FACILITIES MANAGEMENT
150 Work Backlog

U156: Current Schedule and Views
EXAMPLES NEEDED FOR TRAINING

Slide 5: Review the differences between Current Schedule and Daily Schedule Backlog so they can decide what workbench would work best for them.

Slide 6: Go through the different functions available on the Current Schedule form. Making sure to go through the right click functions: viewing/editing, quick scheduling, closing and printing. Then go through how to assign work orders and look at some of the reports that are available as well.

Slide 13: You may want to assign building numbers to each student, making sure there are at least three work orders available with %DOORS% in the equipment field. Have the students work through Exercise 1 and when everyone is done, work through the exercise on the projection screen.

Slide 14: Go through the process of creating a new view. The new view could be for repair work orders for HSTM1-LM; you will get plenty of records with those parameters.

Slide 18: Allow the students to work through Exercise 2 and when everyone is done, work through the exercise on the projection screen.

Slide 19: Review how to modify, delete and rename a view.
SUBJECTS COVERED IN THIS UNIT:

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INTRODUCTION

What is a Current Schedule?

- A workbench where the entire backlog can be viewed and evaluated with reports; work orders can be assigned, scheduled, edited, printed and closed
- Generally used by line staff and custodial supervisors
- Work order information is summarized and can be easily queried
- Similar to the Daily Schedule Backlog tab
INTRODUCTION

Current Schedule can be used instead of using the Daily Schedule, however, the following differences exist:

**Daily Schedule**
- 15 work orders displayed at one time
- Daily Scheduled WOs can be viewed
- Scheduling history available
- Similar WO search available
- Child WOs are not viewable
- WOs must be assigned one at a time
- Daily Scheduling reports available
- Minimal reports for evaluating backlog

**Current Schedule**
- 19 work orders displayed at one time
- Daily Scheduled WOs cannot be viewed
- Scheduling history unavailable
- Similar WO search unavailable
- Child WOs are viewable
- Multiple WOs can be assigned at one time
- Daily Scheduling reports unavailable
- Numerous reports available for evaluating backlog
CURRENT SCHEDULE FORM

1. Current Schedule
2. Work Order
3. Supervisors

U156 Current Schedule and Views Ver 2.1
1. Access the Current Schedule form from the Navigator screen.
2. Choose the folder you would like to view or create a new folder for sorting the work orders.
3. Right clicking a work order number on the Current Schedule gives you a drop down menu with more functions to choose from.
   • **View/Edit...**: To access the work order form so it can be viewed in it's entirety and also edit if necessary.
   • **Quick Schedule...**: To access the Quick Schedule form and schedule the work order to one of the employees on the crew assigned to the work order.
   • **Close...**: Brings up the Work Order Closing form so the work order closing process can be performed.
   • **Cost Summary...**: To view the work order cost summary.
   • **Print...**: To print the work order.

Reference Fields:

- **Building**: Building number where the work will take place.
- **Equipment**: The Equipment number for this work order.
- **Description**: The short description for the work order.
- **Type**: The maintenance type for this work order; REPAIR, CUSTODIAL, PREVENTIVE, etc.
- **Priority** (field labeled P): If this work order has been placed in your backlog by the Call Center, PM generation or by some other means, it will have a priority already defined.
- **WO Number**: Work order number assigned to the job.
CURRENT SCHEDULE FORM

- [Image of schedule form page]

The image shows two tables with details such as Craft, SLStart Date, Crew, Phase, Assigned To, Status, Due Date, Site, and Req Num.

- [Image of schedule form page]

The second image is similar to the first, displaying the same types of columns with relevant data entries.
CURRENT SCHEDULE FORM

Reference Fields cont’d:

