



Assignar

Scheduling: Tips & Tricks

May 2023

Scheduling Tips & Tricks

Agenda

- **Intro**
- **General Overview**
- **Scheduling Shortcuts!**
- **Managing Existing Orders**
- **Equipment and
Maintenance**
- **Q&A**

General Overview:

Calendar View: Resource/Worker Centric View

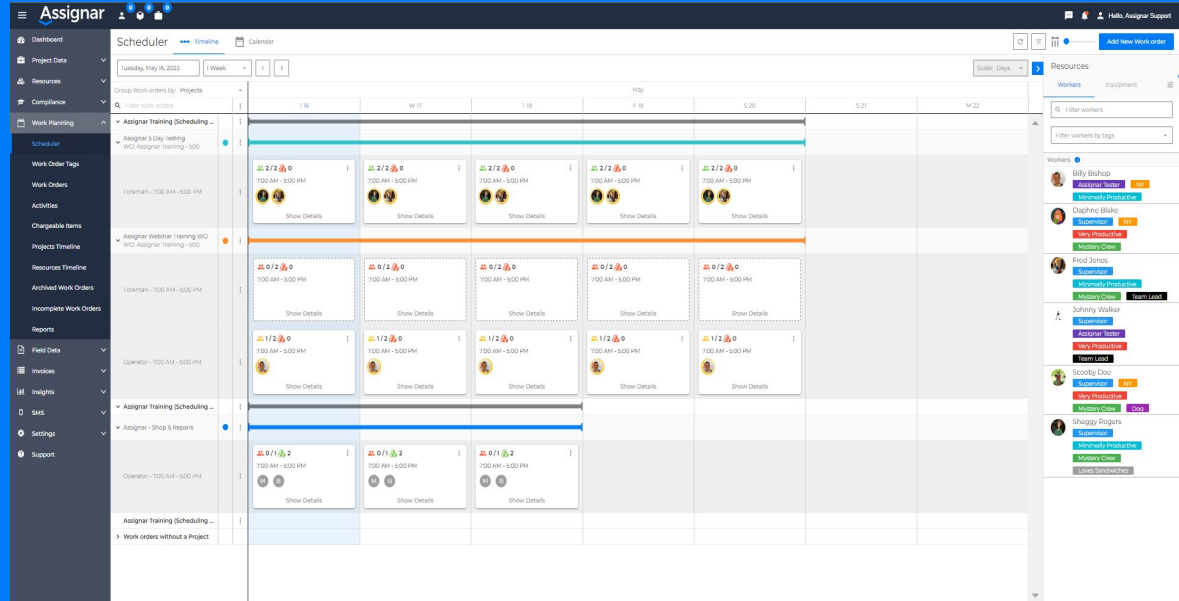
Timeline View: Project/Task Centric View

Filters to remember: Project, Client, Role, WO Status, Owner, Tags

Additional Options: “In Selected Range” & “With Unfulfilled Assignments”

Resource Filters: Search Workers by name, filter workers by tags, show tags.

General Overview



Different Views can emphasise various functions of your business.

Either making the resources your business possesses the forefront of your operations, or ensuring that every job is scheduled for completion.

Scheduling Shortcuts:

How to: Leverage the ability to create work orders without a project

How to: Templatize a project

Best Practice: Create a Work Order Quickly

Best Practice: Multi Selecting Days & Multi Selecting Resources

Group Work Orders By: Projects, Clients, None

Managing Existing Orders:

How to: Move an Existing Order

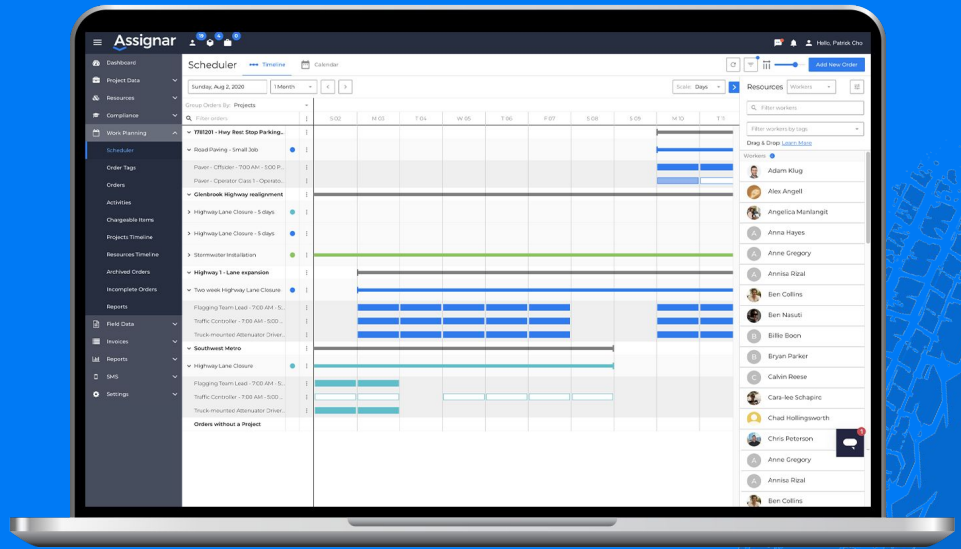
Best Practice: Leveraging WO Statuses

Best Practice: Leveraging Allocation Statuses

How to: Extend an Existing Order (With/Without current resources)

How to: Remove and Reschedule Resources/Role Association

**Take a look at
your future
availability and
capacity!**



Being able to take a look at future capacity can help your business create opportunities to make more money!



