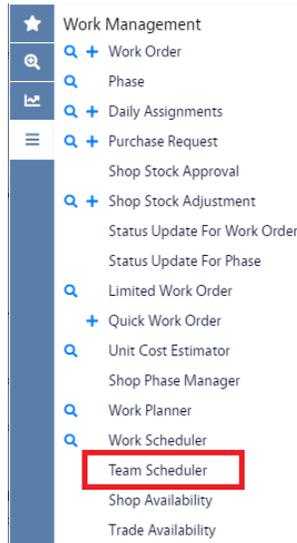


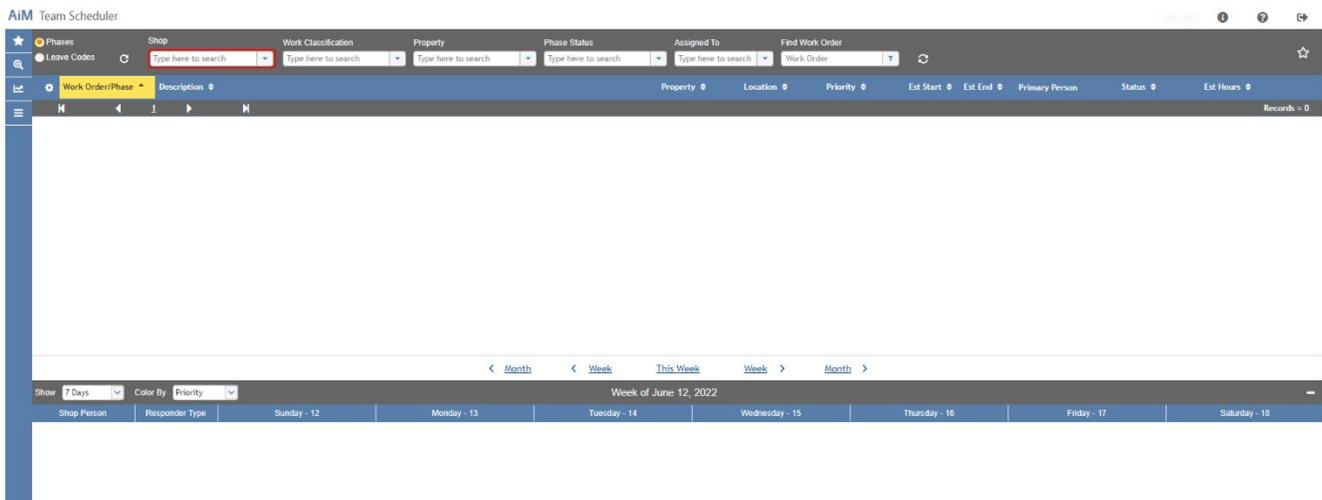
Using Team Scheduler

Team Scheduler is graphical way to look at, and visualize, Daily Assignments for Shop Persons based on data the user can select in order to sequence work, add or remove scheduled assignments and generally see the work assigned to a Shop and the Shop Persons in that Shop.

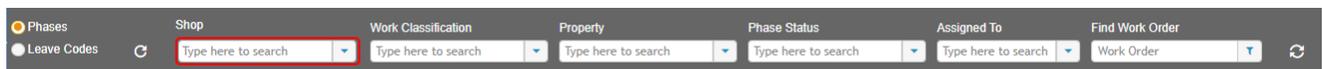
1. On the menu, under **Work Management**, click **Team Scheduler**.



2. The Team Scheduler screen will look this way the first time you enter it. After this it will remember your Quick Filters from your previous session and use those to populate the screen.

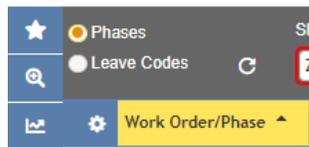


3. The Quick Filters are at the top.



4. The Quick Filters determine what data will be displayed in the Phase Listing under it. You must have a Shop as a minimum.
 - a. You can display the Phases that meet the Quick Filters or the Leave Codes that are available. Just click the radio button for the option you want. The data will be displayed immediately.
 - b. Use the Quick Filters (**Shop, Work Classification, Property, Phase Status, Assigned To and Find Work Order**) to reduce the data being displayed.
 - c. Click the  button to reset the Quick Filters (except the **Shop**) to blanks.
 - d. Click the  button to refresh the data in the Phase Listing after changing the Quick Filters.
 - e. You can change the configuration of the Quick Filters. Click  in the Phase Listing headings.

