



Computer Methods (a division of Physio Systems, Inc)

4424 Technology Drive Fremont, CA 94538 (510) 824 0252 v (510) 824 0254 f

ActivitySuite.com Scheduling Tutorial

Overview

As part of our commitment to provide comprehensive, browser-based daily activity reporting and management tools, a scheduling component is included with ActivitySuite.com.

Schedules consist of a collection of work "shifts". For any of your Company sites, you define a template consisting of one or more work shifts. Week by week, you assign your personnel to the shifts. There are helpful toolbar icons to streamline the process such as copying schedules from previous weeks.

Once your personnel have been assigned for the week, you can generate master schedules to distribute to your staff or have users view their schedules online.

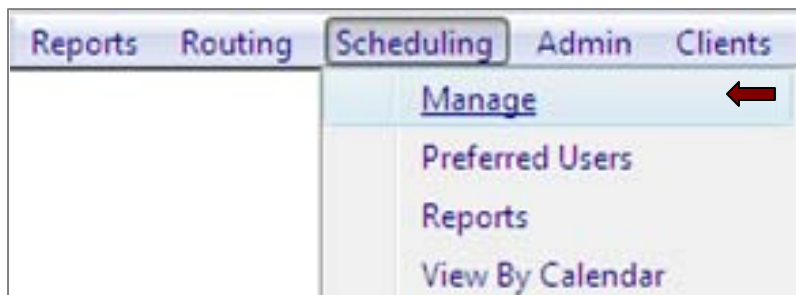
Getting Started

To begin this tutorial, it is assumed that you have completed the following;

- Created an account with **ActivitySuite**
- Created a site
- Added several users

It is recommended that you review the [Quick Start Tutorial](#) which presents a basic orientation to using **ActivitySuite** and provides a good foundation for the steps outlined below.

Creating Work Shifts



Log into *ActivitySuite* and choose **Scheduling > Manage** from the menu.

Menu Item for Managing Shifts



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Week of:	Location:	Copy From:	Clone Week of:
9/19/2010	L-001: Grimmer Busin	Week of 09/12	9/12/2010

L-001: Grimmer Business Center (Sep 19 to Sep 25)																								
	0000	0100	0200	0300	0400	0500	0600	0700	0800	0900	1000	1100	1200	1300	1400	1500	1600	1700	1800	1900	2000	2100	2200	2300
Sun 09/19																								
Mon 09/20																								
Tue 09/21																								
Wed 09/22																								
Thu 09/23																								
Fri 09/24																								
Sat 09/25																								

Schedule Management Screen

The first step to create a schedule is to define one or more work *shifts*. In this example, we will define a shift from 8:00 am to 4:00 pm Monday through Friday. Select a location and then click the **Add Shift** button.

Type in a description. Select a color to graphically represent the shift. Check the day(s) the shift will be worked at the site. Select the start time and duration, then click the **Add** button.

Tip: You can also define patrols and track site hits by checking the "Requires Hits" option. For this tutorial, make sure this option is not checked.

Add Shift to Schedule

Shift Description: Requires Hits

Shift Color:

Day(s) of Week: [Check](#) [Uncheck](#)
 Su Mo Tu We Th Fr Sa

Start: Length: Weapon Required

Popup screen to Define a Work Shift



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	0000	0100	0200	0300	0400	0500	0600	0700	0800	0900	1000	1100	1200	1300	1400	1500	1600	1700	1800	1900	2000	2100	2200	2300
Sun 09/19																								
Mon 09/20																								
Tue 09/21																								
Wed 09/22																								
Thu 09/23																								
Fri 09/24																								
Sat 09/25																								

Work shifts defined for 8:00am to 4:00pm Monday through Friday

The next step in the scheduling process is to assign personnel to the work shift. Click the **Assign** button in any of the work shift cells.

Assign Personnel

(Unassigned)

hpotter

mnm6102

pwalker

cgabel

dlieberman

jdietch


physiosystemssecurity

plieberman

rseward

Day(s) of Week: [Check](#) [Uncheck](#)

Su Mo Tu We Th Fr Sa



Select the name of the person to be assigned to the shift. Check the boxes for all days of the week. Then click the **Assign** button.

Tip: When assigning personnel to shifts, you can apply the settings to one or more days by checking the Day(s) of Week boxes.



Tip: Clicking the "Check" or "Uncheck" links will check or uncheck all boxes respectively.

