FACILITIES MANAGEMENT
150 Work Backlog

U151: WO Planning and Daily Schedule
EXAMPLES NEEDED FOR TRAINING

1. If there are multiple students from the same District, make sure they choose different crews within the District to schedule.

2. Use the following work orders as demonstration work orders when going through the planning process.

   Slide 7:
   W001144204 – estimate work order
   W001179697 – multiple crews listed on Crew tab

   Slide 8:
   W001189715 – Task tab

   Slide 10:
   W001189715 – Parts tab

   Slide 11:
   W001189715 – POs tab

   Slide 12:
   W000377775 – Parts tab>Bill of Material button>BOM Parts

   Slide 13:
   W001120846 – Routing tab
   W001144209 – Attachments icon>Mail tab

   Slide 14:
   W001144209 – Request button

   Slide 16:
   Go to crew EBTM1-LM and select 12/26/2007 for the date
U151 WO PLANNING AND DAILY SCHEDULE

SUBJECTS COVERED IN THIS UNIT:

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INTRODUCTION TO PLANNING

Process of preparing a WO for scheduling

- Review backlog frequently to ensure constant work flow and dispatch urgent work orders
- Review work orders for completeness
- Prepare work order for scheduling – labor requirements, confirm tasks, material requirements, access, hazards, permits required
- Communication with customer and line staff
REVIEW WORK ORDER DATA

✓ Building number and Zone correspond to each other

✓ Description is complete and understandable
  • BLDG/ROOM/DESCRIPTION OF WORK
  • Look for more information on the Work Plan

✓ Crew and Craft assignment are correct for type of work
  • Follow BMS Agreement and follow District’s procedure for assigning work
  • If incorrectly assigned, change crew and/or craft and enter Routing Comments

✓ Requestor information is complete
  • LAST NAME, FIRST NAME
  • Telephone number
  • Email address
  • Confirmation email sent (click Attachments icon and Mail tab)
REVIEW WORK ORDER DATA

✓ Priority and Due Date are realistic
  • Review description to determine and/or contact customer to confirm urgency
  • Review amount of work currently in the backlog

✓ Check the Equipment number for accuracy
  • Query equipment workbench
  • If unsure, leave blank
  • Can also be entered when WO is closed
  • Use the Where-to-Write Guide as a reference

✓ Charge account is correct for work being done
  • Billable vs. non-billable work
  • See the FM Service Level Standards at:
    http://www.facm.umn.edu/services/index.html

✓ Update the Status of the WO using the LOV button
PREPARE WO FOR SCHEDULING

- Labor planning
  - Will the job be outsourced?
  - Does customer require an estimate before work can proceed?
  - Are secondary crews required?
  - Determine crew size
PREPARE WO FOR SCHEDULING

- Review, update, and edit the Tasks
  - Detailed description of job, symptoms, quantities, etc.
  - Hours of operation, availability of area
  - Availability of requestor
  - Detailed location information
PREPARE WO FOR SCHEDULING

- Review special requirements
  - Access information – keys, combination codes
  - Safety precautions or instructions – biohazards, radiation exposure, asbestos, confined space
  - Outages notices required? Who and what will be affected?
- Permits required
PREPARE WO FOR SCHEDULING

- Determine if parts have been ordered via Issue Request

MDOC Statuses:
- CREATING – Issue Request has not been submitted
- AVAILABLE – Parts are in stock and ready to be picked up
- BACKORDER – On order
- PARTIAL – Some of the parts are in stock and reserved
- ISSUED – All parts have been issued to requestor
PREPARE WO FOR SCHEDULING

- Determine if parts have been ordered via PO
  - Select the POs tab
  - Click the **Orders** button and the **Orders** screen appears
  - Click All Orders and if there are Purchase Orders, they will appear below
  - Put cursor on PO number and click the **View** button to view PO details
  - Drill down further to view receiving information
PREPARE WO FOR SCHEDULING

- **Order Material**
  - Material is generally not ordered until job is reviewed in the field
  - Parts for repetitive PMs can be ordered in advance by accessing the Bills of Material if available for that equipment (ordering from BOMs is covered in another unit)
WO COMMUNICATIONS

- Utilize Routing Comments when forwarding work orders to a different crew.

