

CleanOpsStaff-3ed-ProScheduler and DayScheduler Help

Updated 11/23/2012

(Recommend you print this file)

NEWS – CleanOpsStaff-3ed Training Resource Center under development. *CleanOpsStaff-3ed* featuring **ProScheduler** with **ProBalancer** has evolved into a very powerful and feature rich application offering great potential for cleaning organizations to significantly improve the efficiency of their operation and reduce cost. To help users become proficient in using this and other powerful features, **Hunter Consulting and Training** will be establishing a web based [CleanOpsStaff-3ed Training Resource Center](http://www.hunterconsulttrain.com/3edtrainingresourcecenter) where you can go to increase your **CleanOpsStaff-3ed** Skills. The initial focus will be on **ProScheduler** with **ProBalancer** and will expand to cover other topics based on user feedback. We will begin offering this service for free, but will likely have to evolve it to some type of fee based arrangement or tie it to Tech Support agreement to sustain it for the long run. See <http://www.hunterconsulttrain.com/3edtrainingresourcecenter>.

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CleanOpsStaff-3ed-ProScheduler Concept:

CleanOpsStaff-3ed-ProScheduler is an upgrade that optimally assigns the day of the week to perform routine cleaning activities and then allow you to schedule project activities in a way that balance the work assigned for all days of the week. It allows you to create a stable **weekly schedule** for your routine activities and to assign project work to the weeks of the month, based on staffing availability and the **least loaded day**. **CleanOpsStaff-3ed-ProScheduler** uses a **Dynamic Least/Most Loaded Day** protocol to assign day of week to cleaning activities. It assigns **Monday through Friday (M-F)** to activities to be cleaned **Daily (D)**. It computes a running Least **Loaded Day** and **Most Loaded Day** for assigning day of week to routine activities to be cleaned **Weekly (W)**. It also computes a running **Least Loaded Two-Day Pair** and the **Most Loaded Two-Day** pair to optimally assigned activities to be performed **Twice Per Week (TW)**. For activities to be performed three times per week, it assigns Monday, Wednesday and Friday (**MoWeFr**).

After the routine activities have been automatically scheduled for the week, you can easily automatically assign project work while automatically staying within a **Maximum Custodians per Day** number that you set based on your staffing availability. You can then manually adjust the automatically generated weekly schedule with use of the Least **Loaded Day information**, which is constantly updated as you assign work to the days. **CleanOpsStaff-3ed-ProScheduler** uses the **Time to Cleaning Report** as a starting point. **CleanOpsStaff-3ed-ProScheduler** adds a scheduler setup to the **Time to Clean Report** to provide space to record the required frequency based on the selected cleaning level and to record the assigned day to clean and then it computes the time required for the days.

You can automatically schedule the **entire worksheet** or a **range of cells**, or an **entire category** at a time or a **room** at a time depending on what you select within the macro staffing and inventory worksheet. You can automatically schedule base on just the **activity frequencies** only or you can schedule based on **both the activity frequency and the activities names**.

IMPORTANT NOTE: The **Dynamic Least/Most Loaded Day** protocol involves many recursive calculations and can take some time when applied to large numbers of spaces. While you can apply

CleanOpsStaff-3ed-ProScheduler to your entire inventory at once, it would take a good deal of time and might not be the best way to use the tool. **It is not recommended that you apply ProScheduler to your entire inventory at once.** You will achieve better results if you apply **CleanOpsStaff-3ed-ProScheduler** to only a single building or several buildings at a time such as all building cleaned by a specific crew.

CleanOpsStaff-3ed-ProScheduler Concept and General Steps

1. While in the Macro Staffing and Inventory worksheet, select the spaces, which you want to create weekly schedules for.
2. To launch the **CleanOpsStaff-3ed-ProScheduler** interface (a) click **Reports** in the **MiniToolbox**; (b) then click **ProScheduler** in the **Report Generator Toolbox**
3. After the **Time to Clean Report** is generated, click **Setup ProScheduler (Start Here)** in the **ProScheduler** Interface.
4. Confirm that all **routine** frequencies checkboxes are checked in the yellow **Frequencies To Include** box in **Auto-Scheduling** panel on the right of the interface.
5. Enter the maximum number of custodian per day in the **Max Cust** box or accept the default, which comes from the **Macro Staffing and Inventory** worksheet.
6. Use the **Auto-Schedule All Checked Frequencies in the Worksheet** button to schedule all Routine Activities to create a standard weekly schedule for routine activities.
7. Use the manual schedule features to refine the standard weekly schedule of routine activities to balance the days of the week if necessary.
8. Save the standard weekly schedule as **Standard Weekly Schedule**
9. Determine the number of custodians you have available and enter the maximum number of custodian per day in the **Max Cust** box.
10. Load the **Standard Weekly Schedule** and Save As **Week 1 Schedule**
11. Uncheck all the Routine Activities in the **Frequencies To Include panel** since they are already assigned days from the **Standard Weekly Schedule**.
12. Use the **Auto-Schedule All Checked Frequencies in the Worksheet** button to schedule as many monthly project activities as allowed by the **Max Cust** constraint.
ProScheduler will warn you when your automatic scheduling attempts to exceed the Max Cust number by turning the background red for the progress message box, the Max Cust box, the Least Loaded Day and the Most Loaded Day.
13. If you have not exceed the **Max Cust** number after scheduling all the Monthly frequencies, then un-check all the **Monthly frequencies checkboxes** and schedule as many quarterly activities as possible, then schedule as many **Simi-Annual** activities as possible and so on until you reach the **Max Cust** limit and so on.....
14. When you reach the **Max Cust** number limit, save the **Week 1 Schedule**. You may print the Week 1 schedule to help you keep track of which project activities have been scheduled. You can choose not to print the schedule and rely on the **Mark as Scheduled feature**, which marks the activities already, scheduled to prevent you from double scheduling activities. See **Mark as Scheduled** feature later in this user manual.
15. To create the second week schedule, load **Week 1 Schedule** and immediately **Save As Week 2 Schedule**. To mark the project activities that were scheduled in a previous week, use the **Mark Scheduled** button just before you start scheduling project activities for this current week. This will prevent you from double scheduling and eliminate the need for you manually keep track of already scheduled project activities.
16. Click the **Month** and **Week** in the **Week of Scheduled Activities** tool to indicate when the activities were previously scheduled. In other words, if **Week 1 Schedule** will be performed in the first week of January then click **Jan** and click **Week 1** to mark the project activities that you already scheduled to be performed in **Week 1**.
17. Save the **Week 2 Schedule** again to capture the marked previously scheduled project

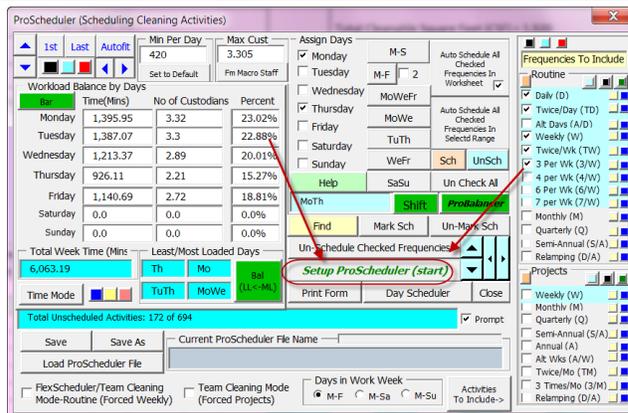
activities

18. Repeat steps 9 through 17 until you have completed a month of weekly schedules name them **Week 3 Schedule**; and **Week 4 Schedule** or as many weekly schedules as you wish up to **Week 52 Schedule**.
 - a. **Note that each time you enter a new period you must use the *Un-Mark Scheduled* button to unmark the activities for that period so that they will be performed again. For example; each time you begin a weekly schedule for a new month; you must Un-Mark all the monthly activities so they will be performed again. If the Max Cust is exceed when you Un-Mark activities, then you must also un-schedule the monthly activities and then re-schedule as many as you can without exceeding Max Cust. This same concept applies to the other periods as well such as when you start a new quarter, and when you need to repeat semiannual activities and so on.**
19. You may repeat all the above steps for as many months and weeks as you wish trying to keep the **routine schedule unchanged** while capturing all the project work for the period for which they are prescribed. You must keep track of the Project Activities you schedule for each month. Again, you can print the schedules on legal or oversized paper to help you keep track of which project activities you have scheduled and in which week you scheduled them and/or you can rely on the **“Mark Scheduled”** feature.
20. Note that you can use the **Un-Mark Scheduled** button to unmark activities that you previously marked as already scheduled. This feature can help you re-use schedules created for previous weeks for scheduling future weeks.

CleanOpsStaff-3ed-ProScheduler Interface

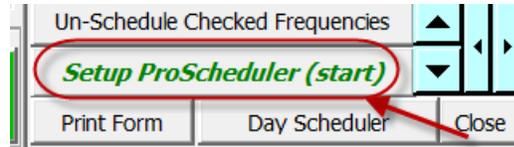
To launch the **CleanOpsStaff-3ed-ProScheduler** interface do the following:

1. Ensure you have a space inventory file open In Macro Staffing and Inventory worksheet. Select all or some of the records. Click **Reports** button in the **MiniToolbox**.
2. From the **Report Generator Toolbox** click the **ProScheduler** button
3. This will launch the **CleanOpsStaff-3ed-ProScheduler Left Panel** as shown in the below screenshot and the **Time to Clean Report** will be automatically generated and become the weekly schedule worksheet.



Set Up The ProScheduler Within The Time to Clean Report

1. Click the **Setup ProScheduler** button to add the frequencies to the **Time to Clean Report**
2. This will take a few moments.
3. **NOTE:** You may have used the **Standard Space Categories Matrices** button in the Main menu to adjust some of the standard category matrices to meet your local conditions. For those activities that you **excluded** in the Standard Category Matrices the frequency will be denoted in **ProScheduler** as “[Ex]” and for those activities that you changed to “Never” in the Standard Category Matrices, the frequency will be denoted as “[N].” For those activities that are blank in the APPA Guidelines book, the frequency will be denoted as “[].” These three frequencies will always be skipped when you use any auto-scheduling feature (**Auto-Schedule All Checked Frequencies In The Worksheet** button or **Auto-Schedule All Checked Frequencies In Selected Range** button). However, you can force these any frequencies to be scheduled manually by selecting a day or days from the **Assign Days** panel and clicking the **Sch** button.



CSF	Level	Spot clean walls doors	Relamp	Clean Chalkboards Trays	Dust flat surface	Empty waste containers	Empty pencil sharpeners	Var...
		7.8	7.82	8.4	11	1.4	1.2	4;
		0.13	0.13	0.14	0.18	0.02	0.02	
00	Level 1	1.3 [D]	1.3 [D/A]	1.4 [D]	1.83 [D]	0.23 [D]	0.2 [Ex]	
00	Level 2	1.3 [W]	1.3 [D/A]	1.4 [D]	1.83 [W]	0.23 [D]	0.2 [Ex]	
00	Level C2	1.3 [W]	1.3 [D/A]	1.4 [N]	1.83 [W]	0.23 [D]	0.2 [Ex]	
00	Level 3	1.3 [M]	1.3 [D/A]	1.4 [D]	1.83 [W]	0.23 [D]	0.2 [Ex]	
00	Level 4	1.3 [S/A]	1.3 [D/A]	1.4 [A/D]	1.83 [M]	0.23 [A/D]	0.2 [Ex]	
00	Level 5	1.8 []	1.3 [D/A]	1.4 [A/D]	1.83 []	0.23 [A/D]	0.2 []	
		0.00	0.00	0.00	0.00	0.00	0.00	0.00

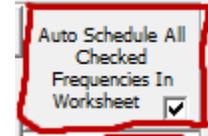
4. The two screenshots below show the Time to Clean Report before and after the frequencies are applied.

