Training Guide

SCHEDULING

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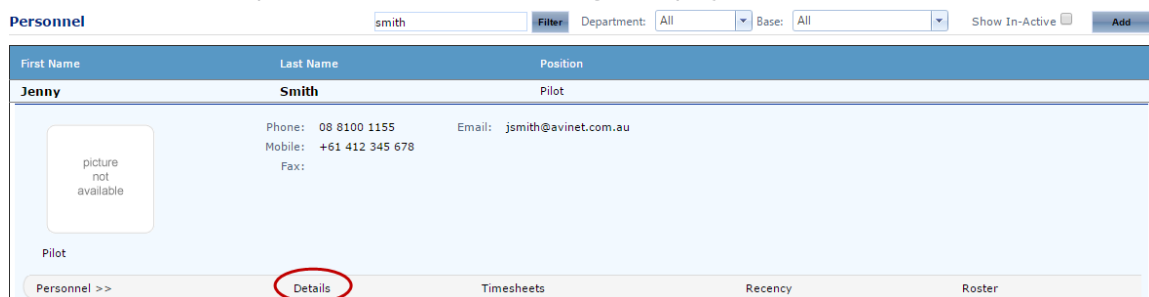
Assigning Access Levels

Before users can attempt to manage the scheduler for your organisation they must be assigned the correct access levels. Follow the steps below to assign the access levels:

Step 1.   Select **Operations > People > Personnel**. The **Personnel** screen is displayed.

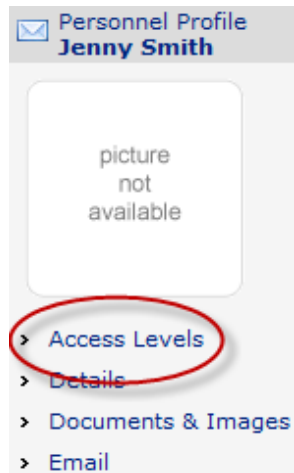Step 2.   Filter the **Personnel** screen according to your requirements.
- Enter filter criteria in the text-box and click [Filter].
- Select a value from the **Department** drop-down list to view personnel located in a particular department.
- Select a value from the **Base** drop-down list to view personnel located in a particular base location.
- Select the **Show In-Active** tick box to include personnel that are no longer active in the system. This includes personnel which have ceased employment with your organisation.

Step 3.   Click [Details] to view detailed personnel information. If you do not have the required access level to view personnel details, a warning is displayed.

Step 4.   Select 'Access Levels' from the **Personnel Profile** pane.

Step 5.   Click [Edit].

Step 6. Select the applicable access levels in the **'Scheduling'** group.

Access Level	Description
Scheduling > Administration > Modify All	Allows users to setup the **Scheduling** module including task types, schedule notifications and custom fields. This access enables access to **Manage > Setup... > Scheduling**.
Scheduling > Scheduler Role > Modify Selection	Allows users to add, edit and delete tasks in the **Scheduling** module for a specific base. Users with this access are able to change all settings for the task, including resource requirements, notification rules and task details.
Scheduling > Scheduler Role > Modify All	Allows users to add, edit and delete tasks in the **Scheduling** module for all bases. Users with this access are able to change all settings for the task, including resource requirements, notification rules and task details.
Scheduling > Tasking Role > View Selection	Allows users to view tasks for a specific base, but prevents the addition and editing of data for all fields.
Scheduling > Tasking Role > View All	Allows users to view tasks for all bases, but prevents the addition and editing of data for all fields.
Scheduling > Tasking Role > Modify Selection	Allows users to add and edit tasks and assign resources for a specific base, but prevents changes to task resource requirements.
Scheduling > Tasking Role > Modify All	Allows users to add and edit tasks and assign resources for all bases, but prevents changes to task resource requirements.

Step 7. Click [OK].

Setting Up Global Settings

Setup Scheduler Options

Step 1.   Select **Manage > Setup… > Scheduling**. The **Scheduling Setup** screen is displayed.

Step 2.   Select the name(s) of the primary scheduler(s) from the **Chief Scheduler(s)** drop-down list.

Step 3.   Select the default time zone for your organisation from the **Default Timezone** drop-down list.

Step 4.   Enter the start and end time for a working day in the **Start of Working Day** and **End of Working Day** fields.

Step 5.   Click [Save Changes].

Setup Department Roles

Department roles allow endorsements to be segregated into different groups for each department in the Air Maestro system. Defining endorsements by department roles allows the scheduling module to filter personnel based on certain resource requirements in addition to tracking which pilots are endorsed to perform what role.

For example, John Smith has been given the F14 endorsement for the PIC department role and the B412 endorsement for the SIC department role (see below).

This ensures that John Smith only appears as a resource in the scheduler for tasks that require pilots who are endorsed on the PIC role for the F14 and A109 aircraft type.

Step 1. Select **Manage > Setup... > Scheduling**. The **Scheduling Setup** screen is displayed. The **Department Roles** pane is displayed below the **Scheduling Options** pane.

Step 2. Click [Add new record] to define a new department role.

Step 3. Select a department from the **Department** drop-down list.

*To create additional departments, select **Manage > Setup...> AM Data**. Next, select the 'Departments' option from the drop-down list and click [Add Record]. Complete the new department details and click [✔] to save the new department.*

Step 4. Enter an applicable department role name in the **Role** text box.

Step 5. Click [✔] to confirm the new department role.

To edit an existing department role, click [✏] for the applicable department role, make the required changes and click [✔] to confirm.

