HOW TO USE PLANNING CALENDAR

The primary function of the Planning Calendar, incorporating Wet Rental, is to manage rental and operator bookings. The *Equipment Planning* screen has additional functionality for displaying equipment that is 'in transfer' and 'on service jobs'.

The **Equipment Management > Configuration > Skilled Persons** screen allows users to add technicians (including mechanics, operators, drivers) along with their roles and skills to the system.

The system can be configured so that only certain skills can be associated with a specific make and model from **Equipment Management > Configuration > Equipment Make/Model**. These are the skills required when operating equipment with this make and model.

The required site skills can be added to customer sites. There are two sets of required skills recorded under the customer site:

- Skills that require a site, these are the site induction type of skills.

- Skills that do not require a site, these are the specific skills that are needed to operate equipment on this site (an example would be the skill to drive a truck on rails for a rail site).

Availability Engine

In order for the Availability Engine to provide accurate and timely availability information to users, a comprehensive cache of availability data is stored in the Enterprise database. This cache is maintained automatically by SQL jobs which run on the database. These jobs are automatically installed and configured when Enterprise is deployed.

The full build is set to run once a day quarter past midnight.
A SQL agent is then set to process a queue that by default, will run every minute between 7:00 AM and 7:00 PM.

The number of messages processed every time the job runs is controlled by a system parameter: **Availability Engine Queue Processor Batch / Transaction Size**.

Software Version: 1802

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FILTERING CRITERIA FOR THE PLANNING CALENDAR

The purpose of the Planning Calendar is to show equipment and/or operator bookings from the current date plus 90 days. These bookings can take into consideration service jobs, rental contracts and equipment transfers (provided the system parameter **Include Equipment Transfers In Availability Checking** is enabled). There may be instances when rental contracts are created without an equipment code using only the make/model. The Planning Calendar can also be used to view such 'unallocated bookings'.

1. From the Menu, select **Rental > Planning Calendar**

The **Planning Start Date** will default to the current date. This can be changed, if required.

The Location **Level** and **Value** will default to the user's branch. This can be changed, if required.

2. In the *What To Show* grid, check all the relevant items that are to be displayed in the calendar

The system parameter **Use Quotes in Rental Contract** must be enabled by Baseplan so that the **Include Quotes** checkbox is activated. The ability to create a quote within the rental contract only applies in the *Rental Counter* screen, or generic *Equipment Rental* screen.

Selecting Operators in the *What To Show* grid will enable the *Operators* grid in the *Search Criteria* panel. If results displayed for the selected Location **Level** are not satisfactory, then the **Include All Locations** checkbox can be checked to view operator availability from all the locations. Checking **Include All Skills for Operators** will display results for all the operators associated with all the skills in the system. A required skill can be highlighted in the calendar by selecting a record from the **Highlight Skill** drop down list. If the availability of only a specific skill is to be viewed, it can selected from the **Skill** drop down list.

Checking Quick Create in the *What To Show* grid will allow users to select a customer/site and enter a rental number for creating a new booking (undelivered contract).

The frequency of the calendar refresh can be adjusted by checking the **Auto Refresh** checkbox. This will display a screen showing the date and time that the results were last refreshed and a progress bar denoting time till the next update. The refresh interval is in minutes - lower the interval, quicker is the refresh.

If the **Show Details** checkbox is unchecked, the calendar will display the equipment quantity available each day/hour. Clicking the '+' sign will display more details about the equipment in an expandable region.

Equipment Planning	Hire Availability	Service Availability	Thu 04 Oct	Fri 05 Oct	Sat 06 Oct	Sun 07 Oct	Mon 08 Oct	Tue 09 Oct	Wed 10 Oct	Thu 11 Oct	Fri 12 Oct	Sat 13 Oct	Sun 14 Oct	Mon 15 Oct	Tue 16 Oct	Wed 17 Oct	Thu 18 Oct	Fri 19 Oct	Sat 20 Oct	Sun 21 Oct	Mon 22 Oct	Tue 23 Oct	Wed 24 Oct	Thu 25 Oct	Fri 26 Oct
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Total Availability			1	1	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2

If the **Show Details** checkbox is checked, the calendar will display the equipment quantity available as below:

Equipment Planning	Hire Availability	Service Availability	Thu 04 Oct	Fri 05 Oct	Sat 06 Oct	Sun 07 Oct	Mon 08 Oct	Tue 09 Oct	Wed 10 Oct	Thu 11 Oct	Fri 12 Oct	Sat 13 Oct	Sun 14 Oct	Mon 15 Oct	Tue 16 Oct	Wed 17 Oct	Thu 18 Oct	Fri 19 Oct	Sat 20 Oct	Sun 21 Oct	Mon 22 Oct	Tue 23 Oct	Wed 24 Oct	Thu 25 Oct	Fri 26 Oct	Sat 27 Oct	Sun 28 Oct	Mon 29 Oct	Tue 30 Oct	Wed 31 Oct
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9999111	ON HIRE	OK																													
Total Availability			1	1	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2	2

Note: Checking **Show Details** only changes the display of serialised items. Bulk items will always show availability and hide bookings in an expandable region:

3. In the *How to Show* panel, select if equipment/operator availability is to be displayed **By Hour** or **By Day**.

If **By Hour** is selected, details can be viewed by increments of 1 hour. Selecting this option will activate a drop down list for selecting '15', '30' or '60' minute increments. Checking **Work Hours Only** will hide the day/time for 'out of hours'. This is based on the system parameter **Planning: Use the User Branch Opening and Closing Times**.

If **By Day** is selected, details will be displayed for each day from the **Planning Start Date** up till 90 days. Checking **Mark Weekends** will highlight weekends in the calendar after all the required criteria are entered and FILTER is clicked.

Checking **Availability Status** will display the **Rental Availability** and **Service Availability** columns in the results grid after all the required criteria are entered and FILTER is clicked.

4. In the *Equipment* grid, select the grouping for the results from the **Group By** drop down list

For example: Equipment Type

It is mandatory to select a value from the **Group By** drop down list.

5. Select the relevant equipment code from the **Equipment** drop down list

Either **Equipment**, **Type**, **Pricing Group**, **Model** or **Make** must have a value.

6. If equipment/operator availability is to be viewed for a particular contract, enter the **Rental No.** in the *Contract* grid

This can be used to check when an equipment item/operator is expected to be available.

Contracts for specific customers and sites can also be viewed by selecting the relevant records from the **Customer Code** and **Site** drop down lists, respectively

The **Site** drop down list is activated when the **Customer Code** field has a value.

7. Once all the required filtering criteria have been selected, click the FILTER button.

EQUIPMENT AND CALENDAR VIEW

Equipment Planning

Once the FILTER button is clicked, results will be displayed in the calendar grid. This grid will include the following columns:

- Equipment Planning – Displays the equipment items that meet the filtering criteria entered.

- Rental Availability – Displays the rental status of the equipment item, provided the Availability Status checkbox in the How To Show grid is checked.

For example: 'AVAILABLE'

- Service Availability – Displays the service status of the equipment item, provided the Availability Status checkbox in the How To Show grid is checked.

For example: 'OK'

- Date Range – Displays equipment quantity available at the selected location, by day/hour depending on the option selected in the *How To Show* grid.

Operator Planning

If **Operators** was checked in the *What To Show* grid, an additional grid will be displayed in the calendar with the following columns:

- Operator Planning – Displays the operators skilled for the equipment selected. Alternatively, all operators for the selected location will be displayed if **Include All Skills for Operators** is checked in the *Operators* grid when filtering. Hovering over a record in the **Operator Planning** column will display the skills associated with that operator.

- Date Range - Displays operator availability by day/hour depending on the option selected in the *How To Show* grid.

Operator Planning	Skill Availability	26 Sep 6:00	26 Sep 7:00	26 Sep 8:00	26 Sep 9:00	26 Sep 10:00	26 Sep 11:00	26 Sep 12:00	26 Sep 13:00	26 Sep 14:00	26 Sep 15:00	26 Sep 16:00	26 Sep 17:00	27 Sep 6:00	27 Sep 7:00	27 Sep 8:00	27 Sep 9:00	27 Sep 10:00	27 Sep 11:00	27 Sep 12:00	27 Sep 13:00	27 Sep 14:00	27 Sep 15:00	27 Sep 16:00	27 Sep 17:00
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This grid enables users to see the operator bookings, so that they can make a decision to allocate or swap operators. By default, only operators for the equipment filter at the top of the screen will be displayed. The grid will show operator bookings once they are allocated to the equipment.

The available number of internal operators (where **Supplier** is blank on the *Skilled Persons* screen) will be displayed.

The operators listed will have at least one skill from each group configured at make and model level (the make model will be used from the filter criteria at the top of the screen). If site is also added to the filter, then the operators will need to possess all the skills configured for the site as well as at least one skill from each group configured at make/model level.

Note: Expiry dates on skills will also be checked when performing the availability check for the operators.

Users will be able to drag an operator from the *Operator Planning* grid and drop it on the equipment line in the *Equipment Planning* grid to allocate.