Seq	Building	Floor	Room	CSF	Level	Spot clean walls doors	Relamp	Clean Chalkboards Trays	Dust flat surface	Empty waste containers	Empty pencil sharpeners	Sweep dust mt floors	Clean erasers	Routine Subtot
Total Minutes To Clean						18.85	18.9	20.3	26.58	3.38	2.9	79.27	2.90	173.08
Total Hours To Clean						0.31	0.31	0.34	0.44	0.06	0.05	1.32	0.05	2.88
38	Barton Hall	1	181/B	550	Level 2	1.79	1.79	1.93	2.52	0.32	0.28	7.52	0.28	16.43
52	Barton Hall	1	181D	576	Level 2	1.87	1.88	2.02	2.64	0.34	0.29	7.87	0.29	17.2
53	Barton Hall	1	181E	576	Level 2	1.87	1.88	2.02	2.64	0.34	0.29	7.87	0.29	17.2
54	Barton Hall-Office with Car	1	124	288	Level 2	0.94	0.94	1.01	1.32	0.17	0.14	3.94	0.14	8.6
58	Barton Hall	1	182	874	Level 2	2.84	2.85	3.06	4.01	0.51	0.44	11.94	0.44	26.09
59	Barton Hall	1	186	672	Level 2	2.18	2.19	2.35	3.08	0.39	0.34	9.18	0.34	20.05
86	Barton Hall	2	251	278	Level 2	0.9	0.91	0.97	1.27	0.16	0.14	3.8	0.14	8.29
117	Barton Hall	2	281	896	Level 2	2.91	2.92	3.14	4.11	0.52	0.45	12.25	0.45	26.75
120	Barton Hall	2	285A	1090	Level 2	3.54	3.55	3.82	5	0.64	0.55	14.9	0.55	32.55
End of Category 1														

Seq	Building	Floor	Room	CSF	Level	Spot clean walls and doors	Relamp	Clean Chalkboards and Trays	Dust flat surfaces	Empty waste containers	Empty pencil sharpeners	Sweep dust mt floors	Clean erasers	Routine Subtotal
Total Minutes To Clean						18.85	18.9	20.3	26.58	3.38	2.9	79.27	2.90	173.08
Total Hours To Clean						0.31	0.31	0.34	0.44	0.06	0.05	1.32	0.05	2.88
38	Barton Hall	1	181/B	550	Level 2	1.79 [W]	1.79 [D/A]	1.93 [D]	2.52 [W]	0.32 [D]	0.28 [D]	7.52 [D]	0.28 [D]	16.43
52	Barton Hall	1	181D	576	Level 2	1.87 [W]	1.88 [D/A]	2.02 [D]	2.64 [W]	0.34 [D]	0.29 [D]	7.87 [D]	0.29 [D]	17.2
53	Barton Hall	1	181E	576	Level 2	1.87 [W]	1.88 [D/A]	2.02 [D]	2.64 [W]	0.34 [D]	0.29 [D]	7.87 [D]	0.29 [D]	17.2
54	Barton Hall-Office with Car	1	124	288	Level 2	0.94 [W]	0.94 [D/A]	1.01 [D]	1.32 [W]	0.17 [D]	0.14 [D]	3.94 [D]	0.14 [D]	8.6
58	Barton Hall	1	182	874	Level 2	2.84 [W]	2.85 [D/A]	3.06 [D]	4.01 [W]	0.51 [D]	0.44 [D]	11.94 [D]	0.44 [D]	26.09
59	Barton Hall	1	186	672	Level 2	2.18 [W]	2.19 [D/A]	2.35 [D]	3.08 [W]	0.39 [D]	0.34 [D]	9.18 [D]	0.34 [D]	20.05
86	Barton Hall	2	251	278	Level 2	0.9 [W]	0.91 [D/A]	0.97 [D]	1.27 [W]	0.16 [D]	0.14 [D]	3.8 [D]	0.14 [D]	8.29
117	Barton Hall	2	281	896	Level 2	2.91 [W]	2.92 [D/A]	3.14 [D]	4.11 [W]	0.52 [D]	0.45 [D]	12.25 [D]	0.45 [D]	26.75
120	Barton Hall	2	285A	1090	Level 2	3.54 [W]	3.55 [D/A]	3.82 [D]	5 [W]	0.64 [D]	0.55 [D]	14.9 [D]	0.55 [D]	32.55
End of Sub Totals						0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Monday						0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Tuesday						0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Wednesday						0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Thursday						0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Friday						0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Saturday						0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Sunday						0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	

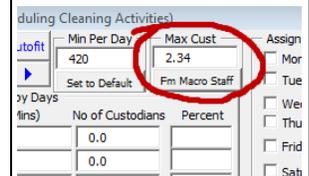
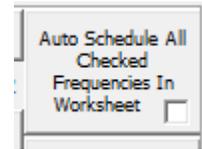
Method 1 -- Auto Assigning Day to Clean To All Activities in the Worksheet Based on Frequency

1. You can have **CleanOpsStaff-3ed-ProScheduler** automatically schedule all of the routine and Project Activities Automatically by clicking the **Schedule All Checked Frequencies in Worksheet** button.
2. When the Automatically **Schedule All Checked Frequencies in Worksheet** checkbox is checked Method 1 Auto-Scheduling is used. Method 1 is described below.
3. The steps are as follows:
 - a. Ensure the **Schedule All Checked Frequencies in Worksheet Checkbox** is checked
 - b. Check the frequencies checkboxes in the **Frequencies Panel** for the frequencies you want to auto-schedule
 - c. Click the **Automatically Schedule All Checked Frequencies in Worksheet** button.
 - d. Note that the **Max Cust** will contain a number from the **Macro Staffing Inventory worksheet** if you have a data file open. You can change this input to reflect the actual number of custodian per day you expect to be available. This number will restrict the number of activities to be automatically scheduled if the time exceeds the number of the maximum number of custodians available per day. Use the **Fm Macro Staff** button to get the number from the **Macro Staffing Inventory worksheet** if you have changed the number but now what to use the number from the inventory worksheet.
 - e. The **Daily, Twice Daily, and Alternate Days** activities will be scheduled first
 - f. Then the Weekly activities and the Project activities will be scheduled starting with Monday until Monday reaches the **Max Cust** number.
 - g. Then the activities will be scheduled for Tuesday until Tuesday reaches the **Max Cust** number.
 - h. Then the activities will be scheduled for Wednesday until Wednesday reaches the **Max Cust** number.
 - i. Then the activities will be scheduled for Thursday until Thursday reaches the **Max Cust** number.
 - j. Then the activities will be scheduled for Friday until Friday reaches the **Max Cust** number.
 - k. After Friday reached the Max Cust number, no more activities will be scheduled unless you increase the **Max Cust** number.



Method 2 -- Auto Assigning Day to Clean To All Activities in the Worksheet Based on Frequency

4. You can have *CleanOpsStaff-3ed-ProScheduler* automatically schedule all routine and Project Activities by clicking **Automatically Schedule All Checked Frequencies in Worksheet** button with the checkbox checked. This will invoke **Method-2 auto-scheduling**.
5. The **Automatically Schedule All Checked Frequencies in Worksheet Method-2** process starts with the first space category and applies the **Least/Most Loaded Days** assignment protocol to all activities for the first category
6. It then checks **Least Loaded Days** and moves to the second category using the **Least Loaded Days** to make day to clean assignment to Weekly, Alternate Days and Twice Weekly. These steps are repeated until all categories have been scheduled for the week.
7. The steps are as follows:
 - a. Check the frequencies checkboxes in the **Frequencies Panel** for the frequencies you want to auto-schedule
 - b. Click the **Automatically Schedule All Checked Frequencies in Worksheet** button.
 - c. Observe the **Workload Balance by Days** information. Repeat the above process to schedule more activities if you have resources left over.
 - d. Note that the **Max Cust** will contain a number from the **Macro Staffing Inventory worksheet** if you have a data file open. You can change this input to reflect the actual number of custodian per day you expect to be available. This number will restrict the number of activities to be automatically scheduled if the time exceeds the number of the maximum number of custodians available per day. Use the **Fm Macro Staff** button to get the number from the **Macro Staffing Inventory worksheet** if you have changed the number but now what to use the number from the inventory worksheet.
 - e. The **Max Cust** textbox and the **Least/Most Loaded day** textboxes, and the **Progress Message textbox** will have a red background if the maximum number of custodian prevented auto-scheduling of any activities. Additionally, the **Progress Message textbox** will contain a message indicating that not all selected activities were scheduled because of the **Max Cust** constraint.



Displaying the Information about the Schedule in the Information Center

- To see how many cleaning activities are unscheduled, click the **Number of Unscheduled Activities Status Button**.
- The CleanOpsStaff Information Center will be launched containing the number of unscheduled activities listed by frequency along with the total number of activities and other useful information as shown in the below screenshot.

The screenshot shows the CleanOpsStaff Information Center window. On the left, a callout points to the 'Number of Unscheduled Activities Status Button' in the ProScheduler interface. The main window displays the following information:

- Unscheduled Routine Activities (Unscheduled of Total):**
 - Daily[D]: 0 of 543
 - Twice Daily(TD): 112 of 112
 - Alternate Days(A/D): 0 of 0
 - Weekly[W]: 486 of 486
 - Twice Weekly(TW): 0 of 0
 - 3 Per Week(3/W): 662 of 662
 - 4 Per Week(4/W): 0 of 0
 - 6 Per Week(6/W): 0 of 0
 - 7 Per Week(7/W): 0 of 0
 - Monthly[M]: 0 of 0
 - Quarterly[Q]: 0 of 0
 - Semi-Annual(S/A): 0 of 0
 - Relamping(D/A): 1 of 1
- Unscheduled Project Activities (Unscheduled of Total):**
 - Weekly[W]: 78 of 78
 - Monthly[M]: 127 of 127
 - Quarterly[Q]: 342 of 342
 - Semi-Annual(S/A): 30 of 30
 - Annual[A]: 17 of 17
 - Alt Weeks(A/W): 0 of 0
 - Twice per Month(TM): 32 of 32
 - 3 Time per Month(3/M): 0 of 0
 - Relamping(D/A): 0 of 0
- Total Unscheduled Activities: 1920 of 2463**
- Avg Cust/Day for M-F = 5.18**
- Avg Cust/Day for M-Sa = 4.32**
- Avg Cust/Day for M-Su = 3.70**

Callouts on the right side of the screenshot provide additional context:

- Zero unscheduled Daily Activities in the schedule
- 112 unscheduled Twice Daily Activities in the schedule
- 1920 total unscheduled Activities in the schedule
- 2463 total Activities in the schedule
- Average number of custodian needed per day for the scheduled activities for a 5-day, 6-day and 7-day work week

Using the Workload Balance by Days Information

- Once you have scheduled all of the routine activities, you can use the **Workload Balance by Days** section of the **CleanOpsStaff-3ed-ProScheduler** to help you make decisions on which days to manually assign project work to or to further refine the schedule balance.
- The **Time** column tracks the amount of time each day has been assigned.
- The **No of Custodians** column tracks the number of custodians you will need each day to perform the work as it is currently scheduled.
- The **Percent** column is simply a percentage representation of the first two columns.
- The **Total Week Time** box is the sum of the time assigned to all seven days of the week.
- The **Time Mode** button toggles the time between Minutes and Hours in the **ProScheduler Interface** and in the **ProScheduler** part of the worksheet.
- Average Number of Custodians/day buttons** -- click these buttons to compute the average number of custodians per day contained in the **No of Custodians** boxes in the Workload Balance by Days frame. The blue computes the average for Monday-Friday and the yellow button computes the average for Monday-Sunday.