AiM Team Scheduler



- f. This will bring up the Configuration menu.

Configuration

Quick Filters

| Available | Selected |
|-------------|---------------------|
| Asset Tag | Assigned To |
| PM Template | Phase Status |
| Priority | Property |
| Work Code | Work Classification |

Always selected:
Shop, Find Work Order

Display Columns

| Available | Selected |
|---------------|-----------|
| Asset Tag | Est End |
| PM Template | Est Hours |
| Type/Category | Est Start |
| Work Code | Location |
| | Property |

Always selected:
Work Order/Phase, Description, Priority, Primary Person, Status

Apply
Cancel
Reset

- g. You can add and remove columns as you want.
 - h. To save your changes, click Apply
 - i. To discard your changes, click Cancel
 - j. To reset the chooses back to the defaults, click Reset
5. Once you have entered the Quick Filters and clicked  data will populate the Phase Listing (top pane) and Daily Assignment (lower pane).

AIM Team Scheduler

SCOTT

Shop: ELECTRICAL | Work Classification: | Property: | Phase Status: |

Assigned To: | Find Work Order: |

| Work Order/Phase | Description | Property | Location | Priority | Est Start | Est End | Primary Person | Status | Est Hours |
|------------------|-----------------------------|------------------------|------------------------|----------|-----------------------|----------------------|----------------|-------------|-----------|
| BREAK 001 | ELECTRICAL BREAK | 564 RESEARCH LAB NO... | | 4 | | | | IN PROGRESS | 0.00 |
| W2000018 002 | WEEKLY CHILLER INSPECTION | 208 HENDERSON BUILD... | 03 UTILITY/MECHANL... | 3 | Sep 9, 2022 10:36 AM | Oct 7, 2022 10:36 AM | | SCHEDULED | 0.00 |
| W2000025 001 | CINC - OUTLET NOT WORKING | 585 CENTER FOR INNO... | 102 CONFERENCE ROOM | 3 | Sep 14, 2022 11:21 AM | Oct 6, 2022 5:40 PM | | SCHEDULED | 0.00 |
| W2000027 001 | LBB - BLINKING LIGHT | 217 EDUCATION BUILD... | 149 ALTERATION CONV... | 3 | Sep 8, 2022 5:53 PM | Oct 6, 2022 5:53 PM | | IN PROGRESS | 0.00 |
| W2000028 001 | ENVYD - BROKEN LIGHT SWITCH | 344 ENVIRONMENTAL D... | 120 CLASSROOM | 3 | Sep 12, 2022 4:01 PM | Oct 10, 2022 4:01 PM | | SCHEDULED | 0.00 |
| W2000029 001 | EVNT - BROKEN BALLAST | 420 CU EVENTS CENTE... | 131A STAFF OFFICE | 3 | Sep 12, 2022 5:34 PM | Oct 10, 2022 5:34 PM | | SCHEDULED | 0.00 |

