

# White Paper

Scheduling & Dispatch in simPRO

## Scheduling & Dispatch in simPRO

Service Managers have struggled in regards to knowing where their staff are, what they are doing and how far away they are from jobs. A number of systems have been developed over the years in an attempt to alleviate this common issue. Inventive job diaries used to track this information tend to evolve into larger whiteboards as organisations grow and need more central management practices. More electronic methods such as outlook calendars and spreadsheets are then utilised to track what jobs employees are doing and where.

These systems all work in showing the user which jobs are assigned to each employee, assuming they are up to date. However, the data will typically need to be entered into other areas for purposes such as, spreadsheet or systems to manage the jobs list, other job cards for the information to be sent and retrieved from the field, and accounting engines so the job can be invoiced.

Each manual step also introduces another point where the data can be inaccurately recorded. These inaccuracies can ultimately cost the business time, money and inevitably is the source of issues that arise with customers.

Eliminating these problems is the key reason systems like simPRO Enterprise exist. simPRO allows seamless communication between the office and the field, allowing users to enter information into the system which will be used and reused every step of the way. It will keep all employees up to date, decreasing the time taken to administer each task and allowing your staff to focus on more important aspects of the business.

There are two ways jobs are typically issued, either scheduled or assigned. An assignment is when you tell your employee what their job will be. For example, 'John this is your job, get to it when you can'. Systems like this are implemented when there are a high volume of jobs that need to be done and the organisation allows the field technician to organise their own run sheet. Jobs can also be assigned in bulk which is useful when creating multiple jobs and wanting to pre-assign them to technicians ahead of schedule.

## Key Scheduling features in simPRO

The screenshot displays the 'Pending Jobs (3)' section of the simPRO software. It features a table with the following data:

Job No.	Status	Customer	Order No.	Request No.	Due Date	Scheduled	Created Date	Customer Contact	Customer Phone	Technician	Site Phone	Site Town	Sell Price
27088	Yellow	Agrade Car Sales			02/06/2014	19/06/2014	18/06/2014		0288	01372			£3,848.40
27087	Purple	Agrade Car Sales			01/06/2014	19/06/2014 to 25/06/2014	18/06/2014		0288				£1.80
26884	Cyan	Agrade Car Sales				29/11/2013	29/11/2013	Brian Free	0288				£168.75
<b>Total</b>												<b>£4,018.95</b>	

Below the table, there are several management options:

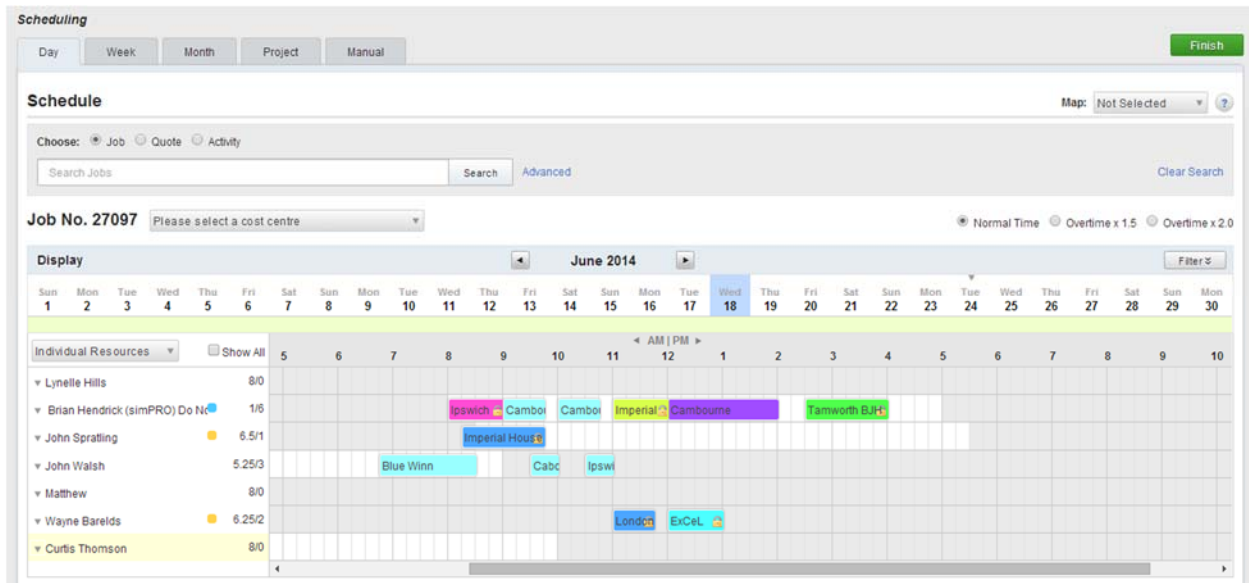
- Select All
- With selected: [Map Jobs](#) | [Invoice](#) | [Archive](#) | [Delete](#)
- Assign Salesperson: Not Selected
- Assign Project Manager: Not Selected
- Update Status: Not Selected
- Add Tag: 0 Selected
- Change Due Date: [Calendar icon]
- Change Stage: Not Selected

An 'Update' button is located at the bottom right of the interface.

