User Reference

# Dispatch v10x

By CMiC

CMiC
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# Contents

# Project Planning/Scheduling and Dispatch

## Dispatch Overview

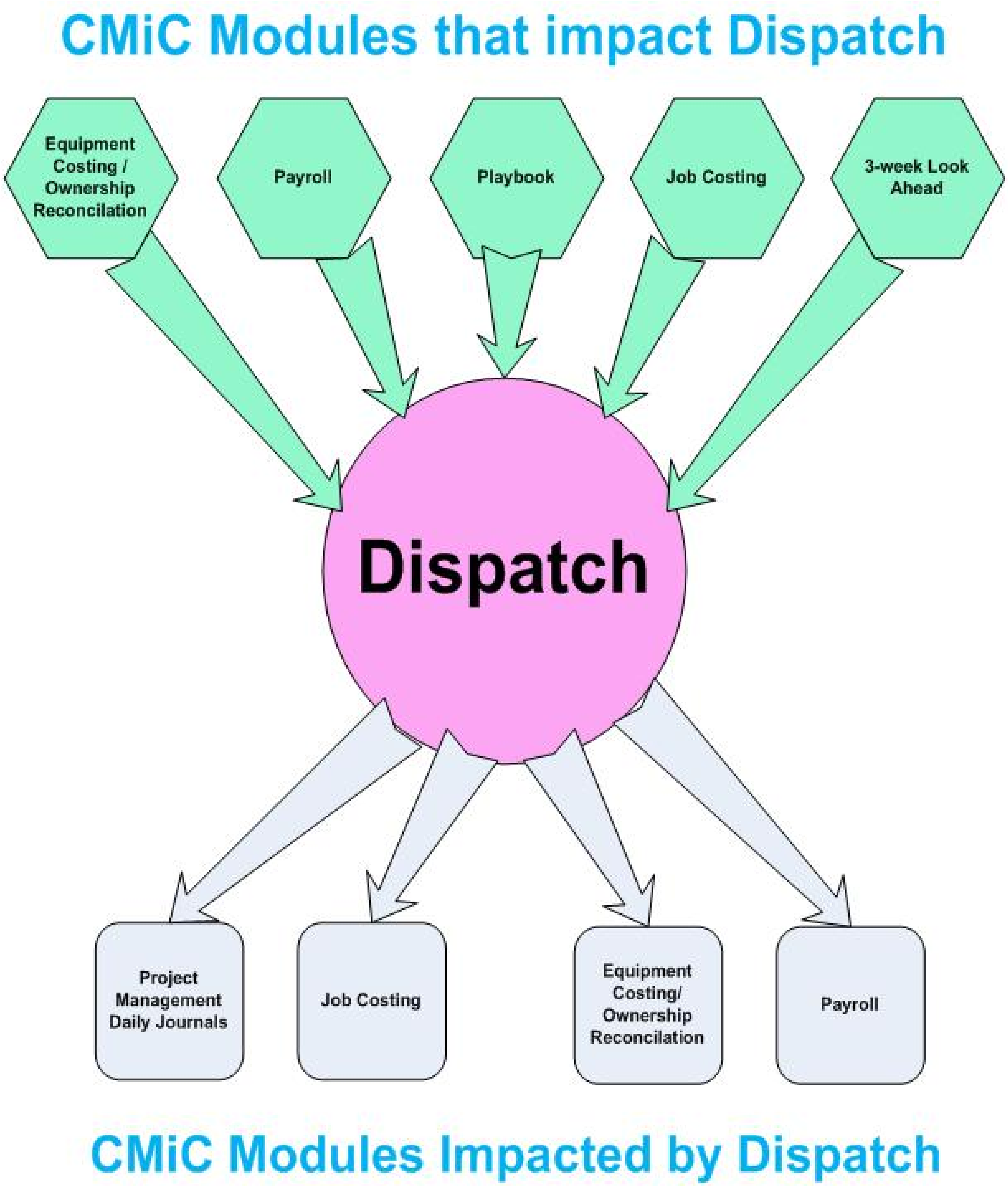
The Resource/Scheduling system has multiple programs that can be placed anywhere on the menu. There are 3 project/job scheduling screens, 4 dispatch specific screens plus reports and queries. All of these screens are interrelated in some way. For example the scheduling screens can create dispatch requests and the dispatching process updates the schedules.

Dispatch is the function of scheduling and moving resources from place A to place B. Resources are Employees, Crews, and Equipment. The dispatch module interfaces with payroll timesheet entry, equipment, and job cost.

The dispatch system is driven from dispatch requests or “needs”. Dispatch requests can be created via a planning screen such as the 3 week look ahead, directly in a Dispatch Request screen or via Ad-Hoc requests. In total the system supports 5 different categories of dispatch requests **-** Employees, Crews, Equipment, Heavy Equipment and Adhoc Requests.

The Dispatching screen allows the dispatcher to view and schedule current requests plus view and schedule requests for the future. The system allows unlimited future planning/scheduling. The dispatchers can ‘Soft Allocate’ resources at any point in time, and then come back and record the actual allocation at a later date, once the Dispatch has been completed.

The dispatch system is fully integrated with CMiC Job Costing and CMiC Equipment Costing modules. A mobilization posting in Dispatch will update the location history and equipment status plus post mobilization charges to the job.




## Modules that Impact Dispatch

There are certain items that are required to be set up in order to allow dispatch to be run. This section will provide an overview of the modules and programs that require set up. Detailed instructions on what to setup is provided later in the manual. The purpose of this section is to provide an overview of the flow of the dispatch module.

### Equipment Costing

Equipment Classes have fields available to enter a flat rate fee to charge a job for moving equipment within this class to and from a job. As well, there are fields to record the class of equipment required to move this class of equipment and the type of employee (employee trade) required to drive the moving vehicle.

If a piece of equipment has a Truck Class and Employee Trade assigned, then the piece of equipment is considered 'Heavy Equipment' by the Dispatch system which means that in order to move this piece of equipment from location A to location B a driver and a moving vehicle are required.

Ownership Reconciliation setup transaction codes provide the LOV for status changes as well as the parking code if the date of the equipment move is less than the start date of the piece of equipment.

### Payroll

In the employee profile, the employee must be flagged to be 'Available for Dispatch' and initially assigned to an unallocated job. If the employee is a truck driver, they also need to be assigned to a mobilization job. This will allow payroll to be charged to the mobilization job while the system charges either the standard fee or manually entered rate to the working job.

### Playbook

The playbook contains standard phrases and instructions for the mobilization trucker. The dispatcher is able to select the phrases and instructions that will print on the trucking information. (Set up for Dispatch is standard Playbook setup. Please see the Playbook Manual for further instructions.)

### Job Costing

A job for mobilization costs needs to be created including the phases and categories required.

An unallocated job also needs to be created to allow for equipment / crews / personnel to be assigned to whenever they are not assigned to a working job.

The job is designated as an Unallocated Job in the Material Sales Module.

## Modules Impacted by Dispatch

Once a dispatch request has been fulfilled, other modules are updated.

### Job Costing

If there are mobilization costs, these will create job costing entries directly to the job.

### Payroll

Employees and crews are assigned to the job. During crew timesheet input the system displays all members of the crew with the associated job/phase/category. (This includes both employees and equipment).

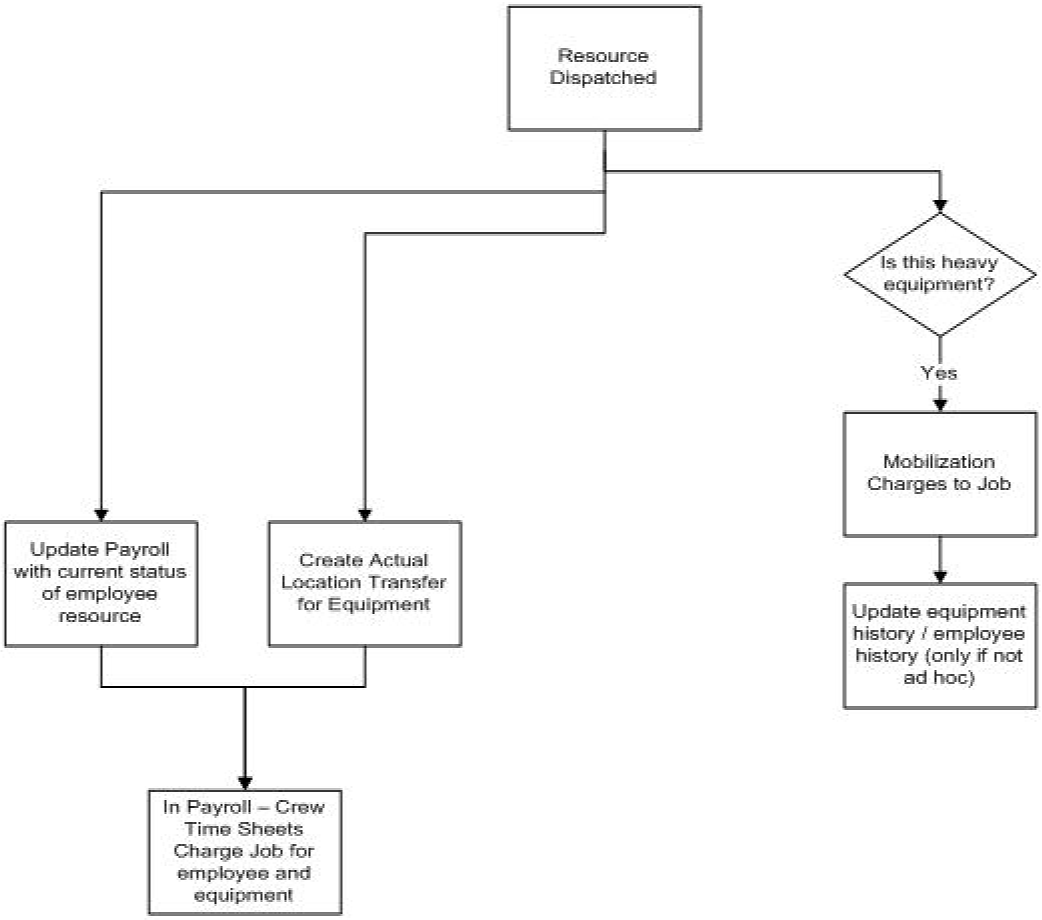
### Equipment Costing

The piece of equipment is transferred to the job via the Dispatch program. No manual transfers are required. The Dispatch module will update the equipment location history table.

### Project Management Daily Journal

A printout of the Daily Work plan Report includes crew definitions to allow for timesheet entries.

## Dispatch Model




# Dispatch and Planning System Terminology:

### To be Allocated

Refers to a dispatch request that has not yet been fulfilled by a dispatcher.

### Soft Allocated

Refers to a dispatch request that has been fulfilled by a dispatcher but the actual completion of the request has not been verified or posted.

### Allocated

Refers to dispatch request has been fully completed, also referred to as 'Firm Allocated'

### Equipment

This term refers to equipment that can be moved without requiring Dispatch to schedule another piece of equipment and a driver to move it from location to location.

### Heavy Equipment

This refers to a piece of equipment that requires another piece of equipment to move it from location to location.

### Adhoc Request

This is a type of dispatch request where the request can be to move broken equipment, move a piece of equipment to another spot on the same job, or deliver to or pick up from the job.

### Large Screen Format

Some of the programs in this module have been written in Large Screen Format which means that they are designed to work in a format where at a minimum the Width is 1550 and the Height is 800.

# Project Planning

## Project Planning Overview

Project Planning consists of 3 screens, the Project Team Planner, the 3 Week Look Ahead and the Long Range Planner. The planning should start with the Project Team Planner – this is the highest level planner, items from this planner can be passed forward to the 3 Week Look Ahead. The 3 Week Look Ahead planner allows for the entry of new items, adding specifics to the Project Team Planner items and it allows for the submitting of items to Dispatch. The Long Range Planner, shows all 3 Week Look Ahead items and any dispatch requests (both regular and Adhoc) entered outside of the planners plus dispatch requests can be created from this screen.

All three screens show the status of the planning item from the Dispatch point of view if the item was submitted to dispatch.

Project Planning can only be accomplished when projects and jobs are linked, as some of the information used in scheduling is Project specific such as RFI's and Issues.

All planning screens use the same fields from the User Element Interface screen to indicate the color legend for Allocated, Soft Allocated, Un-allocated and Not Submitted Dispatch records.

## Project Team Planner

This program allows the user to enter all types of project activities; it is not limited to only those that require resources and is the starting point for project planning/scheduling. The screen is split into 4 tabs that allow for different views / entry of the data. This schedule is entered by company and project. The system allows for the addition of 6 classifier fields that will display after the Responsible person on the Standard View tab.

#### Company:

This is the company the project being scheduled belongs to. This field will default to the users Job Cost Default Company setup but this can be changed. There is an LOV to the standard CMiC Company List. This is a required field.

#### Project:

The Project will default to the users default project from the Job Cost Default Company setup but can be changed. There is an LOV to valid projects available. This is a required field.

#### As of Date /To Date:

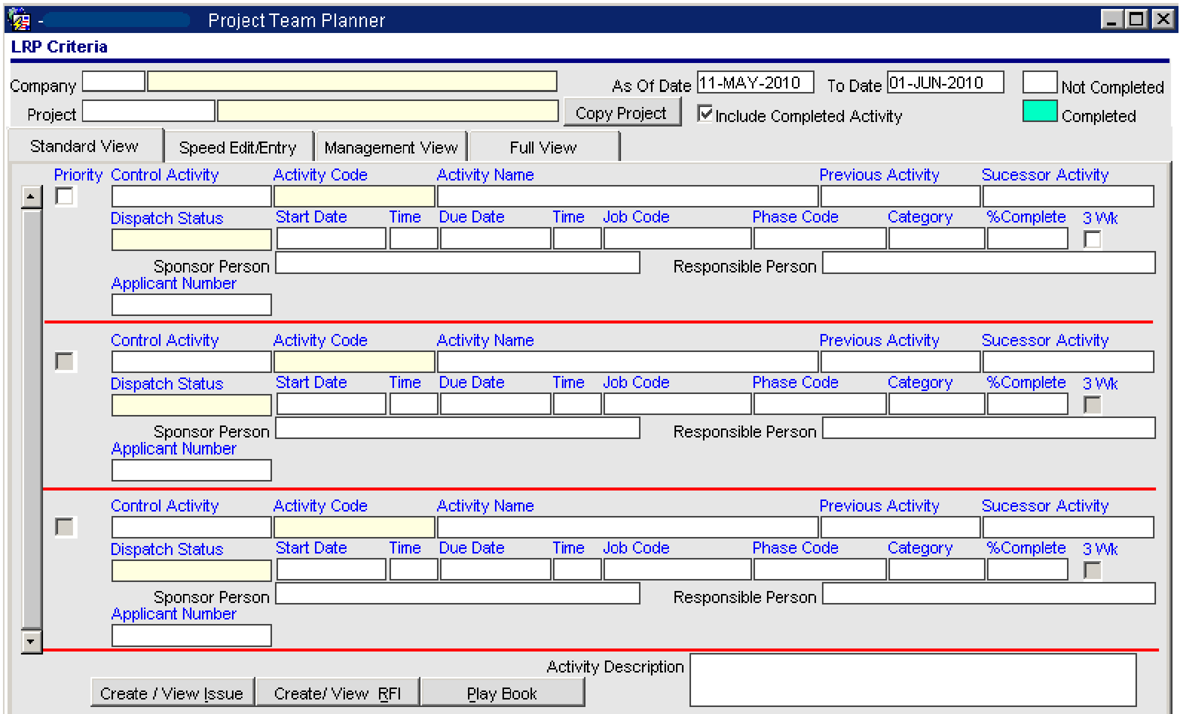
The As of Date will default to the current date, and the To Date will be 21 days later. Both of these dates can be changed. The dates entered will determine what records show in the details using Start Date.

#### Include Completed Activity:

This flag determines if completed items should be displayed in the details. By default this flag is checked but the user can change this value. Completed activities are those where the % Complete is 100.

#### [Copy Project]:

This button can be used to copy Project Team Planning records from another project. This is useful when starting a new project that is very similar to an existing one, or if there are multiple items that are standard for every project, then a PTP default project can be created and used to bring in the same activities for every project.  Note- This button is only available if there are not PTP records existing on the current project.




## Standard View

The Standard View allows the user to enter or view existing records.

### Priority:

This flag should be used to indicate if the activity is a Priority activity.  There is no degree to priority it is either a Priority Item or not.  By default this flag is not checked.