Equipment and Maintenance:

Best Practice: Equipment Tags

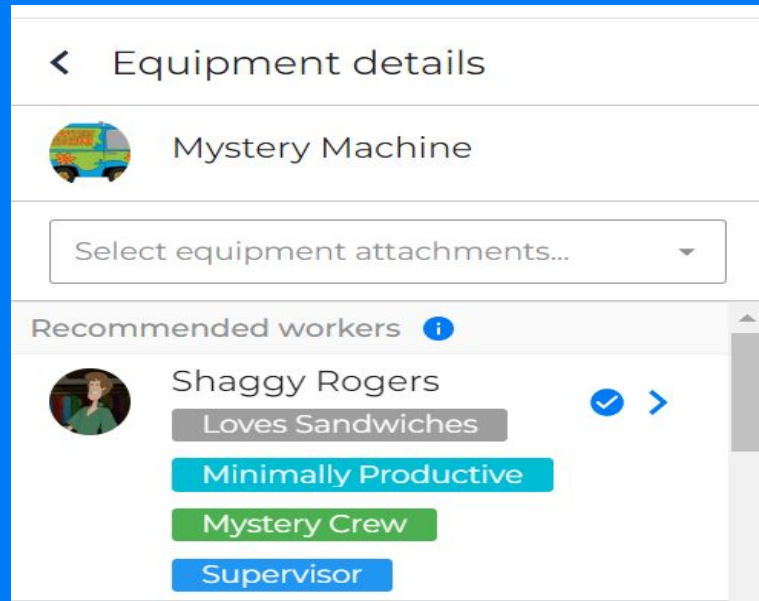
Best Practice: Worker and Equipment Association

Equipment Maintenance and Equipment Recommendations

How to: Add an equipment attachment



Equipment Associations



Do you have a crew using the same piece of equipment all of the time?

Do you want to see your name come up when your favorite truck is selected?

Associate a worker to a piece of equipment, and it will show on the schedule!

Upcoming Features

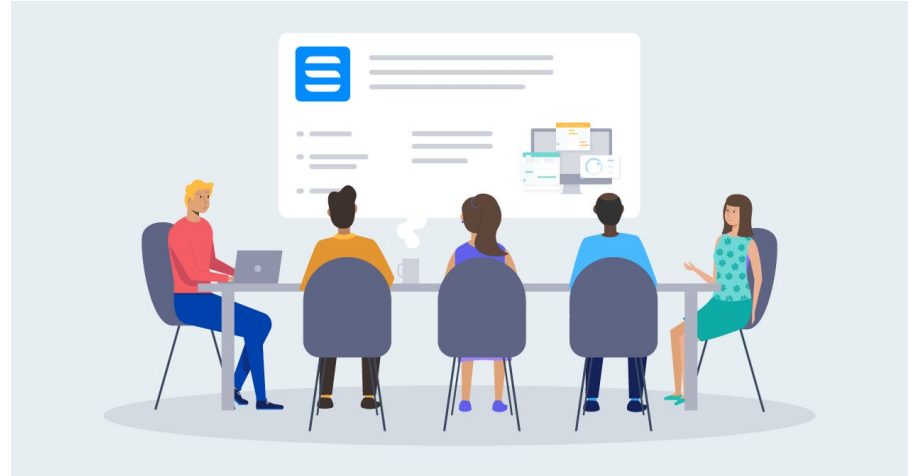
- Show Resources on the Timeline View
- More Job Details on Scheduler

The screenshot displays the Assignar Scheduler interface. The main view is a timeline for January 10, 2022, showing resource allocation for two projects: 'Highway Duplication - Katoomba to Medlow Bath' and 'Speer Construction Test Project'. The timeline is divided into time slots (F 09, S 10, S 11, M 12). Resources are assigned to tasks, with details such as laborer and excavator counts and names visible. A 'Resources' panel on the right lists available workers, including Adam Klug, Ben Thomas, Chris Peterson, Craig Gray, Sean McCreanor, Stacey Hannigan, and Trudy Jones. The interface also includes a sidebar with navigation options and a top navigation bar with the user name 'Hello, Sherlock Holmes' and an 'Add New' button.



Customer Advisory Panel: Scheduling

- We have lots of enhancements planned for scheduling and would love your feedback!
- Reach out to your Customer Success Manager if you are interested in participating



The background image shows a construction site with an excavator and a truck. The excavator is in the center, with its arm raised. The truck is on the left, and there are large piles of earth or rubble on the right. The entire image is overlaid with a semi-transparent blue filter. The text 'Q & A' is centered in the middle of the image.

Q & A