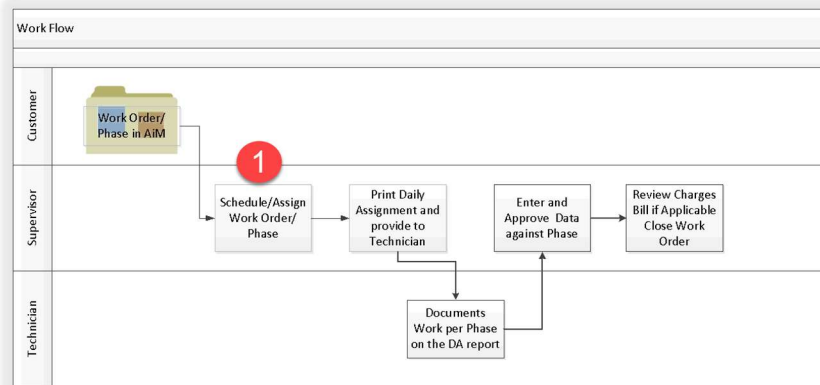


Scheduling

Work Flow Step 1 – Schedule Work



WorkDesk

- In WorkDesk Daily Tasks & Charge Outs, click **Shop Phase Manager**
- **Shop Phase Manager** – Visual view of the progress of a Work Order. Grouping is based on transactions against a Work Order in AiM. Provides access to the Work Planner, Work Scheduler, and the Shop Daily Assignment.

- Search for the Work Orders by Phase Shop. Additional criteria can be specified to limit results.
- Click **Refresh**

Backlog	Planning	Scheduling	Started	Stalled
<p>160202-116630 SCL 3270 HEAVY EQUIPMENT PLEASE GENERAL MAINT 2 Apr 20, 2016 09:50 AM IN PROGRESS Q 0.00</p>				<p>161141-500861 SCL Test for grounds HED CORRECTIVE 2 Nov 21, 2016 11:27 AM ASSIGNED Q 0.00</p>
<p>160726-263670 SCL HOUSTON STREET AND UNIVERSITY STREET ROAD REPAIR 2 Jul 26, 2016 10:50 AM ASSIGNED Q</p>				<p>170524-303320 SCL Fix pothole ROUTINE 1 Feb 24, 2017 08:40 AM ASSIGNED Q</p>

Results are displayed in 5 columns based on the following criteria –

- Backlog – No transactions exist against the WO/Phase. No planning screens or scheduling screens have been started.
- Planning – Work Planner screen has been started. No other transactions started. No charges on the phase. *(Not using at this time.)*
- Scheduling – Been added to a Daily Assignment. Pick Ticket created. No time has been started.
- Started – Timecards started. Charges posted to the phase.
- Stalled – Charges posted to the phase. No Daily Assignment, Pick Tickets or Asset rentals for a future date.

Work Order/Phase (WOP) Information

Status can be edited from this screen. All other fields are display only.

Work Order #
Phase #

Description
Work Code
Priority
Date created
Status
Estimated Hrs

160420-236630
001
0270 HEAVY EQUIPMENT-PLEASE
GENERAL MAINT
2
Apr 20, 2016 09:50 AM
IN PROGRESS
0.00

Work Planner
Work Scheduler
Shop Daily Assignment


Work Order Descending

Backlog 5

170404-303477
001
broken bricks in the middle - test
LANDSCAPE DESIGN
1
Apr 04, 2017 10:11 AM
OPEN
0.00

161207-300946
002
Grounds work order.
OTHER
4
OPEN
0.00

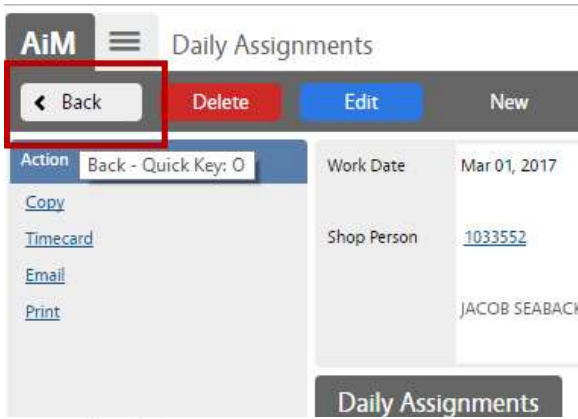
Shop Daily Assignment

- By default, the Work Orders will appear with the oldest on top. Change the drop down to Work Order Descending to see the newest on top.
- Click  to open the **Shop Daily Assignment** screen.

