

Construction crew scheduling



Case background

Myke Great is the owner of a small construction company, GreatBuilds. The company is made up of several departments each with its own manager.

Each department works on different areas of construction. In each team, there are a number of employees who are deployed (generally in pairs) to work on client projects.

Myke needs a system that allows

- his department managers to schedule and assign jobs to their crews
- all the crew members to know what jobs they've been allocated and where they are. They also need to have access to all relevant information about the job while on the road
- the senior management to have oversight on the entire operation



The challenge

1. The needs of the department managers

James is the manager of the concrete crew. He has 10 members in his team. He needs a way to:

- assign his team to different jobs
- attach relevant documents to each appointment (for example, "Blue chandelier in the master bedroom for JOB 12345")
- filter jobs so he can see which member of his team is working where
- see where everyone is deployed on a daily and weekly basis to make sure he's optimally allocated his team
- see what has occurred in the past, how busy the team is, and what's coming up in the future
- know who is working and where so if he needs to make changes, no job is left short staffed
- quickly and easily update the schedule

2. The needs of the crew

Tim Smith and Joe Harrison are members of the concrete crew.

They need to know where they're working at any given time and on what. They also need to know whether there's any additional information needed to complete the job.

They also need to be able to add comments and attachments to jobs with the results of their work – pictures, notes, etc. to show that they were there, what they encountered, and what they did. This is later used as part of the company's record keeping.

Tim and seven others work just in the concrete department, while Joe and another colleague are skilled to also work in the drywall department.

3. The needs of the management team

Antonio is a member of GreatBuilds' management team. He needs to keep track of work that's been done, and have oversight on any future work. As he's in charge of customer service and feedback, it's also important that he knows exactly what's happened at each job and what (if any) the next steps are. He needs to be able to "filter" the calendars by client, job or account id, as well as keywords.

Erika is GreatBuilds' HR manager. She needs to have access to all the appointment records (and any attachments). They are used as a record of which employees were working and what they were working on.

Members of the management usually do not need to modify the calendar. They do need to be able to scroll or switch easily to drill into individual jobs or view the big picture of the calendar.

The Teamup Solution

All members of the GreatBuilds team need a scheduling tool that allows a lot of detailed information with different accesses for different people.

Myke realised that a Teamup calendar would help him achieve his goals and deliver a calendar that worked for all his team.

Setup and administration

Sub-calendars

Each department is given its own folder, with sub-calendars for team member nested within the folder.

If one of the team works in multiple departments (e.g., painting and electricity) their jobs would be color coded according for the respective department they work for.

There's a separate "projects" folder that holds all the information on each individual client or project.

All the team's individual calendars are set up to [disallow overlapping events](#) – this prevents anyone being double booked

Access links

Sharing the Teamup Calendar among staff users is by means of calendar links. Each member of the team is given their own personal link to their calendar. The calendar administrator can set [different combinations of access permissions](#) for the calendars, depending on who the calendar is for.

For example:

- Myke (owner) or his director of operations: administrator with full rights to manage the entire calendar, including access to Settings
- James (department manager): modify events on all his team calendars but no access to other departments
- Erika (HR): read only (she can view all calendar events and details but can't make changes)
- Antonio (management team): add only (he can add new appointments but can't modify any existing events)
- Tim (concrete crew): Modify-from-same-link (he can add details to jobs he's been assigned to but can't change anything else)

Calendar Views

Teamup supports nine different ways to view calendars plus countless ways of filtering calendar information.

Myke has set a default 4-week view. However, if any member of his team wants to change this, all they need to do is a click on the "view" tab or add [link parameters](#) to the calendar's url.

The calendar in practice

Entering jobs

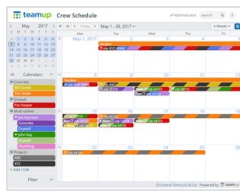
It is important that the department manager [assigns each job to one or more crew members and a project](#). If someone like Joe who works for multiple departments, the job needs to be assigned to his calendar (folder level) and one of the departments in the folder in order to ensure Joe will not be double booked.

To make sure the management team can filter appointments by job number, the department managers need to enter the job number in the event consistently, for example, in the title .

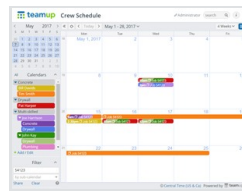
Below are some example views for the different roles. Click the image to make it full screen.

Myke's view (Administrator)

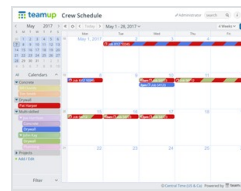
As the calendar administrator, Myke has the central control of the calendar and manages everything in Settings, incl. [managing calendar links](#).