- Click the Attachments button to send Mail or create Notes that will print on the work order.
Contact the Requestor or Alternate Requestor to obtain more information regarding the job and to communicate changes in the Priority or Due Date.
INTRODUCTION TO DAILY SCHEDULE

• A Daily Schedule for each crew every day...
  • Ensures continuous work flow
  • Provides the most efficient set of work for the day
  • Knowledge of what work is being done that day
  • Provides for easier timecard entry
  • Helps ensure completion of work before Due Date
SCHEDULE TAB
1. **Access the Daily Schedule form from the Navigator screen**

2. The Daily Schedule form appears with the Schedule tab view appearing first. This tab displays the work scheduled for the date selected.
   - **Employee:** Employee that is scheduled to perform the tasks on the work order.
   - **Craft:** Craft of the employee to whom the work is scheduled.
   - **Building:** The building number on the work order that is scheduled.
   - **WO Number:** The work order number that is scheduled.
   - **Description:** Short description of the work order scheduled.
   - **Status:** Work order status of the work order scheduled.

3. The date can be changed by clicking the date button and entering a new date. Also click the right or left arrow to move ahead or backward one day.

4. Click the LOV button to change the crew being scheduled.

5. List of employees remains visible from anywhere in the Daily Schedule form. The hours available to work appears in the **Avail** field and hours scheduled to work on the date selected appear in the **Sched** field. Employee crew assignment changes should be communicated to the FM Payroll Department so they can make the changes in COMPASS.

6. **Status...** This button is used to change the status of a work order. Click the check box next to the work order number and then click the **Status...** button to change the WO status to another active status (not CLOSED).

7. **Unschedule...** Removes work orders from the Schedule. Click the checkbox next to the work order number to unschedule, and then click the **Unschedule...** button. A pop-up box appears which allows changes to the work order **Status**. Change the status or leave it as it is and click the **Unschedule...** button and the work order is removed from the Schedule.

8. **Rollover...** This button is used to reschedule work orders that are currently on the Schedule to a different date or a different employee. Click the check box next to the work order number and click the **Unschedule...** button. The **Rollover** form appears and the date, employee, and the hours can be changed. Please note, whatever is entered on the **Rollover** form, will apply to all the work orders checked.

9. **Close WO...** This button will open the **WO Close** form to allow you to close the selected work order. Click the checkbox next to the work order to close and then click the **Close WO...** button and the **WO Close** form appears.

10. **View WO...** Click the checkbox next to the work order and then click the **View WO...** button and the **Work Order** form appears so the work order can be reviewed and other planning functions can be accessed.

11. **History...** Click the checkbox next to the work order and then click the **History...** button to display the scheduling history for the selected work order. Also displayed are the hours scheduled and actual hours for each schedule date that appears.

**REMEMBER** Right click the work order number to access the drill down menu to choose other functions as well as View/Edit and Close.

**Reference Fields:**
- **Employee Summary:** These fields are automatically updated as work orders are scheduled to the employee highlighted.
1. Views have preset selection criteria so that you are only viewing work orders that fit the criteria. Only the ALL ACTIVE WORK ORDERS view will show all work orders in the backlog. Click the LOV button for the view you would like to choose. There are various public views that are set up for everyone to use; these views cannot be deleted or modified. Click the **Edit View...** button to create or edit a private view. The primary and secondary sorts, sort orders, column orders, and filters can be changed from there. Work orders can be queried further from any work order field on the Backlog tab.

