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.

AiM Team Scheduler				0 0
★ OPhases Shop Work Classification O	Property Phase Status	Assigned To Find Work Order	7 0	\$
Work Order/Phase Description		Property © Location © Priority	y ♦ Est Start ♦ Est End ♦ Primary Perso	n Status & Est Hours &
				Records = 0
	K Month K Week	This Week Veek > Month	>	
Show 7 Days V Color By Priority V	Week	of June 12, 2022		-
Shop Person Responder Type Sunday - 12	Monday - 13 Tuesday - 14	Wednesday - 15	Thursday - 16 F	riday - 17 Saturday - 18

3. The Quick Filters are at the top.

Phases		Shop	Work Classification	Property	Phase Status	Assigned To	Find Work Order
Leave Codes	;	Type here to search 🔹	Type here to search 🔻	Work Order 🛛 🏹 😂			

- 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 C 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.



f. This will bring up the Configuration menu.

Configuration						
Quick F	ilters	Display Columns				
Available	Selected	Available	1	Selected		
Asset Tag	Assigned To	Asset Tag	1	Est End		
PM Template	Phase Status	PM Template		Est Hours		
Priority >	Property	Type/Category	$ \rightarrow$	Est Start		
Work Code 🗲	Work Classification	Work Code	< ⊢	Location		
				Property		
Always selected:		Always selected:				
Shop, Find Work Order		Work Order/Phase, Description, Prio	rity, Prin	nary Person, Status		
g. You can add h. To save your	and remove columns as yo changes, click Apply	ou want.				
i. To discard yc	our changes, click Cancel					
j. To reset the	chooses back to the defau	Ilts, click Reset				
5. Once you have enter and Daily Assignmen	ed the Quick Filters and c t (lower pane).	licked ² data will popula	te the	e Phase Listing (top pane)		

AiM	Tear	m Schedule	er							SCOTT	0 0	•
★ ⊗ ⊻	😑 Pha 🔵 Lea	ases ave Codes	c	Shop ELECTRICAL Assigned To Type here to search	Work Classification Type here to search F	Propert Type h Find Work Order Work Order	ere to search		Phase Status Type here to search			ድ
=	۰	Work Order/	Phase 🔺	Description ¢	Property 🗢	Location 💠	Priority 🗢	Est Start 🗢 Est E	ind 🗢 Primary Person	Status 🗢 Es	t Hours 🜩	1
	0	<u>BREAK</u> 001		ELECTRICAL BREAK	564 RESEARCH LAB NO		4		C	IN PROGRESS	0.00	c I
	٢	<u>W2000018</u> 002		WEEKLY CHILLER INSPECTION	208 HENDERSON BUILD	03 UTILITY/MECHANI	3	Sep 9, 2022 Oct 7 10:36 AM 10:36	7, 2022 🍓	SCHEDULED	0.00	6 🔳
	0	<u>W2000025</u> 001		CINC - OUTLET NOT WORKING	585 CENTER FOR INNO	102 CONFERENCE ROOM	3	Sep 14, 2022 Oct 6 11:21 AM 5:40	э, 2022 🏼	SCHEDULED	0.00	c 📑
	0	<u>W2000027</u> 001		BB - BLINKING LIGHT	217 EDUCATION BUILDI	149 ALTERATION CONV	3	Sep 8, 2022 Oct 6 5:53 PM 5:53	5, 2022 😵	IN PROGRESS	0.00	c 📑
	٢	<u>W2000028</u> 001	E	ENVD - BROKEN LIGHT SWITCH	344 ENVIRONMENTAL D	120 CLASSROOM	3	Sep 12, 2022 Oct 1 4:01 PM 4:01	10, 2022 🔒 РМ	SCHEDULED	0.00	6 📑
	0	<u>W2000029</u> 001	E	2 EVNT - BROKEN BALLAST	420 CU EVENTS CENTE	131A STAFF OFFICE	3	Sep 12, 2022 Oct 1 5:34 PM 5:34	10, 2022 🗳	SCHEDULED	0.00	c 📑
		M	•	<u>1</u> ▶ ₩	< Month	< Week	This Week	Week >	Month >		Reco	rds = 25
	Show	7 Days	✓ Co	lor By Priority		Week of 0	October 9, 2022	<u>Heen</u>	interior (-
		Shop Person	_	Responder Type Sunday	- 9 Monday - 10	Tues	day - 11	Wednesday - 12	Thursday - 13	Friday - 14	Saturday	- 15
	ALEW ALAN	/IS LEWIS	G	1 2 3 4 5	6789123456	7891234	5678912	345678	9 1 2 3 4 5 6 7 8 9	123456789	12345	6789
	ANTE BEATE	QUER RIZ ANTEQUE	G' RA	1 2 3 4 5	6789123456	7891234	5678912	3 4 5 6 7 8	9 1 2 3 4 5 6 7 8 9	1 2 3 4 5 6 7 8 9	1 2 3 4 5	6789
	CALV ANDR	OA IEW CALVO	ß	1 2 3 4 5	6789123456	7 8 9 1 2 3 4	5678912	3 4 5 6 7 8	9 1 2 3 4 5 6 7 8 9	1 2 3 4 5 6 7 8 9	12345	6789
	CHMC CHAD	9782 MCCUE	G	1 2 3 4 5	6789123456	7891234	5678912	3 4 5 6 7 8	9 1 2 3 4 5 6 7 8 9	1 2 3 4 5 6 7 8 9	12345	6789
@2022	AssetWe	orks 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.