Setup Sunrise/Sunset Options

Air Maestro's Scheduling module includes a feature to calculate the sunrise and sunset times at each base location for scheduled tasks.

Step 1.   Select **Manage > Setup... > Scheduling**. The **Scheduling Setup** screen is displayed. The **Sunrise/Sunset Options** pane is displayed adjacent to the **Scheduling Options** pane.

Step 2.   Select the **Display Sunrise/Sunset Times in Scheduler** option to view the sunrise and sunset times at the base corresponding with the scheduled task.

Step 3.   Select the applicable option from the **Zenith** drop-down list.

Step 4.   Enter the required offset for the sunrise and sunset times in the **Apply offset of** text box.

Step 5.   Select the applicable rounding options for the sunrise and sunset times in the **then round** and **to the nearest** text boxes.

Step 6.   Click [Save Changes].

> *To calculate the sunrise/sunset times for a base location, ensure the GPS co-ordinates and the time zone are set for the location. Set the GPS co-ordinates via* **Operations > Locations > All Locations > Location Details**. *Set the time zone via* **Operations > Locations > Bases > Base Details**.

Managing Task Statuses

Create Task Status

When a new task status is created, it must contain a unique identifiable name. The name assigned to the task status is displayed in the schedule.

Step 1. Select **Manage > Setup... > Scheduling**. The **Scheduling Setup** screen is displayed.

Step 2. Select the **Task Status** tab.

Step 3. Click [Add New Task Status]. A new row is displayed in the **Task Status** grid.

Step 4. Enter a unique identifier for the task status in the **Task Status** text box.

Step 5. Use the colour swatches to set a background colour for the task status.

Step 6. Select the **Active** tick box if this task status is to be available immediate for scheduling.

Step 7. Click **Apply** [✔]. The new task status is displayed in the **Task Status** grid.

Managing Task Types

Task types are used in the Scheduling module to organise common company tasks. Each task type can be associated with a set of resource requirements (aircraft and personnel), notification options and custom fields. An instance of a task type with associated resource requirements, notification rules and custom fields is then created in the scheduler.

It is important that the task types are configured according to the organisational requirements, before using the Scheduling module.

Create Task Type

When a new task type is created, it must contain a unique identifiable name. The name assigned to the task type is displayed in the scheduler.

Step 1. Select **Manage > Setup… > Scheduling**. The **Scheduling Setup** screen is displayed.

Step 2. Select the **Task Types** tab.

Step 3. Click [Add New Task Type]. A new row is displayed in the **Task Types** grid.

Step 4. Enter a unique identifier for the task in the **Task Type** text box.

Step 5. Select the **Don't allow resources to multitask** option to prevent resources being assigned to this task if they are already assigned to an existing task during the same period.

Step 6. Select the **Ensure resources are rostered** option to ensure that resources being assigned to this task are rostered for duty on the associated day.

Step 7. Select the **Link to sunrise times** option to link the task start time to the calculated sunrise time of the base location.

Step 8. Select the **Link to sunset times** option to link the task end time to the calculated sunset time of the base location.

> *The **Link to sunrise times** and **Link to sunset times** options are only available if the **Display Sunrise/Sunset Times in Scheduler** option is enabled via **Manage > Setup… > Scheduling > Global Settings**.*

Step 9. Use the colour swatches to set a text and background colour for the task type.

Step 10. Select the Active tick box if this task type is to be available immediate for scheduling.

Step 11. Click Apply [✔]. The new task type is displayed in the task type grid.

Scheduling Setup

| Global Settings | Task Types | Task Status | | ADHOC Flight | EMS Flight | Maintenance Flight | SAR Flight |
| Scheduled Flight | Survey Flight | Training Flight | | | | | |

☐ List Disabled Task Types   **Add New Task Type**

Task Type	Don't allow resources to multitask	Ensure resources are rostered	Link to sunrise times	Link to sunset times	Text Colour	Background Colour	Active	
ADHOC Flight	☑	☐	☐	☐	■ ▼	☐ ▼	☑	✔ ✖
EMS Flight	☑	☐	☐	☐	■ ▼	🟩 ▼	☑	✏
Maintenance Flight	☑	☑	☐	☐	■ ▼	🟦 ▼	☑	✏

Setup Aircraft Resource Requirements
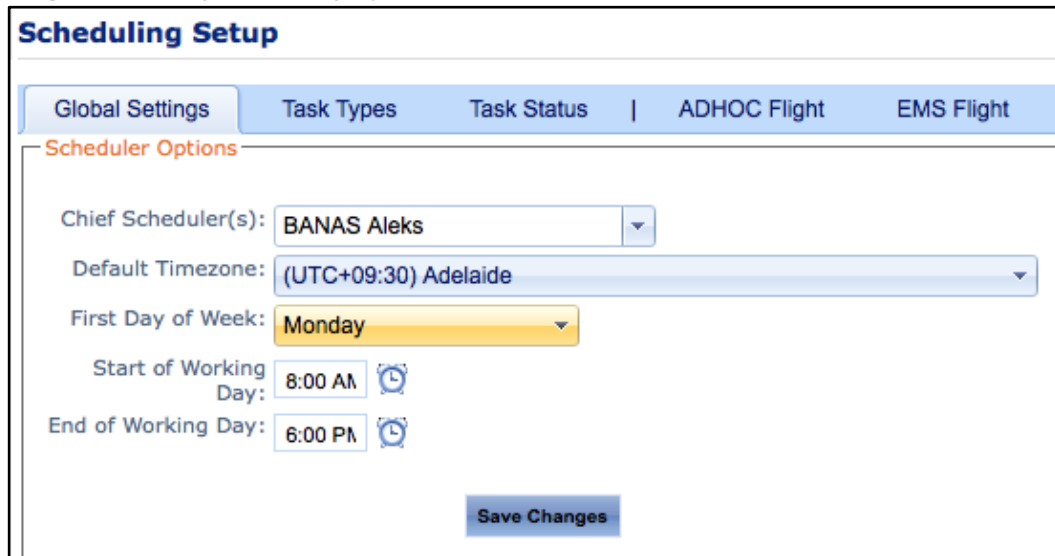
Air Maestro allows you to associate the required resource requirements for each task type.