### Control Activity:

This is a way of linking related activities together.  This is not a required field.  This field has an LOV to already existing activities – these activities could have been created via the PTP or the 3week look ahead.

### Activity Code:

This is a system generated code that is generated using the Project Code and then the next available activity number.

### Activity Name:

This is a required field.   The activity name will default to the Activity Description.

### Previous and Successor Activities:

These two fields are not required, but it is possible to enter the prior activity and the next activity for planning purposes.  Both fields have an LOV.  There are no rules to these two fields except that the values entered must be valid activity codes.

**Start Date and Time:**

These two fields represent the start date of the activity. This field will default to the current system date and time but can be changed.  The start date is a required field, the time is not required and if removed will be set to 00:00 (midnight)

**Due Date and Time:**

The Due Date and Time represent when the Activity is to be completed by.  This is not necessarily the actual end date and time of the complete task.  For example the activity could be to schedule an equipment move - it is not the actual date the equipment is scheduled to move.  These are not mandatory fields.

**Job/Phase/Category:**

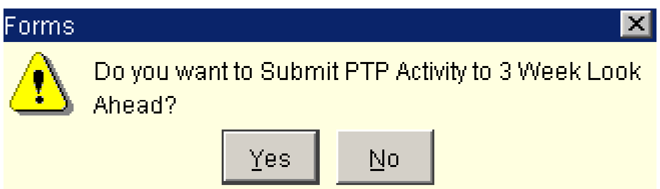
This is the Job/Phase and Category against which this activity applies.  If the activity will eventually be passed to dispatch, this will be the Job/Phase/Category that resources will be assigned to and therefore eventually costs will be incurred and posted to.  The Job Code will default to the current Project Job Code, but can be changed to any sub job if required.  The Phase and Category are not required fields.

**% Complete:**

This field is used to determine the completion percent of the activity.  This is a manually entered field that allows values from 1 to 100

**3 WK:**

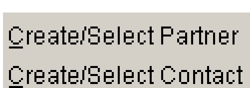
This field if checked will send this record to the 3 Week Look Ahead schedule.  This means that it cannot be changed in the PTP anymore but you will be able to view the record and see any changes made to it by the 3 Week Look Ahead.  If this field is checked the system will confirm that you wish to submit the record to the 3 Week Look Ahead.




Once a record has been submitted to dispatch the only fields that are updateable in this screen are the Start Date and Time and Due Date and Time.

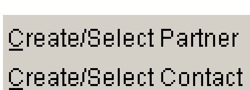
**Sponsor Person:**

The sponsor person can be any person connected with the project. This includes Partner Contacts assigned to the project.  The user can also create a Project Partner on the fly or add a Project Contact to an existing partner on the fly by right clicking in the field to display a sub menu of these two options.




**Responsible Person:**

The Responsible person can be any body connected with the project this includes Partner Contacts assigned to the project.   This value is passed all the way thru to the Dispatch program.  The user can also create a Project Partner on the fly or add a Project Contact to an existing partner on the fly by right clicking in the field to display a sub menu of these two options.



### [Create/View Issue]

This button will open the PM Issue screen where the user can enter an issue linked to this PTP record or if there is already a linked Issue – view the linked issue.

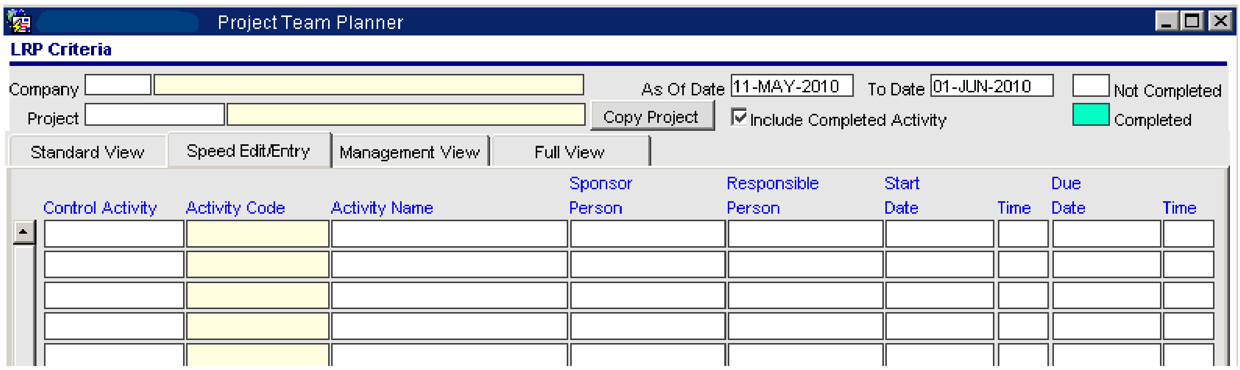
### [Create/View RFI]

This button will open the PM RFI screen where the user can enter a RFI linked to this PTP record or if there is already a linked RFI – view the linked RFI.

### [Play Book]

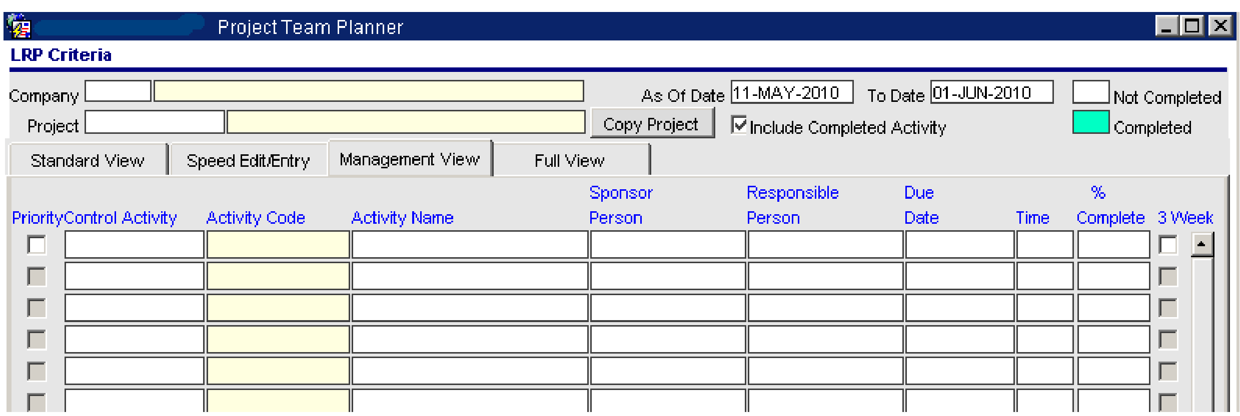
This button will allow the user to bring in information from the Play Book into the PTP. The Activity Name will be updated to be the Playbook Act Name and Display Order #, and the Activity Description will be set to the line text. Both can be further updated.

## Speed Entry/Edit



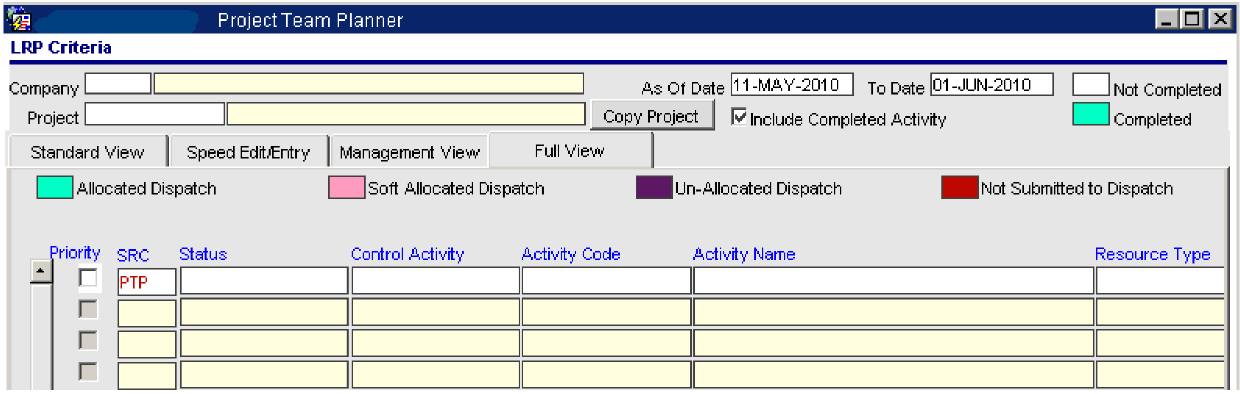

This tab has a limited number of fields and is designed for quick entry or update of PTP Activities. The fields available on this tab are Control Activity, Activity, Sponsor Person, Responsible Person, Start Date and time and Due date and time. The data entered or updated on this tab will display in all other tabs on this program.

## Management View




This tab is designed to show at a glance the status of activities. The view shows the Activity, Sponsor Person, Responsible Person, % Complete, Due date and if the record has been submitted to the 3 Week Look Ahead.

## Full View

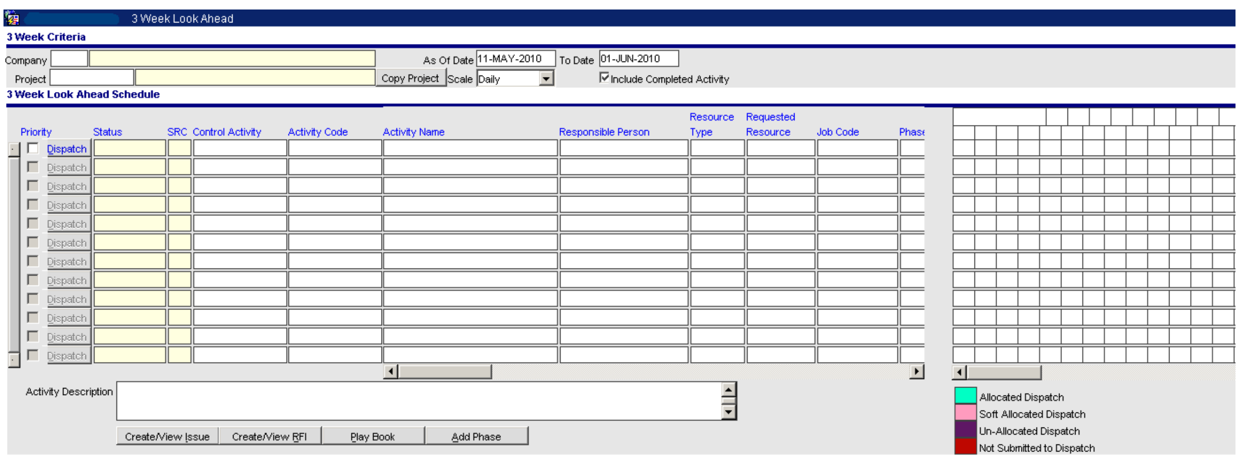



This tab shows the activity according to the status of associated Dispatch Requests – it shows which resources have been asked for, allocated and dispatched.

# 3 Week Look Ahead

The 3 Week Look Ahead scheduler can be used to create new activities for the project and/or update records submitted from the Project Team Planner (PTP). This scheduling program has the facility to submit records from the Planner to the Dispatch Program

This program has all the same fields as the PTP plus extra fields for assigning resources. Fields not required on the PTP will be required in this program before the record can be submitted to Dispatch. This program is designed to be run in large screen format of at least Width of 1550 and Height of 800.




### Company:

This is the company the project being scheduled belongs to. This field will default to the users Job Cost Default Company setup but this can be changed. There is an LOV to the standard CMiC Company List. This is a required field.

### Project:

The Project will default to the users default project from the Job Cost Default Company setup but can be changed. There is an LOV to valid projects available. This is a required field.

### As of Date /To Date:

The As of Date will default to the current date, and the To Date will be 21 days later. Both of these dates can be changed. The dates entered will determine what records show in the details using Start Date.

### Scale:

The scale determines the scale of the Ghant Chart only. By default this is set to Daily but it can be changed to weekly or monthly. The Ghant can handle approx 4 months in the Daily Scale.

### Include Completed Activity:

This flag determines if completed items should be displayed in the details. By default this flag is checked but the user can change this value. Completed activities are those where the % Complete is 100.

### Priority:

This flag should be used to indicate if the activity is a Priority activity. There is no degree to priority it is either a Priority Item or Not. By default this flag is not checked.

### [Dispatch]

If this button is activated it will submit the schedule line to the Dispatch program.

### Status:

This is the Status of the record in the Dispatch program if the record has been submitted to dispatch. If the record has not been submitted to dispatch this field is blank.

### SRC:

This is the Source of the record being displayed. PTP indicates the record was first created in the Project Team Planner, 3WK indicates it was first created here.

### Control Activity:

This is a way of linking related activities together. This is not a required field. This field has an LOV to already existing activities.

### Activity Code:

This is a system generated code that is generated using the Project Code and then the next available activity number.

### Activity Name:

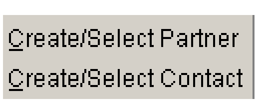
This is a required field. The activity name will default to the Activity Description field at the bottom of the screen. This is a required field.

### Activity Description:

This is a long description field that can be used to explain the details of the activity. This field defaults from the Activity Name when a new activity is entered.

### Responsible Person:

The Responsible person can be any person connected with the project. This includes Partner Contacts assigned to the project. This value is passed all the way thru to the Dispatch program. The user can also create a Project Partner on the fly or add a Project Contact to an existing partner on the fly by right clicking in the field to display a sub menu of these two options.



### Resource Type:

The resource type can be one of 3 types, Crews, Employees or Equipment. This is a mandatory field if the activity is to be sent to Dispatch.

### Requested Resource:

Depending on the Resource Type this field can be a Crew Type, Employee Trade or Equipment Class or it can be the actual crew code, employee code or equipment code. The user has the option of entering in specific or generic information. The LOV on this field will change depending on the Resource Type, but it is always split into two sections: the first is a list of the generic codes for the resource type, and after that a list of the actual resources. This is a mandatory field if the record is to be sent to Dispatch.

### Job/Phase and Category:

This is the Job/Phase and Category against which this task applies. If the activity is to be submitted to dispatch, this will be the Job/Phase/Category that resources will be assigned to and therefore eventually costs will be incurred and posted to. The Job Code will default to the current Project job code, but can be changed to any sub job if required. The Phase and Category are required fields before the record can be submitted to Dispatch.

### Requested Start Date and Time:

If the record is to be submitted to dispatch this is the Requested Start date that will display in the Dispatch program. If the record came from the PTP this is the 'Start Date and Time' from the PTP record. This can be updated. If the record has been submitted to dispatch but not yet Soft Allocated the user can change this date by right clicking in the field and displaying an options menu. Select the Change Dates option.

### Requested End Date and Time:

This is the expected date that the Resource will no longer be required. This field is a required field if the record is to be submitted to dispatch. If the record has been submitted to dispatch but not yet Soft Allocated the user can change this date by right clicking in the field and displaying an options menu. Select the Change Dates option.

### Shift:

This field is for reference only and choices are Day, Evening, Night or N/A.

### %Complete:

This field is a reference field that indicates the % complete. This value is brought forward when a PTP record is submitted to the 3 Week Look Ahead. Valid values are blank or 0 thru 100.

### Previous and Successor Activities:

These two fields are not required, but it is possible to enter the prior activity and the next activity for planning purposes. Both fields have an LOV. There are no rules to these two fields except that the values entered must be valid activity codes.

All other fields to the left of the Successor Activity are view only and reflect the information from Dispatch that pertains to this record.

### [Create/View Issue]

This button will open the PM Issue screen where the user can enter an issue linked to this record or if there is already a linked Issue – view the linked issue. If the record was submitted from the PTP with a link already that link was also brought forward to the 3 Week Look Ahead.

### [Create/View RFI]

This button will open the PM RFI screen where the user can enter a RFI linked to this record or if there is already a linked RFI – view the linked RFI. If the record was submitted from the PTP with a link already that link was also brought forward to the 3 Week Look Ahead.

### [Play Book]

This button will allow the user to bring in information from the play book into the 3 Week Look Ahead. The Activity Name will be updated to be the Playbook Act Name and Display Order #, and the Activity Description will be set to the line text. Both can be further updated.