The screenshot shows the ProScheduler (Scheduling Cleaning Activities) window. The 'Workload Balance by Days' panel is highlighted, showing the following data:

Day	Time (Mins)	No of Custodians	Percent
Monday	1,488.82	3.54	20.17%
Tuesday	1,460.18	3.48	19.78%
Wednesday	1,485.3	3.54	20.12%
Thursday	1,487.0	3.54	20.14%
Friday	1,460.75	3.48	19.79%
Saturday	0.0	0.0	0.0%
Sunday	0.0	0.0	0.0%
Tot Week Time (Mins)	7,382.05		

Callouts on the left side of the screenshot provide additional context:

- Display the Schedule Information Center box to the right of the ProScheduler tool
- Show Average Custodian/day for six-day and seven-day week
- Show Average Custodian/day for five-day week
- Time Mode. Switch to and from Minutes and Hours
- Information Display Copy button. Copy content of display to the clipboard to paste to other applications

Callouts on the right side of the screenshot provide additional context:

- Workload Balance by Days Panel. Let you know if workload is in balance or not.
- Information Display. displays information you can use to balance the weekly schedule

ProBalancer Components

NOTE: Visit the [CleanOpsStaff-3ed Training Resource Center](http://hunterconsulttrain.com/CleanOPsStaff3edTrainingResourceCenter.aspx) for more detail instructions on using the **ProScheduler** Advance features <http://hunterconsulttrain.com/CleanOPsStaff3edTrainingResourceCenter.aspx>

- **CleanOpsStaff-3ed** automatic scheduling process produces schedules that are nearly balanced, but because of the complexity of certain frequencies that can only be performed on specific days of the week, the schedules still might require adjustment for better balancing.
- In the **Old Edition CleanOpsStaff**, you would use the manual scheduling features to make these adjustment. This can be somewhat time consuming. The **ProBalancer** and its associated **green** buttons makes workload balance adjustment easier and more efficient. The **ProBalancer** feature of the **ProScheduler** provides powerful tool to allow you to **shift activities** between days of the week to achieve almost perfectly balance schedules.

The screenshot shows the ProScheduler interface with several callouts pointing to specific features:

- Balance Delta button:** Points to the 'Bal' button in the 'Workload Balance by Days' section.
- Bar graph button. Show/Hide Bar graph:** Points to the 'Bar' button in the 'Workload Balance by Days' section.
- Most Loaded and Least Loaded Day boxes:** Points to the 'LL' and 'ML' buttons in the 'Least/Most Loaded Days' section.
- Information Display Copy button:** Points to the 'Info' button in the 'Least/Most Loaded Days' section.
- General Information Display box:** Points to the 'Info' button in the 'Least/Most Loaded Days' section.
- Days Display box:** Points to the 'Assign Days' section.
- Schedule Button:** Points to the 'Sch' button in the 'Assign Days' section.
- Un-Schedule Button:** Points to the 'UnSch' button in the 'Assign Days' section.
- ProBalancer Advance Features button:** Points to the 'ProBalancer' button in the 'Assign Days' section.
- Activity Shift button. Shift Activities from any day to to any other day:** Points to the 'Shift' button in the 'Assign Days' section.
- Auto Balance button. Shift Activities from Most Loaded Day to Least Loaded Day:** Points to the 'Bal (LL<-ML)' button in the 'Assign Days' section.

- **Balance Delta button:** Select the delta ProBalancer uses to declare a schedule balance
 - **Low** – if the percentage loading for each day are within 0.5% of each other then the schedule is declared balanced
 - **Med** – if the percentage loading for each day are within 0.25% of each other then the schedule is declared balanced
 - **Hi** – if the percentage loading for each day are within 0.125% of each other then the schedule is declared balanced
- **Bar Graph burron:** Displays the percentage bar graph
- **Most Loaded and Least Load day display boxes:** Displays Most Loaded and Least Load day
- **General Information Display Box:** Displays information to help you balance your schedule
- **Days Display Box:** Displays the days you select from the Assign Days checkboxes to shift activities to and from
- **Schedule (Sch) button:** used to manually assign a day of the week to a selected activities in the weekly schedule worksheet
- **Un-Schedule (Un-Sch) button:** used to manually un-assign a day of the week to a selected activities in the weekly schedule worksheet
- **Auto Balance –(Bal (LL<-ML) button:** Used to automatically shift activities of the selected frequency from the **Most Loaded day to the Least Load day** to attempt to balance the schedule
 - **Activity Shift (Shift) button:** Used to shift activities of the selected frequency to and from days of your choice either to balance the shcedule or to assign days of preference to certain selected spaces in the weekly shedule woeksheet.

Using the ProBalancer Auto-Balance button (Bal (LL<-ML))

Bar Graph. Show percentage of work assigned to each day of the week.

Auto Balance Scope buttons. Set how much of the schedule will be searched for activities to shift

Auto Balance Frequency Selector. Used to select the frequency of the activity you want to shift from the Most Loaded Day to the Least Loaded Day

OK button. Execute the Auto Balancing Shifting

Worksheet Scroll buttons. Scroll the weekly worksheet up, down, left and right.

Auto Balance Frequency Selector Position Movement button. Use to move this tool.

- **Auto Balance-Bal (LL<-ML) button:** Use this button after running one of the automatic scheduling features. This will further refine your schedule so that it become almost perfectly balance. This balance is achieved by searching **all** spaces in the schedule for activities of the frequency you pick from the **Balance Frequency Selector** that are assigned to be performed on the **Most Loaded day** and shifting them to the **Least Loaded day** until the schedule becomes balanced, or just for the next space. The fineness of the balance will depend on the number of **Flexible Activities** you have in your schedule for the **ProBalance** to work with. **Flexible Activities** are those activities with frequency of Twice Weekly [TW]; Weekly [W]; Monthly [M]; Quarterly [Q]; Semi-Annual [S/A]; Alternate Weeks [A/W]; Twice Monthly [TM]; and Three times Per Month [3M] because these activities can be performed on any day of your choice.
- **Steps for Bal (LL<-ML) button:**
 - Click the **Bal (LL<-ML) button** which brings up the **Balancing Frequency Selector**
 - Select either the **Next Space** or **Until Balanced** radio button in the **Balancing Frequency Selector**
 - **Next Space:** By selecting the **Next Space** radio button, this will further fine tune your schedule by shifting activities one space at a time. This balance is achieved by starting at the current active row in the schedule worksheet and searching for the **next** space containing activities of the frequency you pick from the **Balance Frequency Selector** that are assigned to be performed on the **Most Loaded Day** and shifting them to the **Least Loaded day**. To start at the top of the worksheet, click the **Top** button in the upper left corner of the **Balancing Frequency Selector**.
 - **Until Balanced:** By selecting the **Until Balanced** radio button, this will further fine tune your schedule by starting at the top of the worksheet and searching for the **all** spaces containing activities of the frequency you pick from the **Balancing Frequency Selector** that are assigned to be performed on the **Most Loaded Day** and shifting them to the **Least Loaded day**. If this achieves a balance, you will see a message indicating that a balance schedule has been achieved.
 - Select the frequency you wish to shift from **Most Loaded Day** to **Least Loaded Day**
 - Click the **OK** button to executing the **Balancing** or **Activity Shifting** action.

Using the ProBalancer Activity Shift button (Shift)

Bar Graph. Show percentage of work assigned to each day of the week.

Activity Shift Scope buttons. Set how much of the schedule will be searched for activities to shift.

Activity Shift Frequency Selector. Used to select the frequency of the activity you want to shift to and from the two days in the Days Display box.

OK button. Execute the Activity Shifting action.

Worksheet Scroll buttons. Scroll the weekly worksheet up, down, left and right.

Activity Shift Frequency Selector Position Movement button. Use to move this tool.

Activity Shift Direction Button. Set which direction activities will be shifted (We to Fr or Fr to We).

- **Shift buttons:** Use this button to shift any **Flexible Activity** to and from any two days you choose.
 - First you select the two days you want to shift activities between by clicking checkboxes in the **Assign Days** frame. The selection will be displayed in the **Days Display** box.
 - Click the **Shift** button which brings up the **Shift Activity Frequency Selector**.
 - Select either **Next Space**, **All Spaces**, or **Until Balanced** radio button
 - **Next Space shifting:** same as Next Space balancing except with the days of your choice
 - **All Spaces shifting:** all spaces in the worksheet are search for the specified flexible activity and shifted from and to the specified days.
 - **Until Balanced:** all spaces in the worksheet are search for the specified flexible activity and shifted from and to the specified days until the schedule is become balanced or until you run out of flexible activities to shift. . If this acheives a balance, you will see a message indicating that a balance schedule has been achieved.
 - Select the frequency of the activities you want to shift
 - Click the **OK** button to executing the **Activity Shifting** action.

Getting Balancing Information (Assigned Activities Profile Information)

You can use the **Assigned Activities Profile** information for each day of the week to help you decide which days to shift activities between and what frequencies the activities should have that you intend to shift

Roll move over Day label to see the Assigned Activity for each day. In this example 2 Twice Weekly, 65 Weekly; 41 Twice Daily, and 156 Daily activities are scheduled for Tuesday.

Shows total activities contained in the weekly schedule worksheet by frequency and how many are un-scheduled. In this example all Routine activities are scheduled and no Project activities are scheduled yet.

Shows total activities in the schedule and how many are not yet scheduled

Total Unscheduled Activities: 181 of 731

Total Cleanable Square Feet (CSF) = 580
Number of Custodian-days for Routine work = .08

In the screenshot to the right the Assigned Activities Profile for

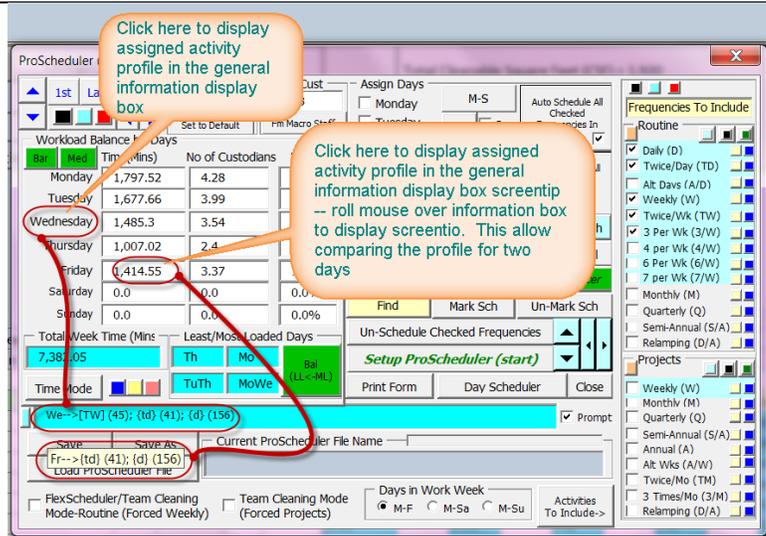
Wednesday has:

- 45=Twice Weekly [TW]
- 41=Twice Daily {td}
- 156=Daily {d}

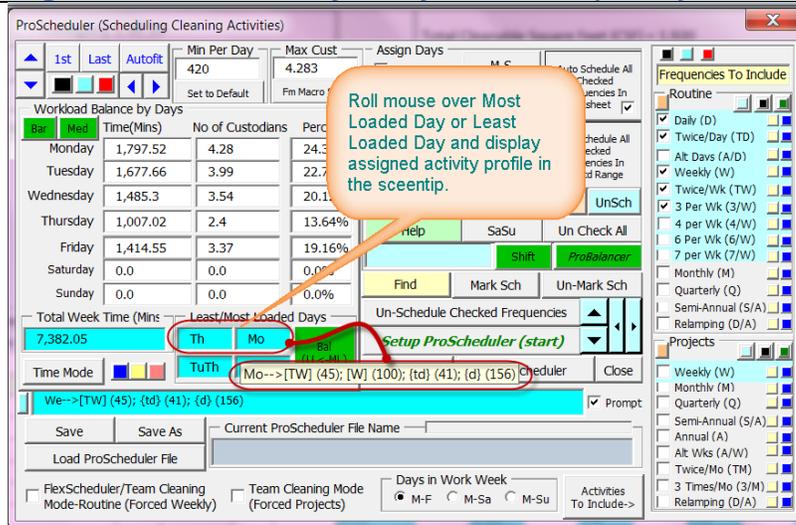
Friday has:

- 41=Twice Daily {td}
- 156=Daily {d}

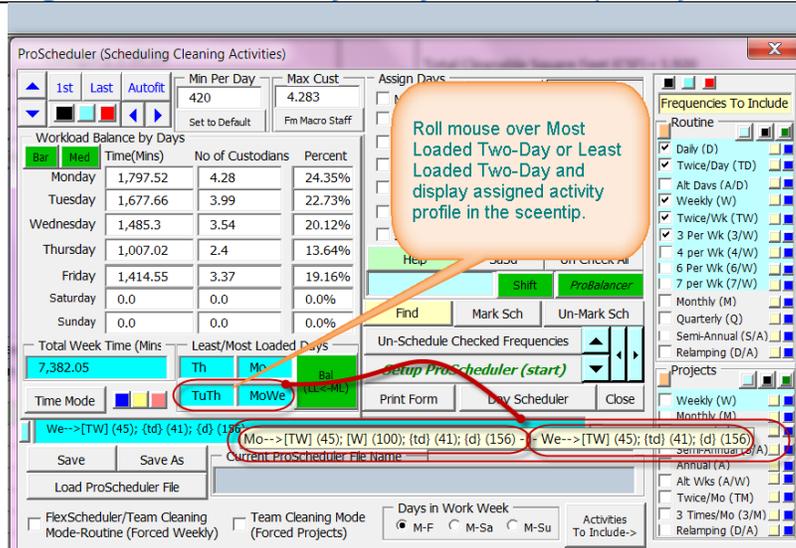
NOTE:
 [XX] = **Flexible Activities** that can be shifted
 {xx} = **Non-Flexible Activities** that cannot be shifted



Getting Assigned-Activities Profile Information (Cont.)