Vork Order/Phase	W2000018 / 002 WEEKLY CHILLER	INSPECTION						
Shop Person	Shop Person	Responder Type	New Immediate	All Immediate	Total Queue		Assigned	Primary
	ALEWIS ALAN LEWIS		0	0	2		ANTEQUER BEATRIZ ANTEQUERA	
	CHMC9782 CHAD MCCUE		0	0	2		CALVOA ANDREW CALVO	
	DARI7611 DANA RICHARDS		0	0	0	÷		
	DATH9905 DANIEL THOMPS(0	0	0	÷		
	DOKI9784 DONALD KING		0	0	0			
	JMCKEE		0	0	0			

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.

1000									_	
ION	BUILD	03 UTILITY/MECHANI.	3	Sep 9, 2022 10:36 AM	Oct 7, 2022 10:36 AM	² 83	SCHEDULED	1.00	G	
FOR	INNO	102 CONFERENCE ROOM	3	Sep 14, 2022 11:21 AM	Oct 6, 2022 5:40 PM	* <u>8</u> 5	SCHEDULED	0.00	ß	đ
лс		149	3	Sep 8, 2022	Oct 6, 2022	121	IN PROGRESS	0.00	ß	.
MEI	Edit Work C	Phase Drder/Phase	W2000018 / 002	1	, 2022		SCHEDULED	0.00	Ø	1
TS (Descrij Status	ption	SCHEDULED	ER INSPECTION	2022	4	SCHEDULED	0.00	ß	.
	Est Ho	urs	1	\$				Rec	ords = 2	25
th			Apply	Cancel	<u>Month</u> >					
	L									

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.