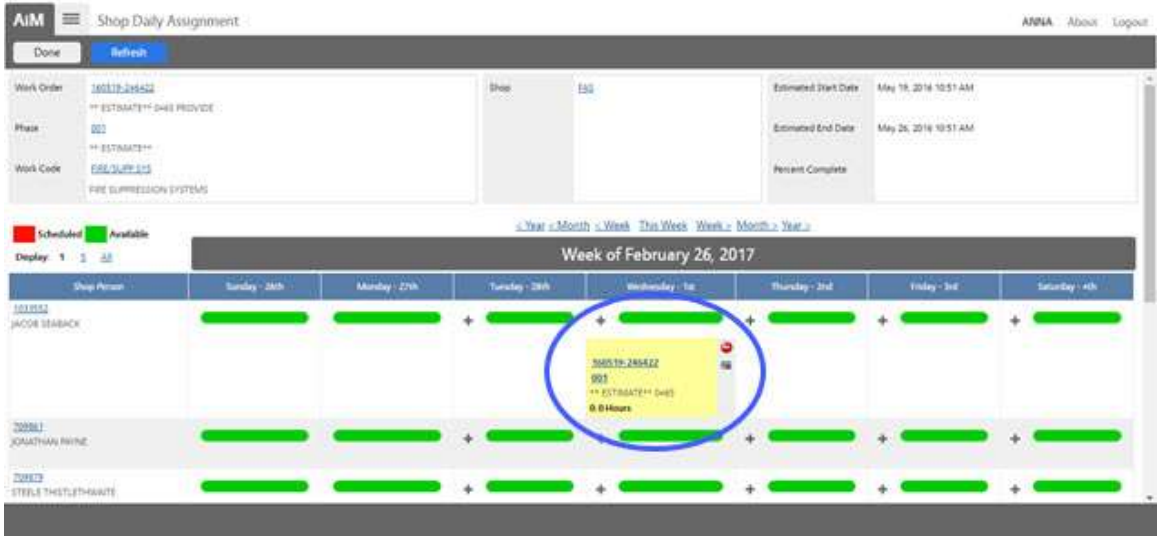
This screen is a graph of the daily assignments for the technicians assigned to a specific shop.
The screen shows a week at a time.

- Click the **Work Order** number to see more information on the job.
 - On the **Work Order**, verify Billable Status (*more info pg. 17*)
 - One the **Phase**, verify Priority
- Click the plus sign to add the Work Order/Phase to a technician’s **Daily Assignment**
- The **Daily Assignment** screen for the technician will open.

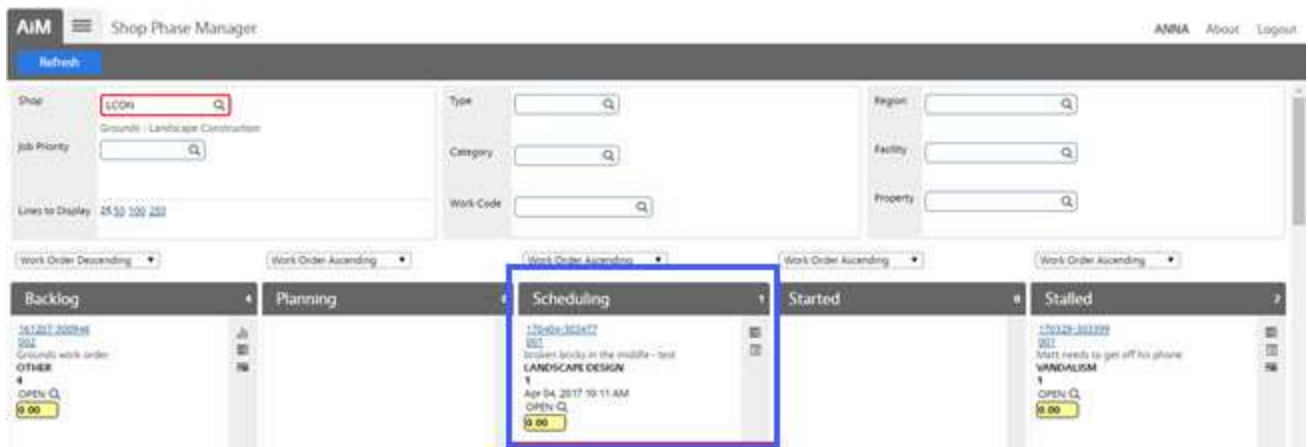
- Add scheduled hours
- Add sequence if desired. (Sequence determines the order the Work Orders will appear on the Daily Assignment report.)
- Click Save



- Click **Back** to return to the Shop Daily Assignment screen



- Once items are added to Daily Assignments, they will appear on the Shop Daily Assignment screen highlighted in yellow.
- The Work Order/Phase (WOP) can be added to additional technicians and/or dates by clicking on another plus sign.
- After completely scheduling the WOP, click **Done** to return to the Shop Phase Manager.
- Repeat for other WOPs.