Getting Assigned-Activities Profile Information (Cont.)



Using ProBalancer Bar Graph Workload Balance Display

- You can use the **ProBalancer Bar** button in the **Workload Balance by Days** frame to display the workload balance information in a bar graph. You can click the **Bar** button any time, even when **ProScheduler** is in process.
- The **Balance Marker** will assist you by visually showing you when your weekly schedule is balanced.
- The position of the **Balance Week Marker** is based on your selected **Days in Work Week** radio button. The marker is at 20% (1/5) for a five-day work week; 16.67% (1/6) for a six-day work week; and at 14.29% (1/7) for a seven-day work week.

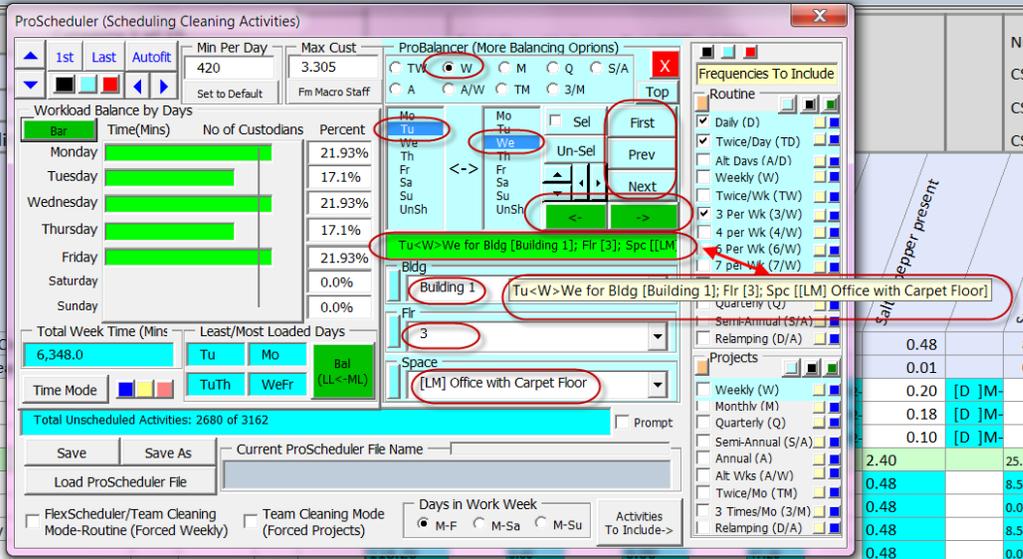
The screenshot shows the 'ProScheduler (Scheduling Cleaning Activities)' window. The 'Workload Balance by Days' section displays a table with columns for Day, Time(Mins), No of Custodians, and Percent. A bar graph is visible below the table, with a 'Bar' button highlighted. A 'Balance Marker' is shown at the bottom of the bar graph. Callouts point to various features: 'Graphic Assisted Workload Balancing' points to the bar graph area; 'Show/Hide Bar Graph' points to the 'Bar' button; 'Percent Bar Graph' points to the bar graph bars; and 'Balance Marker. Position depends on Days in work Week selection.' points to the 'Balance Week Marker' at the bottom of the bar graph.

Day	Time(Mins)	No of Custodians	Percent
Monday	1,392.3	3.32	21.93%
Tuesday	1,085.55	2.58	17.1%
Wednesday	1,392.3	3.32	21.93%
Thursday	1,085.55	2.58	17.1%
Friday	1,392.3	3.32	21.93%
Saturday	0.0	0.0	0.0%
Sunday	0.0	0.0	0.0%

ProBalancer Advance Features

The screenshot shows the 'ProScheduler (Scheduling Cleaning Activities)' window with the 'ProBalancer (More Balancing Options)' dashboard. Callouts describe various features: 'ProBalancer Dashboard Frequency Selector' points to the radio buttons for TW, W, M, Q, S/A, A, A/W, TM, and 3/M; 'ProBalancer Dashboard Day Selector' points to the two list boxes for selecting days; 'ProBalancer Dashboard Command Box' points to the text input area; 'ProBalancer Right and Left Arrow buttons' points to the left and right arrow buttons; 'ProBalancer Dashboard Select and Un-Select buttons' points to the 'Sel' and 'Un-Sel' buttons; 'The Auto Select Checkbox' points to the 'Auto Select' checkbox; 'ProBalancer Dashboard Find buttons' points to the 'First', 'Next', and 'Prev' buttons; 'ProBalancer Dashboard Scroll buttons' points to the up, down, left, and right arrow buttons; and 'ProBalancer Advance Feature Dashboard' points to the 'ProBalancer' button.

- **ProBalancer Dashboard:** This is the large blue area that is displayed when you click the **ProBalancer** button.
 - **ProBalancer Dashboard Frequency selector** – there are nine frequency radio buttons you can choose from to shift from one day to another day. Select TW, W, M, Q, S/A, A, A/W, TM or 3/M – these are the **Flexible Activities**.
 - In the two list boxes of the **ProBalancer Dashboard Day selector** below the Frequency frame, you will select an entry in both text boxes to denote the days of the week you intend to shift the activities to and from for the frequency radio button you selected

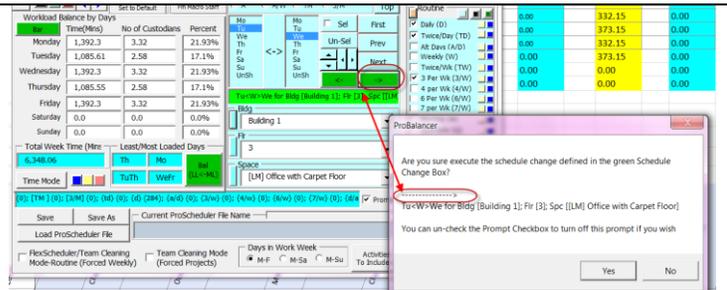


- In the above screenshot then following step
 - Click the “W” radio button in the **ProBalancer Dashboard Frequency selector** to work with Weekly activities
 - Click the “Tu” entry on the left of the **ProBalancer Dashboard Day selector** and click the “We” entry on the right to denote that you intend to work with these two days of the week
 - Observe the **ProBalancer Command Box** recording your selections
 - Select Building 1 from the Building dropdown list
 - Select floor 3 from the Floor dropdown list
 - Select Office with Carpet Floor in the Space dropdown list
 - Observe the command box recorded you selections as in the below screenshot

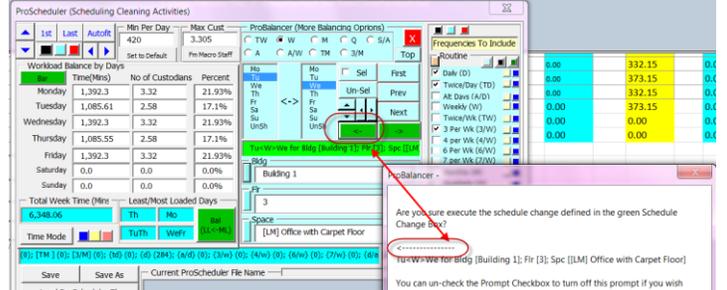
Tu<W>We for Bldg [Building 1]; Flr [3]; Spc [(LM) Office with Carpet Floor]

- So now when you click the below buttons the command box is interpreted and certain actions are performed for you to give you control over your schedule. Using the above screenshot for illustration below is an explanatin of what the various ProBalancer button will
 - **First Button:** Will search from the top of the worksheet for an Office with Carpet Floor with a Weekly activity assigned to Tuesday for Building 1 on the third floor
 - **Next Button:** Will search from the current location in the worksheet to the end of the worksheet until it finds an Office with Carpet Floor with a Weekly activity assigned to Tuesday for Building 1 on the third floor
 - **Next Button:** Will search from the current location in the worksheet backward to the top of the worksheet until it finds an Office with Carpet Floor with a Weekly activity assigned to Tuesday for Building 1 on the third floor
 - **Sel button:** Will select every Office with Carpet Floor with a Weekly activity assigned to Tuesday for Building 1 on the third floor
 - **Un-Sel button:** Will un-select all selected spaces. You can achieve the same un-selection results by click anywhere inside the worksheet.

○ **Right Arrow button:** in the currently selected range in the worksheet, find every Office with Carpet Floor with a Weekly activity assigned to Tuesday for Building 1 on the third floor and shift them to Wednesday



○ **Right Arrow button:** in the currently selected range in the worksheet, find every Office with Carpet Floor with a Weekly activity assigned to Wednesday Tuesday for Building 1 on the third floor and shift them to Tuesday

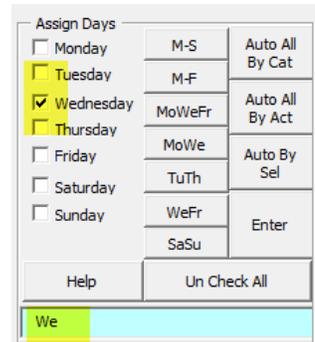


NOTE: The Right and Left arrow can serve as somewhat of an Undo feature for each other

NOTE: Visit the [CleanOpsStaff-3ed Training Resource Center](http://hunterconsulttrain.com/CleanOpsStaff3edTrainingResourceCenter.aspx) for more detail instructions on using the ProScheduler Advance features

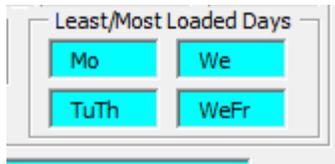
Manually Assigning Day to Clean to a Range of Activities

- Once you have run the ProScheduler Setup and the frequencies are display in the schedule worksheet, you can manually assign day to clean to individual activities for a space or to ranges of spaces by highlighting an area that encompasses the frequency to which you want to assign day of cleaning. You will use these manual scheduling features to fine adjustments after **CleanOpsStaff-3ed** has automatically scheduled the activities.
- Click the day of week checkbox or checkboxes to fill the **Cleaning Days Input box** with the day or days you want to assign
- Highlight an area that includes the frequencies of the activities you want to assign day (s) of cleaning to
- Click **Sch** button
- The day or days from the **Cleaning Days Input box** will be appended to the frequency and the time will be recorded below in the days of the week section of the report.



0.31		0.31		0.34		0.4
1.79	[W]	1.79	[D/A]	1.93	[D]	2.5
1.87	[W]	1.88	[D/A]	2.02	[D]	2.6
1.87	[W]	1.88	[D/A]	2.02	[D]	2.6
0.94	[W]	0.94	[D/A]	1.01	[D]	1.3
2.84	[W]	2.85	[D/A]	3.06	[D]	4.0
2.18	[W]	2.19	[D/A]	2.35	[D]	3.0
0.9	[W]	0.91	[D/A]	0.97	[D]	1.2
2.91	[W]	2.92	[D/A]	3.14	[D]	4.1
3.54	[W]	3.55	[D/A]	3.82	[D]	
70		0.00		0.00		0.00

- The Least/Most Loaded Days input boxes will be updated to reflect current assignment of days to clean.