Popup screen to Assign Personnel





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Week of: 9/19/2010		Location: L-001: Grimmer Busin		Copy From: Week of 09/12		Clone Week of: 9/12/2010																		
L-001: Grimmer Business Center (Sep 19 to Sep 25)																								
	0000	0100	0200	0300	0400	0500	0600	0700	0800	0900	1000	1100	1200	1300	1400	1500	1600	1700	1800	1900	2000	2100	2200	2300
Sun 09/19												hpotter	X											
Mon 09/20												hpotter	X											
Tue 09/21												hpotter	X											
Wed 09/22												hpotter	X											
Thu 09/23												hpotter	X											
Fri 09/24												hpotter	X											
Sat 09/25												hpotter	X											

Personnel Assigned to Shifts

There are several ways to view schedules. Master schedules can be viewed by *personnel* or by *location* by clicking on the icons in the upper-right hand corner of the screen.

		PHYSIO SECURITY INC.							
hpotter								9/19/2010 - 9/25/2010	
Location	Sunday 9/19	Monday 9/20	Tuesday 9/21	Wednesday 9/22	Thursday 9/23	Friday 9/24	Saturday 9/25		
L-001: Grimmer Business Center	Morning 0800 - 1600	Morning 0800 - 1600	Morning 0800 - 1600	Morning 0800 - 1600	Morning 0800 - 1600	Morning 0800 - 1600	Morning 0800 - 1600		

Schedules Viewed By Personnel

		PHYSIO SECURITY INC.							
L-001: Grimmer Business Center								9/19/2010 - 9/25/2010	
Shift	Hrs	Sunday 9/19	Monday 9/20	Tuesday 9/21	Wednesday 9/22	Thursday 9/23	Friday 9/24	Saturday 9/25	
Morning 0800 - 1600	8	hpotter	hpotter	hpotter	hpotter	hpotter	hpotter	hpotter	

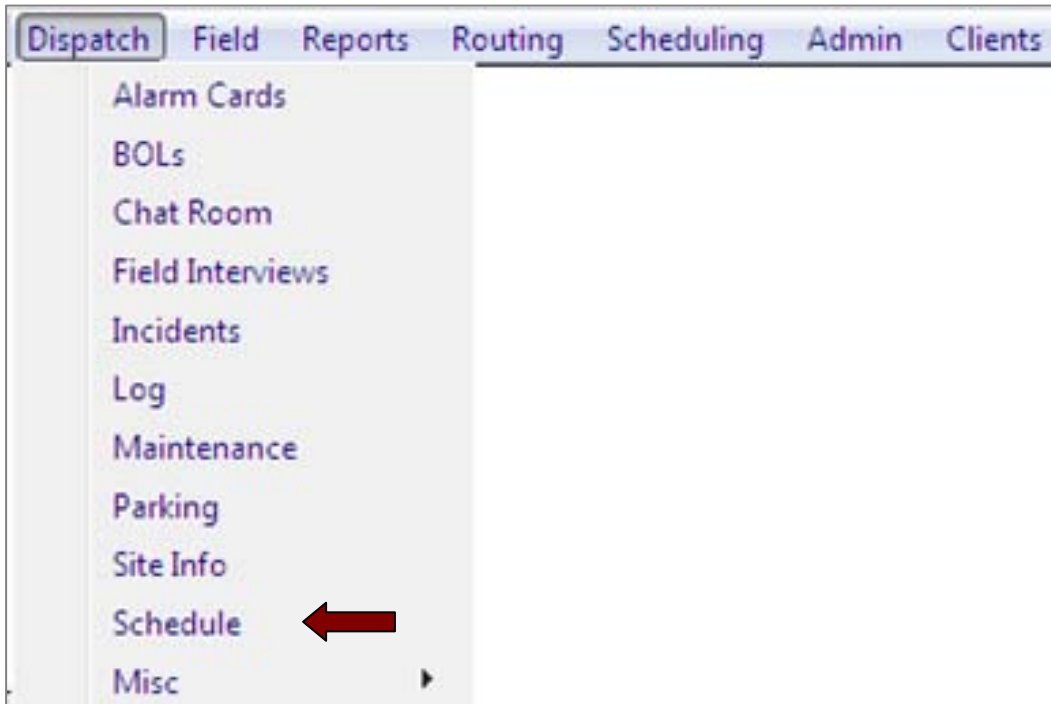
Schedules Viewed By Location



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Schedules can also be viewed on a calendar. Each user can view his or her individual schedule by selecting the **Schedule** menu item on the **Dispatch** or **Field** menu.



Menu Item to View Schedule

August		September 2010					October
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
29	30	31	1	2	3	4	
5	6	7	8	9	10	11	
12	13	14	15	16	17	18	
19 Grimmer Business Center Morning 0800 - 1600	20 Grimmer Business Center Morning 0800 - 1600	21 Grimmer Business Center Morning 0800 - 1600	22 Grimmer Business Center Morning 0800 - 1600	23 Grimmer Business Center Morning 0800 - 1600	24 Grimmer Business Center Morning 0800 - 1600	25 Grimmer Business Center Morning 0800 - 1600	
26	27	28	29	30	1	2	
3	4	5	6	7	8	9	

Schedule Viewed By Calendar