IBM Maximo Asset Management V7.1

Creating a new work shift with the calendars application

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In this training module for Maximo® Asset Management V7.1, you learn how to create a new calendar for a weekly night work shift.

Objectives

- When you complete this module, you can perform these tasks:
- Create a new calendar record for a weekly work shift
- Define a work shift with repeating patterns
- Apply a work shift's scheduled start time, end time, and work hours
- Designate non-working time such as vacation, sick, and personal time
- View and modify work periods for calendars
- Associate a calendar with a labor record to identify both work hours and non-work hours

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When you have completed this module, you can accomplish these tasks:

- Create a new calendar to associate with Maximo records

- Define shifts with repeating patterns

- Apply a shift with a date range

- Designate non-working time

- View and modify work periods

- Associate the calendar with labor records

The relationships between calendars, shifts, and work periods

- The calendars application is used to establish calendar records
  - Indicate working time over a given date range
  - Indicate non-working over a given date range
- Shifts define working time not specific to dates
  - Can apply defined shifts to calendars
  - Can apply calendars to objects to specify working time
  - Multiple shifts can be contained within a calendar
- Work periods map single shift definitions to specific dates
- Work periods are created when applying shifts to calendars

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Use the Calendars application to establish calendar records to indicate working time and non-working time for equipment, craft, and labor records for the given date range.

A shift defines working time that is not specific to a date. Once a shift is defined, you can apply it to a calendar.

You can then apply the calendar to person, location, asset, and other records to specify working time. The calendar can have multiple shifts such as day and night shifts.

Similarly, you can designate non-working time such as vacation, sick, personal, holiday or other. You can also use calendars to specify things like the time that equipment is operational.

A work period is a period that maps a single shift definition to a specific date. Work periods get created when you apply a shift to a calendar.

Opening the calendars application

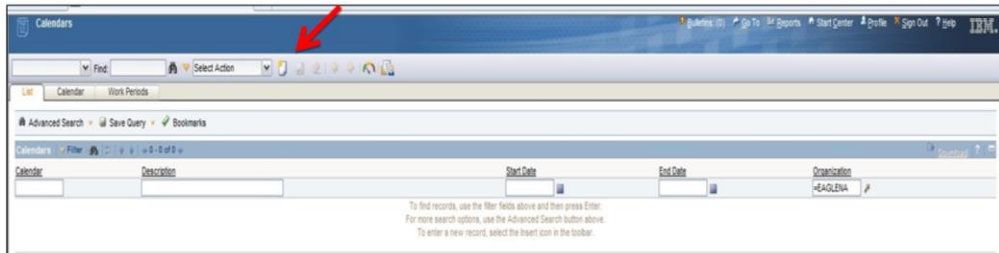Click **Go To** > **Administration** > **Calendars**
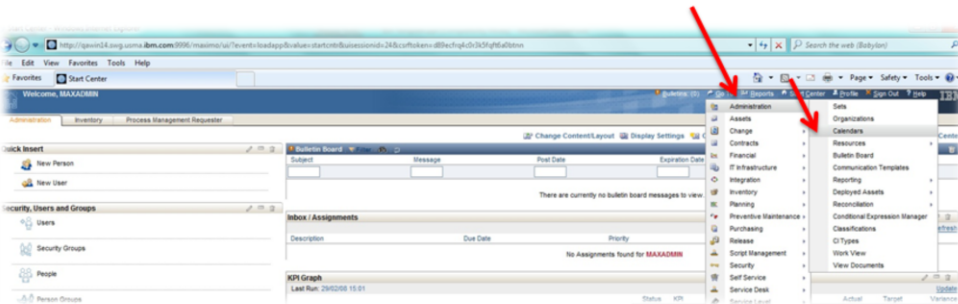
To start creation of a new calendar, click **Go To**. Next, click **Administration,** and then click **Calendars**.

Now you see the Calendars application window. In the Calendars application, click the **New Calendar** icon.