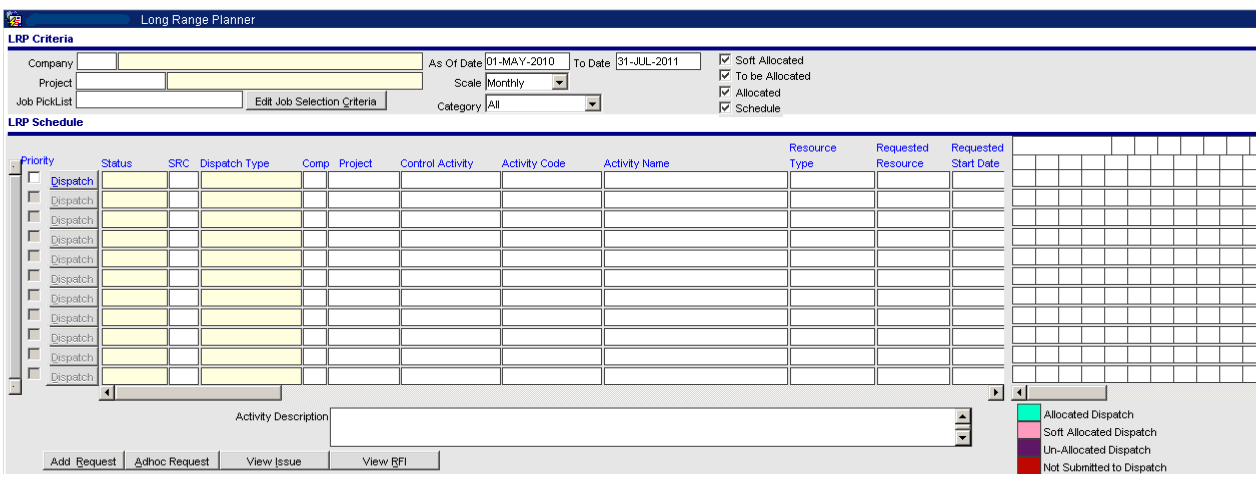
### [Add Phase]

This button is only active when the user has the required security to add phases on the fly. This button will open the standard CMiC Add Phase/Category on the Fly window.

# Long Range Planner

The Long Range Planner allows the user to see all 3 Week Look Ahead records plus all Manual Dispatch Requests and Add Hoc Requests entered for the Project. This screen is a query screen only. The user can create Dispatch Requests or Adhoc Requests but cannot create PTP or 3Week Look Ahead planning activities from this screen. Although this is a query screen it does allow for the updating of Request Start and End dates if the dispatch record has not been allocated.

This screen allows the user to select a specific company/project to review or enter a Cross Company Pick List to view multiple jobs.



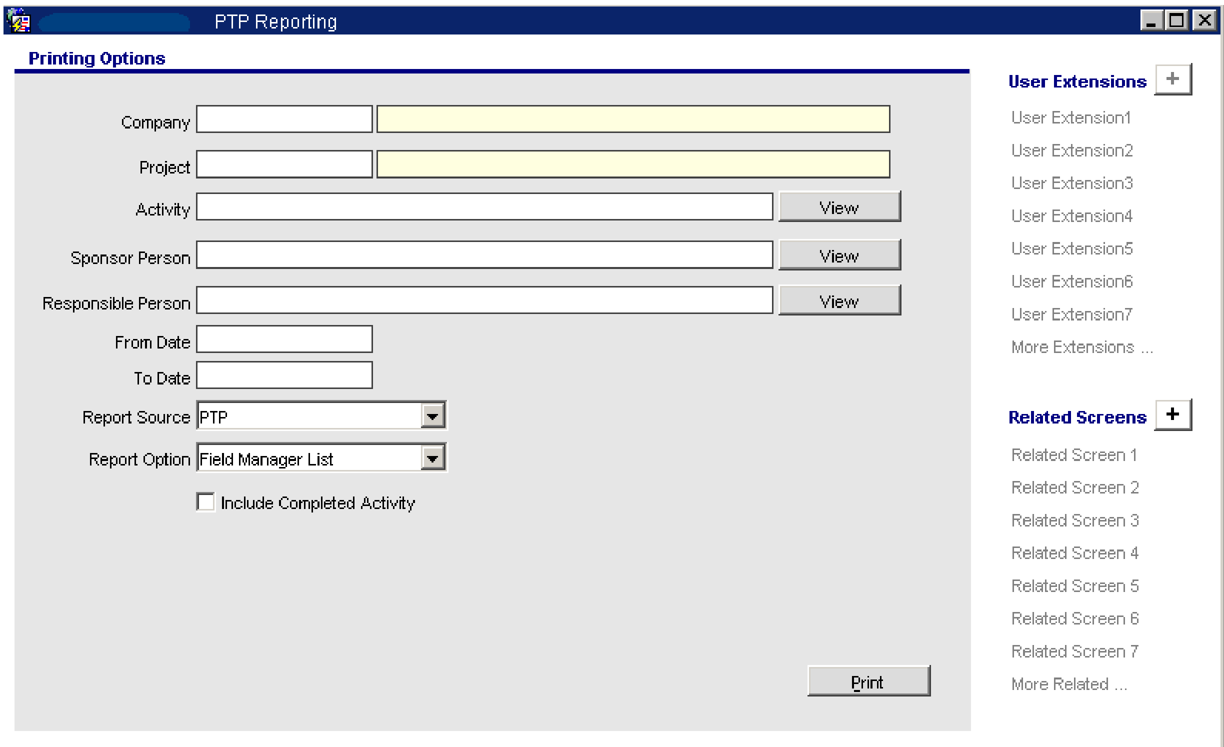

To view the makeup of a crew – right click in any of the Dispatch Type, Resource Type or Requested Resource fields where the Dispatch Type is Crew. This will display an Option menu – select the 'Show Detail' option and a window will open displaying the makeup of the crew. If the crew is Allocated or Soft Allocated the window will display the dispatched makeup, if the crew is Unallocated then the window will show the Generic makeup of the crew.

To view the required resources for a Heavy Equipment move right click in the Dispatch Type, Resource Type or Requested Resource field if the Dispatch Type is Heavy Equipment. This will display an Option menu – select the 'Show Detail' option and a window will open displaying extra resources required. If the record is Firm Allocated or Soft Allocated the window will display the dispatched resources, if record is unallocated then the window will show the required resources.

To change the Requested Start Date or End Date right click in any of the Dispatch Type, Resource Type, Requested Resource Type or the Requested Start/End date fields. This will display an Option menu – select ‘Change Dates’. This opens a window where the user can enter the new start date and time or end date and time. This can be done on any unallocated record. To change the start and end dates on records that have not been submitted to dispatch just change the dates directly on the screen.

To create a Dispatch Request or an Adhoc Request use the buttons at the bottom of the screen. These will open the standard window for entering the requests.

# PTP Reporting




The PTP Report allows the user to print either Project Team Planner information or 3 Week Look Ahead information. There are also 3 different versions of the report to select from, Field Managers List, Responsible Persons List and Project List.

The Company Code and Project will default from the users Job Cost default company.

The Activity, Sponsor and Responsible person all have special multi select LOV’s that allow the user to select more than one value. To view the selected values use the [**View**] button.

# Dispatch Requests

## Creating a Dispatch Request

A Dispatch Request is a request to have Equipment, Crews or Employees moved to a job for a specific period of time.

There are multiple ways to create a dispatch request. How it is done will depend on the role of the user. Dispatch requests can be created via the Three Week Look Ahead and Long Term Planning scheduling programs by submitting a schedule line to Dispatch. They can be created directly from the menu using the Dispatch Request Entry screen or by using the [Add Request] button in the Long Term Planning schedule or from the Dispatch screen itself. The [Add Request] buttons in Dispatch and Long Term Planning open the 'Dispatch Request Entry' screen as a popup window.

### Dispatch Request Entry

The Dispatch Request screen can be used to enter multiple dispatch requests in a tabular form or one at a time in Single Record format. It has two different tabs – Multi Record or Single Record both require the same information, it is merely a preference for input that differentiates the screens. This program is available as a standalone program or can be opened as a popup window from the Dispatch screen or the Long Term Planning screen.

**Steps for entry are:**

1) Enter Query Parameters in the top section
2) Page Down – the system will automatically display all existing requests as per the parameters.
3) Move to a blank line **-** Enter request.
4) Save and Review Request.
5) Submit to Dispatch.

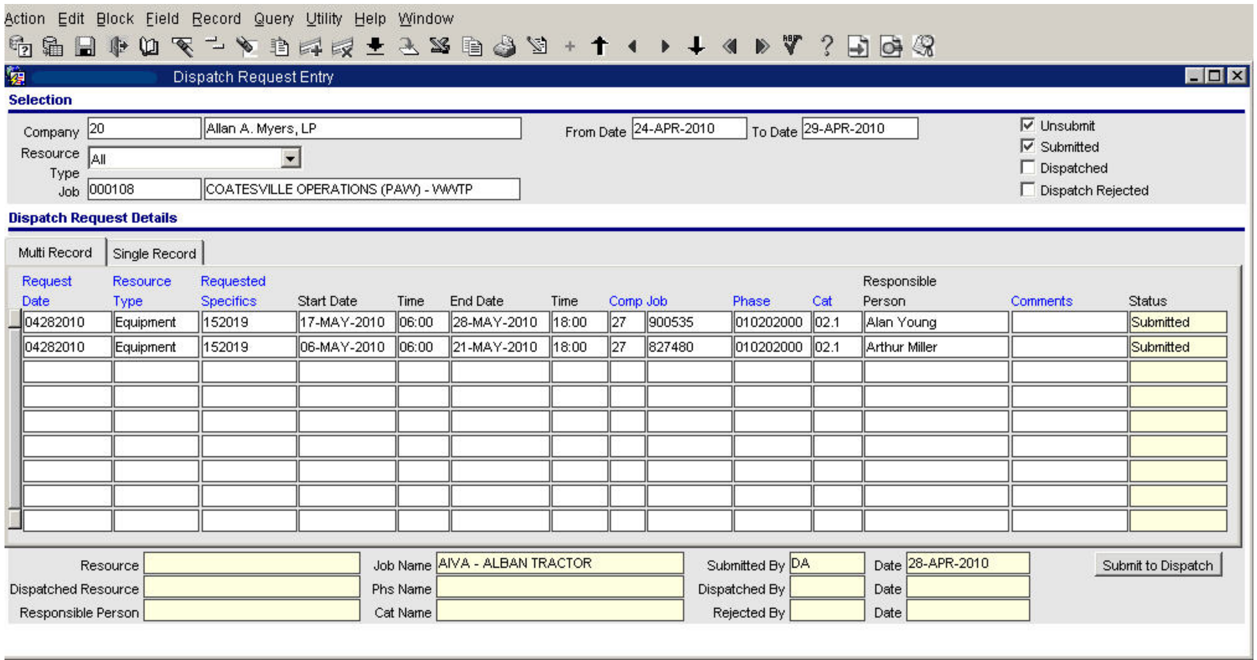
When creating a request for 'Heavy Equipment' there is no need to create the request for the Driver and Truck needed to move the equipment, when the record is submitted to dispatch it will automatically expand the request to include a driver and a truck.

**Rules for Updating Existing Records are:**

If the request status is Un-Submitted then any field can be changed or updated or the record can be deleted.

If the request status is 'Submitted' and it has not been 'Soft Allocated' then the requestor can update the dispatch request and resubmit for dispatch.

If the request has a status of Dispatched or Dispatch Rejected then no updates are allowed.




## *Selection/Header Fields*

### Company Code:

This field will default to the users default Job Cost company, but may be changed. There is an LOV available. The company code entered in this field will default in the company code in the details and limit the details to only those for this company. This is a required field.

### Resource Type:

This field will default to ‘All’ when the screen first opens. The user may change this to be Equipment, Crew or Employee. If changed from ‘All’ it will limit the query of existing records and the entry of new dispatch records to only that type.

### Job Code:

This field may be left blank or a specific job code can be entered. There is an LOV available. If a job code is entered here it will default in the details and will limit the details when queried to only those with this job.

### From/To Dates:

The From Date will automatically default to the current date minus 5 calendar days and the To Date will default to the current date. These fields are used to restrict the details to only those records that have a Request date within the range entered. These are required fields.

### Status Check Boxes:

These fields determine what information is shown in the detail section of the screen. By default the Submitted and Un-Submitted status types are checked.

- **UnSubmitted** – Indicates that the Request has been entered but it has not yet been forwarded to Dispatch. Dispatch is not aware of these requests.
- **Submitted** – Indicates that the request has been forwarded to Dispatch.

- **Dispatched** – Indicates that the request has been completed (Firm allocation has occurred).
- **Dispatch Rejected** – Indicates that the request has been rejected by Dispatch for some reason. Dispatch has deleted this request and it will no longer show up on the dispatch screen. It must be re-entered to be resubmitted.

## Detail Fields

### Request Date:

This field will default to the current date but may be changed. There is a Calendar available on the LOV. This field is the date the request was entered and has no relationship to the Start and End dates of the request itself. There is no restriction when entering a record that the Start Date must be on or before the Request Date or that it must be within the From/To range in the header.

### Resource Type:

The resource type can be one of 3 types, Crews, Employees or Equipment. This is a mandatory field. If the Header Resource Type field is not set to All then this field will limit the entry to the type specified in the header.

### Resource Specifics:

Depending on the Resource Type this field can be a Crew Type, Employee Trade or Equipment Class or it can be the actual crew code, employee code or equipment code. The user has the option of entering in specific or generic information. The LOV on this field will change depending on the Resource Type, but it is always split into two sections, the first is a list of the generic codes for the resource type, and after that is a list of the actual resources. This is a mandatory field.

### Start and End Date and Time:

This is the start and end time that the resource is required to be working on the job. The date fields have a calendar LOV. The Time fields are in 24 hr clock format and will default to 00:00 and 23:59 respectively but can be changed as required. There is validation that the End Date and Time cannot be before the Start Date and Time.

### Company:

This is the company the resource is being requested for. This field will default to the Company Code in the header, but there is no restriction that it must remain as that company. There is an LOV on this field. This is a mandatory field.

### Job:

This is the job for which the resource is being requested. This field will default to the Job Code in the header, but there is no restriction that it cannot be changed. The restriction is that this Job Code must belong to the company entered in the previous field. The LOV for this field lists all jobs in the company entered in the previous field that as per JC security the user has access to. This is a mandatory field.

### Phase and Category:

These fields are the Phase and Category on the job where the resource will be working and therefore costing. These fields are not required to submit the request. The dispatcher can fill these in during the dispatch process. If they are not filled in by the time the dispatch is completed the system will default the Mobilization Phase and Category as defined on the Equipment Control File.

### Responsible Person:

This is the person who is responsible for the Timesheets of the Resource. The LOV available shows a list of Contacts that are also Crew Foremen. This is not a mandatory field at entry time but is required before the request can be submitted to Dispatch.

**Comment:**

This is an open field where the requester can enter extra information regarding the request.  This is not a required field.

**Status:**

This field shows the status of the record.  Please note if the status of the record is submitted the color of this field will change depending on the status of the record in Dispatch – if Dispatch has allocated the required resources but the move has not yet been completed this field will show in with the color as per the legend.

**[Submit to Dispatch]**

This button will forward the request to the dispatch program and allow the dispatcher to see and process the request in the dispatch screen.  The user will be notified that the submission was completed and the status of the record will be updated to Submitted.  Note: This function submits the current line only to dispatch.

# Creating an Adhoc Dispatch Request

An Adhoc Move Request is a request that falls into one of the following three categories.

a) Pickup From or Deliver To a job something

b) Move something from Place A to Place B on a job.

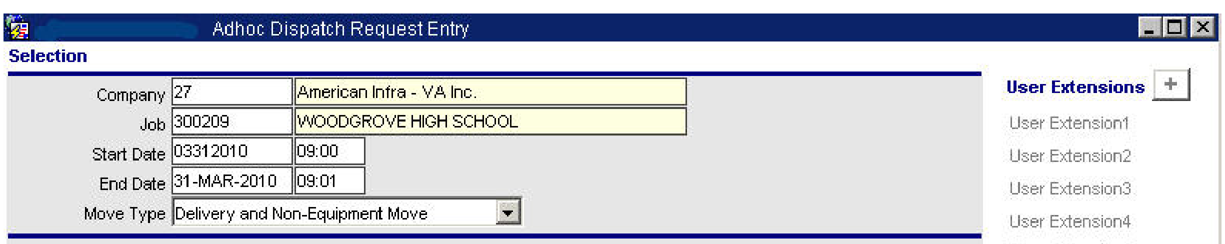
c) Move Broken Equipment back to the Yard. (Either Heavy or Regular Equipment)

Adhoc requests can be entered directly in the standalone Adhoc Request program or this same program can be opened as a popup window called via an **[Add Adhoc Request]** button in the Dispatch program and the Long Range Planner program.

Depending on the move category the data that is required will change.  In order to assist the user the screen will change depending on the Adhoc Move Type entered.