Scheduling in simPRO Enterprise allows you to assign the job to one or multiple field technicians, plant and equipment, subcontractors or teams, and indicates the actual date, expected start and duration of a job. Users are presented with a group calendar-type screen which is accessible to everyone with system privileges. It will allow users to access the schedule as it's being updated and once it is ready for dispatch to the field. The different scheduling views are:

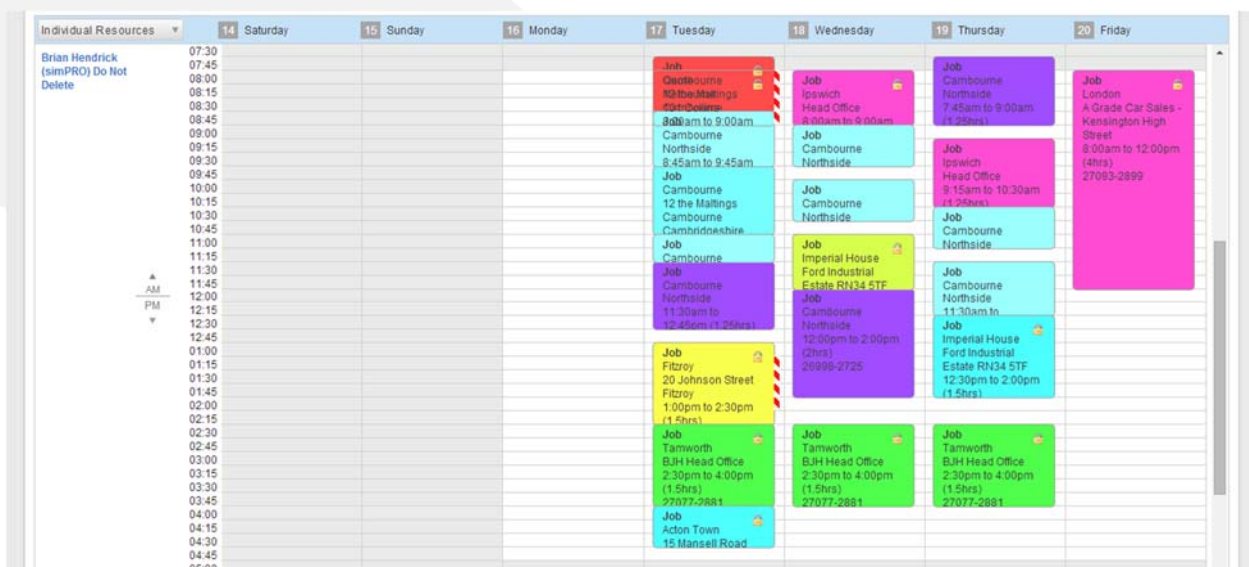
## Day View

The day view is a group calendar showing the days activities (defaulted to today) for all resources. The list of resources will automatically filter itself based on the job that is being scheduled. This shows details such as the zone in which the job is being done in and the type of work being performed (to make sure only the relevant resources are shown).



## Week View

This view is typically filtered to a single resource (though multiple resources can be shown) and shows the entire weekly schedule for that resource. This is a popular view when planning someone's time in advance as it's very simple to move jobs around onto different days and see the impact it's having on the particular resource's calendar.



### Month View

The month view is a much more macro view and is used for a detailed look at what is occurring for the month. This is another option that makes it easy to move jobs on to different days and weeks. This can be especially helpful if the screen is filtered down to view a single resource.

**Schedule** Map: Not Selected

**Filter** July 2014 Filter

Show  Leads  Quotes  Jobs  Activities

Customer  Site  Teams

Cost Centre  Engineer  Job No.