2. Use the scroll bar to move to the right and view additional work order fields.

3. Select the date to schedule.

4. Choose the crew to schedule; use the **LOV** button.

5. Highlight an employee to schedule.

6. Choose a work order or work orders to schedule by clicking the checkbox next to the work order.

7. Enter the number of hours to schedule in the **Hours to Sched** field for each work order selected on the Backlog tab.

8. Click the **Schedule...** button.

9. The scheduled work order will be highlighted green.

10. The scheduled hours appear next to the employee name and the employee summary fields are updated.
BACKLOG TAB

11. Daily Schedule
12. Multi-Schedule
13. Schedule
14. Use Resource Calendar
15. Schedule
16. SIMILAR WO
17. HISTORY
18. SIMILAR WO
11. To schedule multiple people to one work order, click the checkbox next to the work order number and click the **Multi-Schedule** button. **NOTE** Right clicking the work order number and choosing Quick Schedule... from the drill down menu accesses a form identical to the **Multi-Schedule** form.
12. From the **Multi-Schedule** form, change the date range as needed.
13. Click the checkbox next to the employees you wish to schedule.
14. Enter the amount of hours to schedule. The amount entered will be the amount of hours for each employee.
15. Click the **Schedule** button and the **Multi-Schedule** form will disappear and you are brought back to the Backlog tab.
16. **View**...: To access the **Work Order** form and perform further functions and view detailed information about the selected work order.
17. **History**...: To view the schedule history of the selected work order.
18. **Similar WOs**...: Accesses the **Duplicate Work Orders Searching Parameters** form to query work orders that are similar in nature.
EXERCISE 1

1. Access the Daily Schedule form from the Navigator screen
2. Click the Backlog tab
3. Change the date to tomorrow's date
4. Select a crew in your District that ends in "-LM"
5. Change the view to PM WORK ORDERS BY DUE DATE (INCLUDING ROUTE WORK ORDERS)
6. Highlight the first employee on the list of employees
7. In the Backlog, query the Description field for “SUPPLY / RETURN%”
8. Check two unscheduled work orders (not highlighted green) and enter 4.0 in the Hours to Schedule field of each work order.
9. Click the Schedule button. (NOTE: Write down the name of the employee and the date of this schedule on the QS Training Worksheet for use in subsequent training exercises.)
**EXERCISE 2**

1. Change the view to CUSTOMER REQUESTED WORK ORDERS
2. Check one unscheduled work order in the Backlog
3. Click the **Multi-Schedule** button
4. On the **Multi-Schedule** form make sure the date is set for tomorrow’s date
5. Click the checkbox next to the 2\textsuperscript{nd} and 3\textsuperscript{rd} employee on the list and enter 4.0 hours in the Hours to Sched Field

6. Click the Schedule button and notice how the hours scheduled are updated next to each employee’s name

7. Now schedule two more work orders to these same employees for 2.0 hours each work order. (NOTE: Write down the employee’s names and the date of the schedule on the QS Training Worksheet for use in subsequent training exercises.)
BACKLOG TAB

- Access the Work Order screen by highlighting the WO and clicking the View... button or right clicking the work order number and choosing View/Edit from the drill down menu to access vital work order data:

  - Task List
  - Secondary Labor
  - Issue Requests
  - Equipment and Location Notes
  - Requestor Information
  - Work Order Dates
  - Purchase Orders and Purchase Requisitions
  - Order COMPASS Parts
  - Create Child Work Orders
  - View or Create Emails and Notes
  - Access Routing Comments and Timecard Comments
BACKLOG VIEWS

- Daily schedule views are used to group or sort work orders in the backlog.

- Public views are available to all and cannot be modified or deleted.

- Private views can be created and edited by the user only.

