Crew Planner

The Crew Planner Module provides a central location to manage crew assignments for multiple jobs and maintain technician schedules.

This interactive calendar displays crew requirements and assignments, allowing operators to quickly view crew for a given period (Fig 1.2).

Display

Tailor your display further using View, Sort By and Color options from the expandable menu



Manage the colour of displayed jobs using the menu option below

<												ŀ
Bookings	Reports	•				Fri	8/25					-
Dookingo	T SortBy	•	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm
300100046	🥒 Colors	•	🖲 Bas	sed on I	Booking	g Progr	ess Sta	itus				
AED100023					Technic Job offe			ion Lev	rel			
			🛗 Ma	nage co	lors							

Booking Colours/Colors

When using Booking Colours

- unassigned jobs show in red
- assigned jobs show based on the confirmation level of the booking

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Bookings						Fri	8/25					Crew C	Color Selector			×		
bookings	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm						m	4am
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													Heavy Pen	cill				
													Confirmed	booking				
													Cancelled					
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Crew Colours/Colors

- unassigned jobs will show in red
- assigned jobs show based on the Crew Colours and the job confirmation status

< ≡												Aug	25 31	2023		
Bookings						Fri	8/25					Crew Co	lor Selector			×
Bookings	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm					
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AED100023					AED100	023 ELE	TR						Unconfirmed			
					AED100								Confirmed			
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Job Status Colours/Colors

- unassigned jobs will show in red
- assigned jobs show based on the Job Status colours outlined below

< ≡												Aug 25 - 21 - 2022	4
Bookings						Fri	8/25					Crew Color Selector	×
Bookings	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm		m
300100046		300100	046 SET		300100	046 EBR	0 K1					Bookings Colors Crew Colors Job status colors	
AED100023					AED100							Not Offered	
					AED100							Offered	
												Accepted	
												Declined	
												Accepted & Approved	
													_

Scope

The scope tab (Fig 1.1) allows operators to take a detailed look at bookings, crew and times and view options on

the same screen. Once the scope is adjusted, click display.

Refresh

to view the revised

← 🔳		ig 1.2										A	ug 2	5 – 3	31, 2	023													Fig 1.1	*	Scope	Info
Bookings						Fri	8/25																								All	
Jookings	6am	_		_				1pm	2pm	3pm	4pm	5pm	6pm	7pm	8pm	9pm	10pm	11pm	12am	1am	2am	3am	4am	5am	6am	7am	8am	9am	10am 1	1	25/08/2023 🗖	
00100046		30010	0046 SE			046 EBR	_																								1 week	
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Olive Oil																															OAII	
Sean Maclean																															Qualified	
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\																															 Free Lance 	
Fig 1.3																															 Agency 	
																															Refresh	

Assignments

- Bookings show in Red when no technician is assigned while assigned jobs display based on the colour selected in setup (See display tab for more information)
- Hover over any entry on the grid for summary information of the job
- Click on any assignment on the grid to see a qualified list of technicians in the bottom window (Fig 1.3). You can also see the same list of techs via right click on the entry then click Assign
 - Click the info tab (Fig 1.1) to see more information on an assignment
- Change the dates and times of crew assignments (Fig 1.2) by dragging the assignment or expanding the begin and end times of the assignments on the grid. Alternatively, right click on on any booking to edit the crew assignment.
- Right click on any booking to activate other menu options (Fig 1.4). Note the Quick look option to view summary details of the booking.



Reports

Access available reports from the

										Δ	ua 2	5 -	31 2	2023			
	Reports	•	_	ician Schedule	/25						ug z		01, 2	.020			
Bookings	 View SortBy 	•		Assignments	12pm	1pm	2pm	3pm	4pm	5pm	6pm	7pm	8pm	9pm	10pm	11pm	12a
300100046	Colors	•	Job Co														
AED100023			- JOD C	AED100023 RIG	TR												

menu

Technician Schedule

Lists all upcoming jobs that have already been assigned to a technician. If crew entry within a booking is unassigned it will not display on this report. This report has a date range and technician scope to narrow down the information you'd like to view.