29 Sunday	30 Monday	1 Tuesday	2 Wednesday	3 Thursday	4 Friday	5 Saturday
Nothing Scheduled.	<p><b>Yarra Transport</b> Yarra Transport 27110-2947</p> <p>Brian Hendrick (simPRO) Do Not Delete 8:00am - 11:15am</p> <p><b>Northside ABC Enterprises</b> Q1600-1639</p> <p>John Spratling 8:30am - 1:00pm</p> <p><b>Northside ABC Enterprises</b> 27111-2945</p> <p>Curtis Thomson 9:00am - 10:45am</p> <p><b>Head Office ABC Enterprises</b> 27108-2938</p> <p>John Spratling 1:00pm - 3:00pm</p>	<p><b>Northside ABC Enterprises</b> Q1600-1639</p> <p>John Spratling 8:30am - 1:00pm</p>	<p><b>Northside ABC Enterprises</b> 26995-2715</p> <p>Brian Hendrick (simPRO) Do Not Delete 10:45am - 11:00am</p>	<p><b>Epsom Site BHP Infrastructure</b> 25546-392</p> <p>Ash 2:30am - 6:30am</p>	<p><b>Northside ABC Enterprises</b> 27112-2958</p> <p>simPRO Contracting 6:00am - 12:15pm</p> <p><b>Northside ABC Enterprises</b> Q1600-1639</p> <p>John Spratling 8:30am - 1:00pm</p>	<p><b>Unit 1 Town Industrial Site Haywards Heath West Sussex RH16 1RB</b> Fresh L76</p> <p>John Spratling 8:30am - 10:30am</p>
6 Sunday	7 Monday	8 Tuesday	9 Wednesday	10 Thursday	11 Friday	12 Saturday
Nothing Scheduled.	Nothing Scheduled.	Nothing Scheduled.	<p><b>Northside ABC Enterprises</b></p>	Nothing Scheduled.	<p><b>Epsom Site BHP Infrastructure</b></p>	Nothing Scheduled.

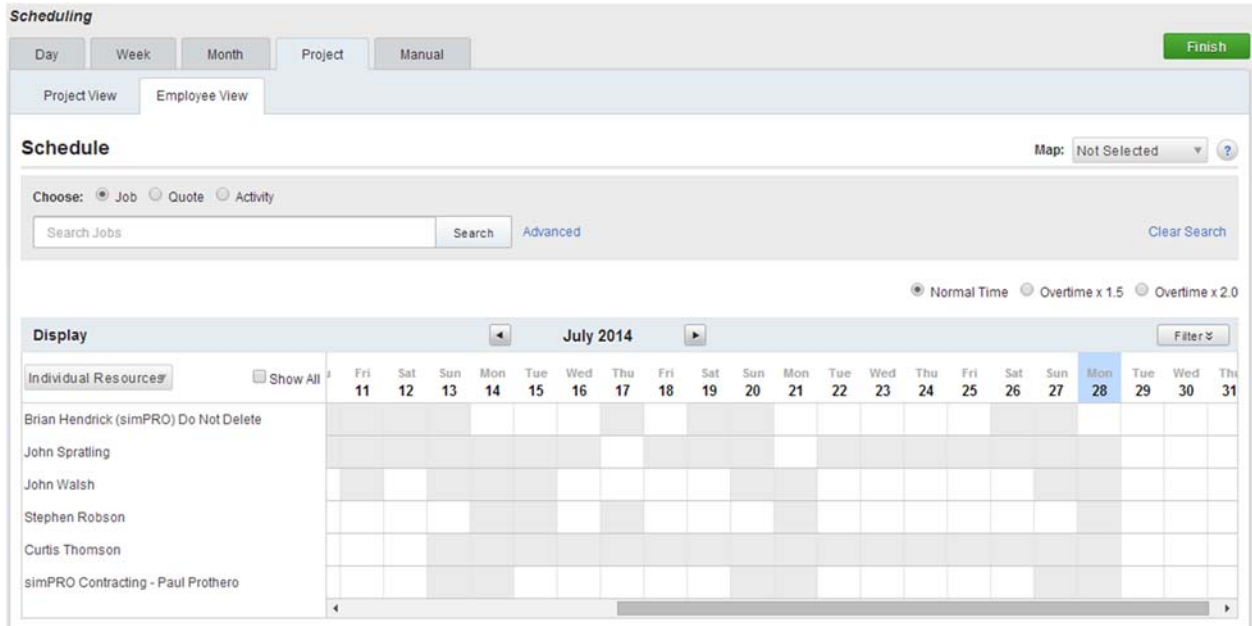
## Project View by Projects

The project views are designed for longer projects, allowing project managers to schedule entire days for their resources. In this particular view the default screen layout looks at jobs as the primary record type and shows the days the resources are scheduled to those jobs. Users can then filter which jobs are viewed, and schedule the resources accordingly.