## *Adhoc Request Header*

Regardless of the type of Adhoc request the fields shown above the blue line on the screen are required.




**Company Code:**

This is the company of the job that the dispatch request is for.  This is a required field.  This field will default automatically to the company code of the current job in Dispatch if this program is called from the Dispatch program, otherwise it will default to the users Job Cost default company code.

**Job Code:**

This is the job requesting the Adhoc Move from dispatch.  This is a required field. There is an LOV on this field and it will be limited to Jobs within the company that the user has security to.   When this screen is opened directly from the ‘Dispatch’ screen, this field will default to the current job in the dispatch screen.

### Start and End Date and Time:

These are required fields and represent the start and end date and time of the dispatch. These fields are updateable within the Dispatch Screen.

### Move Type:

Select the type of move from the drop down list.  This is a required field.

**Down Equipment Move**

This type should be used when a piece of equipment that is on site breaks down and needs to be moved back to the shop or yard to be repaired and to move it back to the shop will require another piece of equipment and a driver.   Extra information required for this type of move is the Equipment Code of the broken equipment, and the Move To Shop information (Company, Job, Phase, Cat).  This type of move creates a location history transfer.

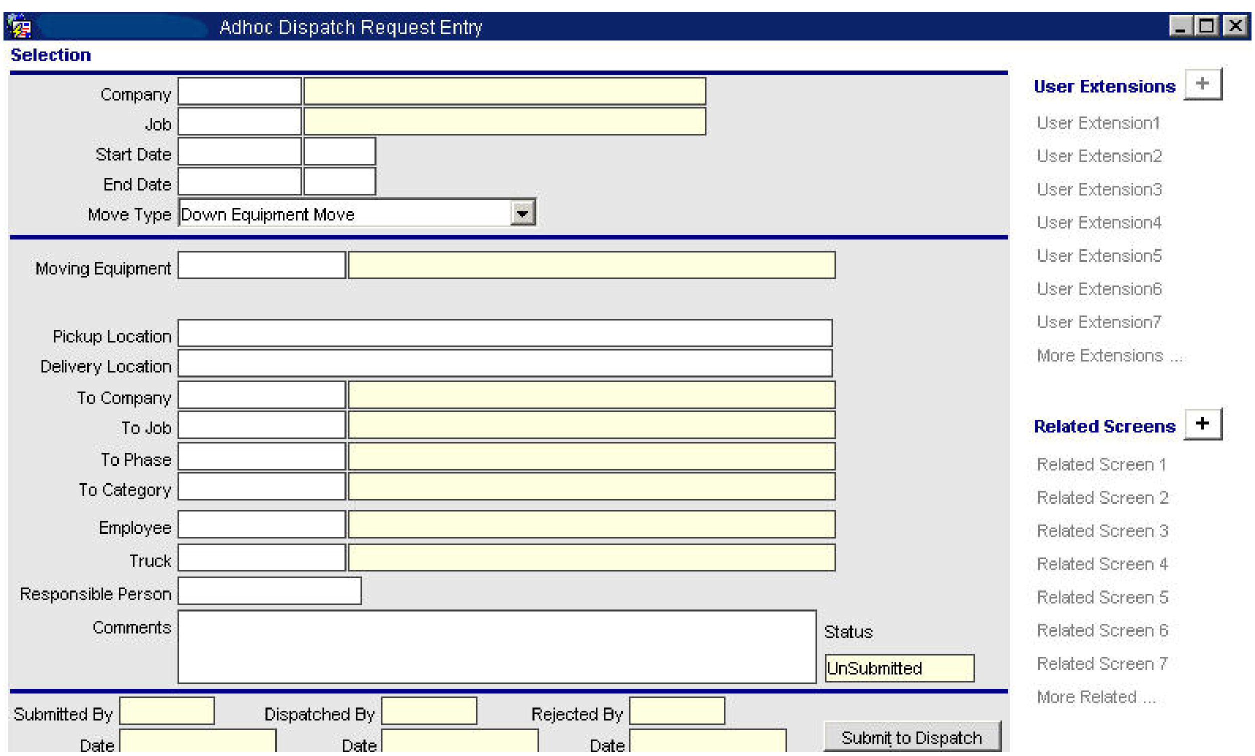
**On Site Equipment Move**

This type should be used when there is a piece of equipment on the job site that needs to be moved from place A to place B on the job.  Extra information required for this type of move is the Equipment Code of the equipment to be moved. This type of move does not create a location transfer.

**Delivery and Non-Equipment Move**

This type of move has a secondary element; this is the pickup/delivery type.  This can be ‘Deliver to Job’, ‘Pick up from Job’ or ‘On Site Move’.  This type of move is designed to handle scenarios where materials are being delivered or picked up from the job site, or non-equipment items on the job need to move from place A to place B such as moving palettes, cones or oil drums.

## *Adhoc Request Details*



### Moving Equipment:

This field is required when the move is an On Site Equipment Move or a Down Equipment Move. This field has an LOV that is restricted to equipment that is marked as 'Down' on the job if the move type is Down Equipment Move otherwise it is all equipment on the job that has a status is anything but 'Available' or Down.

### Pickup/Delivery Type:

This field only displays and is required when the move type is Delivery and Non-Equipment Move. This field indicates what type of move, Deliver to Job, Pickup at Job or On Site Move.

### Pickup Location and Delivery Location:

These are Free Form fields that should be used to give drivers more information about where to start and end this dispatch. These fields are available regardless of the move type. These are not required fields but do print on the Drivers Dispatch report.

### To Company, Job, Phase and Category:

These four fields are only enterable and are required on a 'Down Equipment Move'. This information makes up the location transfer record that will be created when the dispatch is completed. Down Equipment may be regular or Heavy equipment.

### Employee:

This can be either the employee # of the driver for the dispatch or it can be the trade code representing the type of driver needed. This field will default to the trade code associated with the piece of equipment if the down equipment being moved is Heavy Equipment.

### Truck:

This can be either the truck (equipment) class or the exact piece of equipment to be used to fulfill this dispatch request. This field will default to the equipment class associated with the piece of equipment if the down equipment being moved is Heavy Equipment.

### Responsible Person:

This is the person responsible for this dispatch request. This field has the same LOV and validation as the dispatch screen itself.

### Comments:

This is another Free Form area where extra comments/notes regarding the request can be entered. This information will print on the Drivers report.

### [Submit to Dispatch]

This button should be used to submit this request to the dispatch screen. If the record is not submitted it will not be available in the dispatch screen – this is true even if this program was opened directly from the dispatch screen.

# Dispatch Entry

## Overview of Dispatch Entry

The dispatch screen is split into three sections the Header/Selection section the Dispatch Details and the Unallocated Pool. The Dispatch Details section shows all the details about a specific dispatch request, the Unallocated Pool area displays all resources that are currently available and the Header/Selection section allows the dispatcher to select which information he or she wishes to display and/or work on within the Dispatch Details and Unallocated Pool areas of the screen.

### Dispatch Entry Header/Selection Fields


#### Company

This is mandatory and will default to the users' default Job Cost company code. This field will limit the jobs shown in both the Dispatch Details and the Unallocated Pool areas of the screen to only jobs within this company that the user has security access to. This field also has an LOV that allows the company to be changed to any other company to which they have access.

#### Category

The category determines the type of dispatch requests that will be displayed in the Dispatch Details section of the screen. By default the screen opens with the category 'All', but the user may change this to any one of the following:

- **Employee** – restricts to dispatch requests for a specific trade or employee.
- **Crew** – restricts to dispatch requests for a specific crew type or actual crew.
- **Equipment** – restricts to dispatch requests for a specific class or actual piece of equipment
- **Heavy Equipment** – restricts dispatch requests to only those that are related to Heavy Equipment
- **Adhoc** – restricts dispatch request to only those created via the Adhoc Request screen.

#### Include all Equipment on the Job

If this field is checked regardless of the category, the dispatch details will also show all equipment that is currently sitting on the job (if the piece was moved to the job via Dispatch). By default this field is not checked.

#### From Date/To Date

The To Date will default to the current date, while the From Date will default to 5 calendar days earlier. The system will search the dispatch requests and return all records where the requested start and end dates fall within the range. The system will also display any soft allocated or unallocated items prior to the "from" date. This ensures that no requests remain unfulfilled.

### Use Move Date

This field changes the default search for the From/To Dates. If this field is checked, then the system will search the dispatch requests and return all records where the Move Date falls within the date range. If this field is checked the system will not display unallocated or soft allocated items outside the query date range.

### Include

By default the screen opens with all three dispatch record status types checked. The user has the option to limit the types of records shown in the details.

- **Soft Allocation** – Shows only Soft Allocated Dispatch Detail (In Process)
- **To be Allocated** – Shows all the Pending Allocation Dispatch Detail (New)
- **Allocated –** Shows only Firm Allocated Dispatch Detail (Completed)

### Job Pick List

This field allows for the entry of 'Cross Company Job Pick Lists'. If a pick list is entered, the company field is ignored and only the jobs in the pick list will display. This functionality allows the user to work with jobs in more than one company at a time. The Cross Company Pick List setup is done in the Job Cost system

### All Pool Jobs:

By default the system only shows the data in the unallocated pool jobs for the company code entered. By checking this field the program will show all unallocated pool jobs regardless of the company entered.

## Dispatch Detail Fields

### Job Code:

This column shows the job code that the request is recorded against. All dispatch requests are for a job, they are requesting employees, crews, equipment, heavy equipment or Adhoc moves. This is a display only field.

### Class/Trade:

This field indicates the requested employee trade, a crew type or an equipment class. This field is used to limit the information in the Unallocated Pool to the same trade or class. This is a display only field.

### Specifics:

If a specific piece of equipment, employee or crew was requested the name will display here, if the use was not specific then this field will display the name of the class/trade field. This is a display only field.

### Move Date and Time:

These fields default to the requested start date and time on new requests. This field is available for the dispatcher to change at any point in time while the dispatch record status is unallocated or soft allocated. To change these fields right click in the date field and select the Change Mobilization Period from the menu. The only rules are that the mobilization cannot be after the requested end date and the resource doing the mobilization must be available for the time frame entered.

### Requested Start Date and Time:

These fields default to the start date and time entered by the requestor.  The start date itself cannot be changed by the dispatcher.  The system will change the requested start date to the Move Date and Time if the mobilization date and time are after the requested date and time.

### Requested End Date and Time:

These fields default to the end date and time entered by the requestor.  The dispatcher can change the end date by right clicking on the End Date field and selecting the Change Status/End Date option from the menu.

### Dispatched Specifics:

This field shows the name of the equipment, crew, employee that was actually dispatched. This field may show different information from the Requested Specifics field as the dispatcher may have had to substitute resources or the request may only have been for a specific class or trade.  This is a display only field.

### Crew Code:

This field is the 'Responsible Person' for timesheets for the resource.  This means that the resource will show up on this crew code in the 'Dispatch Crew Timesheets program and on Daily Journal Time Card Report Page.  This is a required field and has an LOV.  The Dispatch Record cannot be posted if this field is blank.

### Dispatch Type:

This field displays the Type of the Dispatch record.  This field is display only.

### Resource Type:

This field indicates the type of resource required to fulfill the request.  In the case of Heavy Equipment types of moves, the system will automatically create three linked dispatch requests, one for the actual equipment one for the float and one for the driver for the float.  In this case the Dispatch type will be Heavy Equipment for all 3 records but one will have a resource type of employee.

### Move Type:

This column is only applicable to Adhoc Moves and will contain one of the following 3 descriptions that describe the type of the Adhoc Move **-** On Site Equipment Move, Delivery and Non Equipment Move or Down Equipment Move.  This is a display only field.

### Pickup/Delivery Type:

This column is only applicable to Adhoc Moves that are type 'Delivery and Non Equipment Moves' – this field further describes the Adhoc Move.  There are again 3 types, Deliver to Job, Pickup at Job or On Site Move.   This is a display only field.

### Pickup Information and Delivery Information:

These fields are intended to be information for the driver and will print on the Drivers Dispatch Info report. They are populated with the Pickup and Delivery location data entered on an Adhoc Request and can be manually updated and/or entered on any type unallocated or soft allocated dispatch record where the resource type is 'Employee'.

### From Company, Job Name, Phase and Category:

These fields are for display only and are only applicable to Adhoc 'Down Equipment Moves'.  These fields indicate what Job/Phase/Category the down piece of equipment is being moved from.

### Comments:

This field is intended as extra information for the driver on an equipment move and will print on the Drivers Dispatch Info report. This field will be populated by any Comment entered on an Adhoc Request and can be manually updated and /or entered on any type unallocated or soft allocated dispatch record where the resource type is ‘Employee’.

### Company, Job, Phase and Category:

These fields are for display only and show the Company Code, Job Name, Phase and Category code where the resource is being assigned.

### System Comments:

This is a display field only and will only have information on Allocated records. This field shows the actual dispatched dates that were set when the dispatch was completed.

### [Previous Job][Next Job]

These two buttons allow the user to move though the list of Dispatch Details by jumping forwards or backwards to the next job record.

### [Add Request]

This button opens the Dispatch Request screen and should be used to create requests on the fly.

### [Adhoc Request]

This button opens the Adhoc Request Screen and should be used to create requests on the fly.

### [Notes]

Notes can be entered on any primary record – where the Class/Trade column data is shown in bold. Notes will print on the Dispatch Info report.

### [Play Book]

The user can select lines from the play book to be associated with this dispatch move.

### [Scheduling Data Refresh]

This button is only applicable if the Driver Scheduling program is being used. This will refresh the current records with the data submitted from the Driver Scheduling Program.

### [Post]

The post button should be utilized when the move has been completed. Depending on the type of move the window this button display will differ. Please refer to ‘Completing the Dispatch Assignment’.

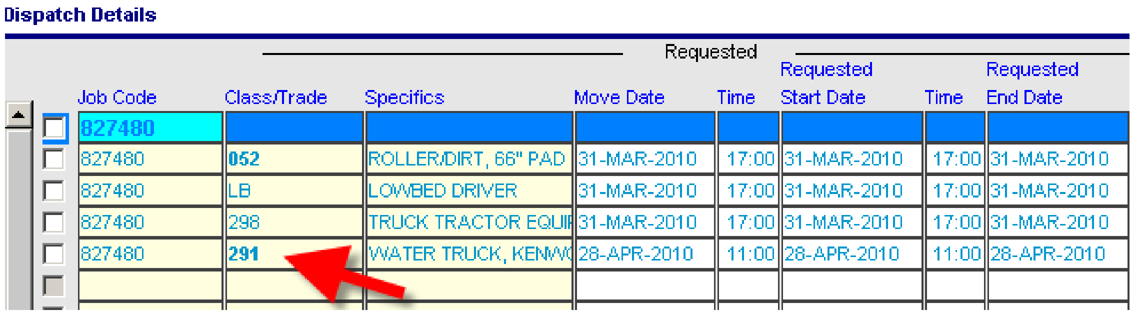
### [Print Dispatch Info]

This button opens a window from where the Drivers Report can be printed.

## Generic Dispatch Functions:

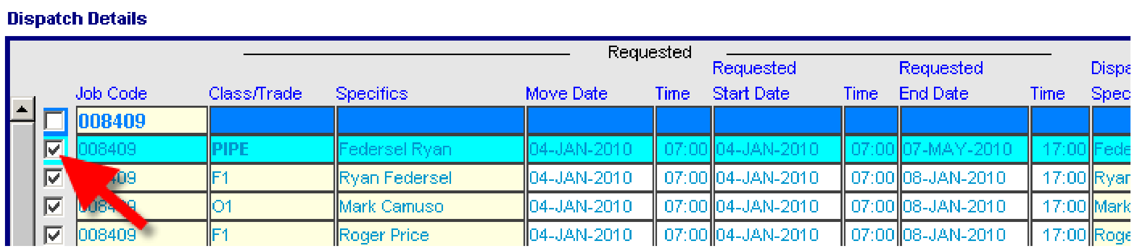
### Primary Records:

Depending on the type of dispatch record there could be one or more related records. Quite a few functions are only active on the Primary dispatch record. A primary dispatch record is indicated by the Class/Trade field being displayed in Bold



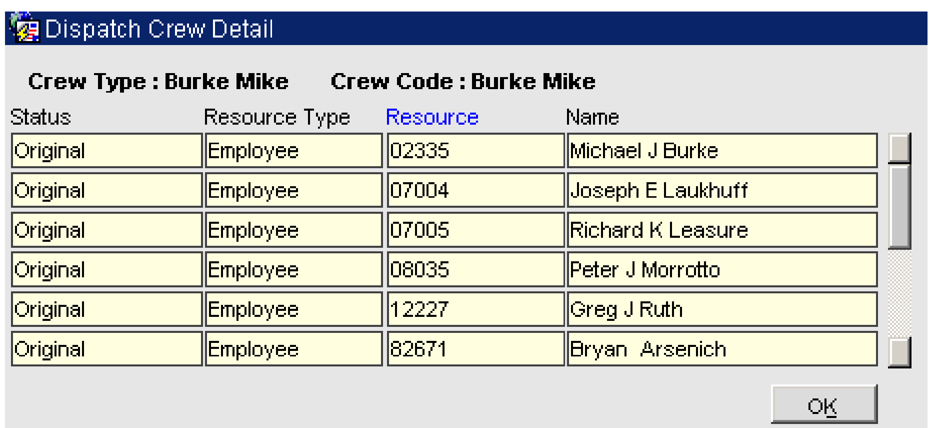

## Hiding Crew Details:

By default when a crew has been allocated, the dispatch details will show all the members of the crew. This information can be hidden by un-checking the box next to the Primary crew code. To view the details again just check the box.