Right clicking in the *Equipment Planning* grid and selecting **Show operators skilled for this contract** will only display operators with the appropriate skills for the site in the *Operator Planning* grid. This will also take the expiry dates of the skills into account for the proposed period. The grid will be filtered to match the skills required for the site of the contract selected. The grid label then changes to *Equipment Operators* instead of *Operator Planning*. To retrieve all selected operators, select **Show all operators** from the right click menu.

Right clicking in the *Equipment Planning* grid and selecting **Show operators skilled for this contract** will only display operators added to the rental contract. The grid label then changes to *Linked Operators* instead of *Operator Planning*. To retrieve all selected operators, select **Show all operators** from the right click menu.

For both the equipment and the operator, users can drag the end of the coloured bar that denotes the booking to another day to lengthen or shorten the period.

Printing Option

Clicking the PRINT button in the toolbar of the *Equipment Planning* screen allows the user to print a 'Daily Job Sheet' for all the operators, for the desired **Date** and **Start Time**.

NAVIGATING THE PLANNING CALENDAR

There are a number of 'right click', 'left click' and 'hover' options available on the *Equipment Planning* screen which are explained below:

ITEM	DESCRIPTION
Right click over the equipment code	Allows users to go to the *Equipment Ledger* screen for the selected equipment code. Users can then access the *Equipment Rental* or *Service Jobs* screens from the *Equipment Ledger* screen.
Right click in the Date field of any item to add to a contract or service job	Options available for selection are • Add to existing Rental Contract • Add to New Rental Contract • Add New Service Job
Hover over existing booking or rental	This will display the rental number, customer and site details.
Right click on an existing booking or rental	Six options will become available for selection: • View Rental Contract • Edit/View Booking (opens rate structure screen) • Item Adjustment • Add Note • Show operators for this contract • Show operators linked to the contract
Left click on the rental or booking	This will allow users to click the item and drag to a new start or expected termination date, the rate structure screen will open for editing. This can also be used for moving the entire booking to a new date.
Hover over an operator to view the skills	All skills associated with the operator will display.
Hover over an operator's existing booking or rental	This will display the rental number, customer and site details
Right click in the date field of any operator to add to a contract	Options available for selection are: • Add to existing Rental Contract • Add to New Rental Contract

ITEM	DESCRIPTION
Right click on the operator's booking	Four options will become available for selection • View Rental Contract • Edit/View Booking (opens rate structure screen) • Item Adjustment • Add Note
Left click to drag and drop Operator	Pick the operator and drag to the booking to allocate the operator to the booking.
Overlapping bookings	The can be identified by the lines across the dates that overlap.
Earlier bookings that are overdue	Bookings that have an expected termination date prior to the current date can be identified by a left pointing arrow.

PLANNING CALENDAR SETTINGS

<u>Save Settings</u>

The criteria selected in the *What To Show* and *How To Show* grids can be saved by selecting **Settings > Save Settings** from the toolbar of the *Equipment Planning* screen.

The saved criteria will automatically be selected when the *Equipment Planning* screen is accessed again.

<u>Palette</u>

Users can customise the calendar view by selecting **Settings > Palette** from the toolbar of the *Equipment Planning* screen.

The field besides each item is a drop down list of colours. Users can select the desired colour from the list and click SAVE. Clicking an item and then the DEFAULT button will make a selected colour a default for that depicting that item.

RENTAL CONTRACTS

Adding Operators to Rental Contracts

Operators can be added to rental contracts from the *Equipment Planning* or *Add Rental Item* screens.

Equipment items can be added to rental contracts with or without an equipment code.

Please refer to the 'How to Process Rental Contracts' guide for more information on creating contracts, adding rental details, processing delivery dockets and finishing contracts.

1. From the Menu, select **Rental > Equipment Rental**

2. Display the relevant rental contract

In this scenario, we assume that an equipment item has already been added to the contract.

3. Select **Actions > Add Details**

This will display the *Add Rental Item* screen.

4. In the *Item Type* panel, select **Operators**

5. Select the detail line that this operator must be allocated to, from the **Equipment Line** drop down list

The **Model** and **Make** fields will default depending on the equipment item selected.

6. Select the relevant **Operator Code**

If the equipment make/model or customer site has a required skill configured, then this drop down list will only display operators who have at least one skill from each group configured to operate the equipment.

It is also possible to select an operator without linking it to any equipment line. **For example:** The time an operator spends for onsite induction could be planned as a separate operator line without a link to equipment.

When selecting an **Operator Code**, the drop down list will also indicate if the skill associated with the operator has expired.

