Written by John Reeve, Cohesive Information Solutions, Inc.
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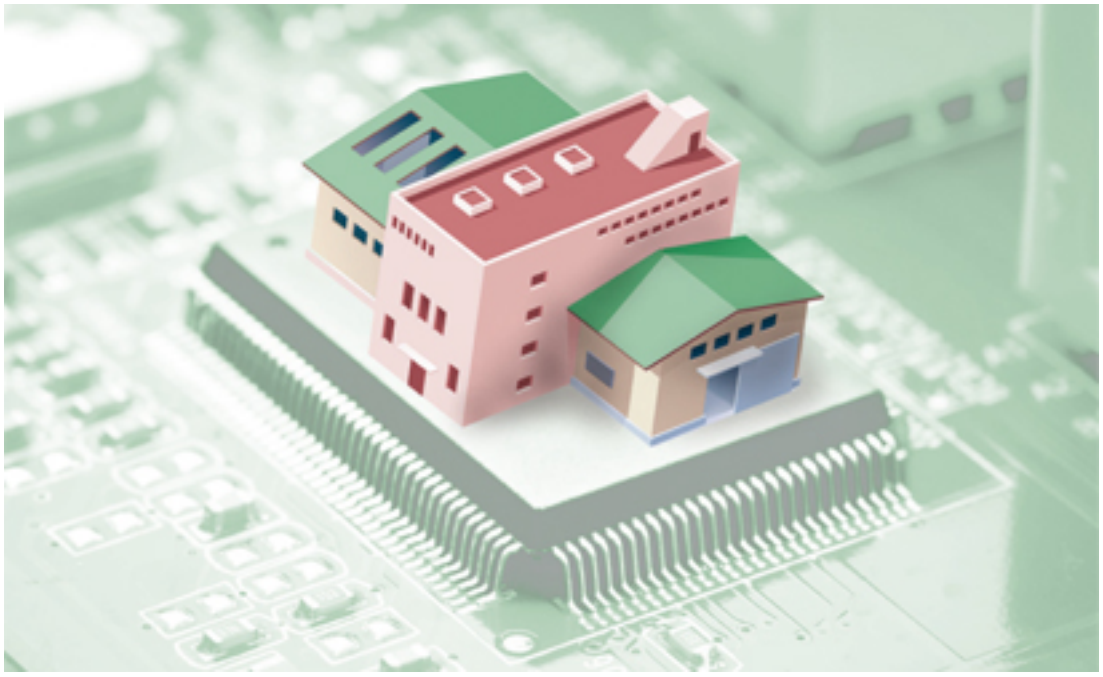


It's an area where the one-size-fits-all approach doesn't work.

Fig. 1. This whiteboard calendar from a countertop supplier's shop is representative of one of the most basic approaches to small-site scheduling. *(Source: Tops Solid Surface Co.)*Have you ever walked into a local business and noticed a big whiteboard mounted on a wall (Fig. 1) indicating what the employees are supposed to do and when? If so, you were looking at a classic example of "small-site scheduling." This concept could also be referred to as "call-center dispatching" (although that term is typically associated only with urgent or emergency work).

Small-site scheduling includes both routine and urgent work—*and involves key operational activities, as well as maintenance work.*
The goal is to provide a level of coordination into the near future and sometimes a week or more out. Does small-site scheduling software, in fact, exist within the CMMS community?

Many systems work beautifully for large, multi-craft organizations, but they may not offer an easy-to-use solution for mid- to small-size sites. Consequently, companies that might have spent many dollars on best-of-breed systems may still find themselves struggling to make the scheduling process work at their smaller sites.

CMMS systems commonly offer two approaches:

- Direct entry of schedule start dates on the maintenance work order (which is like driving in the dark): Could users be over-scheduling staff and not know it?
- Manipulation of logic-based bar charts: But does the user really need to create logic ties and see resource histograms to manage work at his/her small site?

The primary focus of small-site scheduling is what are we doing today, tomorrow and, perhaps, next week. The priorities are, therefore: 1) identify the task; 2) place it on a calendar; and 3) assign a crew. This must be done day-in and day-out without the luxury of job Planners or Schedulers. For those tasked with scheduling at small sites, is there a solution between planning-in-your-head and resource-intensive, computerized maintenance management systems, and, what should this design look like?