## Viewing Crew Makeup:

At any point in time the makeup of a crew can be seen. This is done by right clicking on the primary crew record and selecting ‘Crew Detail’. If the record is un-allocated this window will show the current definition of the crew, if the record is allocated it will show the current makeup for this particular dispatch record. The status indicates if the resource is part of the base definition of the crew or if the resource has been temporarily added to or removed from the crew.



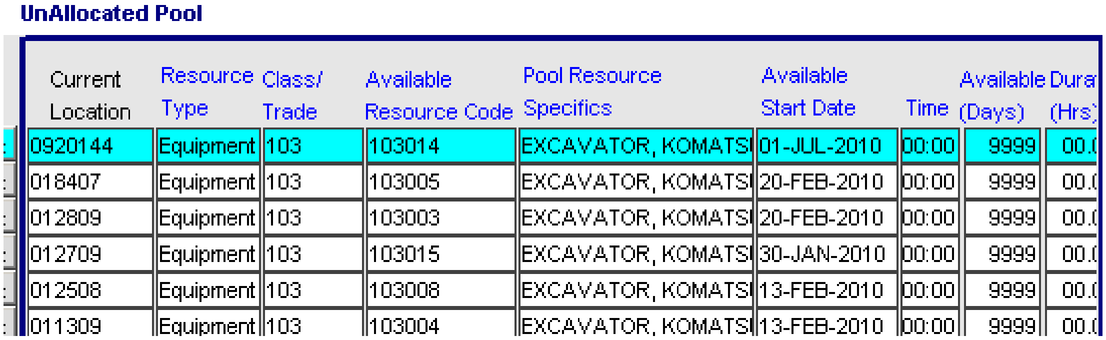

## View Playbook Info:

At any point in time the dispatcher can see any playbook information associated with the record. This is done by Right clicking and selecting ‘View Information’.

## View Equipment on Job:

This option shows all equipment on the job as of the current system date regardless of how the equipment was transferred to the job (via Dispatch or manually via Equipment Location Transfers). This function is available by right clicking on any record and selecting ‘Equipment on Job’ from the options menu.

# Unallocated Pool Fields



UnAllocated Pool

| Current Location | Resource Type | Class/ Trade | Available Resource Code | Pool Resource Specifics | Available Start Date | Time | Available (Days) | Dura (Hrs) |
|---|---|---|---|---|---|---|---|---|
| 0920144 | Equipment | 103 | 103014 | EXCAVATOR, KOMATS | 01-JUL-2010 | 00:00 | 9999 | 00.( |
| 018407 | Equipment | 103 | 103005 | EXCAVATOR, KOMATS | 20-FEB-2010 | 00:00 | 9999 | 00.( |
| 012809 | Equipment | 103 | 103003 | EXCAVATOR, KOMATS | 20-FEB-2010 | 00:00 | 9999 | 00.( |
| 012709 | Equipment | 103 | 103015 | EXCAVATOR, KOMATS | 30-JAN-2010 | 00:00 | 9999 | 00.( |
| 012508 | Equipment | 103 | 103008 | EXCAVATOR, KOMATS | 13-FEB-2010 | 00:00 | 9999 | 00.( |
| 011309 | Equipment | 103 | 103004 | EXCAVATOR, KOMATS | 13-FEB-2010 | 00:00 | 9999 | 00.( |

### Current Location:

This is the current location of the resource. If the resource is a piece of equipment it may still be on a job but with a status of available, instead of being moved to an unallocated pool job. This field is only applicable for equipment. This is a display field only.

### Resource Type:

This field will be one of the following values - Employee, Crew or Equipment. By default this value will match the resource type on the current Dispatch Details record.

### Class/Trade:

This field displays the Employee Trade Code, the Equipment Class Code or the Crew Type Code. By default this value will match the Class/Trade value of the current Dispatch Details record.

### Available Resource Code:

This is the code of the available piece of Equipment or Employee and in the case of a Crew it is the Crew Foreman.

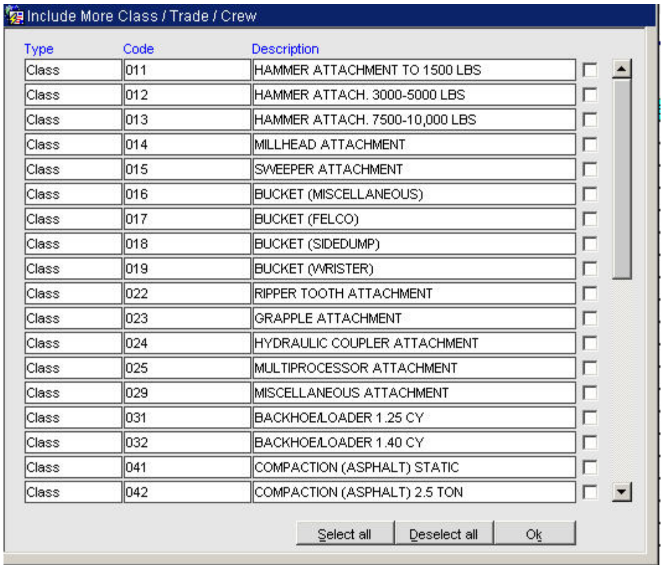
### Pool Resource Specifics:

This is the Name of the available Equipment, Employee or Crew Foreman depending on the Resource type.

### Available Start Date, Time and Duration:

This is the start date and time that the resource is available. The Available Days and Hours (Duration) is the number of days it is available until its next ‘Hard Allocated’ move and the number of hours available if less than 1 day.

# Allocating Resources to a Dispatch Record




To allocate a resource move the cursor to the required Dispatch Request record on the Left Side of the screen. The Unallocated Pool will change to show all available resources that match the Class/Trade of the record. If there is no matching data showing in the unallocated pool, the dispatcher can change the query conditions by using the [**Add Trade/Class/Crew**] button. This will open a window where the user can select related Class/Trades to look at.

Scroll though the list and check the required classes. For even quicker selection the standard query functions are available within this window.

Note: Selections added will remain valid for the session or until this window is reopened and the selection modified.

## *Soft Allocating a Resource*

1. If the resource is still pending for soft allocation (Dispatch Specifics is Blank), soft allocate the resource by clicking the **[<<]** button.
2. The system checks the availability of the resource (whether resource is already soft allocated against any other resource or not) and if it is available for allocation during the required time, starting from the move date and time through the end date and time.
3. The dispatch request will be updated with a status of allocated.

Note: If the Dispatch Resource is Crew then the system fetches the default makeup of that crew from the payroll actual crew definition.

## *Un-allocating a Soft Allocated Resource*

Select the Dispatch Record that has the Soft Allocated resource in the Dispatch Detail (current Dispatch line)

1. Click **[>>]** button.

Note: Soft unallocated equipment or employees will be transferred back to the unallocated jobs. If the un-allocated resource is a “Crew” the system will un-allocate all components of the Crew.

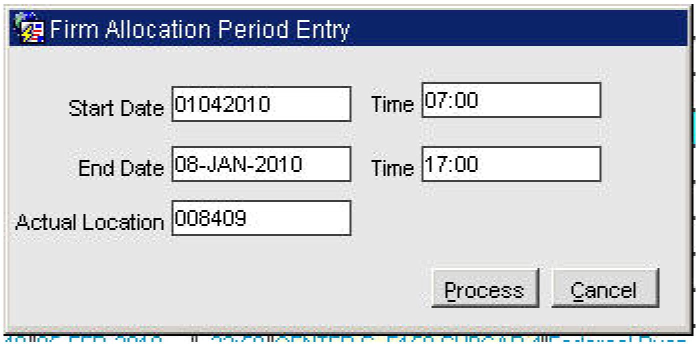
# Completing the Dispatch Assignment

Once the dispatch has been completed and the resources have been moved to the new job/location, the dispatch record then needs to be posted. Depending on the Dispatch Type different information is required at the time of posting.

## *Posting for Crews, Employees or Individual Pieces of Equipment*

Move to the line to be posted

Click the **[Post Dispatch]** button and the following window will open.

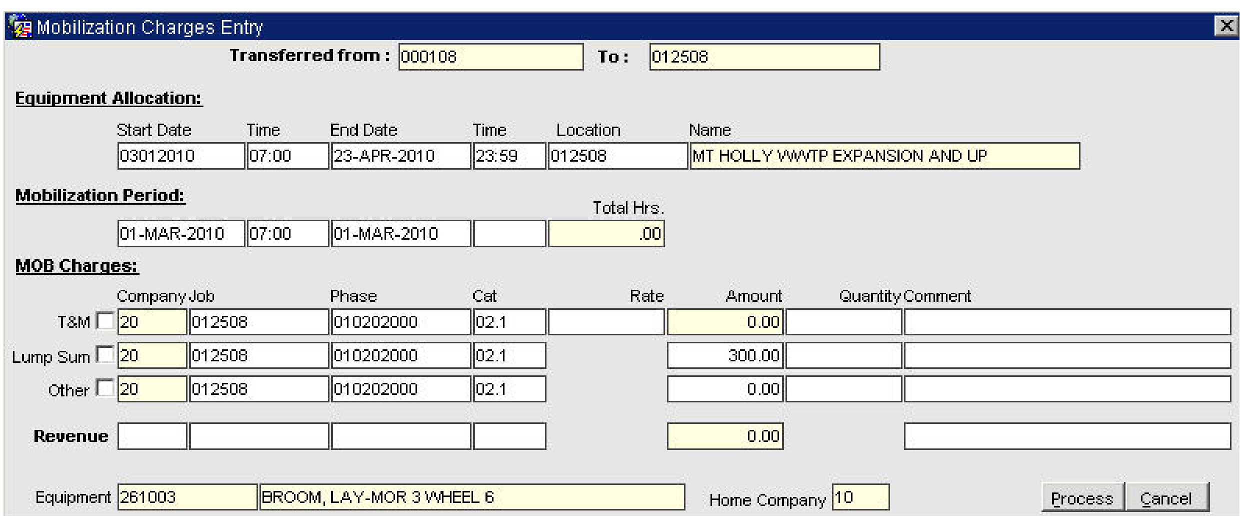



The system will default data into all the fields on this screen as per the Dispatch Request Record. This is where the dispatcher must change this information if there is a discrepancy. The Actual Location will default to the first Active location found for the Job, but if there are multiple locations per job then the dispatcher should correct this as well. If there are no Active Locations found for the Job, the system will display an error message and the user is not able to post the resource.

Once the information is correct select **[Process]** to complete the posting or **[Cancel]** to return without posting or saving any changes made.

The Posting Reports for equipment location transfers do not print during the posting process, but are available via Equipment Costing -> Utilities -> Print Posting Reports. The batch name will be "Dispatch Location Transfer :291029:22-FEB-10 - 28-FEB-10" (Dispatch Location Transfer, date and time). The audit trail will always be in the job company. There is no audit trail for employees.

## *Posting for Heavy Equipment (Mobilization) and Adhoc Requests*




Move to the line to be posted

Click the **[Post Dispatch]** button and the above window will open.

### Transferred From/To:

These two fields show the Job Codes from where the Heavy Equipment is being moved and the Job it is being moved to. These are display only fields and are displayed as per the dispatch record.

### Equipment Allocation:

This is the Start Date and Time that the piece of equipment will be 'Working' on the job and the expected Date and Time that the equipment will no longer be required and therefore will be available to move to other jobs. The location code will default to the first Active location defined for the job, if there is more than one location on the job this may need to be changed. This information defaults from the Dispatch Request screen and should be validated and updated if required by the dispatcher before processing.

### Mobilization Period:

This is the start and end date and time of the actual move. The system defaults the Start Date and Time of the move from the dispatch record. The dispatcher should fill in the End Date and time of the move as per the timesheets. This information may be overridden by the Dispatcher as the move may have taken more or less time than scheduled. The number of hours calculated from the start and end date and times is used as the Quantity in the T&M mobilization Charges section.

The posting process does not verify the driver or float truck information against already soft allocated records, but it will verify against hard allocated records to ensure that there are no overlapping times.

### Mobilization Charges:

**Costs:**

There are three types of charges supported, T&M, Lump Sum and Other. For Time and Material Charges, the Dispatcher will enter the rate. The hours are calculated by the system from the Mobilization Period and cannot be overridden. For Lump Sum charges, the system will default the Mobilization Lump Sum amount setup on the Equipment Class Table, but the Dispatcher can override this amount. The Other Charge may be selected in conjunction with either, Lump sum or Time and Material charges and is free form. Note **-** Both Lump Sum and T&M cannot both be selected at the same time.

The user may also override the Quantity – by default or if left blank the Quantity will be set to equal the dollar amount of the respective line.

By default the system is designed to charge the To location/Job for mobilization costs and this is the information that defaults into the Job/Phase/Category fields. However the dispatcher can change the 'charge to' information – meaning that a piece of equipment may be moved to one job, but the mobilization charges will be to another job.

If the move date is less than the start date, then the system will create two Location History records as part of the posting process. The first with a Parked status on the new job, the second with a Working status from the start date/time to the end date/time. Also during the posting the related Float Truck and Driver dispatch records have their request dates and times updated to match the actual mobilization period.

**Revenue:**

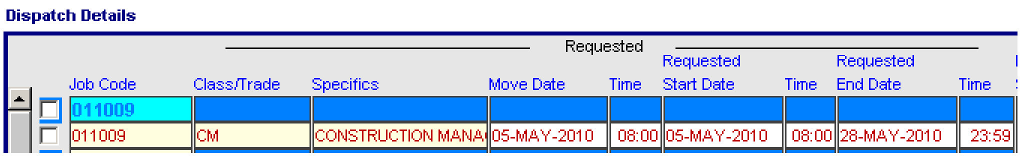
The revenue side of the mobilization transaction can be to any predefined Revenue Job, Phase and Category as defined on the Equipment Control file. The Dispatcher must select the job to which the mobilization revenue will be credited. (This could be a dispatch job or the shop job). There is an LOV limited to available choices. This LOV is unique in that all four fields Company, Job, Phase and Category are returned with one selection.

# Unallocated Record Available Functions:

## *Changing Requested Start and End Date and Time*

Changing the Requested Start and End Date before assigning resources will change the Assignment dates when the required resource is allocated to the record.

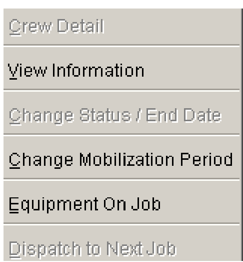
The dispatcher has the ability to change the Dispatch Request start date and time and end date and time for any un-allocated Dispatch Request Type. This is done by entering the new Requested Start Date and Time directly in the Dispatch Details screen. There is validation that the Start Date and Time cannot be greater than the End Date and Time, and on a Heavy Equipment Dispatch Type the Start Date cannot be before the Move Date.



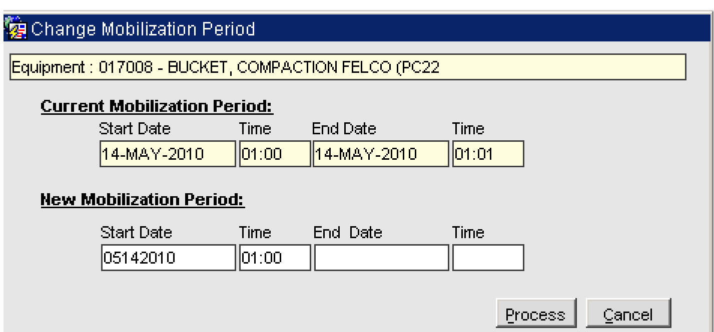

If the dispatcher is changing the Requested date on a Heavy Equipment Move the system will check if the Start Date is on or after the Move date.