Entering new calendar name, start time, and end time information

- For the new Calendar enter **Calendar Name**, **Start Date** and **End Date**
- Save the calendar record

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Click to open the **Calendar** tab. Type a name for the calendar in the **Calendar** field. Entering a description is optional. However, it is beneficial.

Specify the dates on which you want the calendar to start and end using the designated text boxes. Next, save the record.

Starting to define and apply a shift in calendars

From the Select Action menu, click **Define/Apply Shifts**

To begin defining and applying a shift, click **Select Action**, and then click **Define/Apply Shifts**.

Creating a new shift

Click **New Row** to insert a new shift
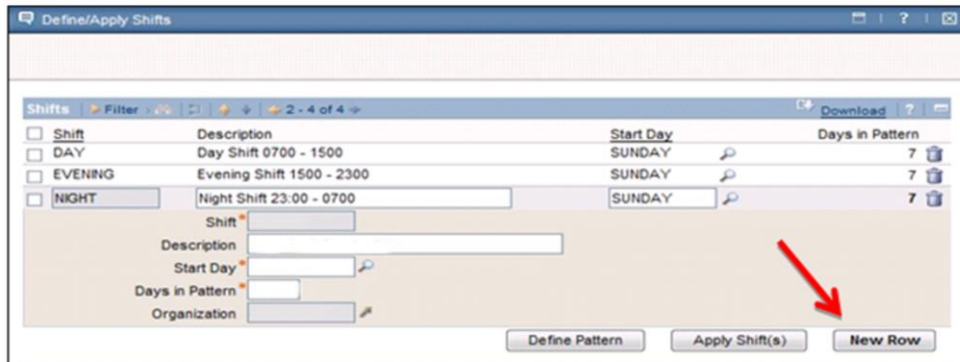
In the Define/Apply Shifts application, there is a Shifts table. In the Shifts table window, click the **New Row** button to begin creation of a new work shift.

Creating a work shift definition

- Put a check mark next to the shift type you want to create with a description of the shift
- Fill in the **Shift Name**, **Description**, **Start Day**, and **Days in Pattern**
- Click **Define Pattern** and click **OK**
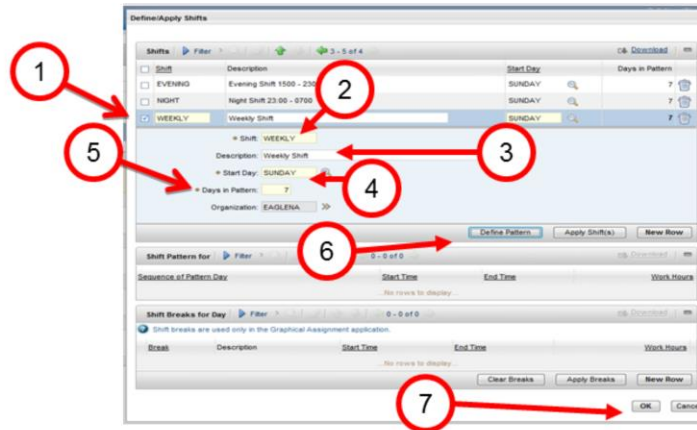
In this example, a new weekly work shift is created. Put a check mark next to the **Weekly** check box. Type a name for the shift. **Weekly** is entered here in the example's **Shift** text box.

Entering a description is optional. Notice that there is no asterisk beside the **Description** field. However, adding a description of the new shift is beneficial. In the example here, **Weekly Shift** is entered.

Specify the day on which the shift begins in the **Start Day** text box. Next, fill in the **Days in Pattern** text box with the number of days for the new shift. Review the configuration and click **OK**.

Defining shift pattern start time, end time, and work hours

- Enter **Start Time, End Time,** and **Work Hours** for each day in the pattern
- Change what is shown to **2300** for **Start Time** and **0700** for **End Time** for each day

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After you create a shift, you can specify a shift pattern using the **Define Pattern** action to create shift patterns.

Fill in the **Start Time** with the time the shift begins on a given day. Do the same for the shift **End Time**.