Records = 25

Navigation: < Month < Week This Week Week > Month >

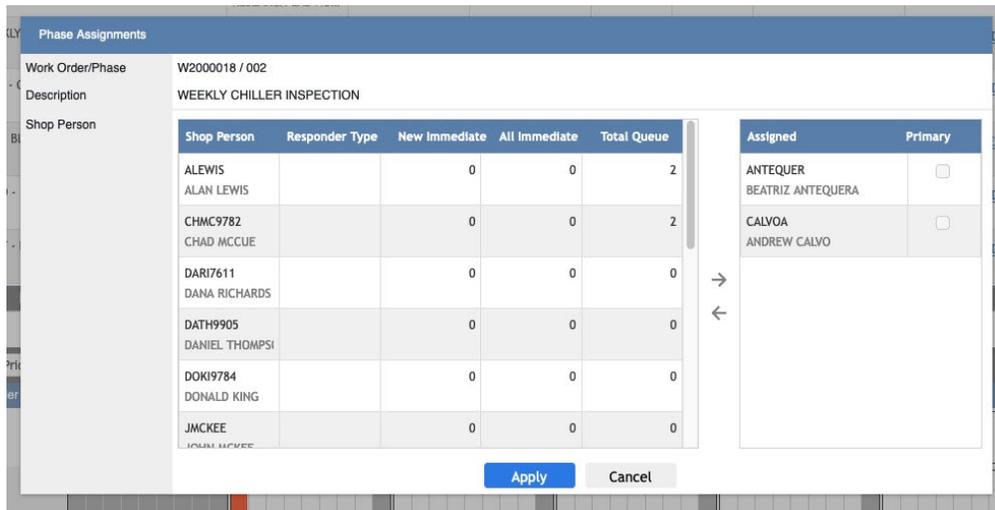
Show: 7 Days | Color By: Priority

Week of October 9, 2022

| Shop Person | Responder Type | Sunday - 9 | Monday - 10 | Tuesday - 11 | Wednesday - 12 | Thursday - 13 | Friday - 14 | Saturday - 15 |
|-------------------------------|----------------|------------|-------------|--------------|----------------|---------------------------|-------------|---------------|
| ALEWIS ALAN LEWIS | | | 1 | 1 | | | | |
| ANTEQUER BEATRIZ ANTEQUERA | | | 1 | | | | | |
| CALVOA ANDREW CALVO | | | | | | 1, 2, 3, 4, 5, 6, 7, 8, 9 | | |
| CHMC9782 CHAD MCCUE | | | | | | | | |

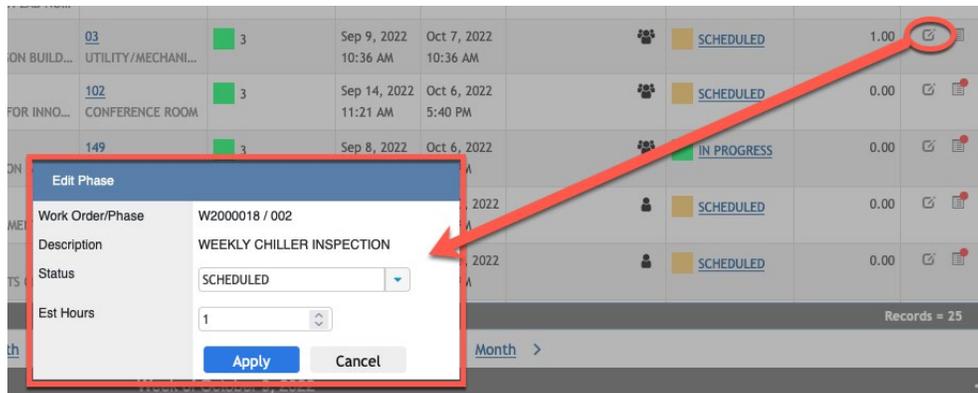
©2022 AssetWorks Inc.

6. The Phase Listing is initially sorted by the Work Order/Phase column. Change the sort by click  on the column you want to sort by. To reverse the sort, click  again.
7. Some Work Order/Phases will have a blue box in the column with them. The number in the box is the number of Daily Assignments there currently is for that Work Order/Phase.
8. All the data on each line it taken from the Work Order/Phase.
9. On the right-side of the Primary Person column will be one of three icons.
 - a.  Means there is no one assigned to the Phase.
 - b.  Means there is one Shop Person assigned to the Phase.
 - c.  Means there are two (or more) Shop Persons assigned to the Phase.
 - d. You can click the icon to add Shop Persons.