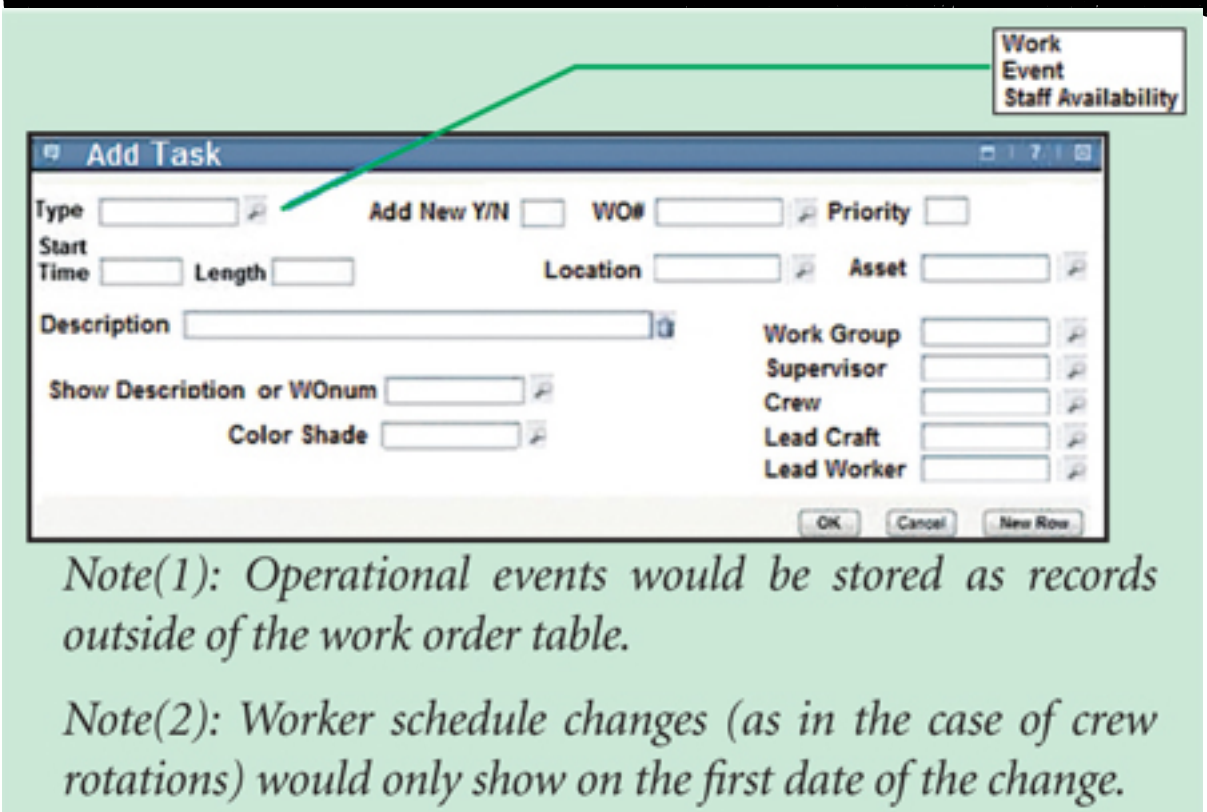
Steps in planning/scheduling

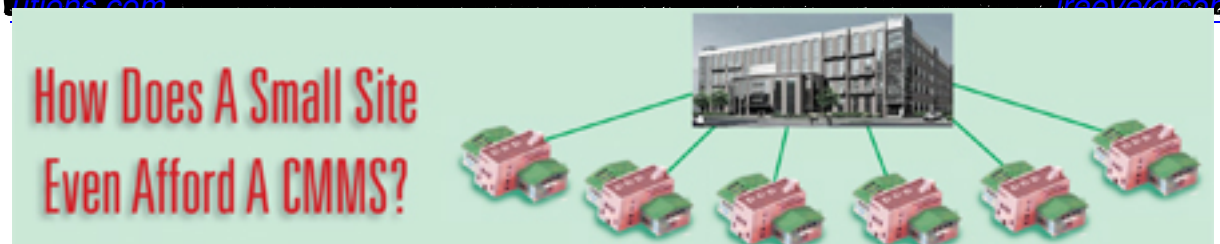
Table I below details the steps in a formal work-order process for a full-size—*i.e., substantial head-count* —Main tenance organization.

Table I. Formal Work-Order Process in a Full-Size Maintenance Organization

1	A work request needs to be created. Requestor identifies problem and asset/location.	**5-10 minutes (per WO)**
2	Work request is reviewed by management, prioritized and then given to Planning.	**5-10 minutes (all new)**
3	Planner position looks for duplicates and begins the Planning function (enters duration and applies craft estimate). Offsite material requests are processed as applicable. The Supervisor or Lead is assigned.	**15-30 minutes (per WO)**
4	Scheduler reviews crew availability for next week, checks open backlog and selects work for week.	**15-30 minutes (per WO)**
5	Scheduler takes proposed schedule to Weekly Schedule meeting for review and approval.	**45-60 minutes (all WOs)**
6	Supervisor prints scheduled work for next week and starts identifying who is to do what, on what day.	**30-60 minutes (all WOs)**
7	Daily plan is created night before. Crew is briefed at the start of day. Work is performed. Actuals are captured. Work order is closed.	**30-60 minutes (all WOs)**
		Total time: 2.5 hours minimum

July 2012


Work
Event
Staff Availability
Add Task
Type
Add New Y/N
WO#
Priority
Start Time
Length
Location
Asset
Description
Work Group
Supervisor
Crew
Lead Craft
Lead Worker
Show Description or WOnum
Color Shade
OK
Cancel
New Row
Note(1): Operational events would be stored as records outside of the work order table.
Note(2): Worker schedule changes (as in the case of crew rotations) would only show on the first date of the change.


How Does A Small Site
Even Afford A CMMS?