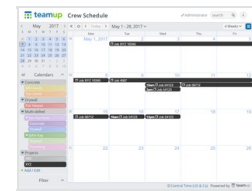
Administrator: Full view



Filter by job #, e.g. 54123



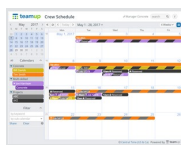
Filter by department, e.g. Drywall



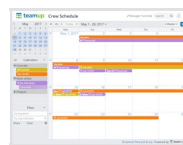
Filter by project or client

James' view (department manager): Concrete Department

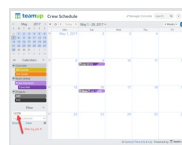
James needs to view his concrete crew's availability and to schedule jobs. He also needs to be able to filter jobs so he can view or re-allocate resources. With a TeamUp calendar, James can simply drag and drop to move a job, or ctrl-drag and drop to copy a job in case people get sick or for other good reasons.



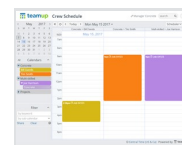
Manager Concrete: Full view



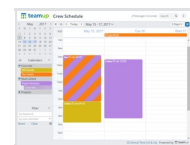
Concrete crew overview



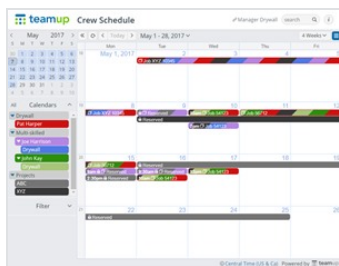
Filter by job #, e.g. 12378



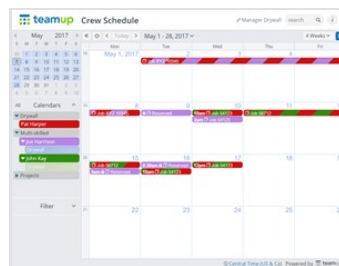
Crew in scheduler view



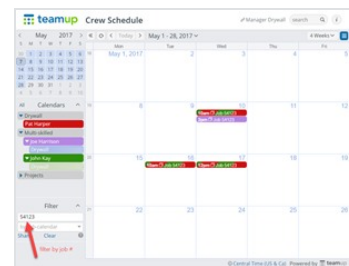
Crew schedule in 3 day view



Manager Drywall: Full view



Drywall crew overview



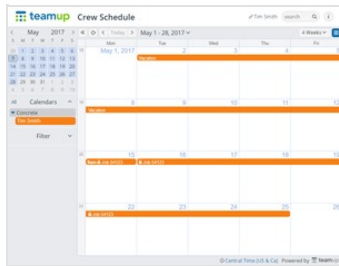
Filter by job #

Tim and Joe's views (Crew members)

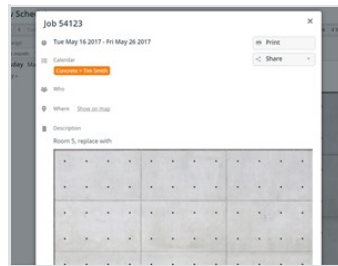
Tim and Joe only need to see what they're working on at any one time.

If they switch to the Agenda view (top right of the calendar) and check the details box, they'll see any notes, documents, or images attached to their appointment.

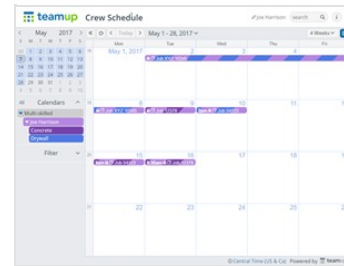
Joe works for two departments. However, he can easily see which job is for which department.



Worker Tim's view



Job instruction with images/files

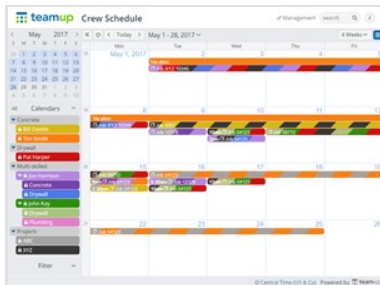


Worker Joe's view

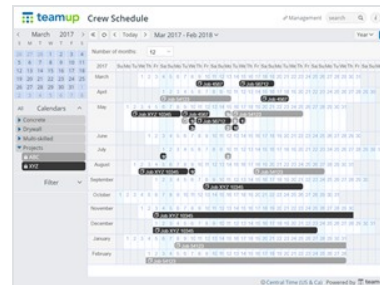
Antonio and Erika's views (Management)

Antonio and Erika need to keep an eye on the big picture. With their settings, they can see all staff activities on one view. They can filter by project or client.

With the year view Antonio can see how many jobs have been booked in the upcoming months.



Management: 4-week view, unfiltered



Management: Year view of all projects

Next Step

Organising and allocating work for GreatBuilds could have been a constant productivity drain. Thanks to a TeamUp Calendar, that process has been streamlined.

Are you facing a scheduling challenge? [Create a free calendar](#) and see whether this method works for you, or contact support@teamup.com for assistance.