- Once added to the Daily Assignment, notice the Work Order/Phase has moved to the Scheduling column.


Updating Phase Status

Throughout the work process, the Phase status will need to be updated to reflect the progress of the work. *Phase Status Flowchart available in the Flowchart Binder Section.*

The Phase status can be updated from the Shop Phase Manager screen or from the Work Order/Phase screen.

Status update from Shop Phase Manager

The screenshot displays the Shop Phase Manager interface. At the top, there is a 'Lines to Display' dropdown set to 25, with options for 25, 50, 100, and 250. Below this is a 'Work Order Ascending' dropdown. The main area shows a 'Backlog' with 14 items. The first item is highlighted and contains the following details: ID 160726-263670, sub-ID 001, description 'HOUSTON STREET AND UNIVERSITY ROAD REPAIR', priority 2, date 'Jul 26, 2016 10:59 AM', status 'ASSIGNED', and a value of '0.00'. A magnifying glass icon is visible next to the 'ASSIGNED' status. Below the backlog, there is a 'Phase Status' section with a search bar and a 'Show All' button. A list of status options is shown: OPEN, ASSIGNED, PENDING BUDGET APP, WORK STARTED (highlighted with a red box and a mouse cursor), and WAITING ON MATERIAL.

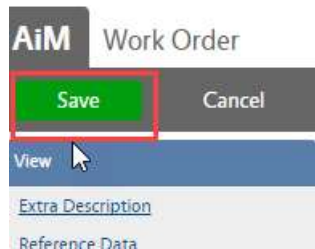
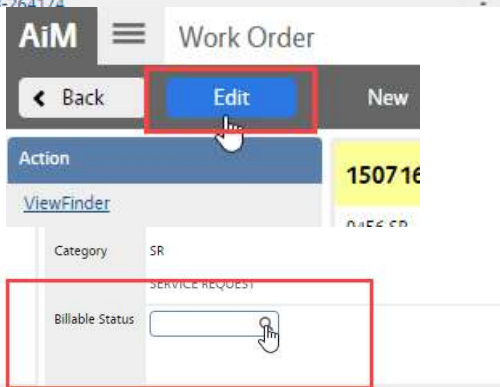
- To change the Status from the Shop Phase manager screen, click the  to pull the available statuses.




- Choose the appropriate status.
 - Assigned** – Technician(s) assigned to do the work.
 - Work Started** – Something has actually been started.

Updating Billable Status

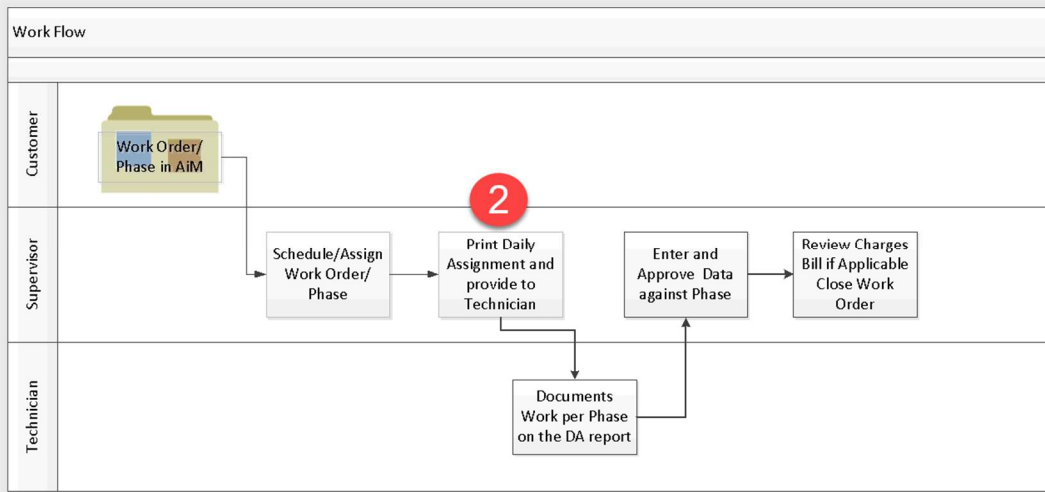
An important part of the Work Order process is determining if the job is Billable to a customer. Once this is determined, the Work Order should be updated appropriately.