- To erase or un-schedule clear all the day checkboxes then click the **Sch** button. You can clear all the days of the week at once by clicking the **Un-Check All** button.

Req	Build	Floor	Room	Ctr	Level	Start	Stop	
Total Minutes To Clean								18.85
Total Hours To Clean								0.31
38	Barton Hall	1	181/B	550	Level 2	1.79	W We	
52	Barton Hall	1	181D	576	Level 2	1.87	W We	
53	Barton Hall	1	181E	576	Level 2	1.87	W We	
54	Barton Hall-Office with Car	1	124	288	Level 2	0.94	W We	
58	Barton Hall	1	182	874	Level 2	2.84	W We	
59	Barton Hall	1	186	672	Level 2	2.18	W We	
86	Barton Hall	2	251	278	Level 2	0.9	W We	
117	Barton Hall	2	281	896	Level 2	2.91	W We	
120	Barton Hall	2	285A	1090	Level 2	3.54	W We	
End of Sub Totals								18.84
Monday								0.00
Tuesday								0.00
Wednesday								18.84
Thursday								0.00
Friday								0.00
Saturday								0.00
Sunday								0.00

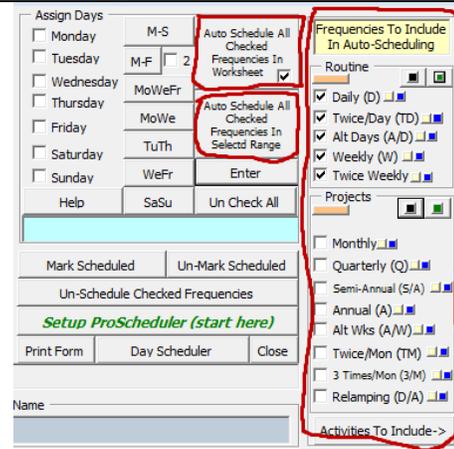
Auto Assigning Multiple Days to Clean To Activities or Range of Activities

- You can use the **Combination Days** buttons to assign multiple days to activities. For example, the M-F button will check the Monday through Friday checkboxes and populate the **Cleaning Days Input box** with M-F.
- You can also click the individual day of week checkboxes to assign multiple days to clean.

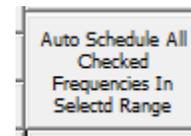


Auto Assigning Day to Clean To Activities or Range of Activities

- The **Frequency Panel** as shown on the right is the first place you will set up before using the automatic scheduling feature.
- You will check the frequency checkbox for the activities you want to be scheduled when you use the two auto-schedule buttons.
- You will use the **Auto-Schedule All Checked Frequencies In The Worksheet** button to schedule all the checked frequencies for the entire worksheet
- You will use the or **Auto-Schedule All Checked Frequencies In Selected Range** button to schedule checked activities only for the range within the worksheet that you have highlighted.



- Check the desired frequencies in the **Frequency Pane**
- In the normal Excel manner, select a range in the worksheet that includes the spaces and activities you wish to auto-schedule.
- Click the **Auto-Schedule All Checked Frequencies In Selected Range** button.
- The **Auto-Schedule All Checked Frequencies In Selected Range** button will use the **Least Loaded Day** box to assign a day to weekly activities, and to assign two alternate days to Twice Weekly activities. It will assign M-F to daily activity and Mon, Wed, Fri to Alternated Day frequencies.



Assigning Day of Week to Specific Activities in a Category

- In addition to being able to assign day of week to a single activities for a single space and ranges of spaces by selecting/highlighting the area that contains them, you can assign day of week to specific activities within a single category by selecting the **activity name** as shown to the right
- Use the **SHIFT key, CTRL key, Arrow keys** and **Mouse Pointer** in the normal Excel fashion to select the Activities to which you wish to assign a day of week.
- Use the **Assign Days** checkboxes and or the **Frequencies to Include in Auto Scheduling** checkboxes to select the frequencies you wish to be scheduled
- In the ProScheduler Interface, click the **Sch button** or **Auto-Schedule All Checked Frequencies In Selected Range** button.
- Day of week will be assigned to all spaces in the select category for all **activity name** selected for all checked frequencies.

Room	Floor	Room	Clp	Level	Activity	Frequency	Day	Time	Duration	Start	End	Frequency	Day	Time	Duration	Start	End	Frequency	Day	Time	Duration	Start	End			
Total Minutes To Clean																										
Total Hours To Clean																										
38	Barton Hall	1	181	B	550	Level 2	1.79	W	1.79	09(A)	1.93	D	2.52	W	1	1.93	D	2.52	W	1	1.93	D	2.52	W	1	
52	Barton Hall	1	181	D	576	Level 2	1.87	W	1.88	09(A)	2.02	D	2.64	W	1	2.02	D	2.64	W	1	2.02	D	2.64	W	1	2.02
52	Barton Hall	1	181	E	576	Level 2	1.87	W	1.88	09(A)	2.02	D	2.64	W	1	2.02	D	2.64	W	1	2.02	D	2.64	W	1	2.02
54	Barton Hall	1	124	288	Level 2	0.94	W	0.94	09(A)	1.01	D	1.32	W	1	1.01	D	1.32	W	1	1.01	D	1.32	W	1	1.01	1.32
58	Barton Hall	1	182	874	Level 2	2.84	W	2.85	09(A)	3.06	D	4.01	W	1	3.06	D	4.01	W	1	3.06	D	4.01	W	1	3.06	4.01
59	Barton Hall	1	186	872	Level 2	2.18	W	2.19	09(A)	2.35	D	3.08	W	1	2.35	D	3.08	W	1	2.35	D	3.08	W	1	2.35	3.08
86	Barton Hall	2	251	278	Level 2	0.59	W	0.59	09(A)	0.57	D	1.27	W	1	0.57	D	1.27	W	1	0.57	D	1.27	W	1	0.57	1.27
117	Barton Hall	2	281	896	Level 2	2.91	W	2.92	09(A)	3.14	D	4.11	W	1	3.14	D	4.11	W	1	3.14	D	4.11	W	1	3.14	4.11
120	Barton Hall	2	285A	1090	Level 2	3.54	W	3.55	09(A)	3.82	D	5	W	1	3.82	D	5	W	1	3.82	D	5	W	1	3.82	5

Assigning Day of Week to All Spaces in a Category

- Assign day of week to all the spaces in a category by selecting the **Room** cell as shown to the right
- Check desired **Assign Days** checkboxes and or the **Frequencies to Include in Auto Scheduling** checkboxes
- In the ProScheduler Interface, Click the **Sch button** or **Auto-Schedule All Checked Frequencies in Selected Range** button.
- Day of week will be assigned to all category spaces and the least/Most loaded day boxes will be updated..

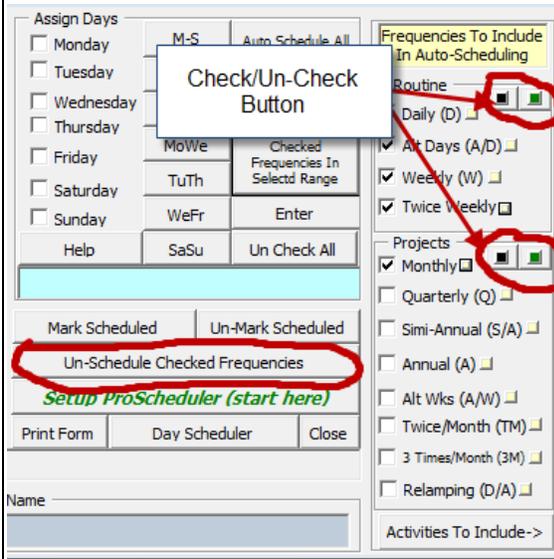
Room	Floor	Room	Clp	Level	Activity	Frequency	Day	Time	Duration	Start	End	Frequency	Day	Time	Duration	Start	End	Frequency	Day	Time	Duration	Start	End			
Total Minutes To Clean																										
Total Hours To Clean																										
38	Barton Hall	1	181	B	550	Level 2	1.79	W	1.79	09(A)	1.93	D	2.52	W	1	1.93	D	2.52	W	1	1.93	D	2.52	W	1	1.93
52	Barton Hall	1	181	D	576	Level 2	1.87	W	1.88	09(A)	2.02	D	2.64	W	1	2.02	D	2.64	W	1	2.02	D	2.64	W	1	2.02
52	Barton Hall	1	181	E	576	Level 2	1.87	W	1.88	09(A)	2.02	D	2.64	W	1	2.02	D	2.64	W	1	2.02	D	2.64	W	1	2.02
54	Barton Hall	1	124	288	Level 2	0.94	W	0.94	09(A)	1.01	D	1.32	W	1	1.01	D	1.32	W	1	1.01	D	1.32	W	1	1.01	1.32
58	Barton Hall	1	182	874	Level 2	2.84	W	2.85	09(A)	3.06	D	4.01	W	1	3.06	D	4.01	W	1	3.06	D	4.01	W	1	3.06	4.01
59	Barton Hall	1	186	872	Level 2	2.18	W	2.19	09(A)	2.35	D	3.08	W	1	2.35	D	3.08	W	1	2.35	D	3.08	W	1	2.35	3.08
86	Barton Hall	2	251	278	Level 2	0.59	W	0.59	09(A)	0.57	D	1.27	W	1	0.57	D	1.27	W	1	0.57	D	1.27	W	1	0.57	1.27
117	Barton Hall	2	281	896	Level 2	2.91	W	2.92	09(A)	3.14	D	4.11	W	1	3.14	D	4.11	W	1	3.14	D	4.11	W	1	3.14	4.11
120	Barton Hall	2	285A	1090	Level 2	3.54	W	3.55	09(A)	3.82	D	5	W	1	3.82	D	5	W	1	3.82	D	5	W	1	3.82	5

Manually Un-Schedule Activities

- Uncheck all the days of the week checkboxes
- Select the range in the worksheet for the spaces and activities you want to un-schedule or select specific spaces.
- Click the **Sch button**. The day of week will be removed for the selected activities.

Auto Un-Schedule Activities in Entire Schedule

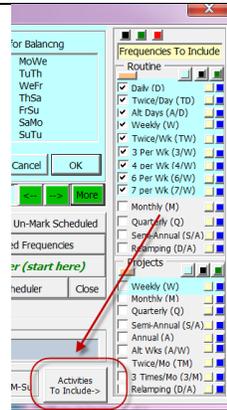
1. Check the frequencies checkbox (s) of the frequencies you want to un-schedule. You can also use the **Check/Un-Check Buttons** to select and un-select all the frequencies at once for Routine or Project activities.
2. Click **Un-Schedule Checked Frequencies** button
3. All activities with the checked frequencies will be un-scheduled in the entire worksheet.