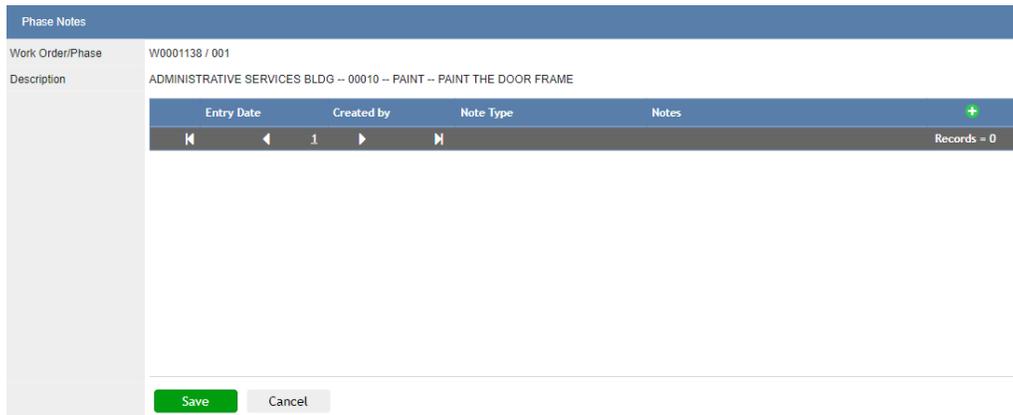
- e. Using the arrows you can assign, and unassign, Shop Persons to the Phase. You can also assign one Shop Person as the Primary by clicking the box next to their name once they are assigned. Click **Apply** or **Cancel** to either save your changes or discard them.

10. Click  to get to the Edit Phase box.

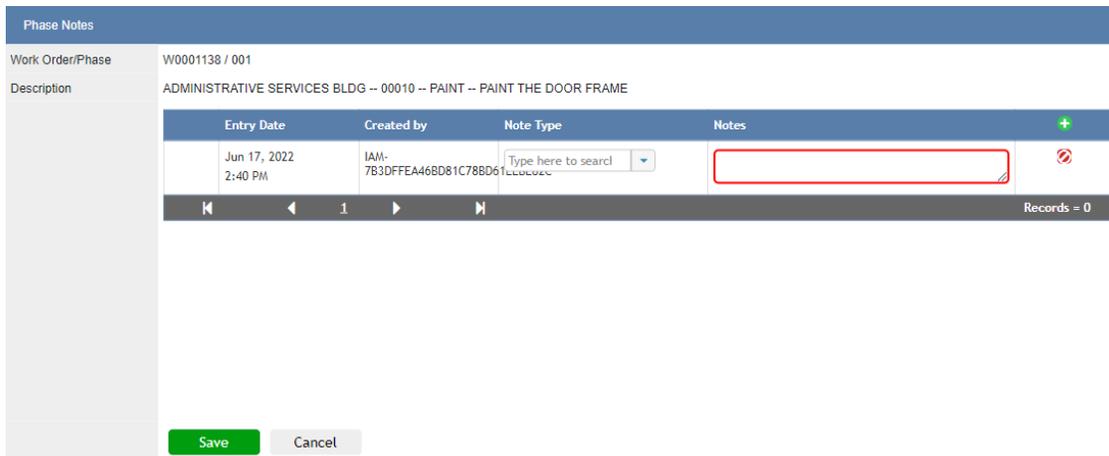


- a. The only fields that can be updated are the Status with the dropdown and the Est Hours.
- b. Click **Apply** or **Cancel** when done to either save your changes or discard them.

11. Click  to get to the Phase Notes box.



- a. You can see the Notes Log for the Phase.
- b. Click  to add a Notes Log entry to the Phase.



- c. Optionally, click the Note Type dropdown to select a Note Type.
- d. Click  or  when done to either save your changes or discard them.

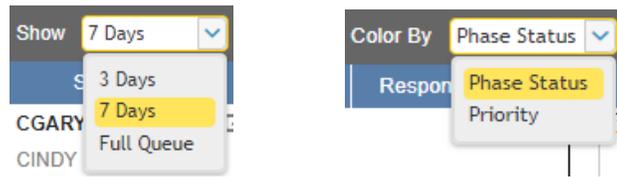
12. The Daily Assignment shows the Daily Assignments for each Shop Person in the Trade selected in the display criteria.

The screenshot displays the 'Daily Assignment' calendar for the week of October 9, 2022. At the top, there are navigation options: '< Month', '< Week', 'This Week', 'Week >', and 'Month >'. Below this is a table with columns for each day of the week (Sunday - 9 to Saturday - 15) and rows for Shop Persons. The Shop Persons listed are ALEWIS (ALAN LEWIS), ANTEQUER (BEATRIZ ANTEQUERA), CALVOA (ANDREW CALVO), and CHMC9782 (CHAD MCCUE). The calendar cells contain numbers 1-9 representing hours. ALEWIS has yellow blocks on Monday (hours 1-2) and Tuesday (hours 1-2). ANTEQUER has an orange block on Monday (hour 1). CALVOA has blue blocks on Thursday (hours 1-4) and Friday (hours 1-4). CHMC9782 has a blue block on Thursday (hour 1) and a blue block on Friday (hours 1-4).