## *Change Mobilization Date*

To change the Move (Mobilization Date) of Heavy Equipment Dispatch Types move the cursor to the Heavy Equipment record and right click to bring up the options menu.




From this menu select the Change Mobilization Period. This will open a screen where the new mobilization period can be entered.




Enter the new Start and End Date and Time. By default if the Start Date is changed the End Date will automatically be updated to match. The End Time will also automatically update to be 1 minute after the start time. The reason for this 1 minute end time is that it makes it easier when scheduling the drivers for the move, as there is really no way to know exactly how long the move will take until it is completed.

The program will also check to see if the Mobilization Date is after the requested start date, and if so will show a warning message that allows the dispatcher to proceed with the change or go back and make further changes.

When the mobilization date is changed the Move Date for the related Driver and Float Truck will also be updated.

### *Delete a Request*

The dispatcher can remove a Request if required.  The Delete function will remove the request from the Dispatchers screen, but it will still show in Dispatch Request Screen as a Rejected by Dispatch record.

To delete a request, move the cursor to the detail record to be deleted and then use the standard CMiC Delete Record Icon from the Tool Bar.

Deleting a request allows for the deleting of system generated records such as the Driver and Truck related to Heavy Equipment without deleting the primary record.  If there are related records generated by the dispatch request they must be deleted individually.

### *Update Pickup/Delivery Information*

The dispatcher can update the Pickup Information, Delivery Information, Comments on any Resource Type line that is ‘Employee’.  This information becomes part of the Drivers report.

## Soft Allocated Record Available Functions:

### *Un-allocate the assigned resource*

This function is available on all types of Dispatch Records.  To unallocated a soft allocated resource move the cursor to the record to be un-allocated and press the [>>] un-allocate button.  This will remove the allocation and put the resource back in the unallocated pool.

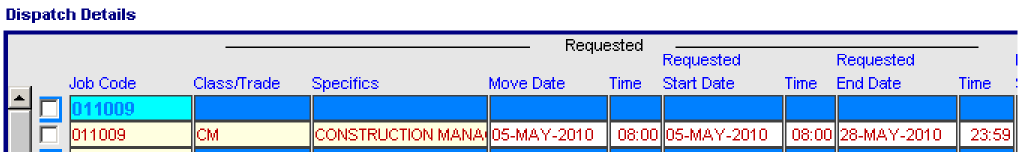
When un-allocating a Crew, if the cursor is on the Crew record the system will un-allocate the complete crew, if the cursor is on a member of the crew record, only that one member will be un-allocated.

### *Changing Requested Start and End Date and Time*

The dispatcher has the ability to change the Dispatch Request start date and time and end date and time for any Soft Allocated Dispatch Request Type. This is done by entering the new Requested Start Date and Time directly in the Dispatch Details screen or by right clicking and selecting ‘Change Soft Allocated Period’ from the options menu depending on the type.


The right click option must be used when there is more than one record involved such as changing the start and end date for an entire crew or a member of the crew.

There is validation that the Start Date and Time cannot be greater than the End Date and Time, and on a Heavy Equipment Dispatch Type the Start Date cannot be before the Move Date.  When changing crew dates the system will verify that all of the crew members are within the start and end date of the primary crew record.




If the dispatcher is changing the Requested Date on a Heavy Equipment Move the system will check if the Start Date is on or after the Move date.

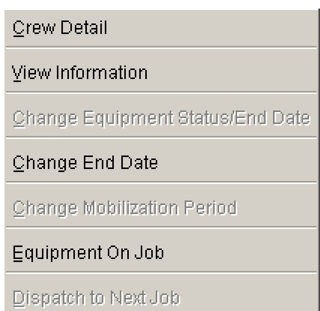
For Adhoc Dispatch Records that are not related to moving down equipment, right click and select change mobilization period.  This will change the start and end dates as well as the move date.

# Allocated Record Available Functions

## *Change Assignment End Date and Time*

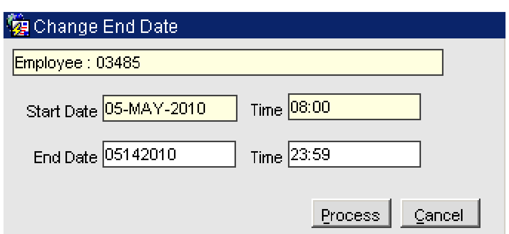
Changing the Assignment End Date should be used when the resource is staying on the job, but just for a different length of time.

To change the End Date and Time of an Allocated record move the cursor to the required record and right click to bring up the options menu.



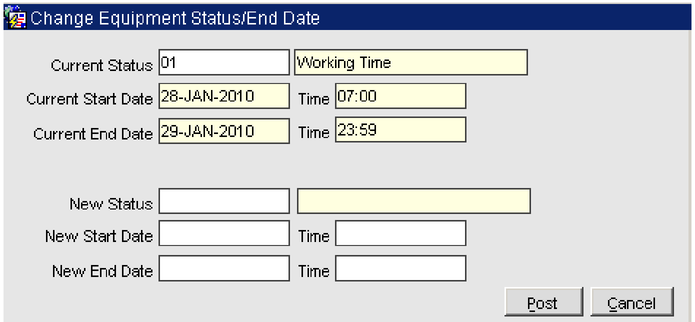

From this menu select the Change Equipment Status/End Date or Change End Date depending on the record type.   This will open a screen where the new End Date and Time can be entered.  The screen displayed will change depending on the Dispatch Record Type.

For Employee and Crew Type records the window will be similar to below:




Enter the new End Date and Time.  When complete press [Process]. This will validate that the New End Date does not conflict with other Soft Allocations for the same resource.  If it conflicts the system will not accept the new date.  The Process button will update the employee dispatch history data to reflect this new end date.

For Heavy Equipment or Equipment Type Records the window will be similar to below:




If there is more than one 'Status' record for the piece of equipment the Current Status field will be blank when this window opens. Use the LOV in the Current Status field to select the 'Working' status record required.

To extend the working period for equipment enter the 'Working' status and the new End Date and Time. When complete press the [**Post**] button. If the new End Date and time conflict with other assignments the system will not accept the record. The Posting Process will update the equipment location history with this new End Date and Time.

## *Move Equipment to Next Job*

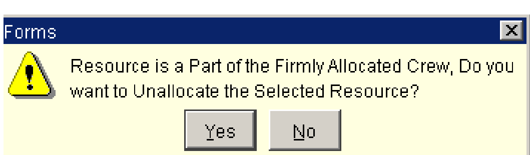
To move Heavy Equipment or Equipment Dispatch Type records to a new job move the cursor to the required record and right click to bring up the options menu.


Select the Dispatch to Next Job option. This will open the standard Dispatch Request screen with the Request Date, Resource Type and Resource Specifics already filled in. Once the Move To information has been entered use the [Generate Move] button to create the Request. This will close the window and return the user to the Dispatch screen. The Generate Move will have automatically created the required Dispatch Records and soft allocated the same resources as were used in the originating transactions.

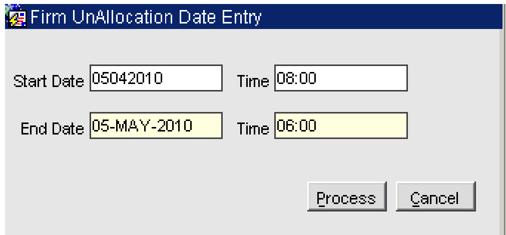
## *Un-allocate a Crew Member or an Employee*

This is a similar function as changing the Assigned End Date except that in this case the user enters the Start Date of when the resource is no longer required, plus this function allows the resource to be fully unallocated.

This function is done by moving to the required record (Dispatch Resource Type Employee) and pressing the [>>] unallocated button. This will bring up a warning message similar to below:




Select Yes and the system will ask for the dates in a screen similar to below:

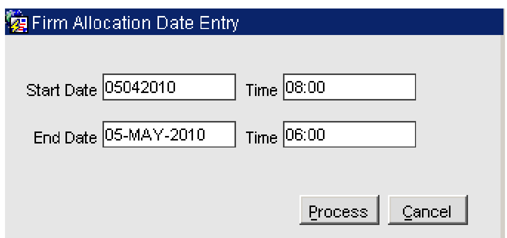



Enter the Start Date of the Un-allocation. The Start Date will default to the start date of the request, but the user can change this. Once done, press [**Process**]. This will update the employee dispatch history. If the user does not change the Start Date (therefore un-allocating for the full period) the record will be re-set to un-allocated.

## *Allocate a new member to a Crew*

This process should be used when a new resource is required on an already allocated crew. Move the cursor to the 'Crew' record in the Dispatch Details section of the screen that the resource will be added to. Then in the Un-allocated Pool Section of the screen query the required resource record. Then use the [<<] Allocate To button to move the resource to the crew.

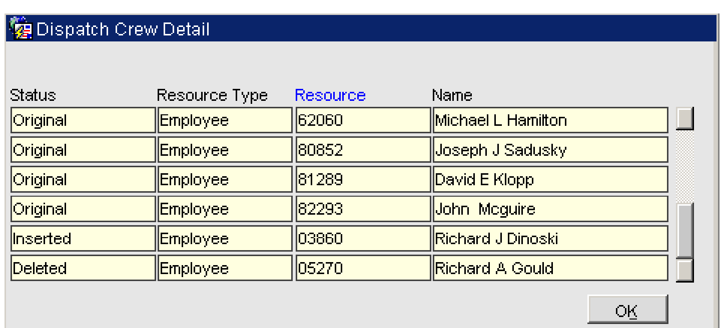
The system will confirm that the resource is to be added to the Firm Allocated crew. Once confirmation is received a window will display similar to below:




Enter the Start and End date and times that the resource will be actively associated with the crew. The only stipulation is that the start and end date must fall within the start and end date of the entire crew. This allows for resources to be added for only a short period of time. Once done, press the [**Process**] button. If the resource is an employee or equipment type the resource will automatically be Hard Allocated if the resource is Heavy Equipment then the resource will be Soft Allocated, as there is a requirement to post Mobilization Charges.

## *View Crew Details*

To view the Crew Details place the cursor on the Crew record and right click to open the Options Menu. Select 'Crew Detail' from the menu. This will open a new window that shows all members of the crew that are currently assigned, and if they are original members of the crew or have been added to the crew on a temporary basis or removed from the crew on a temporary basis.



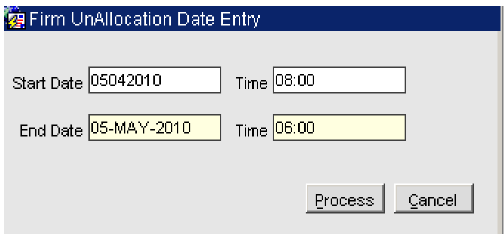

| Status | Resource Type | Resource | Name |
|---|---|---|---|
| Original | Employee | 62060 | Michael L Hamilton |
| Original | Employee | 80852 | Joseph J Sadusky |
| Original | Employee | 81289 | David E Klopp |
| Original | Employee | 82293 | John Mcguire |
| Inserted | Employee | 03860 | Richard J Dinoski |
| Deleted | Employee | 05270 | Richard A Gould |

A status of ‘Original’ means the resource is defined as part of the standard makeup of the crew. ‘Inserted’ indicates that the resource has been added to the crew manually by Dispatch and ‘Deleted’ indicates that the resource is normally part of the standard makeup of the crew, but for some reason has been removed by Dispatch.

## *Un-allocate Equipment*

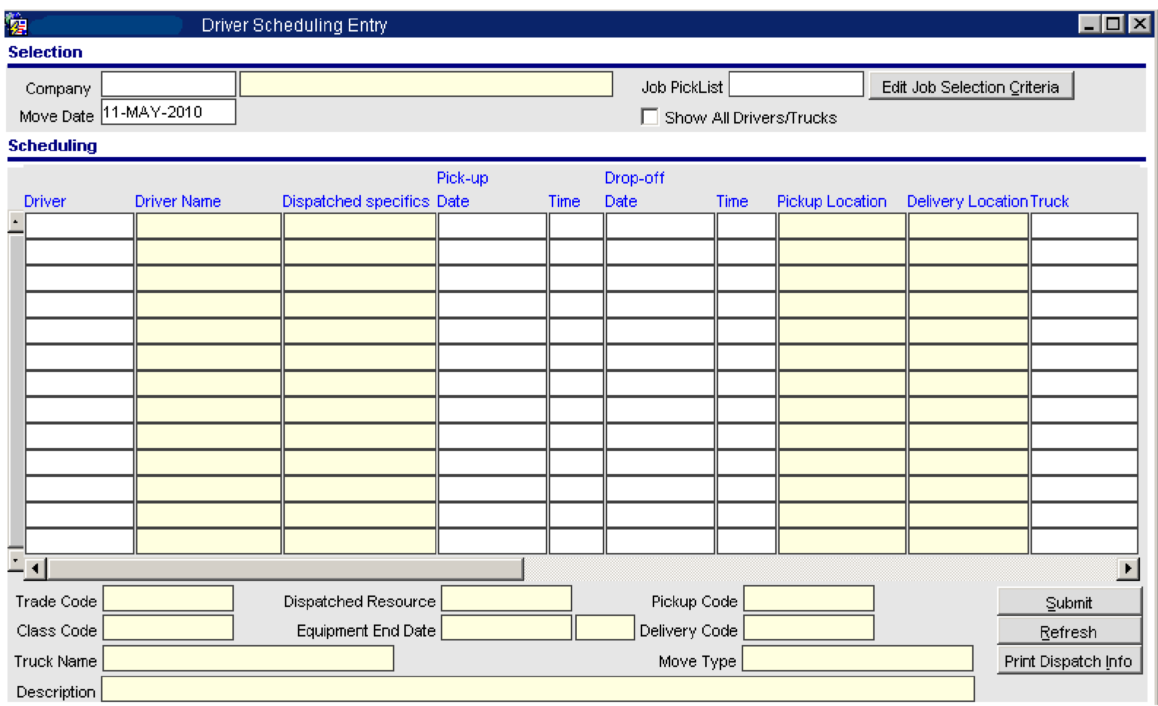
This function is only applicable to Equipment – it is not available for Heavy Equipment as Mobilization costs will have been posted for Heavy Equipment – this is also true for Adhoc Dispatch Records.

This function is done by moving to the required Equipment Dispatch record and pressing the [>>] un-allocate button. This will bring up a warning message indicating that the resource is Firm Allocated which allows the user to stop the process. A screen similar to below will display.




Enter the Start Date of the Un-allocation – The Start Date will default to the start date of the request, but the user can change this. Once done press the [**Process**] button. This will update the Equipment Location history. If the user does not change the Start Date (therefore un-allocating for the full period) the record will be re-set to un-allocated.

# Driver Scheduling




Driver Scheduling can be done via the Dispatch program or it can be done via a screen designed specifically for this task. The Driver Scheduling program is designed to look at a specific date and show all unallocated or soft allocated requests. It allows for the scheduling of both Drivers and Trucks.

When this program is used it creates a Temporary Working Area for the Scheduler. Changes made in this program must be ‘Submitted’ before any changes will show in the Dispatch program.

### Company:

This is a mandatory field if the Job Pick List is not used and will default to the users default Job Cost company code. This field will limit the jobs shown to only jobs within this company that the user has security access to. This field also has an LOV that allows the company to be changed to any other company to which they have access.

### Move Date:

This field defaults to the current system date but can be changed. The Move date restricts the details to only those where the Dispatch Move Date equals the date entered in this field. This is a Mandatory field.

### Show All Drivers/Trucks:

If this field is checked the list of Available Drivers and Trucks will display all available instead of limiting to only those associated with the company.

### Job Pick List:

This field allows for the entry of ‘Cross Company Job Pick Lists’. If a pick list is entered, the company field is ignored and only the jobs in the pick list will display. This functionality allows the user to work with jobs in more than one company at a time. The Cross Company Pick List setup is done in the Job Cost system.

### Driver:

This field will be blank if the request has not been scheduled. There is an LOV on this field that shows available drivers.

### Pickup Date and Time:

These fields will default to the Move Date and Time on the related Driver Dispatch record. But they can be changed directly in this program. Restrictions are that the Pickup Date cannot be after the Requested End date. These are mandatory fields.

### Drop off Date and time:

These fields will also default to the End Date and Time on the related Driver Dispatch record. But they can be changed directly in this program. Restrictions are that the End Date cannot be before the Drop Off date. These are mandatory fields.