For example, a 'HEMS' task type may require an Aircraft, Pilot in Command, Co-Pilot, and Flight Nurse as resources.

When you schedule the task type, the system flags whether the task type meets the minimum resource requirements.

Step 1.   Select **Manage > Setup… > Scheduling**. The **Scheduling Setup** screen is displayed.

Step 2.   Select the tab corresponding with the required task type. The **Default Resourcing Requirements** pane is displayed.

Step 3.   Click [Add Resource Requirement]

Step 4.   Enter the name of the resource in the **Resource Name** field. For example, Aircraft, Secondary Aircraft, Simulator etc.

Step 5.   Select the **'Aircraft'** resource type from the **Type** drop-down list. The resource options are updated depending on the option selected.

Step 6.   Select the total number of this resource type required for the task type from the **# Required** drop-down list.

Step 7. Select the maximum number of this resource type required for the task type from the **Max. Resources** drop-down list.

Step 8. Click [modify] corresponding with the **Type Restriction** field, to restrict the aircraft resource to a particular endorsement. If the aircraft resource does not require a specific endorsement proceed to **Step 11**.

Step 9. Enter the first characters for the required endorsement code and select the required code from the drop-down list.

Step 10. Click [update] after all required type restrictions are selected.

Step 11. Click [modify] corresponding with the **Recency Requirements** field, to ensure the aircraft resource meets particular recency requirements. If the aircraft resource does not require any specific recency requirements proceed to **Step 14**.

Step 12. Enter the first characters for the required aircraft recency item and select the required recency from the drop-down list.

Step 13. Click [update] after all required recency items are selected.

Step 14. Click [Insert] to save the resource.

Setup Personnel Resource Requirements

Step 1. Select **Manage > Setup... > Scheduling**. The **Scheduling Setup** screen is displayed.

Step 2. Select the tab corresponding with the required task type. The **Default Resourcing Requirements** pane is displayed.

Step 3. Click [Add Resource Requirement]

Step 4. Enter the name of the resource in the **Resource Name** field. For example, Captain, First Officer, Flight Attendant, Doctor, Flight Nurse, Paramedic etc.

Step 5. Select the **'Personnel'** resource type from the **Type** drop-down list. The resource options are updated depending on the option selected.

Step 6.   Select the total number of this resource type required for the task type from the **# Required** drop-down list.

Step 7.   Select the maximum number of this resource type required for the task type from the **Max. Resources** drop-down list.

Resource Name: Pilot in Command   Type: Personnel   ,   # Required: 1   ,   Max. Resources: 1
Department filter (or): *any* (modify)
Endorsement restriction (or): *any* (modify)
Recency requirements (and): *none* (modify)
Required experience (and):   (modify)
                                                                        (update) (cancel)

Step 8.   Click [modify] corresponding with the **Department** field, to restrict the personnel resource to a particular department. If the personnel resource is not required from a specific department proceed to **Step 11**.

Resource Name: Pilot in Command   Type: Personnel   ,   # Required: 1   ,   Max. Resources: 1
Department filter (or): *any* (modify)
Endorsement restriction (or): *any* (modify)
Recency requirements (and): *none* (modify)
Required experience (and):   (modify)
                                                                        (update) (cancel)

Step 9.   Enter the first characters for the required department and select the required department from the drop-down list.

Resource Name: Pilot in Command   Type: Personnel   ,   # Required: 1   ,   Max. Resources: 1
Department filter (or): Pilot × Co-P   (update)
Endorsement restriction (or): *an* Co-Pilots
Recency requirements (and): *none* (modify)
Required experience (and):   (modify)
                                                                        (update) (cancel)

Step 10.   Click [update] after all required department restrictions are selected.

Resource Name: Pilot in Command   Type: Personnel   ,   # Required: 1   ,   Max. Resources: 1
Department filter (or): Pilot × Co-Pilots ×   (update)
Endorsement restriction (or): *any* (modify)
Recency requirements (and): *none* (modify)
Required experience (and):   (modify)
                                                                        (update) (cancel)

Step 11.   Click [modify] corresponding with the **Endorsement** field, to restrict the personnel resource to a particular endorsement. If the personnel resource does not require a specific endorsement proceed to **Step 14**.

Resource Name: Pilot in Command   Type: Personnel   ,   # Required: 1   ,   Max. Resources: 1
Department filter (or): Pilot, Co-Pilots (modify)
Endorsement restriction (or): *any* (modify)
Recency requirements (and): *none* (modify)
Required experience (and):   (modify)
                                                                        (update) (cancel)

Step 12. Enter the first characters for the required endorsement and select the required endorsement from the drop-down list.

Resource Name: Pilot in Command	Type: Personnel	, # Required: 1	, Max. Resources: 1

Department filter (or): Pilot, Co-Pilots (modify)

Endorsement restriction (or): A109 × B412| (update)

Recency requirements (and): *none* (mo   B407

Required experience (and): (modify)   B412

(update) (cancel)

Step 13. Click [update] after all required endorsement restrictions are selected.

