

SERVICELINK DIRECT – VISUAL SCHEDULING

OVERVIEW

The Visual scheduling module provides a simple means of scheduling. It provides the ability to see what jobs have not yet been allocated, what resource is available and a simple “drag and drop” method to assign resources to jobs. Ideal for organising a time and date for reactive call outs.

THE RESOURCE SCHEDULE WINDOW

A selection of “Resource Group” brings on screen the operatives assigned to that group, along with the jobs that have already been assigned to those operatives. The selection of “category” displays jobs in that category which are unassigned..

Choose the date you are interested in, and the work programmed for that day is displayed.

The screen shows the operatives, one column for each.

On the left hand side the jobs waiting to be scheduled are shown in a list.

The screen shows each job assigned to each resource, with the ability to display full details shown by placing the cursor over the job.

The vertical size of the job details is based on the time required for that job

The screenshot displays the 'Multiday resource planner' interface. At the top, there are tabs for 'Multi Resource / Day', 'Multi Resource / Month', 'Single Resource / Multi Day', and 'Single Resource / Month (View Only)'. Below these are filters for 'Category: all', 'Resource Group: all', and 'Current Date: 06/06/2008'. The main area is a grid titled 'Service Pro Scheduling - Category - all' for the date '07/06/2008'. The grid has columns for resources: Barbara Finley, Hayley Udale, Mike Thorpe, Peter Bennett, and Roberto Tavarozzi. The rows represent time slots from 7:00 to 19:30. Jobs are assigned to resources, with details shown in pop-up windows. For example, at 8:00, Barbara Finley is assigned job 008731 (Personal Holiday), Hayley Udale is assigned job 008886 (Personal Holiday), Mike Thorpe is assigned job 008887 (Electrician), and Peter Bennett is assigned job 008887 (Electrician). A warning message is displayed for Roberto Tavarozzi: 'DO NOT ALTER WITHOUT CONSULTING CONTRACT MANAGER R.DUNN. It is intended that Roberto will install new system on this date we are awaiting delivery date/time for equipment'. The left sidebar shows a list of jobs waiting to be scheduled, including job 009015 (Void Works) and job 00930K (Decorating).

The process of assigning a job to a resource is a simple drag and drop.

There are options for viewing one day or a whole month in overview.

To move from one day to next, or previous, is a simple “click” at the top panel