### Truck:

This is the truck the Driver will be using. This field has an LOV that shows all available trucks. This is not a required field. If the Truck was soft allocated in the Dispatch screen it will display here.

### Pickup Location and Delivery Location:

These are Free Form fields that should be used to give drivers more information about where to start and end this dispatch. These are not required fields but do print on the Drivers Dispatch report.

### Comments:

This is another Free Form area where extra comments/notes regarding the request can be entered. This information will print on the Drivers report.

### [Submit]

This button will save the changes and Soft Allocate all the records. This function must be done to complete the driver scheduling.

**[Refresh]**

This button will throw away all changes made and reload the data as per the current Dispatch entries.

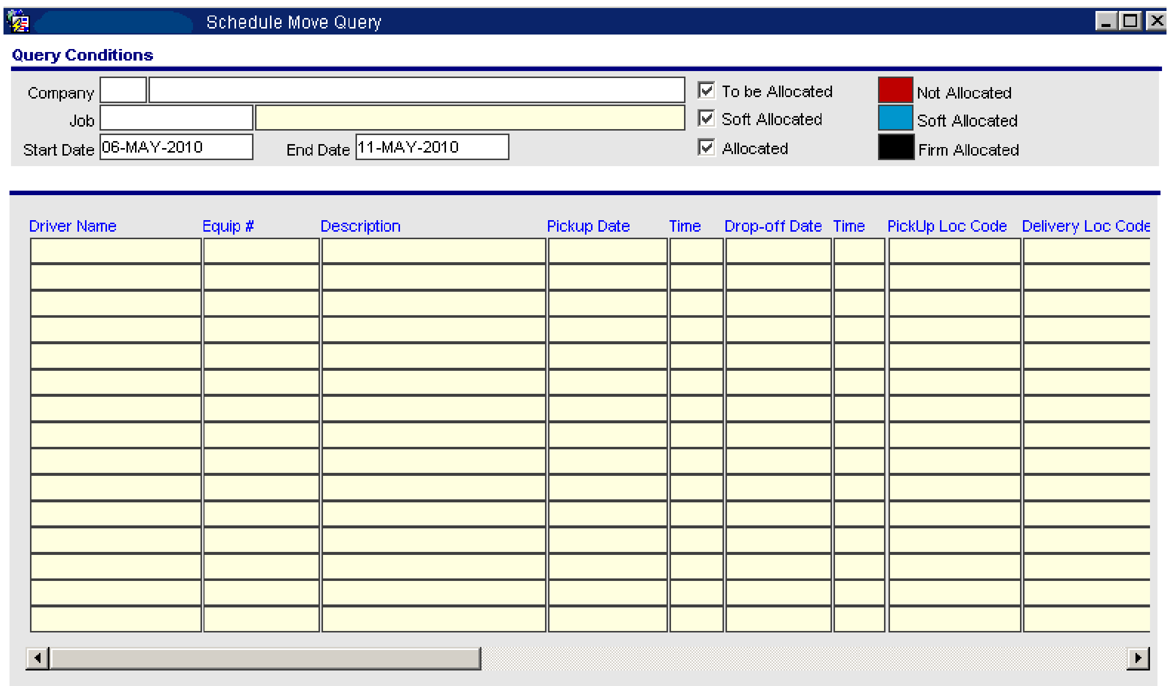
**[Print Dispatch Info]**

This will print the Drivers report. The user can elect to print for all drivers or From/To specific drivers.

# Scheduled Move Query

This query screen shows all the moves in and out of a specific job for a specified date range. The user can specify if they wish to see Allocated, Soft Allocated or Unallocated moves.

If the move is to the job then the Drop Off Date and Time will show when the delivery is expected and the Pickup Date and time will be empty. If the move is from the job then the Pickup Date and Time will show the expected time and the Drop Off Date and Time will be blank. This makes it very easy to see what is coming in and what is going out.




**Company:**

This is mandatory and will default to the users default Job Cost company code. This field will limit the information shown in the details. This field also has an LOV that allows the company to be changed to any other company to which they have access.

**Job Code:**

This is a mandatory field. There is an LOV available.

**Start Date/End Date:**

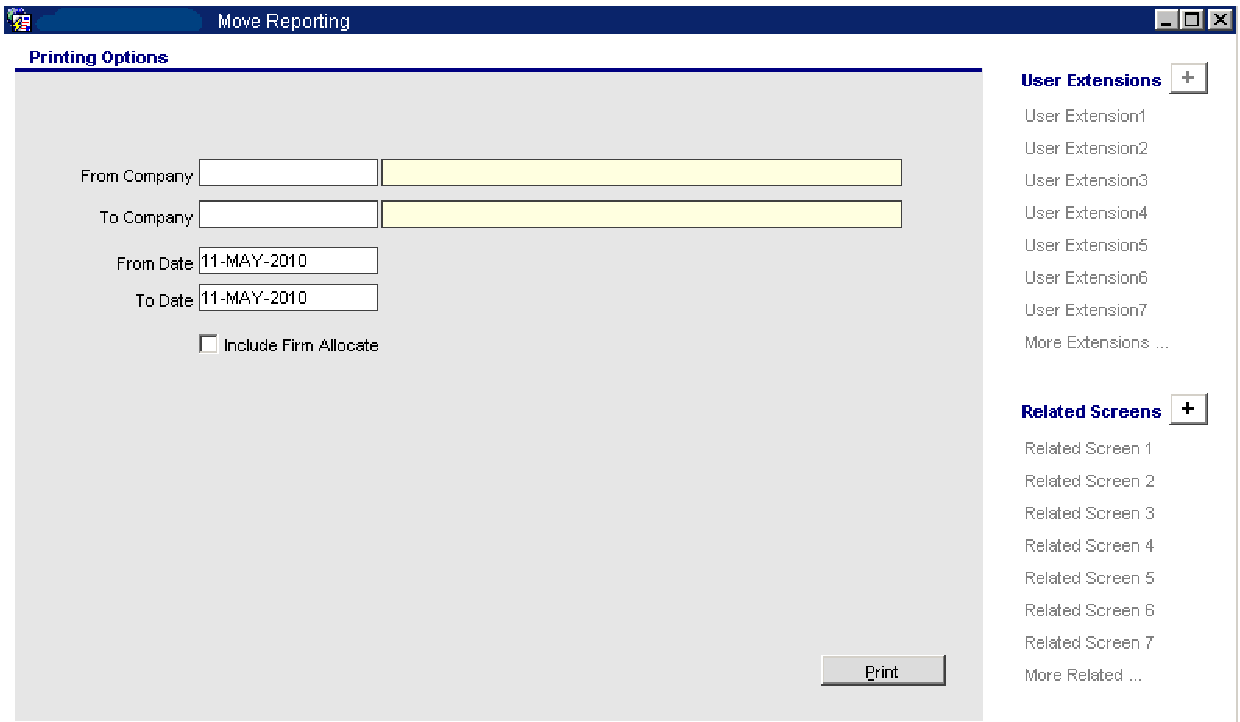
The Start Date will default to the current date minus 5 days, while the End Date will default to the system date. The program will search the dispatch requests and return all records where the Move dates fall within the range.

**Include:**

By default the screen opens with all three dispatch record status types checked.  The user has the option to limit the types of records shown in the details.

- Soft Allocation – Shows only Soft Allocated Dispatch Detail (In Process)
- To be Allocated – Shows all the Pending Allocation Dispatch Detail (New)
- Allocated – Shows only Firm Allocated Dispatch Detail (Completed)

# Move Report




This report is very similar to the Drivers Report except that it does not start a new page by driver.  This report is intended to be a report of all moves for a specific day but by changing the dates and checking the Include Firm Allocated – it can also be used as a historical report of all moves for a specific period of time.

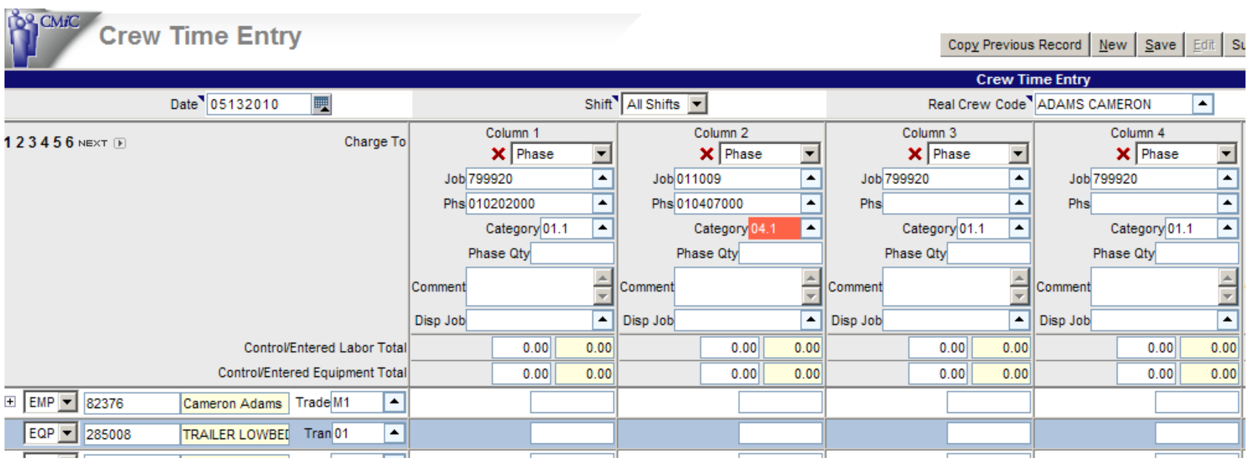
By Default the From To Company will default to the users default Job Cost company code.  The From and To date also default to the system date.

# Other Interfaces

## Payroll Crew Time Entry

The Crew Time Entry program can be configured to Utilize Crew Codes – if this is set and Real Crews are defined, the program will validate that the Crew Code entered is a valid crew code.  It will also then look to the dispatch system to retrieve all members of the crew and what job(s) they are assigned to for the day and pre-populate the details in the time sheet.

If the Crew is a ‘Trucker Crew’ the job(s) will not be the jobs the crew delivered to or from, it will be the Job from the Employee Profile.




The Dispatch Job can be filled in if there is the need to indicate that the job being delivered to/from is a Prevailing Wage Job.

Also if the crew is a Trucker Crew – there is a facility to enter IFTA mileage info against the equipment line.

# Project Management Daily Journal

RG Griffith
800-615-7460

*DAILY JOB CONTROL REPORT* *13479997*

Crew ID#: Gey Rod Foreman: Roderick Gey Temp Range: ______ To ______

Date: 05/14/2010 Day: Friday Weather: ______

Night Shift ☐

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Job | 799920 | | | | | | Page 2 of 2 |
| Phase | 010202000 | | | | | | |
| Category | 01.1 | | | | | | |
| Phase Qty | | | | | | | |
| Comments | | | | | | | |

| | Employee Name | Code | Class | | | | | | | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 | *RODERICK GEY* | 04980 | LB | | | | | | | |
| | | | TOTAL MANHOURS | | | | | | | |

| | Equipment | Equip # | OPER | NON | OPER | NON | OPER | NON | OPER | NON | OPER | NON | OPER | NON | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | TRACTOR TANDEM, PETERE | 298001 | | | | | | | | | | | | | |
| | | TOTAL EQUIPMENT HOURS | | | | | | | | | | | | | |

PAYROLL FAX : (800) 474-7484

DUE BY : 9:00 PM

*I HEREBY CERTIFY THAT TO THE BEST OF MY KNOWLEDGE THE FOREGOING INFORMATION IS COMPLETE AND ACCURATE*

SIGNED: *Roderick Gey* Date: 14-MAY-10

DAILY WORK DIARY

| Work Performed: | Material Received |
|---|---|
| Extra Work Performed: | |
| Extra Work Authorized by: | Total Trucking Hours |
| Subcontractors on Site? YES NO If YES Who & What Location ? | No. of Trucks |

The PM Daily Journal now allows the journal to be created by Crew Code. If the journal is created by crew code, there is a special report that can be printed from the journal the 'Daily Job Report' that will print a Timesheet prefilled with the crew information for the job. The report layout is almost identical to the Crew Time Sheet entry screen in layout.

# Required Setup

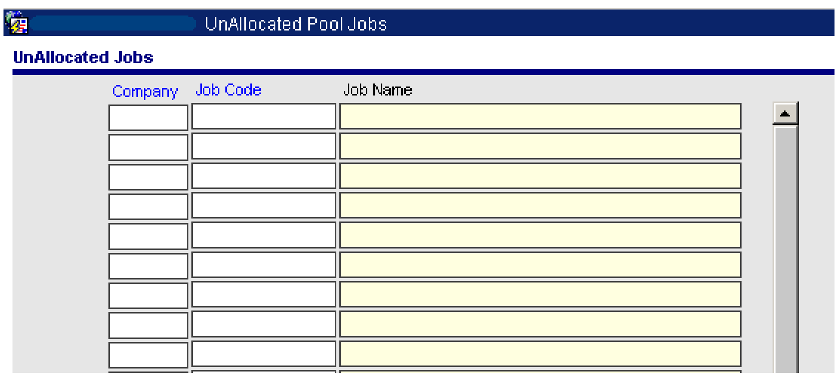
## Setup Overview

The dispatch system utilizes information for lots of other systems within CMiC and the setup is quite complicated in that access to multiple applications will be required.

### Define Unallocated Pool Jobs

An unallocated pool job is a standard job defined in the Job Cost system. Usually this type of job only has one phase ‘Unallocated Resources’ with multiple categories that allow for the separation of labor and Equipment. Usually each company that will be using dispatch will have its own unallocated pool job.

Once the job(s) are defined they must be registered as un-allocated pool jobs, this is done in the Material Sales Menu> Setup>Local Tables> Un-allocated Pool Jobs.




Enter the Company Code and the Job Code of the Pool job.

This setup must be done before Crews are defined.

### Define Employees

When creating an employee who is to be dispatched the employee must have the ‘Available for Dispatch’ flag on the ‘Company Tab’ checked.
If this flag is checked, then Job/Phase/Category fields on the ‘Rates/Salary Tab’ should be left blank unless the employee is a ‘Trucker’. If the employee is a Trucker then the job information entered here should be a Mobilization job. This is where the trucker’s time will be charged as the mobilization is charged to the job as either a fixed rate or a calculated rate at the time of mobilization.

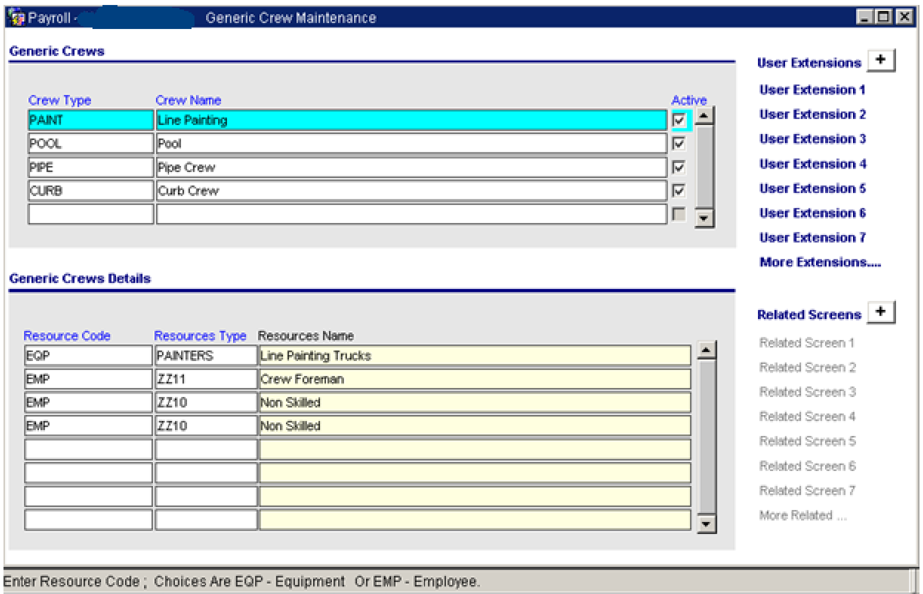
There is a ‘Dispatch Tab’ that is only available when the employee is defined as Available for Dispatch. This tab requires that the employee be assigned to at least an Unallocated Pool job. This is the employee’s default unallocated pool that he will return to after each assignment. This tab also shows the employees dispatch history for existing employees.