In this example, you create a weekly seven-day work shift with these parameters:

- Working days are Monday through Sunday

- Work starts at 23:00 and ends at 07:00

- Work hours for the day total nine, which gets calculated and entered automatically based on the start and end time …

Review and click **OK** when finished.

Now that a pattern has been defined, select the shift you created in the previous step and click the **Apply Shift** button. This opens the **Apply Shift with Range** window, where you can specify the range of dates over which you want to apply the shift. You can apply the shift to either the entire period defined for the calendar or for a shorter period. Click **OK**.

This takes you back to the previous dialog window. Click **OK** again to go back to the Calendars application screen. The Calendar is now populated with all the work hours based on the defined shift.
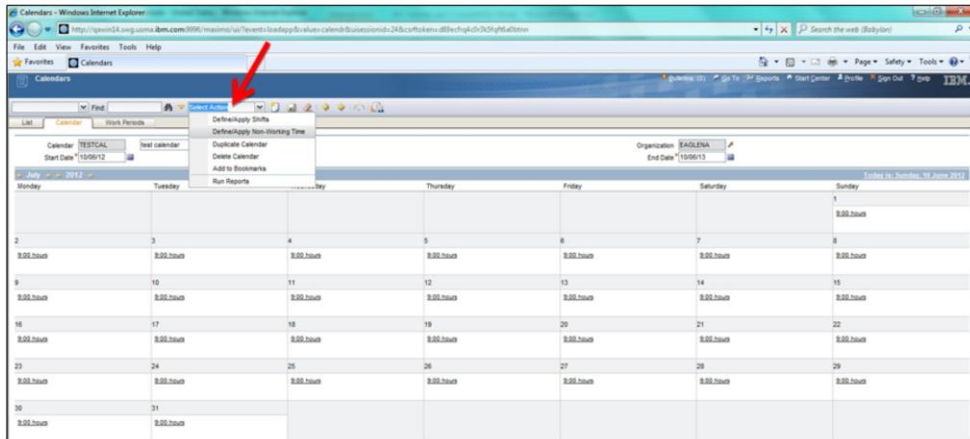
From the Select Action menu, select **Define/Apply Non-Working Time**

A non-working time is a time when labor is not at work. To define a non-working time, you go to the **Select Action** menu**.** Select **Define/Apply Non-Working Time**.

Defining a non-work time (2 of 2)

To define a non-work time, perform these tasks:

- On the Define/Apply Non-Working screen, click **New Row**
- Enter **Description**, **Start Date**, **End Date**, and **Type**
- Select the check box next to the record you just created and click the **Apply** button
- Click **OK**
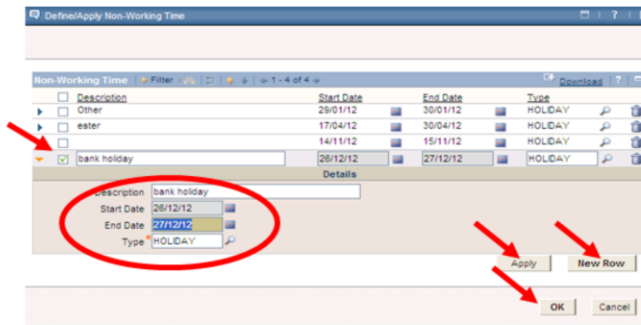
Click the **New Row** button. Next, enter a Description, Start Date, End Date, and Type in the appropriate fields. In the example, you see that description bank holiday is duplicated. The **Type** field is filled with HOLIDAY. Review the start and end date you configured for the holiday. If all is correct, then select the check box and click the **Apply** button. Click **OK**.

