

Maximo: Crews

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Introduction

■ Crews

- Available in Utilities and now Scheduler 7.5.1
- License Key required
 - however will become part of core on the next point release
- Crew Type - equivalent to Crafts and assigned to Job Plans and Work Order Plans
- Crew - a group of Labor and Assets that can be assigned to Job Plans and Work Orders in an equivalent way to Labor

Crews - History

- Originally part of the Utilities release
 - Now part of core with license key
 - An accommodation release for Utilities available
 - Vinicius Garmatz presented Sept. 11th
- Backward compatibility
 - Core currently has a Crew field based on an ALN Domain value
 - With the Crew License key this field is hidden, however the customer can use Application Designer to display the field again if required.
- Changes from Utilities implementation exist
 - Removed many of the configurations settings in administration and incorporated the requirements in the main applications
 - Added to Tasks and Activities Applications
 - Crew Availability and durations now mimic Labor rules in core, however Utilities accommodation release reverts to their original business rules.

Crew Types

- Like a template and treated like a Craft in Job Plans and Work Orders
- Created at the Organization level
- Status – Active, Inactive
 - Status cannot be changed to Inactive if Crew Type assigned anywhere or a crew created specifying the Crew Type
- Hourly rate calculated on save based on Required Crafts and Tools
 - Override available for Crew Type rate
- Required Crafts
 - Position – ALN Domain values
 - Craft / Skill Level / Vendor / Contract
 - Remarks

Crew Types Continued

- **Required Qualifications**
 - Qualification
 - Position or Quantity
 - Can be created if a tool requires it

- **Required Tools**
 - Unique Tool Sequence assigned
 - Tool

- **Crafts and Tools must be flagged for use with Crews**

Crews (Crew Management)

- Created at the Organization level
- Crew Type required – all required values brought forward when filled in
 - Requirements may be changed for an individual crew
- Status – Active, Inactive
 - Status cannot be changed to Inactive if Crew assigned anywhere
- Crew Work Group
 - A person group that must be flagged to be used with Crews
- Vendor / Contract can be specified
- Hourly rate calculated on save based on the assigned Labor and Assets
 - Override available for Crew Type rate
- Calendar / Shift required before Crew can be assigned to a Work Order
- Location Fields used in the Dispatching application
 - Start and End Location used to create routes
 - Use Labor Location, Save Location with Work Order, Location Refresh allows the dispatcher to track where the crew is throughout the day

Crews Continued

- Crew History
 - Required Crafts and Actual Labor
 - Required Qualifications and Qualifications of Actual Labor
 - Required Tools and Assigned Tool Assets
- Labor Assignments
 - Assign Labor to each of the required positions
 - Labor movement between Crews accomplished by specifying the effective and end dates
 - Validations on craft, skill level, shift, assignment to other crews
- Tool Assignments
 - Assign Asset to required tool sequence
- Map
 - Display current location of the crew if available

Crews Actions

- View Labor Assignments
 - Required Crafts
 - Are all positions filled and is the assigned labor qualified for the position
 - Required Qualifications
 - Are the qualifications meet for the crew
 - Assigned Labor
 - View the Labor's name, craft, skill level, available hours and shift
- View Work Orders
- Modify Crew Availability
 - Allows the crew to specify time periods when they will not be available or when they are available for extra hours
 - Same functionality available to Labor

Crew – Preventative Maintenance and Job Plans

■ Preventative Maintenance

– Responsibility Section

- Old Crew field is hidden and Crew and Crew Work Group added
- Generation of Work Orders carries these fields forward

■ Job Plans

– Responsibility Section

- Old Crew field is hidden and Crew and Crew Work Group added

– Labor section

- Crew Work Group, Crew Type and Crew fields added
 - o Rate value comes from Crew Type or Crew application
 - o The override rate will apply if it exists
- Work Orders generated directly from a Job Plan or through Preventative Maintenance will carry these fields into the Work Order

Crews - Work Orders Planning, Assignments and Actuals

- **Detail page**
 - As with PMs and Job Plans the responsibility section has hidden the old Crew field and now displays the new Crew field from the Crew application and the Crew Work Group
- **Plans tab – Labor section**
 - Crew Work Group, Crew Type and Crew fields added
 - Rate value comes from Crew Type or Crew application
 - The override rate will apply if it exists
- **Assignment tab – Labor section**
 - Crew Work Group, Crew Type and Crew fields added
 - Rate value comes from Crew Type or Crew application
 - The override rate will apply if it exists
- **Actuals tab**
 - Enter Time by Crew – button and dialog
 - Allows a user to create Labor and Tool transactions for both the labor and assets assigned to the crew through a single dialog box

Crews - Activities and Tasks

▪ Resources Tab

– Plans Tab

- Labor tab

- o Crew Work Group, Crew Type and Crew fields added
- o Rate value comes from Crew Type or Crew application
- o The override rate will apply if it exists

– Actuals Tab

- Enter Time by Crew – button and dialog

- o Allows a user to create Labor and Tool transactions for both the labor and assets assigned to the crew through a single dialog box
- o Start and Finish assignment actions will work for crews, creating all labor and tool transaction records needed.

Crews – Assignment Manager

- Administration > Organization > Crew Assignment Options
 - Availability Factor added to indicate the percentage of the day the crew is available for assignments
 - Only effective in Assignment manager

- Assignment Manager
 - Tabs added to accommodate both Labor and Crew for assignment
 - All functionality on the Labor table is matched in Crew table for finding and assigning Work Orders
 - Actions added in the drop down list for Crews to match Labor actions
 - Assign Crew button also available in the tool bar
 - Crew Availability dialog available from crew table
 - Start, Interrupt and Finish assignment actions will work for crews, creating all labor and tool transaction records needed.

- Report added – Assignment Manager Daily Crew
 - Matches the Labor report already available

Crews – Labor and Quick Reporting

- Labor Reporting
 - Record detail now includes Crew Work Group, Labor and position fields
 - Enter Time by Crew dialog available in Select Action drop down and icon in the tool bar
- Quick Reporting
 - Old Crew field hidden and new one displayed in the detail section
 - Labor tab – Enter Time by Crew button
 - Crew field added to the detail for both Labor and Tool

Crews – Scheduler

- **Schedule creation**
 - Resource Availability – new data source for Crew (AMCREW)
 - Additional Resources – new data source for Crew Types (AMCREWT)

- **Gantt view**
 - Resource View will display the Crews by Crew Type below the Crafts/Labor values
 - Crew Types/Crews now have all the same functionality as Craft/Labor
 - Other Resources Availability tab now includes Crew Types/Crews

Crews – Graphical Assignments

- New Graphical Assignment application available with Scheduler 7.5.1
- Work List creation
 - Resource Availability – new data source for Crew (AMCREW)
 - Additional Resources – new data source for Crew Types (AMCREWT)
- Gantt view
 - Resource View will display the Crews by Crew Type below the Crafts/Labor values
 - Other Resources Availability tab now includes Crew Types/Crews
- Dispatch view
 - Displays routes and locations for both Crews and Labor

Crews

- Demo
- Questions