# Setup Crews

There are two steps in defining a crew:

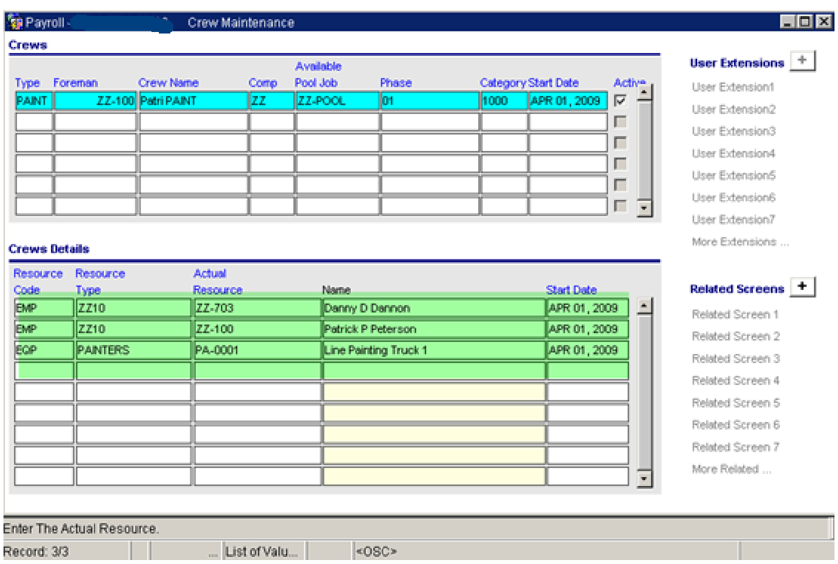
> **Define a Generic Crew** – This allows for the definition of what the standard makeup of a type of crew should be.
>
> **Define the Actual Crew -** This will define the foreman, employees and equipment assigned to a crew.

## *Generic Crews*




On this screen enter a Crew Type and Name and then apply the resources required for the crew. The resource types available are Equipment and Employees. If the Resource Type is Equipment then the user can select a class of equipment, if the Resource Type is Employee then the user selects an employee trade.

## *Real Crews*



When creating a Real Crew select the Generic Crew Type. Select the Foreman and assign the crew to an unallocated pool job. The Un-allocated Pool Job is the default pool for this crew. Whenever the crew is no longer dispatched to an actual job they will return to this Unallocated Job. Note: The crew name defaults to the first 5 letters of the Foreman's first name and then the Crew Type but this can be overridden.

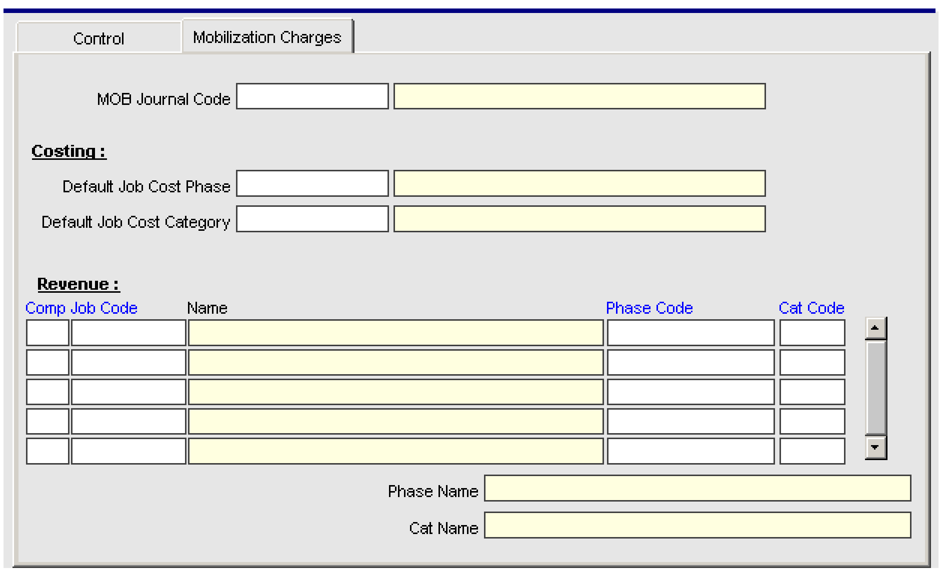
The detail section of the real crew is where actual resources of employees and equipment are assigned to the crew. By Default the system will automatically add the Foreman to the crew details.

Enter the Resource Code – Employee or Equipment and then the required type. The Actual Resource field list of values will be limited based upon the required resource type (payroll trade or equipment class) and the actual resource (as defined in payroll employee maintenance and equipment maintenance).

# Equipment Setup

## *Mobilization Charges*

Control




Mobilization Charges are setup in the Equipment Control File. This information only needs to be defined for companies that have equipment which will be used in the Dispatch system.

The information entered here is used during the posting of Mobilization charges to generate revenue and costing charges.

### MOB Journal Code:

This is the Journal Code that will be used when Dispatch Posts mobilization charges. This must be a valid Journal Code.

### Default Cost Phase and Category:

These values should be the most common phase and category to which mobilization charges are posted. The values entered here will default into the Dispatch system but the Dispatcher can override them. These values will also be used as the default if the Dispatch Request is not specifically coded to any phase/category. These are mandatory fields.

### Revenue Company, Job Phase and Category:

This is a multi row section for each company that mobilization revenue can be posted to. Select the revenue jobs created for each company that owns equipment. When a piece of equipment belonging to this company is firm allocated, the dispatcher will choose one of the jobs to which to allocate the revenue.

## Actual Location Setup

Create an actual location that is linked to an unallocated Pool Job. This is standard Equipment Costing Setup. It also applies that any job a piece of equipment must be moved to must also be setup as an actual location. (Flag set in Job Costing Control file will allow automatic set up of an actual location when a new job is created.)

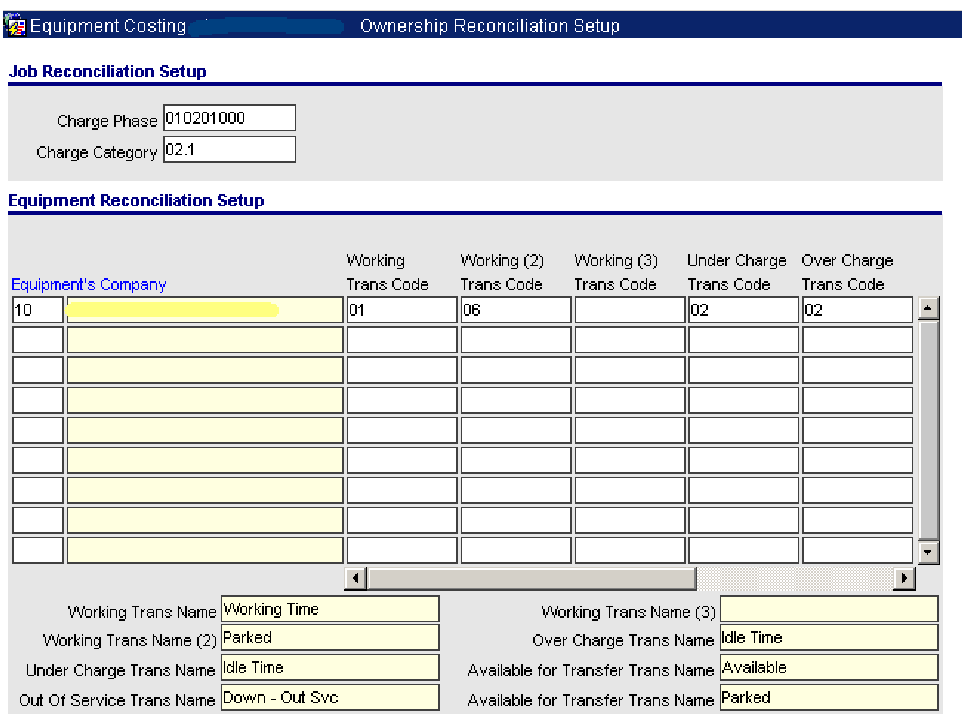
## Equipment Classes

When setting up equipment classes, the user can enter the Trade and Trucker Class **-** the values in these fields will default to each piece of equipment with the same class code. These values represent the Class of Equipment required to move this class of equipment and the trade of the driver needed. These are defaults only and can be overridden when entering a piece of equipment. There is also a field for the Fixed Rate mobilization charge for the class of equipment.

### Additional Fields to the Equipment Maintenance Class Setup

- **Trade Code**:This is the trucker payroll trade code required to move this class of equipment.
- **Truck Class**: This is the class of equipment required to move this class of equipment. For example, a double axle type of truck may be required to move a caterpillar.
- **MOB Rate**: If there is a "fixed" rate to move this class of equipment, enter the Mobilization rate (lump sum). This can be overridden at the time of mobilization.

## Ownership Reconciliation Setup



Even if you are not planning on running Ownership Reconciliation you must set up the transactions codes because Dispatch uses this definition of the code to determine if certain functions can be processed.

### Charge Phase and Category:

These two fields represent the Phase and Category on each job that the reconciliation charges will be posted against. These must be set up the same and exist on every job within each company that equipment can be transferred to.

### Transaction Codes:

For each company that Equipment belongs to, you need to define the usage of the different transaction Codes.

There are up to 3 codes that can have the meaning of 'Working'. This means any hours posted against these codes will be counted as Working Hours and Dispatch knows that any of these codes mean the piece of equipment is not available for moving.

- **Under/Over Charge**: These Transaction Codes are used to determine which transaction code to use to calculate the over or under charge during the reconciliation process. These are not used by Dispatch.
- **Out of Service** – this transaction code is used by Dispatch to determine if a piece of equipment is broken. Adhoc Down Equipment moves utilize this code, plus any equipment with this code will not be considered available. The Ownership Reconciliation considers Out of Service as not chargeable.
- **Available for Transfer** – this code is used by Dispatch to indicate that the piece of equipment is no longer being used and can therefore be moved somewhere else if needed. The Ownership Reconciliation considers Available for Transfer as not chargeable.
- **Parked** – this code is used by dispatch when a piece of equipment is moved to a job before it is required, the system sets the status to Parked. The Ownership Reconciliation considers Parked as not chargeable.

## *Equipment Maintenance Screen*

### Additional Fields to the Equipment Maintenance Setup

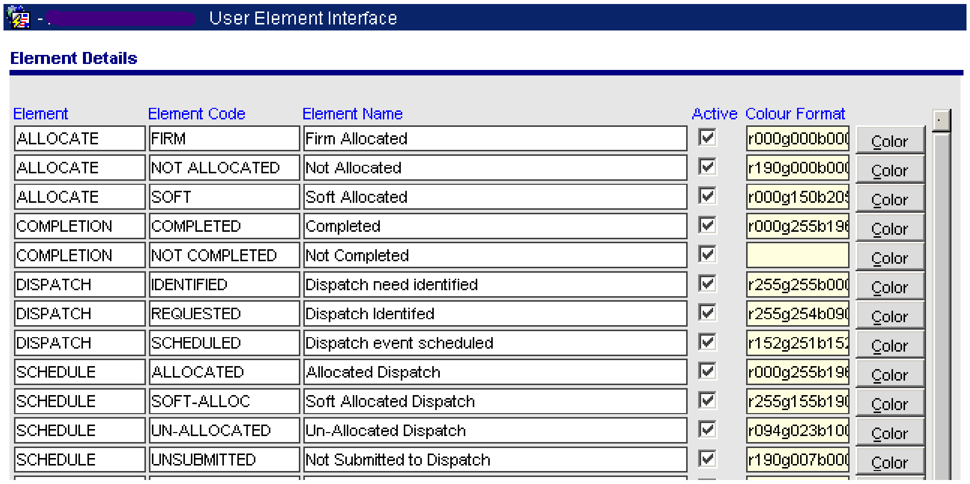
By entering a Truck Class and Trade Code against a piece of equipment you are indicating that this piece of equipment is what Dispatch considers Heavy Equipment which means that the equipment will need a float truck and driver to move it from one location to another. When a Request is given to Dispatch for this piece of equipment the dispatch system will automatically create the Driver Request and a Float Truck Request record.

**Truck Class –** This will default from the class setup but can be overridden. This is the class of equipment that will be required to move this piece of equipment.

**Trade Code –** This will default from the class setup but can be overridden. This is the trade code of the type of driver required to drive the float truck.

**Crew Code –** Equipment can also be assigned directly to a crew by entering the Crew Code.

### *User Element Interface*

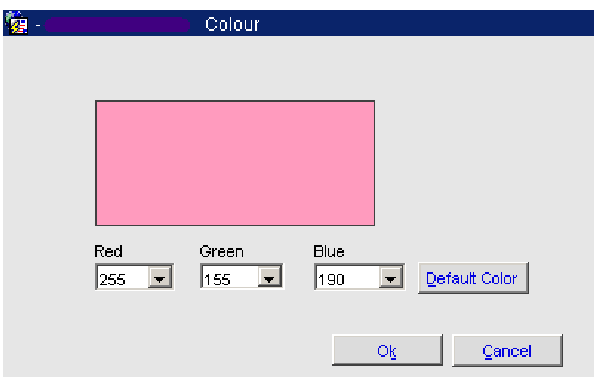



The system will allow a different color schema to be set for the elements indicated above.

Select the element and then select the color button to change the color. The system will populate the Color Format.

This will change the colors for ALL users.

Move to the required Element and tab across to the [**Color**] button. This will open a window similar to below where the user can define the color required by changing the Red, Green and Blue values.




These colors are used in the Dispatch and Planning programs to highlight the status of records.

# Appendix

## Quick Dispatch Function Chart

| | | Dispatch Screen |
|---|---|---|

| Dispatch Type | Function | Unallocated | Soft Allocated | Allocated |
|---|---|---|---|---|
| **Crews** | | | | |
| | Firm allocate to a future start date | NA | NA | No |
| | Change Request Start Date and Time | Yes | Yes | No |
| | Change Request End Date and Time | Yes | Yes | Yes |
| | Add an Employee to the Crew | NA | Yes | Yes |
| | Remove an Employee from the Crew | NA | Yes | Yes |
| | Add Non Heavy Equipment to the Crew | NA | Yes | Yes |
| | Remove Non Heavy Equipment from the Crew | NA | Yes | Yes |
| | Add Heavy Equipment to the Crew | NA | Yes | No |
| | Remove Heavy Equipment from the Crew | NA | Yes | No |
| | Un-allocate an employee | NA | Yes | Yes |
| | Un-allocate Equipment | NA | Yes | Yes |
| | Un-allocate Heavy Equipment | NA | Yes | Yes |
| | Un-allocate the complete crew | NA | Yes | Yes |
| | Delete a Request | Yes | No | No |
| **Employee** | | | | |
| | Firm allocate to a future start date | N/A | N/A | No |
| | Change Start Date and Time | Yes | Yes | No |
| | Change End Date and Time | Yes | Yes | Yes |
| | Un-allocate | N/A | Yes | Yes |
| | Delete a Request | Yes | No | No |
| **Heavy Equipment** | | | | |
| | Firm allocate to a future start date | N/A | N/A | No |
| | Change Request Start Date and Time | Yes | Yes | No |
| | Change Request End Date and Time | Yes | Yes | Yes |
| | Change MOB Start Date and Time | No | Yes | No |
| | Allocate Heavy Equipment | Yes | NA | NA |
| | Un-allocated Heavy Equipment | NA | Yes | No |
| | Allocate Float Equipment | Yes | NA | NA |
| | Un-allocate Float Equipment | NA | Yes | No |
| | Allocate Driver | Yes | NA | NA |

| | | Dispatch Screen | | |
|---|---|---|---|---|
| **Dispatch Type** | **Function** | **Unallocated** | **Soft Allocated** | **Allocated** |
| | Un-allocated Driver | No | Yes | No |
| | Change Equipment Status | No | No | Yes |
| | Move to Next Job | No | No | Yes |
| | Delete a Request | Yes | No | No |
| **Equipment** | | | | |
| | Firm Allocate to a future start date | NA | NA | No |
| | Change Request Start Date and Time | Yes | Yes | No |
| | Change Request End Date and Time | Yes | Yes | Yes |
| | Un-allocate Equipment | NA | Yes | Yes |
| | Change Equipment Status | No | No | Yes |
| | Move to Next Job | No | No | Yes |
| | Delete a Request | Yes | No | No |
| **Adhoc** | | | | |
| | Firm Allocate to a future start date | NA | NA | No |
| | Change Request Start Date and Time or Parent Record | Yes | Yes | No |
| | Change Request End Date and Time of Parent Record | Yes | Yes | No |
| | Un-allocate | NA | Yes | No |
| | Delete a Request | Yes | No | NO |

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