- **Craft**: The planned Craft for this work order.
- **Secondary Labor (field labeled SL)**: If this field is checked (✓) it indicates that there is secondary labor has been assigned to this work order.
- **Start Date**: The start date for this work order; typically interpreted as the earliest date the work order can be started.
- **Crew**: The primary Crew for which the work order is assigned.
- **Phase**: If this field is checked (✓) it indicates that this work order is associated with a phase of a mini-project.
- **Assigned To**: FM employee that was assigned to the job.
- **Status**: When a work order is first placed in your backlog it will arrive with a status of OPEN.
- **Due Date**: The date the work will be completed by.
- **Site**: The campus in which the work will be performed. Minneapolis = 01 and St. Paul = 02.
- **Req Number**: The requisition number assigned to the work order. The requisition number varies depending on how it was created. Requisition numbers that begin with “SR” were created via a service request. Others may have a file name and number and were created from PM files, i.e. FIRE-1, COOL-033, etc. Requisition numbers that begin with “W” were derived from another work order number, and are child work orders.
- **Scheduled Date**: The date the work order was last scheduled.
- **Department**: Will either be FM or DEPARTMENT, depending on who requested the work.
- **Zone**: This is the district where the work will be performed.
4. To assign one or multiple work orders to an employee, click the checkbox next to the work order(s) you want to assign.

5. Click the Assign WO... button.

6. Enter the employee ID of the person you are assigning the work order to or click the LOV to perform a query of the employee name.

7. Highlight the employee from the search results and click the OK button. The employee ID will auto-fill in the Assign Work Order To field.

8. Click the checkbox to change the status of the work order to ASSIGNED.

9. Click the OK button when finished assigning the work order(s).
## CURRENT SCHEDULE FORM

<table>
<thead>
<tr>
<th>Building</th>
<th>Equipment</th>
<th>Description</th>
<th>Type</th>
<th>P</th>
<th>WO Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>142</td>
<td>142-BALLAST</td>
<td>142 BY RM 6.439 LAMPS REPLACED WILL NOT LIGHT</td>
<td>REPAIR</td>
<td>10</td>
<td>W0011411875</td>
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<tr>
<td>142</td>
<td>142-BALLAST</td>
<td>142 MULTIPLE ROOMS 15TH FLR - BALLAST ISSUES - SEE</td>
<td>REPAIR</td>
<td>10</td>
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<tr>
<td>142</td>
<td>142-BALLAST</td>
<td>142 MULTIPLE ROOMS 16TH FLR - BALLAST ISSUES - SEE</td>
<td>REPAIR</td>
<td>10</td>
<td>W001143726</td>
</tr>
<tr>
<td>142</td>
<td>142-BOILR1</td>
<td>BOILER INSPECTION (DAILY INSPECTIONS) - SEASONAL</td>
<td>PREVENTIVE</td>
<td>4</td>
<td>W0011356979</td>
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<td>142-BOILR2</td>
<td>BOILER INSPECTION (DAILY INSPECTIONS) - SEASONAL</td>
<td>PREVENTIVE</td>
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<tr>
<td>142</td>
<td>142-CDUT74</td>
<td>BSAC 14-208 BLD 142 COLD RM ALRM TO COLD</td>
<td>REPAIR</td>
<td>2</td>
<td>W000942729</td>
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<tr>
<td>142</td>
<td>142-CHIL01D</td>
<td>142 ASSIST ZONE WITH CHILLER PIT</td>
<td>REPAIR</td>
<td>5</td>
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<tr>
<td>142</td>
<td>142-CHIL08</td>
<td>FOUR-YEAR CENTRIFUGAL CHILLER EDDY CURRENT TEST</td>
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<td>142</td>
<td>142-CHIL61</td>
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<td>4</td>
<td>W0011142679</td>
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<tr>
<td>142</td>
<td>142-CN001</td>
<td>REPAIR CONDENSATE METER IN 142</td>
<td>REPAIR</td>
<td>3</td>
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<tr>
<td>142</td>
<td>142-CTAIR4</td>
<td>RECIPROCATING AIR COMPRESSOR INSPECTION (OIL)</td>
<td>PREVENTIVE</td>
<td>4</td>
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<tr>
<td>142</td>
<td>142-CWR01</td>
<td>MEASURE PIPE THICKNESS ON MOGS TOWER CONDENSER</td>
<td>ADMIN</td>
<td>30</td>
<td>W001103864</td>
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<td>142</td>
<td>142-CWR01</td>
<td>SERVICE TO INSTALL 6&quot; TAKE OFFS AND VALVES ON MOGS TOWER CONDENSER</td>
<td>REPAIR</td>
<td>5</td>
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<tr>
<td>142</td>
<td>142-CWR01</td>
<td>TESTING AND TREATMENT OF SYSTEMS TREATED WATER</td>
<td>PREVENTIVE</td>
<td>4</td>
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<td>142</td>
<td>142-CWR01</td>
<td>142-PTS01 BLOWS CONTROL FUSE UPON START UP</td>
<td>PREVENTIVE</td>
<td>4</td>
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<tr>
<td>142</td>
<td>142-DOORS</td>
<td>INSPECTION OF DOORS: FIRE, EXTERIOR AND INTERIOR P</td>
<td>PREVENTIVE</td>
<td>4</td>
<td>W001117007</td>
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<tr>
<td>142</td>
<td>142-ISO100</td>
<td>142-ES01: COMPLETE CLEAN-DOWN, REPLACE ROLLERS</td>
<td>PREVENTIVE</td>
<td>30</td>
<td>W001117007</td>
</tr>
</tbody>
</table>
CURRENT SCHEDULE FORM