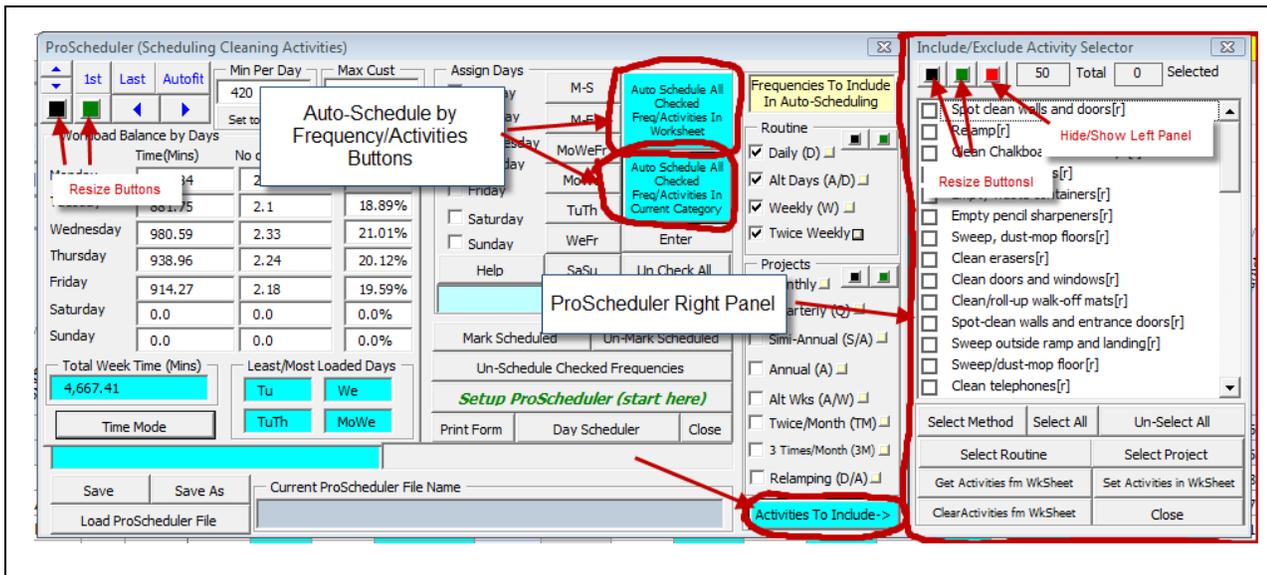
Including and Excluding Activities during Auto-Scheduling Based on Both Frequency and Activity Name

So far, you have learned about the **ProScheduler Left Panel**, to automatically schedule activities based on the frequency of the activities. The **ProScheduler Right Panel** is used to include and/or exclude specific activities during auto-scheduling based on both the frequency of the activity name. This is useful when you are interested in only scheduling **certain** activities associated with the frequency instead of **all** of the activities associated with the frequency – for example scheduling only the floor activities for a dedicated floor crew.

1. To show the ProScheduler Right Panel, click the **Activities To Include->** button.
2. The **ProScheduler Right Panel** also titled **Include/Exclude Activity Selector** is shown in the screenshot outlined on the right of the screenshot.
3. When the Right Panel is visible, you will select which activities will be included in the weekly schedule during automatic scheduling by checking both the desired frequencies in the **Left Panel** and the desired activity names in the **Right Panel**.

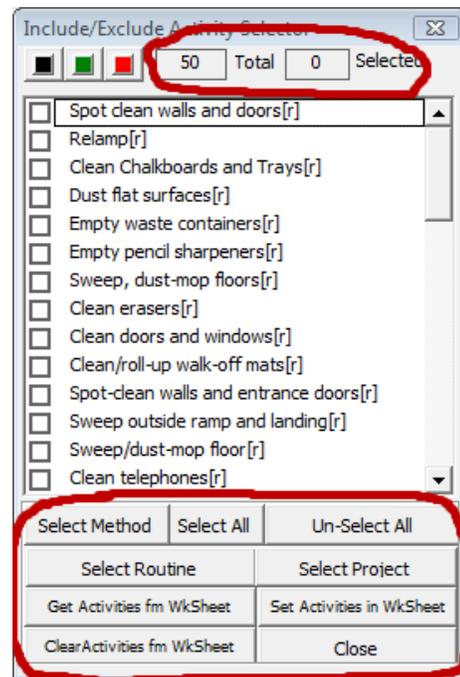


- 4 After selecting the desired frequencies and activities, you will use one of the **Auto-Schedule by Frequency/Activities** buttons to automatically schedule the selected activities for the **entire worksheet** or for the **current category**, **(the current category is the category where the Excel Insertion Point is)**.
- 5 You can use the **Resize Buttons** and the **Hide/Show Left Panel Button** to be able to see more or less of the worksheet.



ProScheduler Right Panel Command Buttons

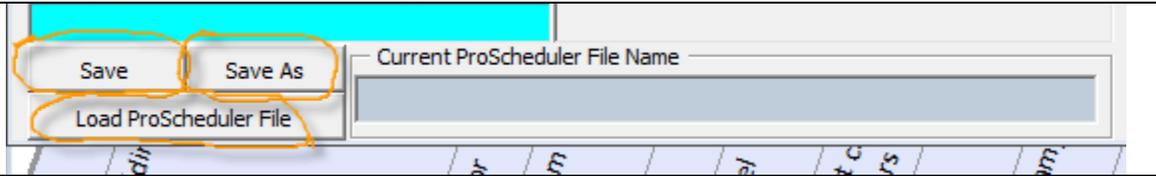
1. Activities **Total and** activities **Selected**: The labels at the top of the Right Panel indicate how many activities are in the worksheet and how many have been selected. The activities are listed in order that they appear in the worksheet with the Routine Activities (“[r]”) listed first and then the Project Activities “[p]”.
2. **Select Method**: Switch the way the selection in the listbox work when clicking, dragging, and using the CTRL and SHIFT key with the mouse pointer. Click the button and then experiment with how clicking, dragging, CTRL and SHIFT keys behave.
3. **Select All**: Select all the activities in the listbox.
4. **Un-Select All**: Un-Select all the activities in the listbox.
5. **Select Routine**: Select all the Routine activities in the listbox.
6. **Select Project**: Select all the Project activities in the listbox.
7. **Get Activities fm WkSheet**: Select an Activity or range of activity Names in the worksheet and then click the **Get Activities fm WkSheet** button to check activities checkbox in the listbox
8. **Set Activities in WkSheet**: Click this button to select the activities in the worksheet for all activities with their checkbox checked in the listbox
9. **Clear Activities fm WkSheet**: Select an Activity or range of activity Names in the worksheet and then click the **Clear Activities fm WkSheet** button to un-check activities checkbox in the listbox
10. **Close**:



Saving and Loading ProScheduler File

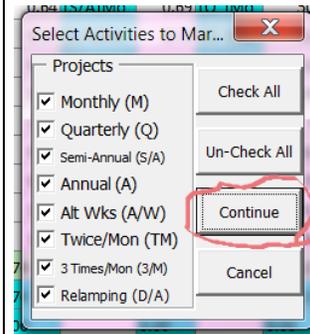
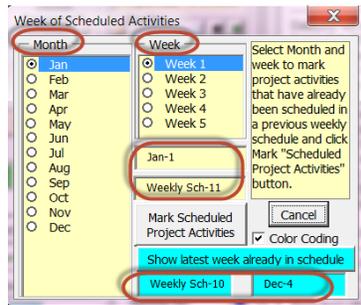
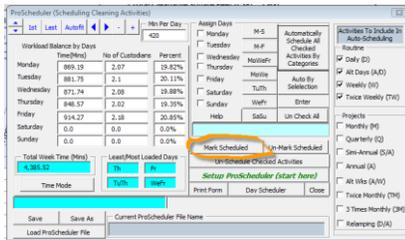
1. To save a schedule file, click the **Save** or **Save As** button and provide a file name if necessary

- Once saved the file name will appear in the **Current ProScheduler File Name** box.
- To load a schedule file, click the **Load ProScheduler File** button and select the file name from the File Open dialog box
- Once opened, the file name will appear in the **Current ProScheduler File Name** box.

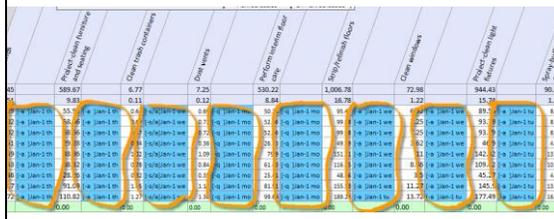
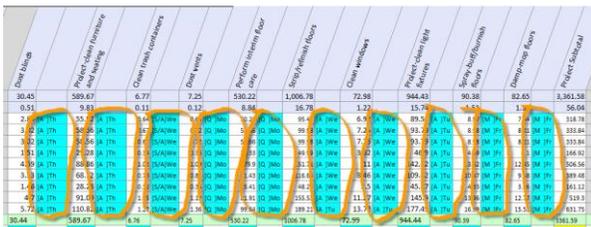


Marking Already Scheduled Project Activities

- To avoid having to manually keep track of which project activities you have already scheduled in a previous week follow the below steps:
- Load the weekly schedule from the previous week and immediately **Save As** under a new name for the week being scheduled.
- Click the **Mark Sch** button
- Accept the default Click a **Month** and **Week** in the **Week of Scheduled Activities** toolbox unless week you previously schedule is for a month that has 5 weeks. Most of the time you will accept the default values that are already in the **Week of Scheduled Activities** toolbox
- Uncheck or check the checkboxes in the **Select Activities to Mark** tool to select the project activities to mark as already scheduled in a previous weekly schedule. Most of the time you will keep all of the activities checked
- Click **Continue** in the **Select Activities to Mark** tool



- Below on the left is a screen shot of the schedule before clicking the **Week of Scheduled Activities** and the right is a screen shot after clicking the **Week of Scheduled Activities**. The Jan-1 represents the first week of January.



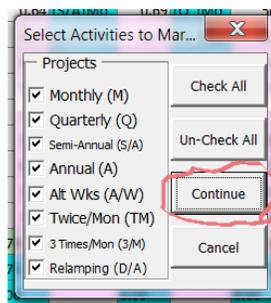
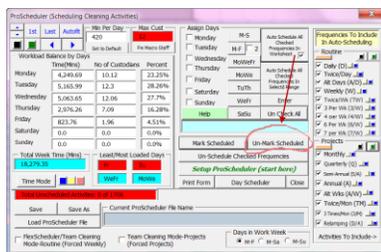
Color Coding for Marked Scheduled Feature

- Each week of the month weeks 1 through 5 is color coded as shown below to help you keep track of when **"already scheduled project activities"** are scheduled to be performed.

	Project-clean furniture and seating	Clean trash containers	Dust vents	Perform interim floor care	Strip/refresh floors	Clean windows	Project-clean light fixtures	Spray-buff/burnish floors	Damp-mop floors	Project-
0.45	589.67	6.77	7.25	530.22	1,006.78	72.98	944.43	90.38	82.65	3,36
0.51	9.83	0.11	0.12	8.84	16.77	1.00	15.74	1.51	1.38	5
2.85	[-a]Jan-1 th 55.92	[-a]Jan-1 th 0.64	[-s/a]Jan-1 we 0.9	[-q]Jan-2 th 50.28	[-q]Jan-2 th 95.4	[-a]Jan-3 th 6.52	[-a]Jan-5 th 89.5	[-a]Jan-4 mo 8.57	[-m]Jan-4 th 7.84	[M] 3:
3.0	[-a]Jan-1 th 58.56	[-a]Jan-1 th 0.67	[-s/a]Jan-1 we 0.2	[-q]Jan-2 th 52.66	[-q]Jan-2 th 99.96	[-a]Jan-3 th 7.5	[-a]Jan-5 th 93.9	[-a]Jan-4 mo 8.98	[-m]Jan-4 th 8.21	[M] 3:
3.0	[-a]Jan-1 th 58.56	[-a]Jan-1 th 0.67	[-s/a]Jan-1 we 1.2	[-q]Jan-2 th 52.66	[-q]Jan-2 th 99.98	[-a]Jan-3 th 7.5	[-a]Jan-5 th 93.9	[-a]Jan-4 mo 8.98	[-m]Jan-4 th 8.21	[M] 3:
1.5	[-a]Jan-1 th 29.28	[-a]Jan-1 th 0.34	[-s/a]Jan-1 we 0.5	[-q]Jan-2 th 26.33	[-q]Jan-2 th 49.99	[-a]Jan-3 th 3.2	[-a]Jan-5 th 46.9	[-a]Jan-4 mo 4.49	[-m]Jan-4 th 4.1	[M] 1:
4.5	[-a]Jan-1 th 88.86	[-a]Jan-1 th 1.02	[-s/a]Jan-1 we 1.0	[-q]Jan-2 th 79.9	[-q]Jan-2 th 151.71	[-a]Jan-3 th 1.1	[-a]Jan-5 th 142.2	[-a]Jan-4 mo 13.62	[-m]Jan-4 th 12.45	[M] 5:
3.5	[-a]Jan-1 th 68.32	[-a]Jan-1 th 0.78	[-s/a]Jan-1 we 0.8	[-q]Jan-2 th 61.43	[-q]Jan-2 th 116.65	[-a]Jan-3 th 8.6	[-a]Jan-5 th 109.4	[-a]Jan-4 mo 10.47	[-m]Jan-4 th 9.58	[M] 3:
1.4	[-a]Jan-1 th 28.26	[-a]Jan-1 th 0.32	[-s/a]Jan-1 we 0.3	[-q]Jan-2 th 25.41	[-q]Jan-2 th 48.26	[-a]Jan-3 th 3.5	[-a]Jan-5 th 45.27	[-a]Jan-4 mo 4.33	[-m]Jan-4 th 3.96	[M] 1:
4.7	[-a]Jan-1 th 91.09	[-a]Jan-1 th 1.05	[-s/a]Jan-1 we 1.1	[-q]Jan-2 th 81.91	[-q]Jan-2 th 155.53	[-a]Jan-3 th 11.27	[-a]Jan-5 th 145.9	[-a]Jan-4 mo 13.96	[-m]Jan-4 th 12.77	[M] 1:
5.72	[-a]Jan-1 th 110.82	[-a]Jan-1 th 1.27	[-s/a]Jan-1 we 1.3	[-q]Jan-2 th 99.64	[-q]Jan-2 th 189.21	[-a]Jan-3 th 13.72	[-a]Jan-5 th 177.43	[-a]Jan-4 mo 16.99	[-m]Jan-4 th 15.53	[M] 6:

Un-Marking Already Scheduled Project Activities

1. You can use the Un-Marking feature to help reuse previous week schedules for future week schedules. For example assume you have created a weekly schedule for the last month of January (Week 5) and now you want to create the schedule for the first week of February (Week 6). You would load the Week 5 schedule and save it as Week 6 to begin creating the schedule for the first week of February
2. You would then use the **Mark Scheduled** button to mark all the Project activities performed in January as already scheduled. However, since February is a new month, you must perform all the Monthly activities again. You would then use the **Un-Mark Scheduled** button to unmark all the monthly activities so they can be included in the Week 6 schedule as work that must be done in February.
3. To un-mark "Already Scheduled Project Activities" that you previously marked, perform the following steps:
 - a. Click **Un-Mark Scheduled** button
 - b. Check the **Projects** checkbox(s) for the frequencies you wish to un-mark (see below screenshot)
 - c. Click **Continue** in the Select Activities to Mark tool

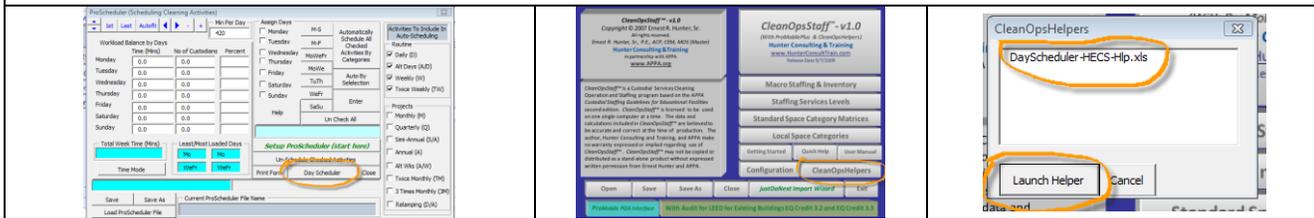


CleanOpsStaff-3ed-DayScheduler Concept:

CleanOpsStaff-3ed-DayScheduler is the first of a series of **CleanOpsHelpers**, which are small application extensions that can be launched from certain command buttons in **CleanOpsStaff-3ed** to perform specific functions requested by users. **CleanOpsStaff-3ed-DayScheduler** allows you to produce Day Schedules or route sheets from the **ProScheduler** weekly schedules you produced following the above instructions. You can give the Day Schedule directly to the custodian to provide them instructions on what cleaning activities they should perform, what day to perform them, and how long it should take. After using **ProScheduler** to produce weekly schedules, you will launch **CleanOpsStaff-3ed-DayScheduler** from the **ProScheduler** interface or from the **CleanOpsHelpers** button in the **CleanOpsStaff-3ed Main Menu**. You can produce the day schedule from the **ProScheduler** weekly schedules saved on disk or from the weekly schedule in memory that has been just created or loaded by ProScheduler. It is for this reason that you can launch the **DayScheduler** from the Main Menu or from the **ProScheduler** tool.

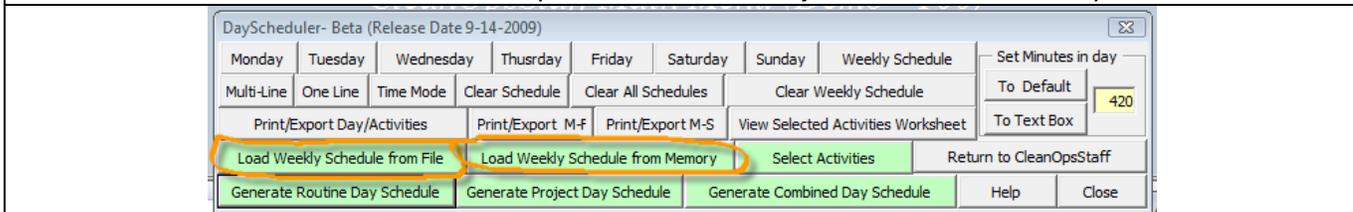
Launching DayScheduler

As noted above you can launch **DayScheduler** from the **Main Menu** or from the **ProScheduler** toolbox. When you launch the **DayScheduler** from **ProScheduler** and then return to **ProScheduler** the **ProScheduler** tool will not be visible. To show the **ProScheduler** tool again click anywhere inside the **ProScheduler** worksheet or click the **Report Generator** button in the **Mini-Toolbox**, then click the **ProScheduler** button in the **Report Generator** toolbox.



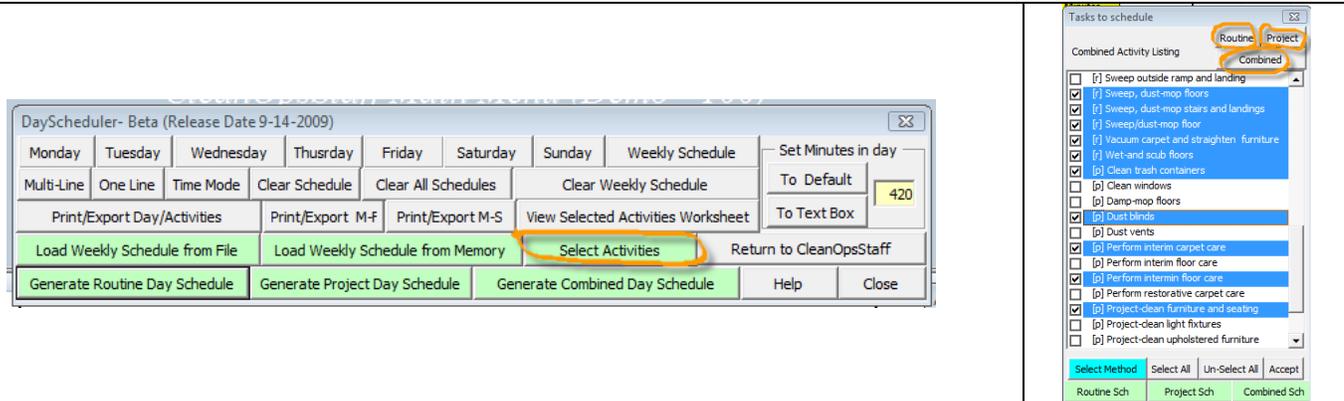
Loading Weekly Schedule into the DayScheduler

You will then load a **ProScheduler** weekly schedule from disk file or from memory into the **DayScheduler**. After completing a weekly schedule in **ProScheduler**, you will save the weekly schedule to a disk file using the protocol described above, which can be loaded later into **DayScheduler**. You can also launch the **DayScheduler** from **ProScheduler** and then load the weekly schedule into the **DayScheduler** from memory.



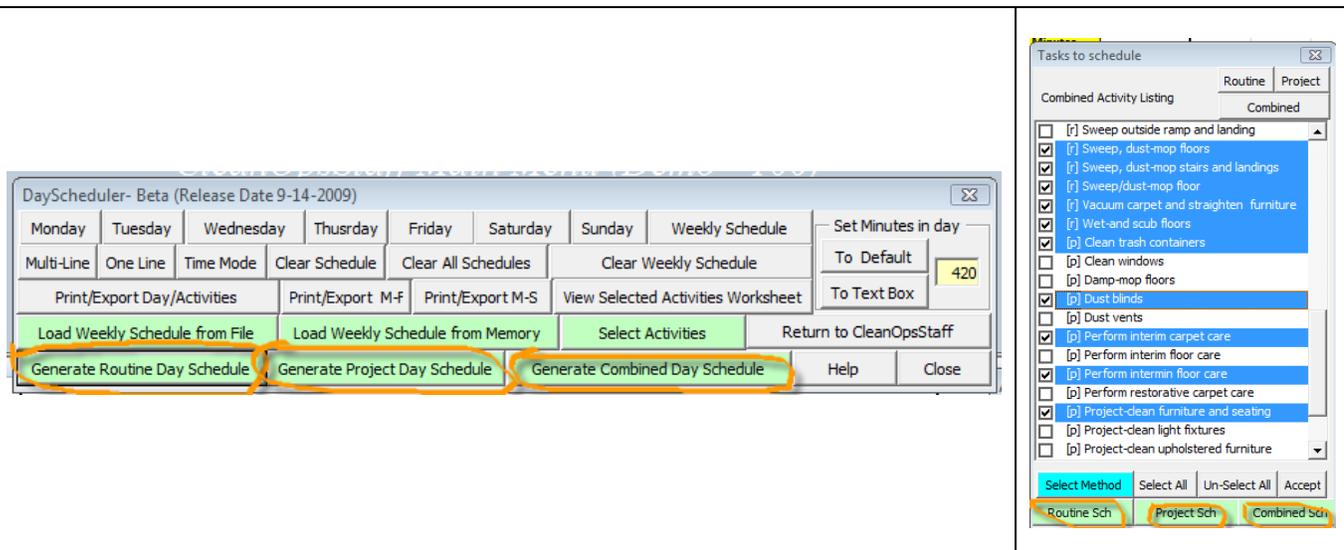
Selecting the Activities to Include in the Day Schedule

You will then select the cleaning activities to include in the day schedule or route sheet by clicking the **Select Activities** button. You will use the **Routine** button or **Project** button or **Combined** button depending on whether you are generating a day schedule for the routine activities or for the project activities, or for combined routine and project in a single schedule. Use the **Select Method**, **Select All**, and **Un-Select All** buttons and click and/or drag on the activity list in the listbox to select the cleaning activities you want to include in the day schedule. This ability to select activities allows you to organize the work in a manner that best fit your local situation. For example if you are using team cleaning, then you can select the activities for a particular cleaning specialist and create a day schedule for that specialist. If you are using area cleaning then you would most likely select all the activities and create a day schedule to accommodate each custodian performing all the activities for a particular area. If you have a dedicate project crew or dedicate floor crew you can select only the activities these crews are responsible for.



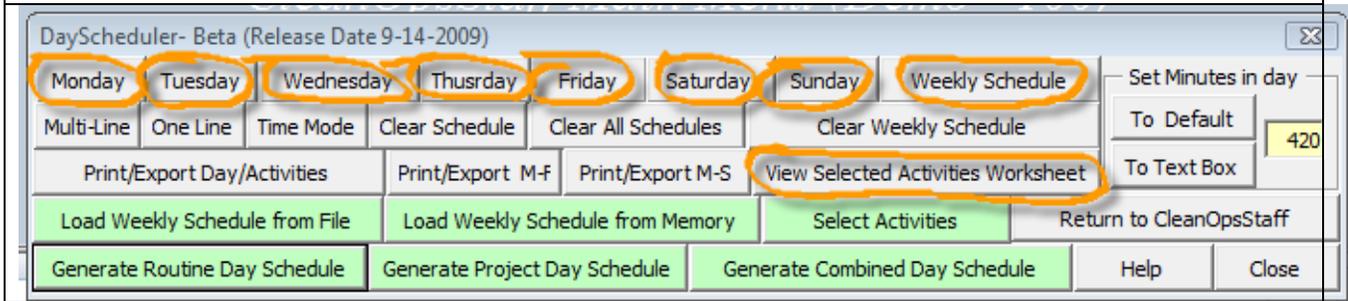
Generating the Day Schedule

Once you have decided whether you will generate a Routine schedule, or the Project schedule, or a Combined schedule and you have selected the activities to be scheduled, you will use the **Generate Routine Day Schedule**, **Generate Project Day Schedule**, Generate **Combine Day Schedule**, **Routine Sch**, **Project Sch**, or **Combine Sch** button to generate the schedule for all seven days. Once you have selected the activities you can close the **Activities to Select** box by clicking the **Accept** button or you can leave it open. Note that when displaying a combined activity listing, “[r]” and “[p]” is appended to the front of the activity name to help you keep track of the type of activities being scheduled. All the activities in the weekly schedule will be captured into the day schedule except the project activities marked as already scheduled.