- Only work orders that meet the selection criteria of the view will appear. The ALL ACTIVE WORK ORDERS view will display all active work orders in the backlog.
EXERCISE 3

1. From the same crew, click the Edit View... button
2. Click the Duplicate View... Button
3. Enter a name for the NewView and click OK
4. Change the Primary Sort to Status
5. Change the Secondary Sort to Due Date
6. Highlight the **Due Date** field under the Display Order of Columns section
7. Click the **Move Field Up** button until the **Due Date** field is below the **WO Number**
8. Click the Filter tab
9. Select a Craft from the LOVs in the **Craft** field and click **OK** (NOTE: Write down the crew number used for this exercise on the QS Training Worksheet for use in subsequent training exercises.)
Intentionally Blank Slide
OPTIONS TAB

[Diagram of the OPTIONS TAB interface with numbered points:]
1. Employee Options
   - Sort By: EMPLOYEE NAME
   - Default Crew: EBTM1-LM
2. Schedule Options
   - Sort By: EMPLOYEE, WO NUMBER
   - Default WO Status: SCHEDULED
   - Default Unsched. Status: COMPLETED
3. Backlog Options
   - Default View: CUSTOMER REQUESTED WORK ORDERS

Employee Summary
- Unscheduled Time: 8
- Selected Time: 9
- Remaining Time: -1
1. **Employee Options:** Sets defaults for how employees are displayed and crew.
   - **Sort By** allows you to select the sort order of the employees listed for the crew:
     1. EMPLOYEE NAME
     2. CRAFT, EMPLOYEE NAME
     3. SHIFT, EMPLOYEE NAME
   - The **Default Crew** allows you to choose the default crew that appears whenever the *Daily Schedule* form is accessed.

2. **Schedule Options:** Sets defaults for the Schedule tab appearance and default work order status.
   - **Sort By** allows you to select the sort order of the work orders posted to the Schedule tab:
     1. EMPLOYEE, WO_NUMBER
     2. EMPLOYEE, BUILDING
     3. BUILDING, EMPLOYEE
     4. WO_NUMBER, EMPLOYEE
   - **Default WO Status** is the default work order status that appears when clicking the **Status...** button on the Schedule tab.
   - **Default Unsched Status** is the default status when the **Unschedule...** button is clicked on the Schedule tab.

3. **Backlog Options:** Sets the default Backlog view; click the **LOV** button to choose the view.
REPORTS TAB

1. Daily Schedule Report by Employee
   - Employee: [Select Employee]
   - Run...

2. Daily Schedule Report by Crew and Craft
   - Crew: [EBTM1-LM]
   - Craft: [Carpenter]
   - Run...

3. Work Order Tickets
   - Employee (Blank for All): [Select Employee]
   - Schedule Date: [Wed Dec 26, 2007]
   - Run...

4. Storeroom Planning
   - Beginning WO Schedule Date: [Wed Dec 26, 2007]
   - Ending WO Schedule Date: [Wed Dec 26, 2007]
   - Run...
1. Daily Schedule Report by Employee: Lists work orders and hours assigned for the date and employee selected. Choose Employee from LOV and click the Run... button. This report can be run daily for each employee on a daily basis.

2. Daily Schedule Report by Crew and Craft: Lists work orders and hours assigned to a selected crew and craft, sorted by employee. Choose a Craft (optional) from the LOV, Crew field defaults to the crew selected, then click the Run... button. This report can be run for the entire crew on a daily basis.

3. Work Order Tickets: Prints a copy of each work order ticket that was scheduled for the date selected. Choose an employee on the crew or leave blank for all employees on the crew and click the Run... button.

4. Storeroom Planning: Assists with determining if desired stock parts are available for scheduled work orders. Enter beginning and ending schedule dates, and click the Run... button.
REPORTS TAB

EXERCISE 4
1. Select the crew you worked with in the previous exercise
2. Change the date to tomorrow’s date
3. Click the Reports tab
4. In the Daily Schedule Report by Crew and Craft, choose a Craft from the LOV in the Craft field
5. Click the Run... button
6. The report appears on your screen and is ready to print if desired
The End!!!

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