Description	ADMINISTRATIVE SERVICE	ES BLDG 00010 PAINT	PAINT THE DOOR FRAME		
	Entry Date	Created by	Note Type	Notes	+
	К	1	М		Records = 0
	Save Can	cel			
	n coo tho Niot/	ac I ag tar th	he Phase.		
	in see the note		le i hasei		
a. Tou ca					
b. Click	to add a No	otes Log en	try to the Phase.		
b. Click	to add a No	otes Log en	try to the Phase.		
b. Click	to add a No	otes Log en	try to the Phase.		
b. Click	to add a Not optimized to the services of t	otes Log en	try to the Phase.		
b. Click	to add a No 0001138 / 001 MINISTRATIVE SERVICES E Entry Date	otes Log for th slDG - 00010 - PAINT - Created by	- PAINT THE DOOR FRAME	Notes	+
b. Click	to add a No to add a No ministrative services e Entry Date Jun 17, 2022	otes Log for th otes Log en BLDG - 00010 - PAINT- Created by IAM-	- PAINT THE DOOR FRAME Note Type	Notes	+
b. Click	to add a No	otes Log for th otes Log en BLDG 00010 PAINT - Created by IAM- 783DFFEA46BD81C7	- PAINT THE DOOR FRAME Note Type 1800 Type Here to search	Notes	+
b. Click	to add a Notes of the Notes	SLDG - 00010 PAINT - Created by IAM- 7B3DFFEA46BD81C7	- PAINT THE DOOR FRAME Note Type 88D6 Type • • • • • • • • • • • • • • • • • • •	Notes	+ ② Records = (
b. Click	to add a Notes of the Notes	albg - 00010 - PAINT - Created by IAM- 783DFFEA468D81C7 1 ▶	- PAINT THE DOOR FRAME Note Type RBD0 Type here to search V	Notes	+ Ø Records = (
b. Click	to add a No	SILDG - 00010 - PAINT - Created by IAM- T83DFFEA46BD81C7	- PAINT THE DOOR FRAME Note Type BBDD Type here to search	Notes	+ ② Records = (
b. Click	to add a Note Note Note Note Note Note Note Note	SLDG - 00010 - PAINT - Created by IAM- 7B3DFFEA46BD81C7	- PAINT THE DOOR FRAME Note Type 8000 Type here to search *	Notes	+ ⊘ Records = (
b. Click	to add a No Double Root and a No Double	albg - 00010 PAINT - Created by IAM- 7B3DFFEA46BD81C7	- PAINT THE DOOR FRAME Note Type BBDD Type to search • BBDD	Notes	+ Records = 1
b. Click	to add a Note Note Note Note Note Note Note Note	SLDG - 00010 - PAINT - Created by IAM- 7B3DFFEA46BD81C7 1	- PAINT THE DOOR FRAME Note Type BBDD Type here to search	Notes	+ 2 Records = (
b. Click	to add a No Double to add a No <td>albg - 00010 - PAINT - Created by IAM- 783DFFEA468D81C7 1 ▶</td> <td>- PAINT THE DOOR FRAME Note Type 8806 Type here to searcl ▼</td> <td>Notes</td> <td>+ Records = (</td>	albg - 00010 - PAINT - Created by IAM- 783DFFEA468D81C7 1 ▶	- PAINT THE DOOR FRAME Note Type 8806 Type here to searcl ▼	Notes	+ Records = (
b. Click	to add a No to add toadd toadd toadd to add toadd to add t	albg - 00010 - PAINT - Created by IAM- 783DFFEA468D81C7	- PAINT THE DOOR FRAME Note Type 8800 Type here to searcl ▼	Notes	+ 2 Records = (

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

			< Month < W	/eek This Week	Week > Month >	
Show 7 Days	Color By Phase State	us 🔽		Week of October 9, 2022		3
Shop Person	Responder Type	Sunday - 9	Monday - 10	Tuesday - 11	Wednesday - 12 Thursday - 13	Friday - 14 Saturday - 15
ALEWIS ALAN LEWIS	C	123456789	1 2 3 4 5 6 7 8 9	9 1 2 3 4 5 6 7 8 9 1	1 2 3 4 5 6 7 8 9 1 2 3 4 5 6 7	8 9 1 2 3 4 5 6 7 8 9 1 2 3 4 5 6 7 8 9
ANTEQUER BEATRIZ ANTEQUE	Cí RA	123456789	1 2 3 4 5 6 7 8 9	9 1 2 3 4 5 6 7 8 9 1	1 2 3 4 5 6 7 8 9 1 2 3 4 5 6 7	8 9 1 2 3 4 5 6 7 8 9 1 2 3 4 5 6 7 8 9
CALVOA ANDREW CALVO	C	123456789	1 2 3 4 5 6 7 8 9	9 1 2 3 4 5 6 7 8 9 1	1 2 3 4 5 6 7 8 9 1 2 3 4 5 6 7	8 9 1 2 3 4 5 6 7 8 9 1 2 3 4 5 6 7 8 9
CHMC9782 CHAD MCCUE	G	123456789	1 2 3 4 5 6 7 8 9	9 1 2 3 4 5 6 7 8 9 1	1 2 3 4 5 6 7 8 9 1 2 3 4 5 6 7	8 9 1 2 3 4 5 6 7 8 9 1 2 3 4 5 6 7 8 9

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.

<	<u>Month</u>	<	Week	This Week	<u>Week</u>	>	<u>Month</u>	>
---	--------------	---	------	-----------	-------------	---	--------------	---

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.

Phases	Shop	Work Classification	Property	Phase Status	Assigned To	Find Work Order
Leave Codes C	ZONE2 🗸	Type here to search	Type here to search 🔹	Type here to search 🔹	Type here to search 💌	Wo Daily Assignment saved!

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	CPOURNER
	CECIL POURNER
Work Date	← Tuesday, June 21, 2022 →
Work Order/Phase	W0001136 / 001
Description	AERONAUTICS AND ENGINEERING BUILDING ELEVATOR LEFT ITEM RETRIEVAL I DROPPED MY WIDGET DOWN THE ELEVATOR DOOR CRACK.
Sequence	100
Scheduled Hours	2
	Apply Cancel Delete

- 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.