Resource Name: Pilot in Command	Type: Personnel	, # Required: 1	, Max. Resources: 1

Department filter (or): Pilot, Co-Pilots (modify)

Endorsement restriction (or): A109 × B412 ×   (update)

Recency requirements (and): *none* (modify)

Required experience (and): (modify)

(update) (cancel)

Step 14. Click [modify] corresponding with the **Recency Requirements** field, to ensure the personnel resource meets particular recency requirements. If the personnel resource does not require any specific recency requirements proceed to **Step 17**.

Resource Name: Pilot in Command	Type: Personnel	, # Required: 1	, Max. Resources: 1

Department filter (or): Pilot, Co-Pilots (modify)

Endorsement restriction (or): A109, B412 (modify)

Recency requirements (and):   (modify)

Required experience (and):   (modify)

(update) (cancel)

Step 15. Enter the first characters for the required personnel recency item and select the required recency from the drop-down list.

Resource Name: Pilot in Command	Type: Personnel	, # Required: 1	, Max. Resources: 1

Department filter (or): Pilot, Co-Pilots (modify)

Endorsement restriction (or): A109, B412 (modify)

Recency requirements (and): Pilot: Medical (Class 1) × Instruc   (update)

Required experience (and): (modify)   Pilot: Instructor Rating

(update) (cancel)

Step 16. Click [update] after all required recency items are selected.

Resource Name: Pilot in Command	Type: Personnel	, # Required: 1	, Max. Resources: 1

Department filter (or): Pilot, Co-Pilots (modify)

Endorsement restriction (or): A109, B412 (modify)

Recency requirements (and): Pilot: Medical (Class 1) × Pilot: Instructor Rating ×   (update)

Required experience (and): (modify)

(update) (cancel)

Step 17. Click [modify] corresponding with the **Required Experience** field, to restrict the personnel resource to a particular experience requirement. If the personnel resource does not

require a specific endorsement proceed to **Step 22**.

Step 18. Enter any character in the **Required Experience** drop-down list to display the applicable options.

Step 19. Select the experience requirements for this personnel resource.

Step 20. Complete the minimum experience requirements in each selected field according to the options available.

Option	Description
Total Experience	Enter the minimum total flying hours required by personnel in order to fulfil this task.
Total Hrs. On Type	Enter the minimum total flying hours on the associated aircraft type required by personnel in order to fulfil this task.
Cmd. Hrs.	Enter the minimum 'in command' flying hours required by personnel in order to fulfil this task.
Cmd. Hrs. on Type	Enter the minimum 'in command' flying hours on the associated aircraft type required by personnel in order to fulfil this task.
Task Hrs. >	Enter the minimum flying hours on the selected task (Charter, Firefighting etc.) required by personnel in order to fulfil this task. Note that the task types are configurable for each organisation via the Manage > Setup > Timesheets option and by selecting the Flight Tasks tab.
Task Hrs. On Type	Enter the minimum flying hours on the selected task on the associated aircraft type required by personnel in order to fulfil this task.

Step 21. Click [update] after all required experience restrictions are completed.

| Required experience (and): | Total Experience > 2000 × | Pilot: HEMS ▼ | Hrs. > 500 × | (update) |

Step 22. Click [Insert] to save the resource.

Resource Name: Pilot in Command   Type: Personnel   ▼ ,   # Required: 1 ▼ ,   Max. Resources: 1 ▼
Department filter (or): Pilot, Co-Pilots (modify)
Endorsement restriction (or): A109, B412 (modify)
Recency requirements (and): Pilot: Medical (Class 1), Pilot: Instructor Rating (modify)
Required experience (and): Total Experience > 500, Pilot: Charter Hrs. > 100 (modify)

(insert)   (cancel)

Step 23. Continue adding additional personnel resources to the task type by following **Steps 3-22**.

Setup Notification Requirements

SMS and email notifications can be setup for each task type when an instance of the task type is created, modified, delete and/or is scheduled but one or more resources do not meet the requirements.

Step 1. Select **Manage > Setup… > Scheduling**. The **Scheduling Setup** screen is displayed.

Step 2. Select the tab corresponding with the required task type. The **Default Scheduling Notifications** pane is displayed below the **Default Resourcing Requirements**.

Scheduling Setup

| Global Settings | Task Types | Task Status | | ADHOC Flight | EMS Flight |

Scheduler Options

Chief Scheduler(s): BANAS Aleks ▼
Default Timezone: (UTC+09:30) Adelaide ▼
First Day of Week: Monday ▼
Start of Working Day: 8:00 AM 🕐
End of Working Day: 6:00 PM 🕐

Save Changes

Step 3. Enter the required notification window for the task type in the **Notification Window** field. Enter the number of hours before the task type is scheduled to begin, where the email alert should be generated. The notification is only sent if the task type does not meet one or more of the resource requirements.

Invalid resourcing notification

Notification window: 0   hours prior to task beginning
Personnel to notify via Email: ▼   when the task is not valid and within the notification window

Step 4. Select the personnel that must be notified for this task type if the task requirements are not met from the **Personnel to notify via Email** drop-down list.

Step 5.   Click [Save Changes].

Setup Custom Fields

Step 1.   Select **Manage > Setup… > Scheduling**. The **Scheduling Setup** screen is displayed.

Step 2.   Select the tab corresponding with the required task type.