Viewing the Seven Day Schedules, the Weekly Schedule and the Selected Activities Worksheet

You will use the **Day of Week** buttons, the **Weekly Schedule** button, and the **Selected Activities Worksheet** button to view the schedules you create. The **Selected Activities Worksheet** keeps track of which cleaning activities you selected to include in the day schedule. It lists all the activities required to be performed by the weekly schedule and places a “Yes” or “No” in the third column of the worksheet to denote whether you selected to include the activities or not. The included activities are highlight in the worksheet.



Reading the day schedules

The schedule is sorted by room number by default. However, you can use the auto sort buttons in the heading cells to sort the schedule, as you desire. The schedule lists the field as shown below. The **Mode** can display time in minutes or hours -- the **Mode** button allows you to switch between minutes and hours. The productive time in shift defaults to 420 minutes (7 hours) of productive time per workday. You can change this to match your local conditions by typing into the **Time in Shift** textbox. The **Time to Clean** column indicates the time to perform the activities for each room/space. The **Cumulative Time to Clean** column indicates the total time required for all the rooms/spaces above the row containing the **Cumulative Time to Clean** number. The **Cumulative Time Per Full Work Day** column indicates the total time required for all the rooms/spaces above the row containing the **Cumulative Time Per Full Work Day** number – this number start over at zero when it reaches the **Time in Shift** number and the row is highlighted green . Each green line represents the need for another custodian except the last green line could be less than a full workday for a custodian. The **Cumulative Number of Custodians** column is a running total of the number of custodians needed as you gone down the activity list. The number in the upper right cell of the schedule is the total number of custodian need to execute the day schedule. Note that in a combined day schedules, “[r]” and “[p]” is appended to the end of the activity name to help you keep track of the type of activities being scheduled.

Monday		Mode	Minutes			
C:\CleanOpsStaff Data\test1-HECS-PSch.xls Routine Day Schedule 9/9/2009 11:07 PM		Time in shift	420.00	2.07		
Room	Cleaning Tasks	Day of Week	Time to Clean	Cumulative Time to Clean	Cumulative Time Per Full Work Day	Cumulative Number of Custodians
Barton Hall 1 100 (Office with Carpet Floor)	Empty and clean ashtrays, Empty waste containers, Vacuum carpet and straighten furniture	Mo	21.39	21.39	21.39	0.05
Barton Hall 1 100B (Stairwell)	Sweep, dust-mop stairs and landings	Mo	3.69	25.08	25.08	0.06
Barton Hall 1 100C (Stairwell)	Sweep, dust-mop stairs and landings	Mo	2.78	27.86	27.86	0.07
Barton Hall 1 100H (Office with Carpet Floor)	Empty and clean ashtrays, Empty waste containers, Vacuum carpet and straighten furniture	Mo	1.89	29.75	29.75	0.07
Barton Hall 1 100I&A (Entranceway)	Clean/roll-up walk-off mats, Damp-mop floors, Dust flat surfaces, Sweep/dust-mop floor	Mo	10.47	40.22	40.22	0.10
Barton Hall 1 100K (Public (Circulation) with Hard Floor)	Clean telephones, Clean water fountain, Empty and clean ashtrays, Empty waste containers, Sweep, dust-mop floors	Mo	7.10	47.32	47.32	0.11
Barton Hall 1 100M (Public (Circulation) with Hard Floor)	Clean telephones, Clean water fountain, Empty and clean ashtrays, Empty waste containers, Sweep, dust-mop floors	Mo	0.69	48.01	48.01	0.11
Barton Hall 1 100N (Public (Circulation) with Hard Floor)	Clean telephones, Clean water fountain, Empty and clean ashtrays, Empty waste containers, Sweep, dust-mop floors	Mo	5.63	53.64	53.64	0.13

DayScheduler		C:\CleanOpsStaff Data\Week One With Some Monthly-HEC		Mode	Minutes
Tuesday		Combined Day Schedule 9/11/2009 10:04 PM		420.00	2.35
Room	Cleaning Activities	Day of Week	Time to Clean	Cumulative Time to Clean	Cumulative Number of Customers
Barton Hall 1 101 (Public (Circulation) with Hard Floor	Clean telephones [1], Clean water fountain [1], Empty and clean ashtrays [1], Empty waste containers [1], Sweep, dust-mop floor [1], Clean trash container [1], Dust vents [1]	Tu	8.39	85.65	0.20
Barton Hall 1 101A_R_C_1 Office with Carpet Floor-61	Clean wall/panels [1], Dust furniture and flat surfaces [1], Empty and clean ashtrays [1], Empty waste containers [1], Spot-clean carpet [1], Spot-clean walls, partitions, and doors [1]	Tu	15.47	101.12	0.24
Barton Hall 1 101D Office with Carpet Floor-225 CSF	Clean telephones [1], Dust furniture and flat surfaces [1], Empty and clean ashtrays [1], Empty waste containers [1], Spot-clean carpet [1], Spot-clean walls, partitions, and doors [1]	Tu	5.80	106.92	0.25
Barton Hall 1 102 Office with Carpet Floor-531 CSF	Clean telephones [1], Dust furniture and flat surfaces [1], Empty and clean ashtrays [1], Empty waste containers [1], Spot-clean carpet [1], Spot-clean walls, partitions, and doors [1]	Tu	13.68	120.60	0.29
Barton Hall 1 103 (Public (Circulation) with Hard Floor	Clean telephones [1], Clean water fountain [1], Empty and clean ashtrays [1], Empty waste containers [1], Sweep, dust-mop floor [1], Clean trash container [1], Dust vents [1]	Tu	10.04	130.64	0.31
Barton Hall 1 103A Office with Carpet Floor-375 CSF	Clean telephones [1], Dust furniture and flat surfaces [1], Empty and clean ashtrays [1], Empty waste containers [1], Spot-clean carpet [1], Spot-clean walls, partitions, and doors [1]	Tu	9.66	140.30	0.33
Barton Hall 1 103B Office with Carpet Floor-150 CSF	Clean telephones [1], Dust furniture and flat surfaces [1], Empty and clean ashtrays [1], Empty waste containers [1]	Tu	3.86	144.16	0.34

Printing and Exporting Day Schedules to Excel

To print the schedule to a printer or export the schedule to Excel, use the three Print/Export button shown below depending on whether you want to print/export one day, five days, or seven days. You will then select **Send to Printer** or **Send to Excel** button. Once the schedule is exported to Excel, it can be treated like any other normal excel workbook. The **Selected Activities Worksheet** is imported along with the day schedule whether you are exporting a single day or five days or seven so as a reminder of which cleaning activities you selected to include.

The screenshot shows the DayScheduler software interface. The 'Print/Export Day/Activities', 'Print/Export M-F', and 'Print/Export M-S' buttons are circled in orange. A 'Print/Export to Excel' dialog box is open, showing 'Send to Printer' and 'Send to Excel' buttons, both also circled in orange. The 'Send to Excel' button is highlighted in yellow.

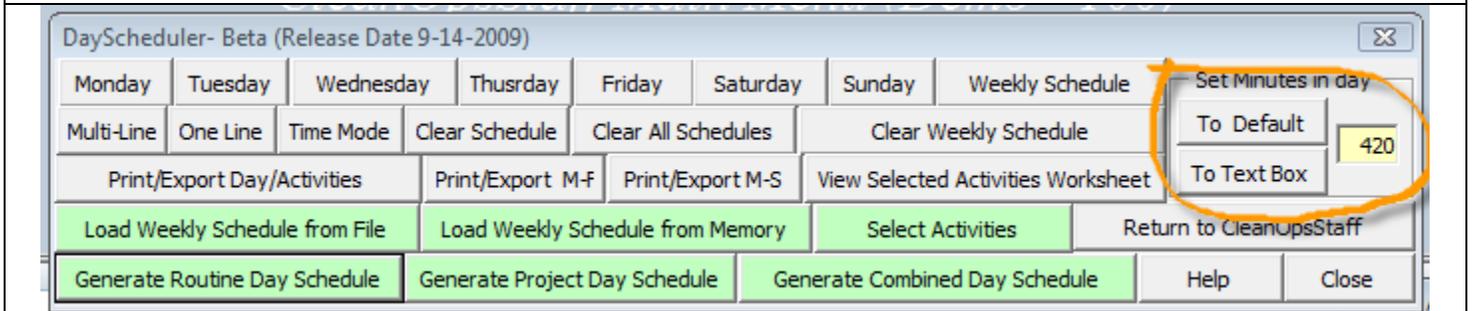
Clearing the schedule worksheets

You can clear or blank out the seven schedule worksheets, one at a time or all at once by using the **Clear Schedule** and **Clear All Schedule** buttons. You can clear or blank out the weekly schedules worksheet by clicking the **Clear Weekly Schedule** button.

The screenshot shows the DayScheduler software interface. The 'Clear Schedule', 'Clear All Schedules', and 'Clear Weekly Schedule' buttons are circled in orange.

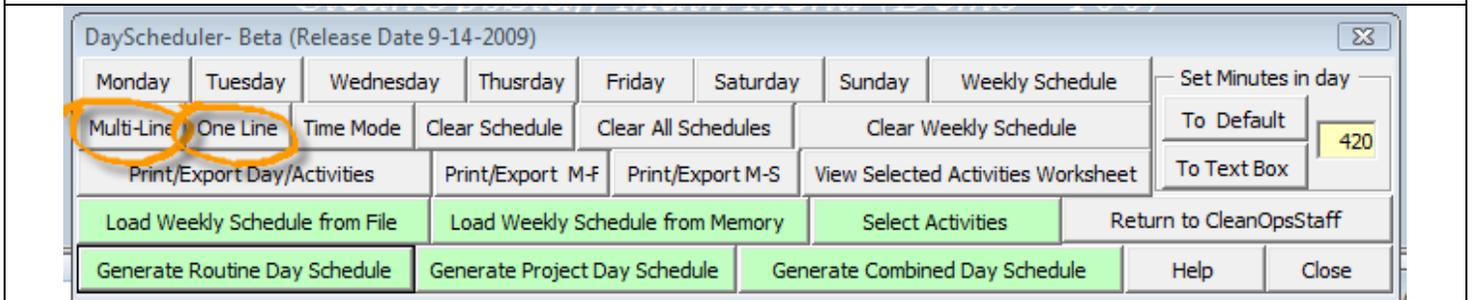
Setting Productive Minutes in Work Day

Before creating the day schedule, you should review the number of productive minutes in the workday. This will determine how many custodians you will need to execute the day schedule. Use the **To default** button to set the productive time in the workday to 420 minutes (7 Hours). Use the **To Textbox** button and the **textbox** to set the productive time in the workday to a different number to meet your local situation.



Adjusting the Schedule Format

You can adjust the column width and row height of the schedules in the same manner as you would in Excel by dragging the column and row devisers. You can use the **Multi-Line** and **One Line** buttons to wrap and unwrap the text in the columns.



Making the Day Scheduler Tool Visible

Each **DayScheduler** worksheet has a **DayScheduler** button in the upper left corner. If you close the DayScheduler tool and want to make it visible again, simply click the **DayScheduler** button.