Edit Assignment	
Shop Person	CPOURNER
	CECIL POURNER
Work Date	← Wednesday, June 22, 2022 →
	Move Assignment
	Copy Assignment
Work Order/Phase	W0001136 / 001
Description	AERONAUTICS AND ENGINEERING BUILDING - ELEVATOR LEFT ITEM RETRIEVAL I DROPPED MY WIDGET DOWN THE ELEVATOR DOOR CRACK.
Sequence	100
Scheduled Hours	2
	Apply Cancel Delete

- 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.

Delete

- g. Click one of the buttons to complete this screen.
 - i. To save the changes, click Apply
 - ii. To discard the changes, click Cancel
 - 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 ^{CC} next to the Shop Person in the Daily Assignment to assign (or unassign) a Responder Type to that Shop Person.

Edit Shop Person		
Shop Person	CGARY	
	CINDY GARY	
Responder Type	Type here to search	•
	Apply	Cancel

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

7 Days Color By Priority Week of October 9, 2022 1 2 3 4 5 6 7 8 9 1 2 3 4 5 6 7 1 2 3 4 5 6 ANTEQUER C) 2 3 4 5 6 7 8 2 3 4 5 6 1 2 3 4 5 6 7 1 2 3 4 5 6 7 8 BEATRIZ ANTEQUERA 2 3 4 5 6 7 8 9 1 2 3 4 5 6 7 8 567 12345678 234567 CALVOA 1 2 3 4 5 6 7 8 C) 1 2 3 4 5 6 7 8 Double Click ANDREW CALVO CHMC9782 G 1 2 3 4 5 6 7 8 1 2 3 4 5 6 7 8 9 1 2 3 4 5 6 7 8 2 3 4 5 6 7 8 2 3 4 5 6 7 1 2 3 4 5 6 7 8 CHAD MCCUE AIM Team Scheduler 0 0 • SCOTT Cancel × Work Date 10/13/22 12:00 AM Capacity 0.00 Scheduled 8.00 Shop Person CALVOA Scheduled 8.00 0.00 ANDREW CALVO Difference -8.00 Difference 8.00 Color By Priority Veek of October 13, 2022 5 6 LIGHT POLE ANN 35BRD - EMERGENCY LIGHT FLASHING Assignments Status ase Est Start Time Stop Time 1135BRD -EMERGENCY LIGHT FLASHING . UCB MAIN CAMP Sep 26, 2022 Oct 24, 2022 PLANNING 8:00 PM 8:00 PM UNPLANNED SERVICE CALL W2000082 3 001 213 LIGHT POLE ANNUAL INSPECTION UCB MAIN CAMP Sep 19, 2022 PLANNING 12:00 AM PLANNED PREVENTIVE W2000056 3 Aug 19, 2022 001 12:00 AM 309 ADM 40 RL2 - REMODEL UCB PLANNED W2000083 4 SCHEDULED 002 EAST CAMP 564 PROJECT

This Week

Week >

Month >

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

< Week

< Month

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

Worl	Save (k Date p Person	Cancel 10/13/22 12:00 AM CALVOA ANDREW CALVO			Capacity Scheduled				0.00	Scheduled					8.00
Worl Shop	rk Date p Person	10/13/22 12:00 AM CALVOA ANDREW CALVO			Capacity Scheduled				0.00	Scheduled					8.00
Shop	p Person	CALVOA ANDREW CALVO			Scheduled										0100
Color		ANDREW CALVO							8.00	Actual					0.00
Color					Difference				-8.00	Difference					8.00
	r By Priority	~				Week of Oc	tober 13, 20	W2000083 / 0 RL2 - REMOD	02 IEL						
						Thurs	sday - 13	564 4		1.0 Hrs					
		1	2		3	4		5	6		7		8		
1135E	BRD - EMERGENCY I	LIGHT FLASHING .		10	LIGHT POLE ANNUAL I.		_(-	-	Slide	40	30		- 1		
Ass	signments								¢				- 1		
Seque	ence Work Order	/Phase Leave Code	Description	Location	Priority	Est Start	Est End	Status	Work (Classification	Phase Est	Trade Est	Start Time	Stop Time	Sch
10	W2000082 001		1135BRD - EMERGENCY LIGHT FLASHING .	UCB MAIN CAMP 213	3	Sep 26, 2022 8:00 PM	Oct 24, 2022 8:00 PM	PLANNING	UNPLA	NNED E CALL					
20	W2000056 001		LIGHT POLE ANNUAL INSPECTION	UCB MAIN CAMP 309	3	Aug 19, 2022 12:00 AM	Sep 19, 2022 12:00 AM	PLANNING	PLANN PREVE	ED NTIVE					
30		ADM													
40	W2000083 002		RL2 - REMODEL	UCB EAST CAMP 564	4			SCHEDULED	PLANN	ED CT					