Step 3.   Scroll to the **Custom Fields** pane.

Step 4.   Click [Add New Field].

> A '**Group**' custom field is recommended when setting up new fields for the tab. Adding custom fields to a group allows the user to control how the custom fields are displayed in the task.

Step 5.   Select **'Group'** from the **Control Type** drop-down list.

Step 6.   Enter the control name in the **Control Name** text box. This name is a unique identifier used to store the custom field in the database. Special characters such as '?' and '%' etc are not accepted.

Step 7.   Enter the control label in the **Control Label** text box. This label is displayed in task.

Step 8.   Select the **Border** tick box to include a border around the custom field.

Step 9.   Select the **Display Label** tick box to display the label entered in the **Control Label** text box in the task.

Step 10. Complete the **Options** pane for the custom field as required.

Option	Description
Display Mode	Select the display mode for the group field. The 'Flow' display mode attempts to fit all the custom fields as close together and as neatly as possible. The 'Table' display mode displays each custom field one after another depending on the direction.
Direction	Select the direction in which the custom fields are displayed.
Number of Columns	Select the number of columns that are contained within this group.
Label Width	Enter the width of each field label within this group.
Group Width	Enter the width of the entire group.
Alignment	Select the required alignment of fields within this group.
Display Options	Select the display option for the group field.

Step 11. Click [Insert]. The **Custom Fields** grid is update with the new custom field.

Field Name	Field Type		
			Add New Field
grpGeneralInformation	Group	✏	🔍

Step 12. Click [🔍] associated to group custom fields or use the **Hierarchy** drop-down list to navigate to the group custom field. All the custom fields that reside inside are displayed in the **Custom Fields** grid.

Step 13. Click [Add New Field] to add a custom field to the group custom field.

Step 14. Select the required field type from the **Control Type** drop-down list.

Option	Description
Aircraft	Displays a drop-down list of every aircraft within the system.
Autonumber	Displays an automatically generated number starting from a base number and prefix.
Calculated Field	Displays a calculated value based on a formula involving other custom fields. For example, you may create an 'Age' calculated field, which outputs a numeric value based on an entry in a 'Date of Birth' custom field.
Checkbox	Displays a tick box that enables the user to select from true/false or yes/no options.
Checkbox List	Displays multiple tick boxes that enable the user to select one or more items.
Cumulative Time	Displays a text box which enables the user to enter an amount of time.
Date Control	Displays a picker that enables the user to select a date.
Date Time	Displays a picker that enables the user to select a date and time.
Drop-Down List	Displays a predefined list that enables the user to select a single item from the list.
Group	Groups multiple custom fields under a single heading.
Label	Displays a line of text.
Numeric	Displays a text box which enables the user to enter numerical data.
Personnel	Displays a drop-down list of all personnel within the system and when a user is selected, further information is displayed about the selected user (Contact Details, Company Details, Pilot Details or Crewmen Details).
Radio Button List	Displays multiple radio buttons that enable the user to select a mutually exclusive option.
Text	Displays a text box which enables the user to enter text data.
Time	Displays a text box which enables the user to enter time data.
Upload	Displays the upload control allowing users to upload files.

Step 15. Complete the custom field options with the required settings.

Option	Description
Control Name	Enter the unique identifier for the custom field in the **Control Name** text box. This name is used to store the custom field in the database. Special characters such as (? % etc.) are not accepted.
Control Label	Enter the display name for the custom field in the **Control Label** text box. For example, you may enter a more descriptive name than that entered in the **Control Name** field as this field is displayed in the interface.
Border	Select the **Border** tick box to include a border around the field.
Display Label	Select the **Display Label** tick box to include the label entered in the **Control Label** text box for the field.

Step 16. Complete the **Options** pane for the custom field as required. The options vary according to the selected custom field.

For example, for the **'Drop-Down List'** control type you must specify if the custom field is required, the different list items, and if the custom field is always displayed. For the **'Text'** control type you must specify if the custom field is required, if a multi-line text box is required, the dimensions of the text box, and if the custom field is always displayed.

*The **Display Options** field allows you to specify when the field must be displayed. The default is **'Always'**, but if you click the **'Always'** text a dialog box is displayed which allows you to set the view rules for the field.*
*For example, if you had a field for **'Delays'** you may wish to display a **'Description'** text box only when the **'Delays'** field is selected.*

Step 17. Click [Insert]. The custom field grid is updated with the new custom field.

*A preview of the custom field is available in the **Preview** pane. To modify the field, click [✏], edit the required options and click [Update].*