Billable Status update from Shop Phase Manager



- To change the Billable Status from the Shop Phase manager screen, click on the Work Order number
- Click 
- Click the  in the Billable Status field
- Choose the correct option – *Some options are not used by Grounds*
 - BILLABLE – All charges are billable to the customer
 - NON BILLABLE – Work covered by the contract
 - SSC PAY – Free Work – Not contract work but Grounds is not billing
- Click 

Work Flow Step 2 – Print Daily Assignment



WorkDesk

Click to return to Main WorkDesk

Channel

Menu always on the left

Watch for New Work Orders

Print Daily Assignment –

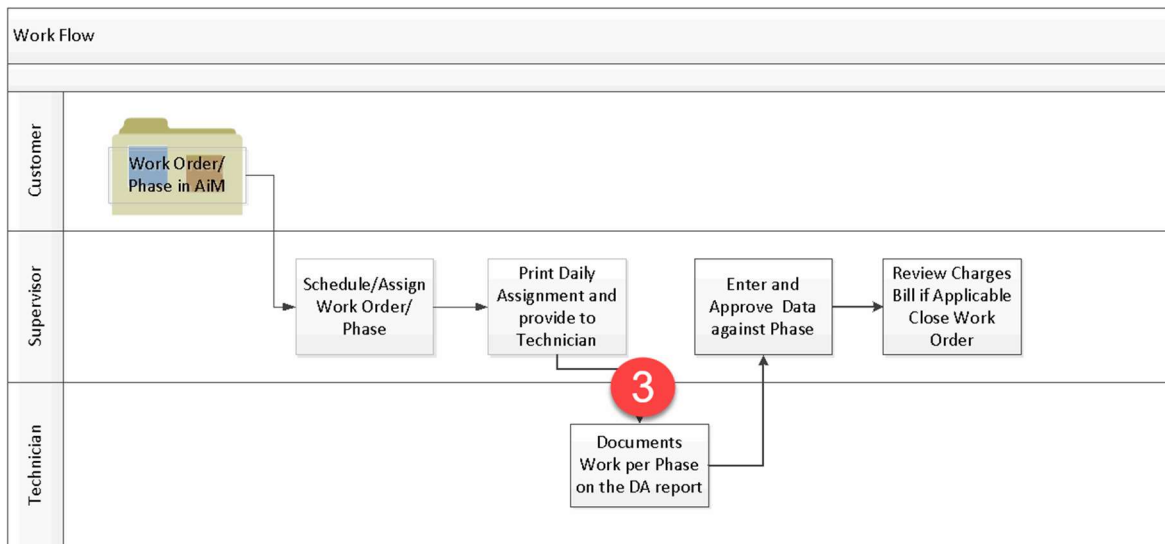
- From the Daily Tasks & Charge Out channel, click on Daily Assignment Print

1. Choose the Shop
2. Enter the first date
3. Enter the last date
4. Click OK

Print the report. There should be 1 page per technician. Make sure to print single sided.

Daily Assignment Report						
Showing page 1 of 11						Work Date
Daily Assignment Report						Apr 7, 2017, 12:00 AM
Employee	EmpName	Work Order	Priority	Work Code	Est Start/End	Prop/Reg/Loc
S38441	KING STEPHANIE	170404-303478	2	SINKHOLES	-	9591
		Test.				02
		Phase	Hours			
			Comments			
S38441	KING STEPHANIE	161206-300928	3	CORRECTIVE	-	1156
		Pothole at 1156 - Needs a stump ground				02
		Phase	Hours			
			Comments			
S38441	KING STEPHANIE	161121-300861	2	CORRECTIVE	-	1156
		Test for grounds HEQ				02
		Phase	Hours			
			Comments			
S38441	KING STEPHANIE	170405-303483	1	BOLLARD	-	0970
		Testing for Matt. Set up the equipment for the event.				02
		Phase	Hours			
			Comments			
S38441	KING STEPHANIE	161207-300946	1	OTHER	-	0275
		Grounds work order.				02
		Phase	Hours			
			Comments			

Work Flow Step 3 – Technicians Document Work



- The Daily Assignment print out will be given to the technicians each morning.
- Technicians will document the following on the Daily Assignment –
 - Hours worked
 - Notes of what was done
 - Equipment used with a time range (ex: 8 am – 12 pm)
 - Work status – Is the job complete?
- Daily Assignment will be turned into the Supervisor at the end of the day.