13. The display will start centered on the current day. To navigate to another day, use the navigation bar at the top of the Daily Assignment.



14. The number of days displayed is controlled by the **Show** dropdown. The coloring of the assignments is controlled by the Color By dropdown.



Note: Assignments are shown in the order they will appear in Go Work Management. The numbers represent blocks of time, not times of day.

15. To add an assignment, click and hold  then drag it to the day and Shop Person you want to create the Daily Assignment for. If successful, you will get a message in a green box in the upper right corner.



16. To get to the Edit Assignment screen, right click on the square in the Daily Assignment and a popup will be displayed.

Edit Assignment

| | |
|--|---|
| Shop Person | <input type="text" value="CPOURNER"/> <div style="font-size: 0.8em; color: #666; margin-top: 2px;">CECIL POURNER</div> |
| Work Date | <div style="display: flex; align-items: center; gap: 10px;"> ← Tuesday, June 21, 2022 → </div> |
| Work Order/Phase | W0001136 / 001 |
| Description | AERONAUTICS AND ENGINEERING BUILDING -- ELEVATOR -- LEFT -- ITEM RETRIEVAL -- I DROPPED MY WIDGET DOWN THE ELEVATOR DOOR CRACK. |
| Sequence | <input type="text" value="100"/> |
| Scheduled Hours | <input type="text" value="2"/> |
| <div style="display: flex; justify-content: flex-end; gap: 10px;"> Apply Cancel Delete </div> | |

- a. Click the **Shop Person** dropdown to change the Shop Person.
- b. For the Work Date, use the arrows to change the assignment to a previous or future date.
- c. Doing either of these actions will bring up two radio buttons.

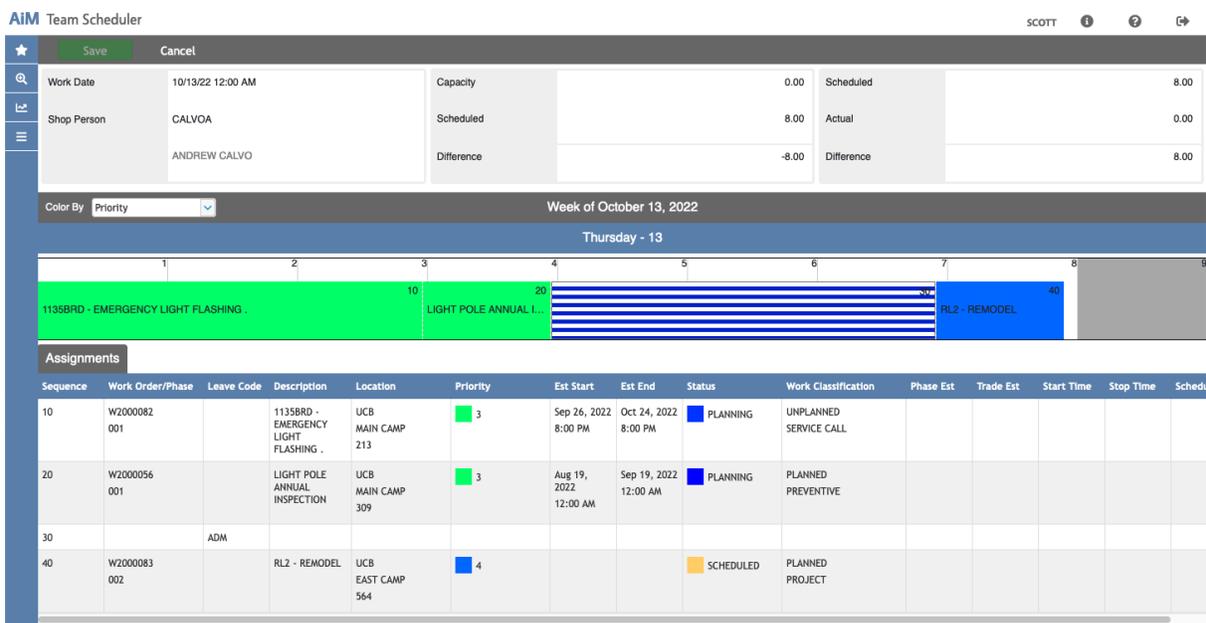
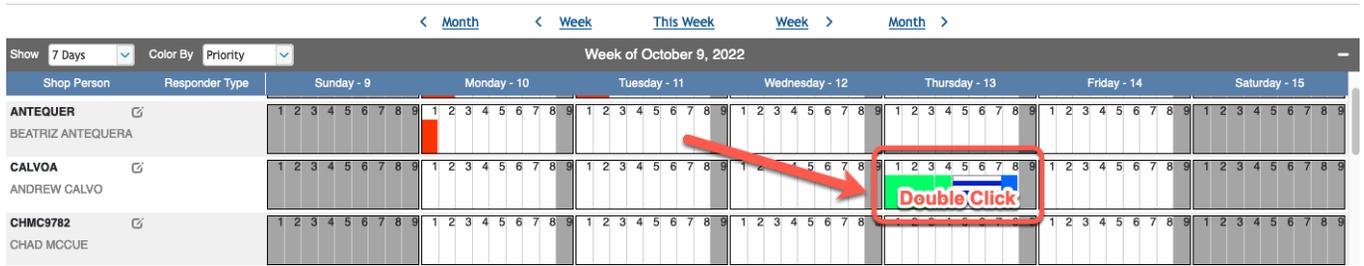
- d. The default is to Move Assignment. If you want to Copy Assignment, click that radio button.
- e. **Sequence** – Assignments will be numbered by 100s starting with zero for the first one. You can enter any positive number to change the sequence of this assignment.
- f. **Scheduled Hours** – The default is zero, or the estimated hours on the phase. (The estimate is displayed in the Phase Listing in the **Est Hours** column.) You can enter a number to change the estimate.
- g. Click one of the buttons to complete this screen.
 - i. To save the changes, click
 - ii. To discard the changes, click
 - iii. To delete the assignment all together, click