Working with periods

- To add a new work period, click the **New Row** button and enter **Work date**, **Shift name**, **Start Time** and **End time** for the shift

- To modify the **Start Time** and **End Time** of the shift, click inside the **Start /End Time** field and change the **Time**

- To delete a work period, click the **Trash Can** icon on the right and click the **Save** button
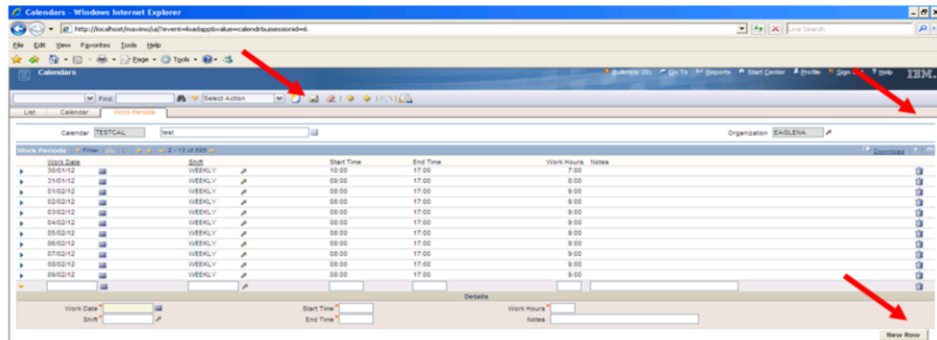
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You can use the **Work Periods** tab to view, add, modify the Start Time and End Time of the Shift. You can also use it to delete work periods from a calendar.

Opening the labor application

On the **Go To** menu, click **Administration** > **Resources** > **Labor**

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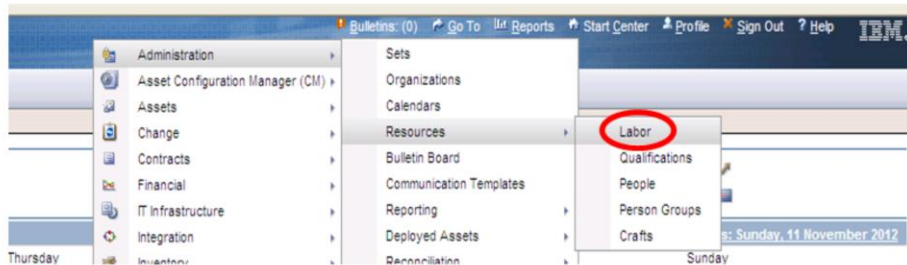
You now associate the calendar with a labor record. Open the Labor application. From the **Go To** menu, click **Administration > Resources > Labor**.

Searching for labor records

- Click the **List** tab in the Labor application:
- Enter a value in the Labor text box
- Begin the labor record search
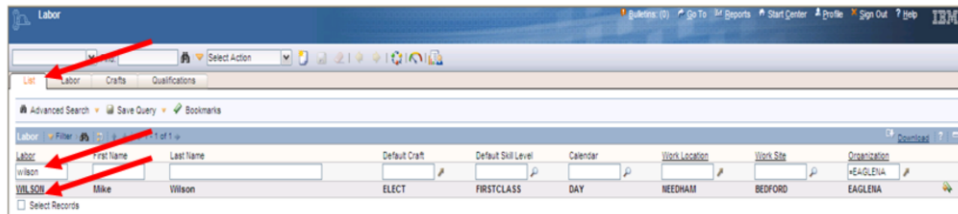
Enter the name of the labor record by typing the name into the labor field. In this example, type **Wilson** and press the Enter key. This initiates the record search. Double-click the link for the Wilson labor record. Next, the **Labor** tab opens, revealing the Wilson labor record.

Associating the calendar with a labor record

- Click the Select Value icon to select the applicable calendar or type in the calendar name in the Calendar field
- Use the same method to add the shift for the calendar
- Save the record
- Use the same method to apply non-working time to the Labor application

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Click the **Search** icon located to the right of the **Calendar** field. Either select the applicable calendar from the value list, or type the calendar name. Use the same method to add the shift for the calendar. Specifying calendar and shift to a Labor can help you schedule, assign, and dispatch work to labor records whose calendar shows that they are available.

Now that you have completed this module, you can accomplish these tasks:

- Create a new calendar record for a weekly work shift

- Define a work shift with repeating patterns

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- Designate non-working time such as vacation, sick, and personal time

- View and modify work periods for calendars

- Associate a calendar with a labor record to identify both work hours and non-work hours