Step 18. Repeat **Steps 13-18** to add additional custom fields within the same group custom field.
Step 19. To add additional custom fields to another group custom field, click [🔍] associated to group custom field or use the **Hierarchy** drop-down list to navigate to the group custom field. All the custom fields that reside inside are displayed in the **Custom Fields** grid.
Step 20. Repeat **Steps 13-18** to additional custom fields to the selected group custom field.
Step 21. Select **'root'** from the **Hierarchy** drop-down list to navigate out of any group custom field and back to the original **Custom Field** grid to add additional custom fields outside of the first group custom field.
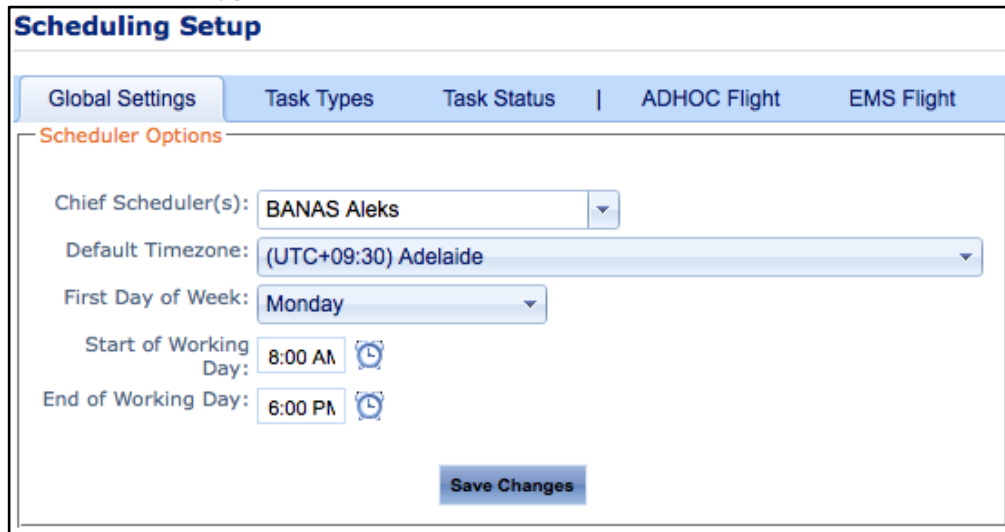
Modify Task Types

Step 1.   Select **Manage > Setup… > Scheduling**. The **Scheduling Setup** screen is displayed.

Step 2.   Select the **Task Types** tab.

Step 3.   Click **Edit** [🖉] corresponding with the required task type.

Step 4.   Edit the required information.

Step 5.   Click **Update** [✔]. The **Task Types** grid is updated with the changes.

Step 6.   Select the tab corresponding with the required task type.
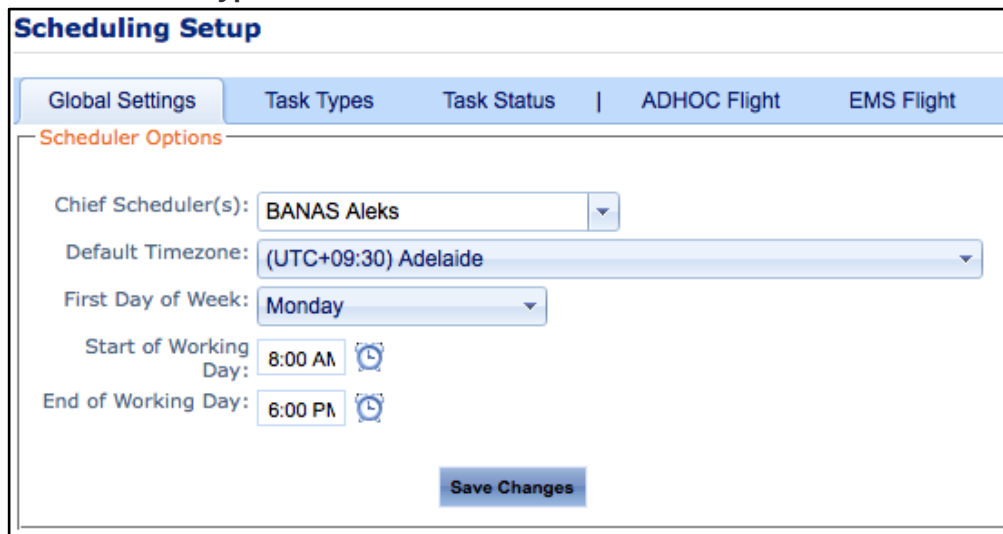
Step 7.   Edit the required resource requirements, notification options or custom fields.

Disable Task Types

Step 8.   Select **Manage > Setup... > Scheduling**. The **Scheduling Setup** screen is displayed.

Step 9.   Select the **Task Types** tab.

Step 10. Click **Edit** [🖊] corresponding with the required task type.

Step 11. Unselect the **Active** tick box.

Step 12. Click **Update** [✔]. The **Task Types** grid is updated with the changes.

Scheduling Fundamentals

Air Maestro's scheduling module allows users to create compliant schedules in an online environment. Schedules created in Air Maestro can be verified to ensure they meet the work practice and resource requirements as setup by your organisation. Furthermore, the notification tool allows you to automatically alert assigned personnel if a task is not allocated or does not meet the task requirements.

The Filters

There are a number of filters users can select to view schedules in the desired format. The available filters are linked to the view type and may not be available in each view type.

Filter	Description
Task Type	Use the **Task Type** filter to view selected task types in the schedule.
Group By	Use the **Group By** filter to group the scheduled tasks by Base, Personnel, Aircraft, Task Type or Task.
Base	Use the **Base** filter to view selected base locations in the schedule.
Department	Use the **Department** filter to view selected base locations in the schedule.
Zoom	Use the **Zoom** filter to view the scheduled tasks for a single day, three days, week or fortnight. This filter is only available in the **Timeline** view.
Display Exact Times	Use the **Display Exact Times** option to display the scheduled tasks according to their start and end times in the schedule. This filter is only available in the **Timeline** view.
Switch Orientation	This option is only available in the **Week** and **Rolling Week** views when grouping is applied in the **Group By** filter.
Begin Validation	Click [Begin Validation] to validate the compliance of all tasks listed in the current view.

The Views

There are five views users can select from when viewing the scheduler.