- **Check All...**: To check all the work orders that appear in the Current Schedule.
- **Uncheck All...**: To uncheck all the work orders that have been checked.
- **Assign WO...**: When clicked, the Assign Work Order form will be displayed; you may then assign the work order to an individual employee. You also have the option to change the work order status to ASSIGNED, otherwise the status will remain the same.
- **Export...**: Allows the exporting of the Current Schedule data in either text or HTML format.
- **Express WO...**: Currently not used by FM.
- **Labor...**: Displays an alternate labor entry screen if no labor has been charged. If labor has already been charged to the work order, it will automatically be displayed here.
- **Reports...**: Displays a list of reports available for evaluating the backlog. When an individual report is highlighted and the Run Report button is pressed, the report will run automatically or the Report Parameters screen will pop-up if relevant, and selection criteria can be entered before running the report.
- **View PR...**: This button is only enabled when the work order highlighted has a check (√) in the Phase field checkbox. If unchecked, the View PR button will be “grayed out”. When you click the View PR button it will drill down to the mini-project header record for this “phased” work order.
- **Print...**: Will print the work orders that have been checked.
EXERCISE 1

1. From the Current Schedule form, choose a building and query up work orders with an equipment number like %DOORS%
2. From the records retrieved, close the first work order
3. Repeat the query (hint: press F7 twice and then F8)
4. Assign all the work orders retrieved to Dave Grayden, making sure to change the work order status to ASSIGN
CREATING CURRENT SCHEDULE VIEWS

- Views are used to group or sort work orders.
- Views will sometimes exclude or include certain work orders, and are not always indicative of the entire work backlog. Only the “All Active Work Orders” view will list all work orders in the backlog.
- Public views are used by all and can only be modified by BAS staff.
- Private views can be created and personalized by individual users.
To create a private view, highlight a view from the list of existing views and click the **Edit...** button.

From the **Edit Folder** form, click the **Duplicate...** button.
CREATING CURRENT SCHEDULE VIEWS

- Enter the new view name and click the OK button

Ways to customize folders:
- Display order of columns that appear on the Current Schedule
- Primary and secondary sorts as well as sort order
- Set filters for preset fields
- Set advanced filters for fields not listed (syntax is covered in Advanced Query training or contact BAS staff for assistance)
CREATING CURRENT SCHEDULE VIEWS

- The Options tab allows the user to set a default view from the LOV
EXERCISE 2

1. Create a private view that will show all work orders with a Maintenance Type of PREVENTIVE and Status of COMPLETED
2. Change the order of the first five columns so they are: WO Number, Equipment, Description, Priority, Due Date
3. Change the Secondary Sort to Due Date
MODIFYING CURRENT SCHEDULE VIEWS

- Highlight a private view and click the **Edit...** button
- Make the desired changes to sort orders, column orders, filters, advanced filters
- Check the **Save Changes** checkbox and click the **OK** button
- If deleting the view, highlight the view, click the **Edit...** button, and then click the **Delete...** button

Folder names cannot be changed. Instead, duplicate the folder, give it a new name, and then delete the original folder.
The End!!!

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