The screenshot displays the 'Scheduling' interface in 'Project View' for July 2014. The interface includes a navigation bar with tabs for 'Day', 'Week', 'Month', 'Project', and 'Manual', along with a 'Finish' button. Below the navigation, there are tabs for 'Project View' and 'Employee View'. The main area is titled 'Schedule' and features a 'Filter' section with dropdown menus for 'Stage' (set to 'Not Complete'), 'Cost Centre' (set to 'All'), 'Customer', 'Site', 'View No. Jobs' (set to '5'), 'Engineer' (set to 'All'), and 'Job No.'. The central part of the interface is a Gantt chart grid for the month of July 2014, with columns for each day from Friday 11th to Thursday 31st. On the left side of the grid, there is a list of job tasks, each with an 'Expand' button and a 'Select Cost Centre' dropdown. The tasks are: Job No. 27133, Job No. 27132, Job No. 27131, Job No. 27130, and Job No. 27129. The Gantt chart shows colored bars representing scheduled tasks: Job 27132 is scheduled on Wednesday 23rd (pink bar), Job 27131 on Tuesday 22nd (cyan bar), Job 27130 on Monday 21st (purple bar), and Job 27129 on Friday 18th (purple bar). A large, light grey abstract graphic is visible in the bottom left corner of the page.

### Project View by Employees

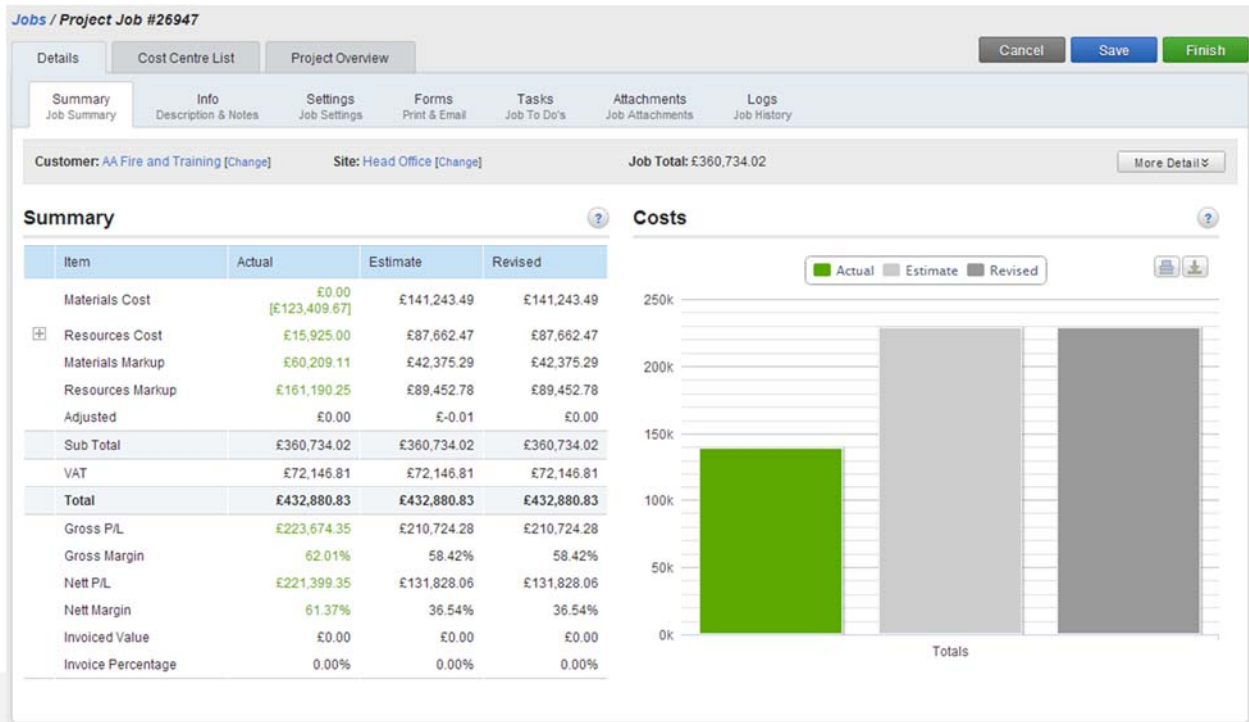
This uses a similar logic where project managers can schedule entire days or weeks to resources. However, it is viewed primarily by the resources down the left hand side (similar to the day view). Users can then select the job and schedule the resource.