17. Responder Type can be used to mark a shop person who is assigned to respond to certain types of jobs. (Responder Types are set up by your system administrator.)

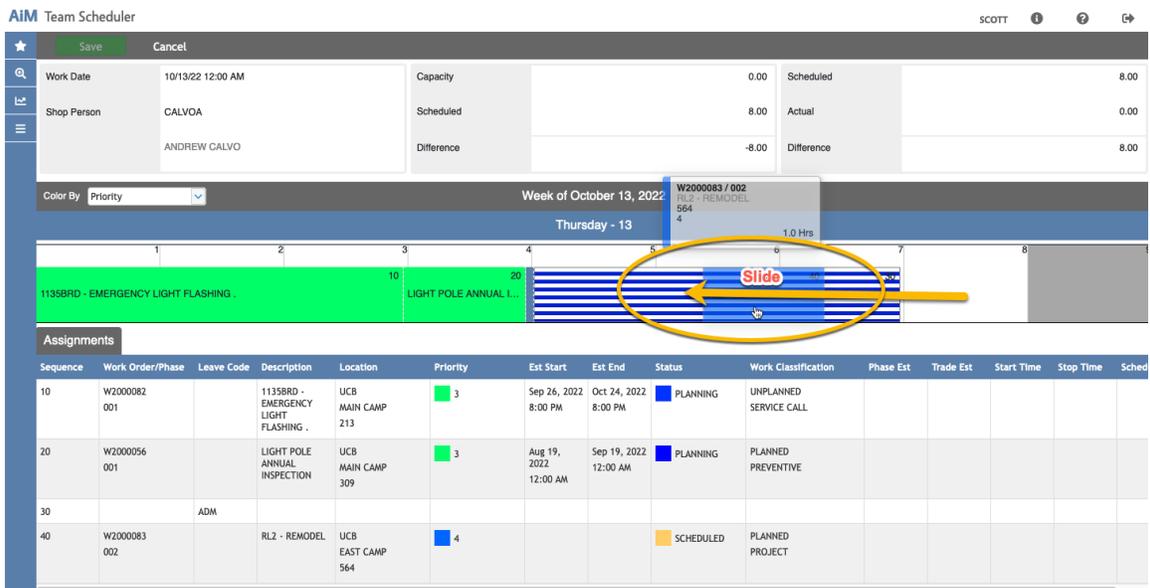
- a. Click next to the Shop Person in the Daily Assignment to assign (or unassign) a Responder Type to that Shop Person.