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

M Tea	ım Scheduler					
P	nases	Shop Leave	Class	Job Family	Find Leave	Code
OLe	ave Codes C	ELECTRICAL Type I	here to search 👻	Type here to search	 Leave Cod 	• 7 3
	Leave Code 🔺	Description 🗢			Start/Stop 🗢	Validate Balance ≑
0	ADM	ADMINISTRATIVE LEAVE			No	Disabled
0	Click and Ho	OMP TIME USED			No	Hard Error
٢	FMLADM	FML ADMINISTRATIVE LEAVE			No	Hard Error
٢	FMLCMP	FML COMP TIME USED			No	Hard Error
۲	FMLDK	MILY MEDICAL LEAVE - UNPAID DOCK			No	Hard Error
٢	FMLHOL	FAMILY & DICAL LEAVE - HOLIDAY			No	Hard Error
•	FMLLBU	FML LEAVE BANK SED			No	Hard Error
۲	FMLOJID	FML ON JOB INJURY - DOGT PR APPTS	lide		No	Hard Error
	4	<u>1</u> 2 > 1				
			< Month <	Week This Wee	k <u>Week</u>	> Month >

a. Click and hold ⁹to drop the Leave Code into the Daily Assignment for a Shop Person. You will get the Add Leave Code box.

Add Leave Code	
Shop Person	CALVOA
	ANDREW CALVO
Work Date	Thursday, October 13, 2022
Leave Code	ADM
Description	ADMINISTRATIVE LEAVE
Hours	3 🗘
	Apply Cancel Delete

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

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

3 Day view

Show 3 Days 🔽 Color By Priority		Week of October 9, 2022		-
Shop Person	Wednesday - 12	Thursday - 13	Friday - 14	
CALVOA 🖸 8 9	1 2 3 4 5 6 7 8	9 1 2 3 4 0 0 / 8	9 1 2 3 4 5 6 7 8 9	
ANDREW CALVO				

7 Day View

Show 7 Days	Color By Priority	~		Week of October 9, 20	22			
Shop Person	Responder Type	Sunday - 9	Monday - 10	Tuesday - 11	Wednesday - 12	Thursday - 13	Friday - 14	Saturday - 15
CALVOA ANDREW CALVO	G	123456789	1 2 3 4 5 6 7 8 9	1 2 3 4 5 6 7 8 9	1 2 3 4 5 6 7 8 9		1 2 3 4 5 6 7 8 9	123456789

One day view

Work Date	10/1	3/22 12:00 AM			Capacity				0.00	Scheduled					8.00
Tion Duto	101	0.22 12:00 744			Capabily				0.00	Concurrent					0.00
Shop Person	n CAL	VOA			Scheduled				8.00	Actual					0.00
	AND	REW CALVO			Difference				-8.00	Difference					8.00
Color By Pr	riority	~				Week of Oc	tober 13, 20)22							
						Thurs	day - 13								
	1		2	3	8	4		5	6		7		8		9
	150051014 1017	51 A 01 11 10		100	110		120						130		
1135BRD - EI	MERGENCY LIGHT	FLASHING .			LIGHT PULE ANNUAL I	RL2 - REMOL									
Assignme	nts						(
Sequence	Work Order/Phase	Leave Code	Description	Location	Priority	Est Start	Est End	Status	Work	Classification	Phase Est	Trade Est	Start Time	Stop Time	Schedu
100	W2000082 001		1135BRD - EMERGENCY LIGHT FLASHING .	UCB MAIN CAMP 213	3	Sep 26, 2022 8:00 PM	Oct 24, 2022 8:00 PM	PLANNING	UNPLA SERVIC	NNED E CALL					
110	W2000056 001		LIGHT POLE ANNUAL INSPECTION	UCB MAIN CAMP 309	3	Aug 19, 2022 12:00 AM	Sep 19, 2022 12:00 AM	PLANNING	PLANN	ed NTIVE					
120	W2000083 002		RL2 - REMODEL	UCB EAST CAMP 564	4			SCHEDULED	PLANN	ED CT					
130		ADM													