Regardless of the view, the user simply has to select the job they wish to schedule (which can be preselected from other areas of the system or can be searched and selected on the screen) then drag and drop across the time / days they would like the job to occur on. Once completed there are a myriad of options that can be accessed by right clicking on the schedule, some of which manipulate the schedule directly, provide dispatching options or can change the entire job the schedule relates to. An individual schedule can simply be dragged, stretched or shrunk to change the resource being used and the allowance of time on the schedule.

## Timesheets

Scheduling in simPRO Enterprise not only allocates resources to jobs during the appropriate times providing transparency and allowing dispatch, but it will also generate the timesheets based on the times scheduled and allocate the costs. For example, if a resource has a direct cost of \$35 per hour and a corporate overhead recovery of \$20 per hour, by scheduling that resource to the job you are getting their actual cost of \$55 per hour. It will allow the project manager to see the gross and nett costs of labour as well as view that in relation to the original allowances. Alternatively, it will show you how much you actually made gross and nett on that do-and-charge service job.

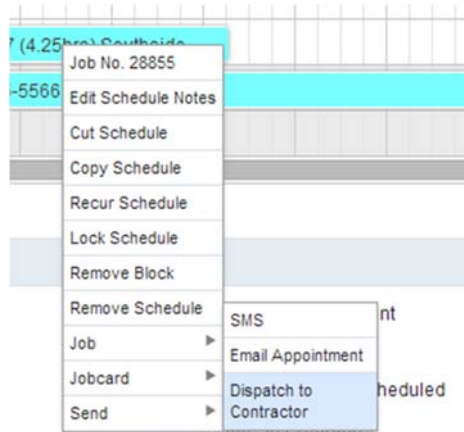




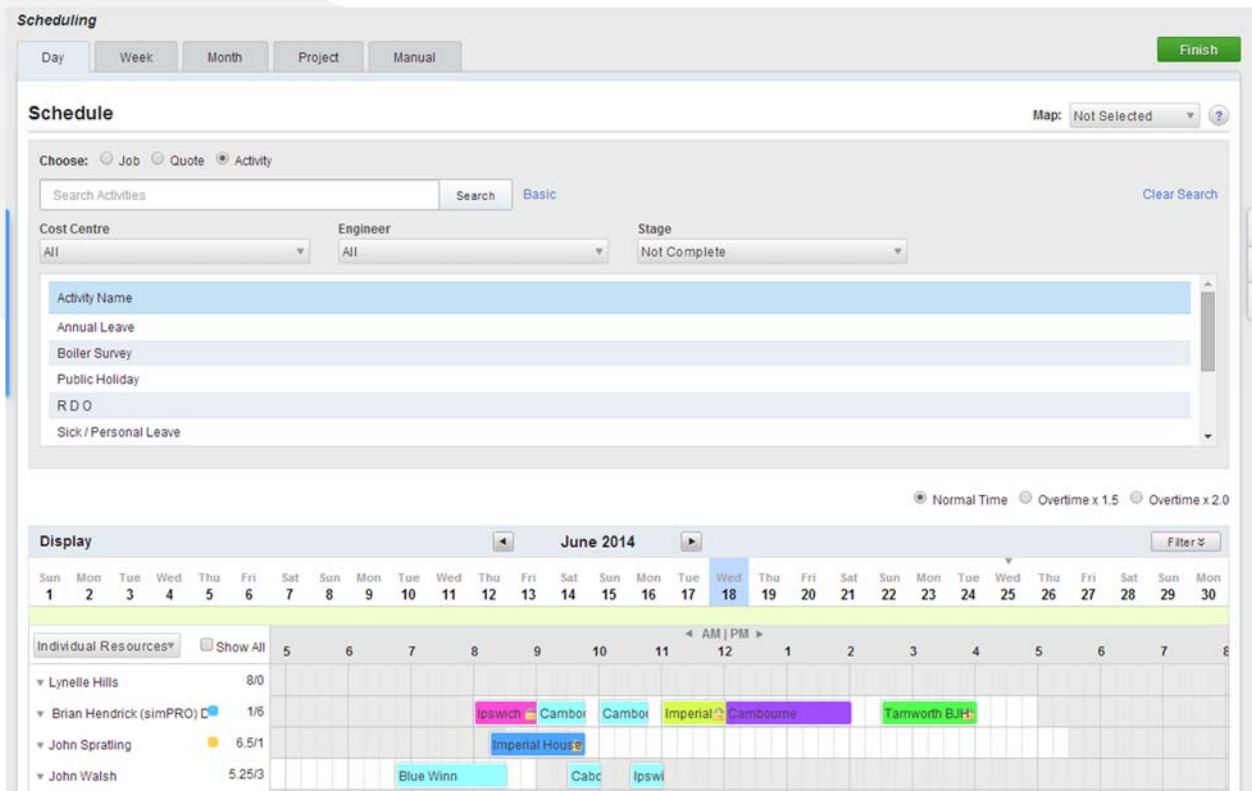
## Contractors

Once a job is allocated to a contractor, a contractor is also able to schedule themselves into the job within the Contractor Portal. In the Contractor Portal, contractors are able to manage the details of their own staff who are used for jobs with you. Just as your own staff can, contractors are able to drag and drop