- b. Click the dropdown arrow in the Responder Type and select (or de-select) a type.
- c. To save the change, click
- d. Do discard the change, click

18. To get to the day view, double click on the day for the Shop Person you want to view.



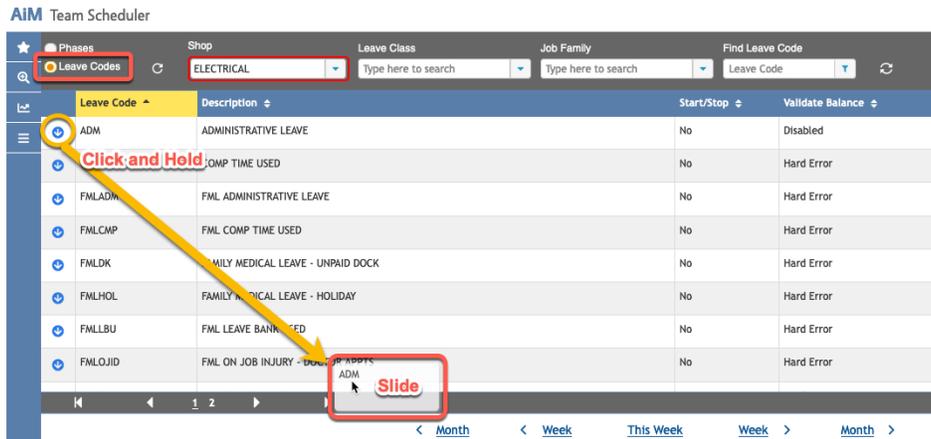
a. You can reorganize the order of the assignments by sliding the assigned work phase.



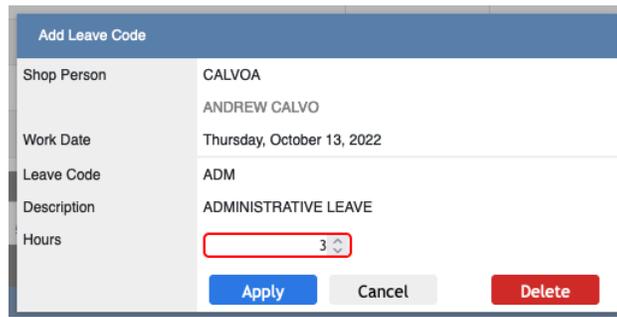
b. To save the changes, click 

c. To discard the changes, click 

19. Leave Codes works like a Work Order/Phase.



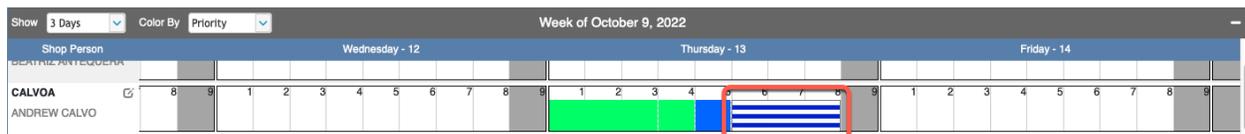
- a. Click and hold  to drop the Leave Code into the Daily Assignment for a Shop Person. You will get the Add Leave Code box.



- b. The default Hours is 1. You can enter a different number as needed.
- c. To save the entry, click .
- d. To discard the entry, click .

Leave time will appear on the Assignment Schedule as a series of blue stripes on the daily assignment:

3 Day view



7 Day View



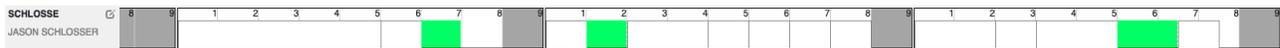
One day view

Tool Tips:

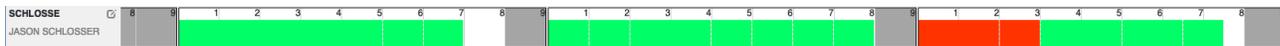
Daily Assignment Counts:

| Work Order/Phase | Description |
|------------------|-----------------------------------|
| W2000027 001 | 6 BB - BLINKING LIGHT |
| W2000028 001 | 1 NVD - BROKEN LIGHT SWITCH |
| W2000029 001 | 2 VNT - BROKEN BALLAST |
| W2000033 001 | 1 AC NEAR 261 POSSIBLE FIRE KILN |
| W2000034 001 | 2 THEM RTU, RF, SF, VFD FAILED AT |
| W2000036 001 | 2 LLZ - SUPPLY FAN OFF |

Double-click on the phase in the listing as shown below to highlight only the associated assignments on the Daily Assignments Grid.



