LATITUDE
Professional Practice Management Software

Latitude Scheduling Guide

1   U: How to Schedule Crews and Jobs (Business Edition / Corporate Edition Only)

1.1   Overview

1.1.1   The Scheduler simplifies assigning employees to a specific project or task on a specific date or conversely assigning projects and tasks to staff & crews. Set expected length of work and special instructions. See who is working on which projects and tasks, and print individual & crew schedules. Monitor future workload of each employee, crews who've missed deadlines, etc.

Before scheduling an employee or crew, you must flag employees, projects and/or tasks as being schedulable.

Employees must belong to a 'crew' in order to be scheduled. Crews can be either permanent (pre-defined) or ad hoc (temporary). An employee can be assigned to more than one crew.

A crew consists of a 'crew chief' and from zero to any number of other crew members.

To schedule individual staff, use 'crews' with them being the sole member (as crew chief).

The Schedule screen displays a week at a time with the week starting from Monday.

NOTE: The Scheduler will require Latitude Email Notifier and/or Exchange for email
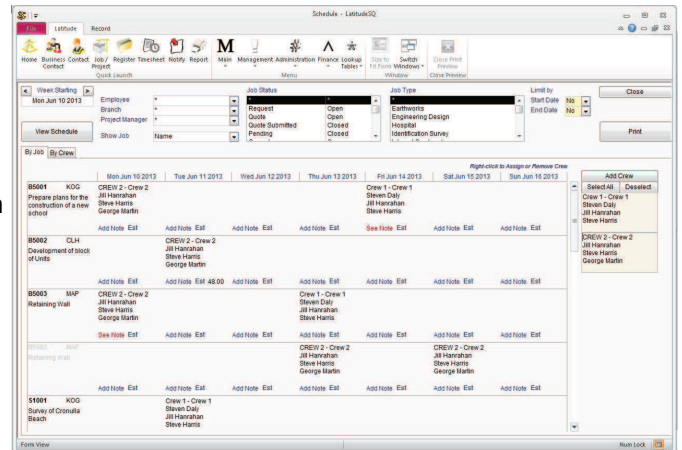
1.2   Set Up Scheduling

1.2.1   Set Up Employees

On the Latitude ribbon, click 'Management' and select 'Employee'.
Set Schedule to 'Yes' to enable an employee to be included in a schedule.
Set Crew Chief to 'Yes' to flag this employee as leader of the crew or the sole member of a one-man crew.

1.2.2   Set Up Jobs

In the Job screen, set the Schedule option to 'Yes' to allow the job to be scheduled.
Jobs flagged as 'Task Only' will show tasks in the Schedule screen.
In the Task tab, set the Schedule option to 'Yes' to allow tasks to be scheduled.

You may opt to disable a job status or a task status to be scheduled by doing these steps.

On the Latitude ribbon, click 'Lookup Tables.'
Select 'Job Status' or 'Task Status' from the drop-down.
Click the 'Disallow Scheduling' option for the preferred status.

Job statuses flagged with the Disallow Scheduling option (in the Job Status lookup) will not be displayed. This option will override the 'Yes' Schedule option in the Job and Task screen.

1.2.3   How to Use the Selection Criteria

On the ribbon, click 'Management' and select 'Scheduler'.

In these fields:

Week Starting - enter a date to select a week
Employee - display jobs of the selected employee
Branch - display jobs under the company
Captain - display jobs assigned under the project manager
Show Job - display jobs either by Name or by Site Address
Job Status - display jobs that are cancelled, current, completed, etc.
Job Type - display jobs of the same type

Limit by:

Start Date
Select 'Yes' to display jobs with a Start Date on or before the end of the current week.
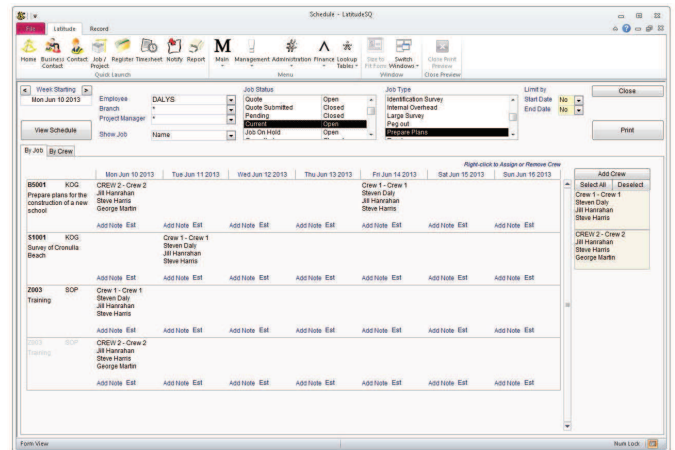Select 'No' to ignore Start Date of jobs.
End Date
Select 'Yes' to display jobs with an End Date on or after the Week Starting date.
Select 'No' to ignore End Date of jobs.

NOTE: All criteria are independent from each other.