Note: In case of service jobs, technicians with the **Role** 'Mechanic' will be available for selection.

This field can be left blank if an operator is to be allocated at a later stage.

The **Start Date**, **Start Time, Exp. Term Date** and **Exp. Term Time** will default from the start date/time and the expected termination date/time of the selected equipment line.

Qty will default to '1' when an **Operator Code** is selected. This field is locked for editing.

Labour Cost will default to the cost configured on the *Skilled Persons* screen for this operator.

This field will be locked for editing.

Retail Rate will default to the cost configured on the *Skilled Persons* screen for this operator.

This cost can be changed, if required.

For sub-contracting operators, if supplier and rate are configured on the *Skilled Persons* screen then these will default in the **Supplier** and **Supplier Rate** fields respectively.

7.   Click SAVE at the bottom of the screen.

The system does not allow double bookings, i.e. users cannot add an operator to a detail line for a certain time if that operator is already booked for another detail line at that time.

Delivering Operator Detail Lines

Delivery indicates that the operator has started their job. Processing delivery dockets for operators allows the system to check operator availability before and after delivery.

Note: If the branch parameter **Default Complete Delivery** is enabled, detail lines will be delivered immediately after being added to the rental contract.

1.   From the Menu, select **Rental > Equipment Rental**

2.   Display the relevant rental contract

3.   Select **Actions > Add Delivery Docket**

4.   In the *Schedule Details* panel, select the operator detail line.

5.   Click OK

Info: "Delivery Docket added successfully."

6.   Click OK

The operator detail line will now have a **Delivery Status** of 'DEL REQ' on the *Equipment Rental* screen.

7.   Select **Actions > Delivery**

8.   In the *Schedule Details* panel, select the operator detail line.

9.   Click on the COMPLETE button

The operator detail line will now have a **Delivery Status** of 'DELIVERED' on the *Equipment Rental* screen.

Changing Dates on Rate Structure Screen

Details of the operator linked to an equipment item on a rental contract can be changed from the *Rate Structure* screen. Dates for the equipment linked to the operator can also be changed.

The *Rate Structure* screen is accessed by:

- Double clicking on the relevant detail line in the *Equipment Rental* screen or

- Right clicking a booking in the *Equipment Planning* (for changing equipment dates) or *Operator Planning* grid (for changing operator dates) of the *Equipment Planning* screen and selecting 'Edit/View Booking'.

1. On the *Rate Structure* screen, click EDIT in the toolbar

2. Change the required date / time

3. Click SAVE

On the *Equipment Planning* screen, users can change the date/time on the linked operator detail line by using the resize functionality on the *Equipment Planning* grid of the calendar. This is done by dragging the coloured bar that indicates booking to the desired day/hour. This will display the *Rate Structure* screen with the revised date/time. Clicking SAVE in the *Rate Structure* screen will then allow the user to make the same change to the linked operator detail line:

Info: "Changing the Start or Expected Termination Date/Time will also change these dates for the associated operator(s).

4. Click on Yes to change dates for the operator line(s) or click on No to not change dates on the operator line(s)"

If the user chooses not to change the date/time on the linked operator detail line, then the change will be applied to the equipment detail line only.

The same functionality applies when users change the date/time on the *Operator Planning* grid.

Dates on the unlinked operator lines can be changed from the *Rate Structure* screen after using the resize functionality on the Planning Calendar.

Adding Packages with Operators

When creating rental packages from **Rental > Configuration > Rental Packages**, equipment items that need to be rented with operators can be configured by checking the **With Operator** checkbox for the main item.

Please refer to the 'How to Use Rental Packages' guide for more information on creating packages.

When this package is added to a rental contract, a detail line for the operator also gets added.

The relevant operator can then be added using the same steps as described in the 'Adding Operators to Rental Contracts' section above.

Customers can be charged a special rate for the whole package. However, the operator detail line will not be billed on the contract and multi-line dockets will be used for billing operator hours.

Returning Operator Detail Lines

Return indicates that the operator has finished their job. If an operator detail line is linked to an equipment detail line, then returning the equipment item will also return the operator. Otherwise, the operator detail line can be returned before the equipment item.

1. From the Menu, select **Rental > Equipment Rental**

2. Display the relevant rental contract

3. Select **Actions > Return**

4. In the *Details* panel, select the operator detail line to be returned.

5. Click OK

Info: "Running this process will terminate and return all the selected items. Please confirm that the changes are correct. Continue?"

6. Click YES

The operator detail line will now have a **Delivery Status** of 'RETURNED' on the *Equipment Rental* screen.

This will not affect the totals as these are always billed via the multi-line dockets.

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