Filter	Description
Day	Use the **Day** view to view a single day in the schedule. Times are listed vertically.
Week	Use the **Week** view to view a single week in the schedule. Times are listed vertically and days of the week are displayed horizontally.
Rolling Week	Use the **Rolling Week** view to view a single week in the schedule, commencing from today's date. Times are listed vertically and days of the week are displayed horizontally.
Month	Use the **Month** view to view a single month in the schedule.
Timeline	Use the **Timeline** view to view scheduled tasks in a selected time period in a Gantt Chart format. Combine the **Timeline** view with the **Group By** filter options, to display scheduled tasks by Base, Personnel, Aircraft, Task Type or Task.

Tool Tip Attributes

Scheduled tasks can be hovered over to display further information about the scheduled task. In the example below, the task is titled 'Hospital Transfer'. When hovered over the details of the task are displayed.

Filter	Description
Task Type and Name	The first section of the tool tip, displays the task type (HEMS Flight) and task name (Hospital Transfer).
Date	The **Date** field displays the date of the scheduled task and the corresponding day of the week.
Time	The **Time** field displays the start and end time of the scheduled task.
Duration	The **Duration** field displays the total duration of the scheduled task, automatically calculated based on the start and end time.
Flight time	The **Flight Time** field displays the total flight time associated with the scheduled task.
Route	The **Route** field displays the route associated with the scheduled task.
Description	The **Description** field displays the detail of the task as entered in the Description text box on the **Task Details** tab.
Resource requirements	The last section of the tool tip, displays the resources required for the task type and if applicable the names of the resources assigned to that task. In the example above, there are two resource requirements (Aircraft and PIC) and both are unallocated.
Custom Fields	If custom fields have been enabled for the task type and completed, the hover also displays the completed details.

Scheduled Task Compliance Icons

Can icon indicates the compliance status with work practices and recency requirements for scheduled tasks. The following icons are used to indicate task compliance.

Icon	Description
No Icon	Normal view of a scheduled task. Indicates that all resource requirements are allocated and there are no conflicts with overlapping tasks, rostered data etc.
	A blue icon in the upper right hand corner indicates a notice for the scheduled task. A notice could be triggered by one of the following: • An aircraft or personnel has been assigned as a resource multiple times for the same task • An aircraft or personnel has been assigned as a resource for the task, but they are not currently located at the task base • A personnel resource assigned to the task has a work practice control on the task date in the caution threshold
	A red icon in the upper right hand corner indicates a critical alert for the scheduled task. A critical alert could be triggered by one of the following: • A required aircraft or personnel resource has not been assigned to the task • An assigned aircraft or personnel resource does not meet the resource requirements for the task • An assigned aircraft or personnel resource has an overlapping task (and it is a requirement of the task that resources cannot overlap) • An aircraft resource assigned to the task is offline • A personnel resource assigned to the task is on leave • A personnel resource assigned to the task is not rostered on duty (or standby) on the task date (and it is a requirement of the task that resources are rostered) • A personnel resource assigned to the task has a work practice control on the task date in the critical threshold • A mandatory custom field has not been completed

Viewing the Scheduler

Step 1.   Select **Operations > Scheduling > Scheduler**. The **Scheduler** screen is displayed.

Step 2.   Modify the filters and views to suit your requirements.

Step 3.   Select the required date period using the date picker.
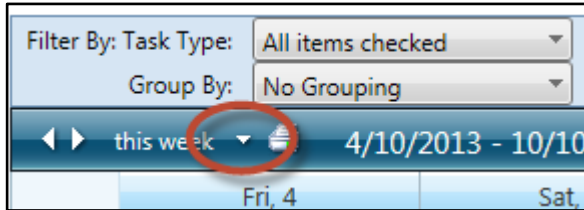
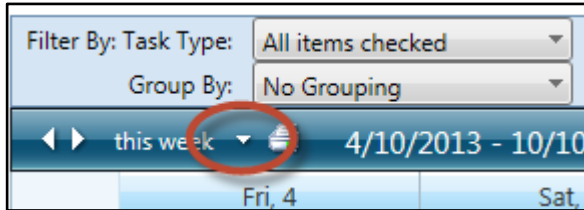The **Scheduler** for the selected period is displayed.

Step 4.   Hover on a scheduled task to display more information for that task. The tool tip is displayed.

If there are any unallocated resources for this task, they are highlighted by the **'Unallocated'** red text. An icon indicates the compliance status with work practices and recency requirements for this task.

Creating Tasks

Step 1. Select **Operations > Scheduling > Scheduler**. The **Scheduler** screen is displayed.

Step 2. Modify the filters and views to suit your requirements.

Step 3. Select the required date period using the date picker.

The **Scheduler** for the selected period is displayed.

Step 4. Select the preferred view for the selected date period. In the example below, the **Timeline** view is selected with a **Single Day** zoom and is grouping the tasks by **Aircraft**.
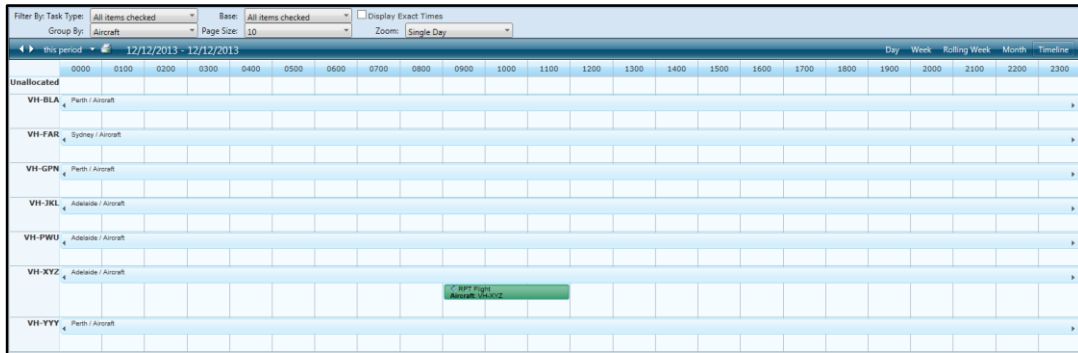
Step 5. Double-click on the required date/time in the scheduler to create a new task. The **Create Task** dialog box is displayed.