across their times, however they can only see themselves and their staff and the work orders you have authorised them for. By scheduling a contractor the system automatically creates the work order, again cutting down administration time and streamlining your processes. A work order, created either manually or by scheduling, can also be automatically dispatched to the contractors using the simPRO Enterprise system if they also use simPRO.

## Leads & Activities



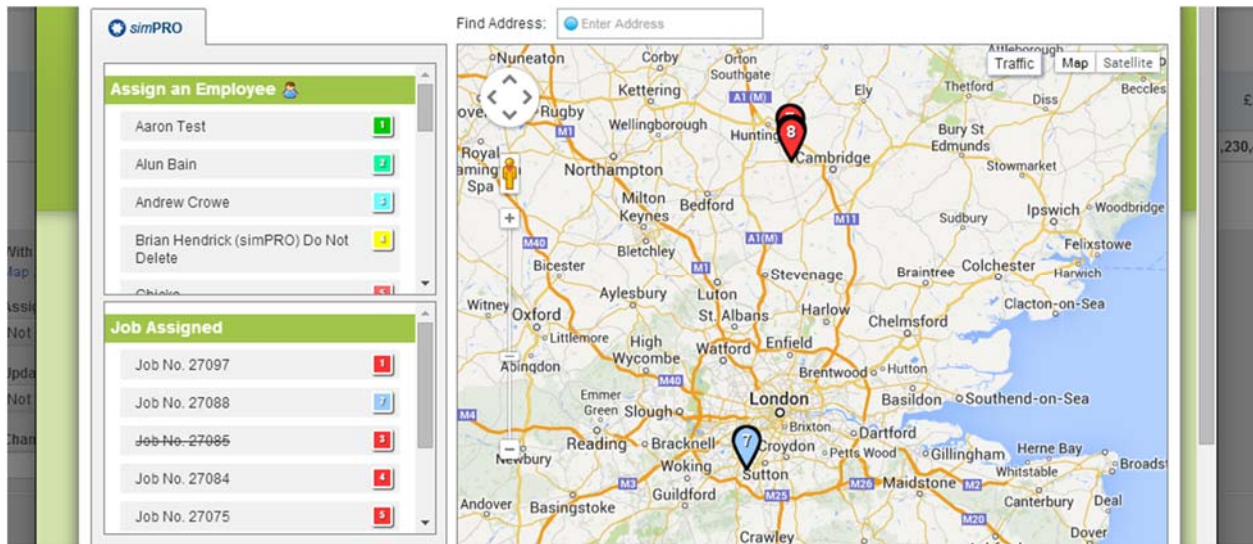
Not only Jobs, but Quotes, Leads and Activities can also be scheduled in simPRO Enterprise. It allows organisations to utilise simPRO as their entire calendaring system so all staff can see what their colleagues are doing, making the best use of their own and their co-worker's time.



## Add Ons

### simTRAC

Maps of jobs can also be produced in simPRO Enterprise, often assisting users to work out an order of jobs to be done for the day or who to send to an urgent job. If coupled with simTRAC, simPRO can also display the location of the field technicians vehicles (and verify the timesheets against the vehicle movements) and send jobs directly to the vehicle with routing instructions.



### simPRO Connect

Using your smartphone or tablet can also be extremely efficient in verifying the field technician locations when they complete various tasks. simPRO Connect synchronizes itself with the schedules throughout the day and sends back updated actual times to simPRO, allowing staff in the office to view in real time what stage each job is up to and where all field staff are. simPRO Enterprise also has options for emailing and texting jobs out into the field if organisations are not looking to add simPRO mobility enhancements to their field teams.