But not on the Full Queue:

Show Full Queue	Color By Priority	Sort By	Work Order 🔽				Wee	ek of O	ctober	9, 20	022																					
Shop Person	Responder Type	Capacity	Assigned											W	ork Q	ueue																
CALVOA	c			123	4 5	6 7	8 9	9 10 11	12 13	14 1	5 16 17	18 1	9 20 2	1 22 2	23 24	25	26 2	7 28	29 30	0 31	32 3	3 34	35	36 3	7 38	39	40 4	1 42	43	14 4	5 46	47
ANDREW CALVO		0.00	1.00																													

Note: the "Assigned" value is a sum of the hours assigned for that week minus the leave time.

Total Phase Assigned Hours – Total Leave Hours

The red number indicates that that person is over-assigned for the week.

To set the capacity, ask the system administrator to go to the Shop configuration and configure the daily "Capacity per Person" fields.

Show Full Queue 🗸	Color By Priority	Sort By	Work Order 🔽	Week of October 9, 2022	-
Shop Person	Responder Type	Capacity	Assigned	Work Queue	
CALVOA ANDREW CALVO	G	40.00	1 2 3	3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45	46 47

Shop Person		Responder Type	Capacity	Assigned					
CALVOA	C.					1 2	3	4	5
ANDREW CALVO		-	0.00	1.00		ŝ			
CHMC9782 CHAD MCCUE	C.	W 20 3	2000018 / 002 EEKLY CHILLER 18	NSPECTION		1 2	3	4	5
DARI7611 DANA RICHARDS	ß			1.0 F	Irs	1 2	3	4	5

Tool Tips:

Daily Assignment Counts:

٠	Work Order/Phas	e 🔺	Description 🗢
۲	<u>W2000027</u> <u>001</u>	6	.BB - BLINKING LIGHT
٢	<u>W2000028</u> 001	1	NVD - BROKEN LIGHT SWITCH
❹	<u>W2000029</u> 001	2	.VNT - BROKEN BALLAST
٢	<u>W2000033</u> 001	1	'AC NEAR 261 POSSIBLE FIRE KILN
☯	<u>W2000034</u> 001	2	HEM RTU, RF, SF, VFD FAILED AT
٢	<u>W2000036</u> 001	2	:L2 - 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 💠	
	SCHEDULED	1.00	G 🔲
	SCHEDULED	0.00	C I
	IN PROGRESS	0.00	c e
	SCHEDULED	0.00	¢ f
	SCHEDULED	0.00	6
	SCHEDULED	0.00	6 🗉

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	٠			
		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				
	K	 <u>1</u> ► 	M			Records = 3			
	Save	Cancel							
	_								

Shop Person Indicator:

Primary Person	_	Status 🗢	Est Hours 💠	
	181	SCHEDULED	1.00	6
	42	SCHEDULED	0.00	6 📑
	121	IN PROGRESS	0.00	6 📑
	•	SCHEDULED	0.00	c 📑
	4	SCHEDULED	0.00	6 📑
	4	SCHEDULED	0.00	6 1

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		
03-ROUTINE	11/22/2019 2:54 PM	11/25/2019 2:54 PM		4	One person assigned
01-HIGH	11/22/2019 2:55 PM	11/23/2019 2:55 PM		0	No shop person assign
03-ROUTINE	11/22/2019 2:58 PM	11/25/2019 2:58 PM	AB12345 ALFRED M BROWNE	425	Multiple shop

To view the assigned people, click on the icon:

nase Assignments									
ork Order/Phase	W2000025 / 001								
escription	ption CINC - OUTLET NOT WORKING								
nop Person	Shop Person	Responder Type	New Immediate	All Immediate	Total Queue		Assigned	Primary	
	ANTEQUER BEATRIZ ANTEQL		0	0	7		ALEWIS ALAN LEWIS SCHLOSSE JASON SCHLOSSER	ssigned	
	CALVOA ANDREW CALVO		0	0	5				
	CHMC9782 CHAD MCCUE	No	o t Assigned	0	2	÷			
	DARI7611 DANA RICHARDS		0	0	0	÷			
	DATH9905 DANIEL THOMPS(0	0	0	L			
	DOKI9784		0	0	0				
				Apply	Cancel				