Double-click again to remove the highlight.



Note Indicator:

| Primary Person | Status | Est Hours | Note Icon |
|----------------|-------------|-----------|-----------|
| SCHLOSSE | SCHEDULED | 1.00 | None |
| SCHLOSSE | SCHEDULED | 0.00 | None |
| SCHLOSSE | IN PROGRESS | 0.00 | Note Icon |
| SCHLOSSE | SCHEDULED | 0.00 | Note Icon |
| SCHLOSSE | SCHEDULED | 0.00 | Note Icon |
| SCHLOSSE | SCHEDULED | 0.00 | None |

A red dot indicator alerts the viewer that a note exists on the Phase.

To view the note(s), click on the note icon:

Phase Notes

Work Order/Phase: W2000025 / 001

Description: CINC - OUTLET NOT WORKING

| Entry Date | Created by | Note Type | Notes |
|--------------------------|------------|-----------------|--|
| Sep 29, 2022 7:54 AM | SCHLOSSE | NOTE TO CLIENT | EVERYTHING IS BROKEN |
| Sep 13, 2022 10:29 AM | CALVOA | | WEAR YOUR NAMETAG |
| Sep 13, 2022 10:22 AM | SCHLOSSE | CLOSING COMMENT | ARRIVED ON SITE AND ORDERED NEW RECEPTACLE WILL RETURN WHEN PART ARRIVES |

Records = 3

Save Cancel

Shop Person Indicator:

| Primary Person | Status | Est Hours |
|----------------|-------------|-----------|
| | SCHEDULED | 1.00 |
| | SCHEDULED | 0.00 |
| | IN PROGRESS | 0.00 |
| | SCHEDULED | 0.00 |
| | SCHEDULED | 0.00 |
| | SCHEDULED | 0.00 |

Under **Primary Person** in the Phase Listing section, there are three (3) different icons indicating if shop people are assigned to the phase.

| Priority | Est Start | Est End | Primary Person |
|-------------------------------------|-----------------------|-----------------------|--------------------------------|
| <input type="checkbox"/> 03-ROUTINE | 11/22/2019 2:54 PM | 11/25/2019 2:54 PM | |
| <input type="checkbox"/> 01-HIGH | 11/22/2019 2:55 PM | 11/23/2019 2:55 PM | |
| <input type="checkbox"/> 03-ROUTINE | 11/22/2019 2:58 PM | 11/25/2019 2:58 PM | AB12345 ALFRED M BROWNE |

Primary Person

← One person assigned

← No shop person assigned

← Multiple shop people assigned

To view the assigned people, click on the icon:

Phase Assignments

Work Order/Phase: W2000025 / 001

Description: CINC - OUTLET NOT WORKING

Shop Person

| Shop Person | Responder Type | New Immediate | All Immediate | Total Queue |
|----------------------------|----------------|---------------|---------------|-------------|
| ANTEQUER BEATRIZ ANTEQL | | 0 | 0 | 7 |
| CALVOA ANDREW CALVO | | 0 | 0 | 5 |
| CHMC9782 CHAD MCCUE | | 0 | 0 | 2 |
| DARI7611 DANA RICHARDS | | 0 | 0 | 0 |
| DATH9905 DANIEL THOMPSI | | 0 | 0 | 0 |
| DOKI9784 DONALD KING | | 0 | 0 | 0 |

| Assigned | Primary |
|-----------------|-------------------------------------|
| ALEWIS | <input type="checkbox"/> |
| ALAN LEWIS | <input checked="" type="checkbox"/> |
| SCHLOSSE | <input type="checkbox"/> |
| JASON SCHLOSSER | <input type="checkbox"/> |