Rental Point		Тес	hnician Schedu	le Report			e
Between (Inclusive dates) or Select Month	[24/08/2023	i and	25/08/2023		D ¢	
🖾 Jan 🖉 Feb	o ∭ Mar	🖾 Apr	🖾 Jun	ul 🖾 Aug	🖾 Sep	Ø Oct	Nov Dec
Technician		Region/Location			Sequence		
All Selected Technician	٩	 All Select Location 0 - Main 		~	 Page Break for Ea Use Alternate Lay This option will disp 	out	nation, but in a slightly differe
Bookings					format		
All Selected Booking	٩				Print Booking Print Venue N		
			ian Schedu	e		Page	∍No: 1
Date Printed: 2023 For Period From 2 Tom Red			ian Schedul	e		Page	e No: 1
For Period From 2 Tom Red Booking No. Customer		023-08-25	ian Schedul	Start D	late and Time ate and Time	Page 2023-08-25 2023-08-25	at 10:00
For Period From 2	2023-08-24 to 2	023-08-25	ian Schedu	Start D		2023-08-25	at 10:00

Technician Listing

Shows all technicians within the selected scope

Date printed: 08-24-23	Τ	echnician Listing		Pa	ge No: 1
Technician	P1	MOBILE	Department	Position	Freelance
234234234 234234234	1 577 789-8787 888				
add tech	1 577 789-8787 888				
Alex Mugford					
Allen Ent	3		the other dept	Manager	
another new		asdfsdaf			
Audrey Daly	514 456-7674	1416 7271522			
Ben Blair					
Bill Gallo	1 555 789-9799				\checkmark
Blanid Bellini					
Desirae Roux					\checkmark
Drew Underhill	1 555 6655-554	333 3333-8888			~
Elmer Franklin				Manager	~

Crew Assignment Report

Shows all jobs a tech is assigned to within date range selected

ental <i>Point</i>		Crew Ass	signment Rep	ort			OK - Show report
Between (Inclusive dates) or Select Month	24/08/2023	۵	and	25/08/2023	D	¢	
Jan Feb	🗭 Mar	🖻 May 💆 Jun	🗹 Jul	Aug	🖾 Sep	Nov Nov	Dec
Selected Technician			Booking Status to	Print			
Tom Red		v	Quote Light Pencil Heavy Penci Confirmed	I			
inted: 2023-08-24 ite Range: 2023-08-24 - 20 chnician: TR - Tom Red	23-08-25	Cre	ew Assignme	nt Report			Page: ·

Job Costing

This flexible report will assist you in determining your profit margin for crew. Several options help you to narrow down your search using a specific booking, technician, designation or task. Output can be sorted for easy readability.

Estimated Crew Hours are printed beside Client Cost, with Standard Time (ST),Overtime (OT) and Double Time (DT) as well as Daily figures. The report can also be printed to CSV so you can easily re-arrange your data and perform custom calculations.

ental Point	Job Cos	sting Report	0
Netween (Inclusive dates)	24/08/2023	and 25/08/2023	—
r Select Month			
🗭 Jan 🖉 Feb 🖉 Mar	🖾 Apr 🖾 May 🖉 Jun	🗭 Jul 🖉 Aug	Dec Dec
echnician	Bookings	Designation	Task
			O All
Selected Technician	 Selected Booking 	 Selected Designation 	Selected Task
٩	٩	ADB ~ Audio Director - Broadcast	Truck Load Up [w]
Order Report By	Detailed Hours	Region/Location	
O Crew Start Date	 Estimated Crew Hours 	O All	
Crew End Date	Client Cost	Select Location	
Technician	 Actual Crew Hours Selecting this option will print a separate report. 	0 - Main	
Booking Number Designation	The Task Scope will not apply to the separate		
Task	report, and Order will be defaulted to Technician if Task is selected.		

From 24-08-23 to	25-08-23			Job Costing I	Report								Page No	c 1
Tehnician:	All Technicia	ns												
Booking:	All Bookings													
Designation:	All Designati	ons												
Task:	AllAsks													
Detailed Hours:	Estimated C	rew Hours, Client Cost												
Order By:	Crew Start D	ate						Fetin	nated Crew	Hours			Client Cost	
Technician	Booking No	Designation	Task	Start Date	Time	End Date	Time	Hours (H)	Rate (R)	Total (H*R)	Hour		Rate (R)	Total (H*R)
Assignments With	Start Date of 25/08/2	23												
Assignments With	Start Date of 25/08/2 AED100023	23 Operations	Setup	25-08-2023	07:00	25-08-2023	19:00	Daily F	Rate	0.00	ST	8.00	16.00	128.0
Assignments With			Setup	25-08-2023	07:00	25-08-2023	19:00	Daily F	Rate	0.00	ST OT	8.00 4.00		
			Setup Setup	25-08-2023 25-08-2023	07:00 10:00			Daily F Daily F		0.00				