Resource Calendar

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Pathway: *Operations > Resource Scheduling > Resource Calendar*

The Resource Calendar offers a comprehensive overview of worker availability, route statuses, and availability conflicts across all routes. It provides valuable information regarding worker capability and allows users to edit route records. Additionally, users can access the Worker Calendar to add availability exceptions when necessary. The data displayed in the Resource Calendar is sourced from Worker Availability and Capability, Worker Calendar, and Dispatch tools. Before using this tool, please review important setup requirements outlined in the Logic section below.

Logic

Permissions

1. Permission 440 (Resource Scheduling) is required to view and edit the Resource Calendar screen.
2. Workers must be assigned ONE of the following permissions to display on the Resource Calendar screen:
   - Driver = permission 305
   - Helper = permission 328
   - Crew Member / Laborer / Technician = permission 313

⚠️ Only assign the permission that best applies to the worker's role to their user account. Assigning all permissions will affect filtering functionality for the 'Work Assignment Type' filter.

Prerequisites

- Worker Availability must be added in Worker Availability and Capability for each worker.

Filters

Use any of the filtering options provided to limit what displays on the screen. Filters apply to both the Worker grid and Truck grid.

Filter	Description
Worker Assignment Type	Use the *Work Assignment Type* filter to filter the screen to a specific worker type. Options include: • Driver • Helper • Technician • Truck (Future release) 🔔 Correct permission setup for workers is critical for filter functionality. Refer to the Logic section above for additional information.
Division	Filters to only display workers of the selected Division.
Line Of Business	Filters to only display workers of the selected Line of Business.
Week	Provides the ability to navigate and view past and future weeks. By default, the current week is displayed.

Understanding the Worker Grid

The Worker grid on the Resource Calendar screen does not load until filter selections have been made and the Refresh icon is selected.

Item	Description
Worker	Workers display vertically along the left side of the screen along with their worker assignment and their servicing capabilities. Availability is columned by day of week beginning with Sunday and ending with Saturday.
Access the Worker Calendar	Select the worker's name to open the Worker Calendar. Add an Availability Exception by right-clicking on the day the exception applies and selecting 'Add Availability Exception.'
Available vs Not Available	Worker availability is indicated using white and gray cell colors. Days a worker is available display white and include the time frame the worker is available to be scheduled within. Cells for days a worker is not available display gray.
Route Information	Route information displays for the worker on the day the route is scheduled. A red exclamation mark displays by the route if the route is assigned to a worker on a day they are not available or have an availability exception. Select the route to open the Edit Route Record and assign the route to another available resource.

Item	Description
Color Legend	**Cells** **Red** - indicates the worker has an availability exception (sick, vacation, etc.) for a day they are considered available. Any assignments that day must be re-assigned to a new resource. **White** - indicates the worker is available to be scheduled for that day. **Gray** - indicates the worker is not available to be scheduled for that day. **Routes** **Blue** - indicates the route is Scheduled. **Yellow** - indicates the route is In Progress. **Green** - indicates the route is Serviced.
Re-assign Drivers and Helpers	Click the route to open the 'Edit Route Record' popup editor to reassign resources. Save when finished.
Worker Availability Exceptions	- Edit an **Existing** Exception: - Select the exception for the worker to open the 'Edit Worker Availability Exceptions' popup editor - Create a **New** Exception: - Right-click within the calendar and select 'Add Availability Exception'.