1.2.4   Set Up Permanent Crews

You can assign a group of employees in a fixed crew by doing the following:

On the ribbon, click 'Management' and select 'Crew'.

In these fields:

Crew Code - Select an existing code or enter a unique code to identify the crew.
Name - Enter a description of the crew.
Current - Select 'Yes' to allow the crew to be scheduled. Select 'No' to hide the crew from the list.
Crew Chief - Select an employee as leader of the crew or the sole member of a one-man crew.

Click on an employee, and click the right arrow to move it to the Crew Members list.

NOTE: Changes do not affect previously scheduled assignments.

1.2.5   Add Ad Hoc Crews

You can assign a group of employees not in a permanent crew by doing the following:

On the ribbon, click 'Management' and select 'Scheduler'.
Go to the 'By Jobs' tab, and click the 'Add Ad Hoc Crew' button.
In the Crew form, select a Crew Chief and crew members and click 'Save'.

NOTE: To modify crew members, double-click on a crew to open the Crew screen. Changes to Crew members do not affect previously scheduled assignments.

1.3   How to Schedule Crews on Jobs

1.3.1   Assign Crews

On the ribbon, click 'Management' and select 'Scheduler'.
Go to the 'By Job' tab.
Select the crews you are going to use in the Crews List on the right. Click the 'Select All' or 'Deselect' buttons to pick or un-pick all chosen crew(s).
Right-click on the Job or Task and Date cells, and assign the active Crew(s) to it.

NOTE: If the cell you selected has an entry, a prompt will ask you to either replace or add the crew.

After assigning a crew or crews to the job, this will display the 'Add Note' option and enable the 'Est' option where you can add details for reference and the estimated hours of job completion given to the assigned crew.

Once scheduled, a notification email is sent out to the crew chief. The email contains a list of jobs with the scheduled date, job number, job name, street name, task code, client name and estimated hours. To configure the email notifier settings, read "Set Up Email Notifier" of the Latitude How-To Guide.

1.3.2   Edit Crews

On the ribbon, click 'Management' and select 'Scheduler'.
Go to the 'By Job' tab, and right-click on an assigned crew and select 'Edit Crew'.
Highlight an employee and move it either to the left to remove or to the right to add.

NOTE: Changes made to a crew assigned to a particular job or task on a particular day will only apply to that instance. It will create a new ad hoc crew, which will be displayed on the right pane.

1.3.3   Remove Crews

Right-click on a crew assigned to a job or task on a particular day and select 'Remove Crew'.

1.4   How to Schedule Jobs to Crews

1.4.1   Assign Jobs

On the ribbon, click 'Management' and select 'Scheduler'.
Go to the 'By Crew' tab.
Select the jobs or tasks you are going to schedule in the Jobs List on the right. Click the 'Select All' or 'Deselect' buttons to pick or un-pick all chosen jobs.
Right-click on the Crew and Date cell and assign the active Job(s) or Task(s) to it.

NOTE: If the cell you selected has an entry, a prompt will ask you to either replace or add the job or task.
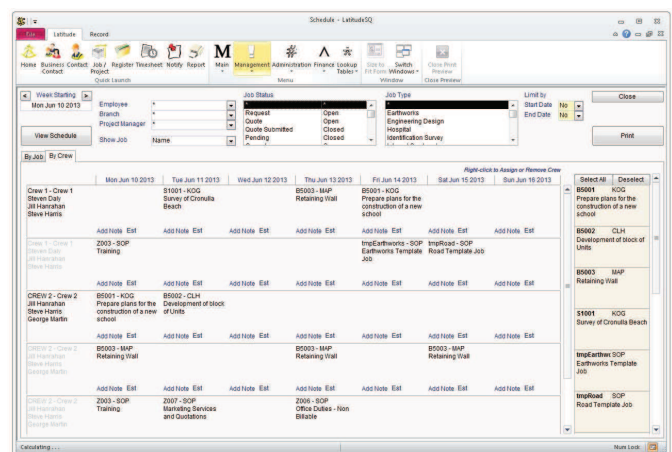
After assigning a job or a task to the crew the 'Add Note' option will display, and the 'Est' option where you can add details for reference and the estimated hours of job/task completion given to the assigned crew will be enabled.

Once scheduled, a notification email is sent out to the crew chief. The email contains a list of jobs with the scheduled date, job number, job name, street name, task code, client name and estimated hours. To configure the email notifier settings, read "Set Up Email Notifier" of the Latitude How-To Guide.

1.4.2   Remove Jobs

Right-click on a job or task assigned to the crew on a particular day and select 'Remove Job'.

1.5   Filter Schedule

1.5.1   Click the 'Filter' button to filter jobs and crews according to the selection criteria. The display includes ad hoc crews that have been scheduled in the current and preceding weeks.

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1.6　　　Preview Schedule

1.6.1　　Click the 'Preview' button to preview the Job Crew Schedule before printing it.

Note, if you filter the scheduler to an employee, it will preview the employee's own schedule instead.