Step 6.   Complete the fields on the **Task Details** tab.

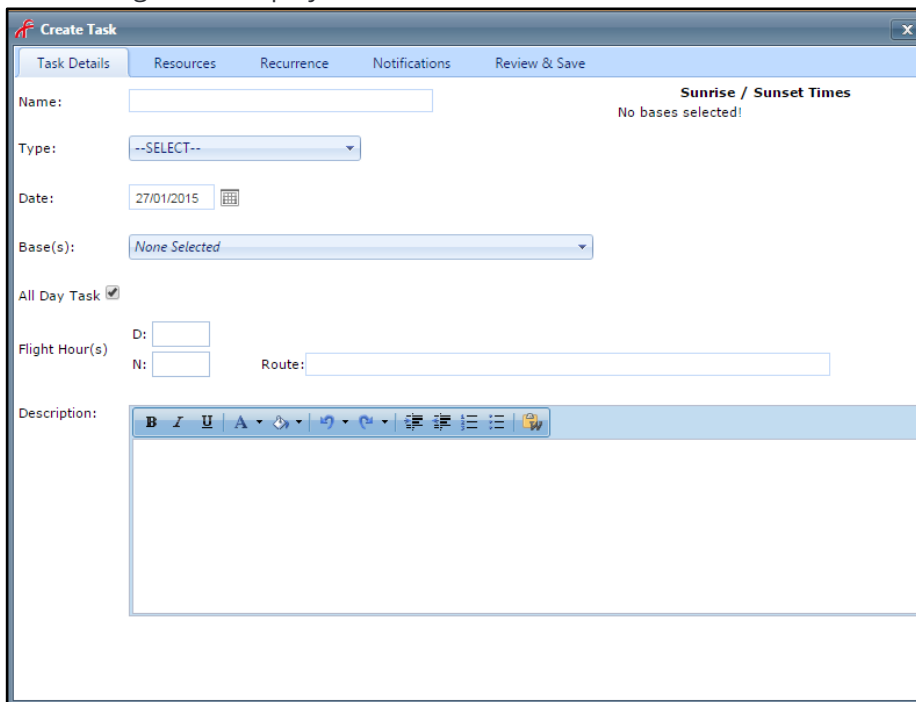| Field	Description
Name	Enter the task name in the **Name** field.
Type	Select the task type from the **Type** drop-down list.
Date	Edit the task date if required.
Base(s)	Select the base(s) related to the task.
All Day Task	Select the **All Day Task** option if the task spans the entire day. Alternatively, unselect the **All Day Task** option to enter a specific start and end time for the task. If entering start and end times for the task, you have the option to link the start and end times to the sunrise and/or sunset times for the base location. This option is only available if the **Display Sunrise/Sunset Times in Scheduler** option is enabled via **Manage > Setup > Scheduling > Global Settings**.
Flight Hour(s)	Enter the total day and night flight hours related to this task if applicable.
Route	Enter the route for the task if the task involves a flight. Alternatively, if the task consists of a number of legs, complete the **Leg Details** tab with the leg information, which will automatically update the Route field on this tab.
Description	Enter a description for the task.

Step 7. Select the **Resources** tab. The required resources for the task type are displayed as set in the task type setup.

Step 8. Assign the required resources to the task by clicking on the **Not Allocated!** button. The **Select Resource** dialog box is displayed.

Step 9. Select the required resource from the **Name** drop-down list for personnel and the **Registration** drop-down list for aircraft. Further information about the selected resource is displayed.

Only resources matching the task resource requirements (endorsements, recency, departments etc.) are displayed in the drop down list. Resources not meeting the resource requirements can be selected by typing the resource name into the drop down list.

Step 10. Click [Set Resource]

Step 11. Select the **Leg Details** tab if legs are required for the task. Alternatively, if legs are not required proceed to **Step 13**.

*The **Leg Details** tab is only displayed if the **'Track Flight Leg Data'** option is selected in **Manage > Setup... > Flight Records**.*

Step 12. Complete the fields on the **Leg Details** tab.

Field	Description
Planned Departure – Time	Enter the expected departure time for each leg.
Planned Departure – Location	Enter the expected departure location for each leg. This field is linked to the locations register and detects previously entered locations. If the departure location is not in the list, you can enter a new location in the text box.
Planned Arrival –Time	Enter the expected arrival time for each leg.
Planned Arrival – Location	Enter the expected arrival location for each leg. This field is linked to the locations register and detects previously entered locations. If the arrival location is not in the list, you can enter a new location in the text box.

Length	This field is automatically calculated based on the time entered in the **Planned Departure – Time** and **Planned Arrival – Time** fields for each leg.
Route Summary	This field is automatically populated based on the **Planned Departure – Location** and **Planned Arrival – Location** fields for each leg.
Update Route and Flight Hours From Legs	Select this option to automatically update the **Route** and **Flight Hours** fields on the **Task Details** tab.
Total	This field is automatically populated based on the total of all the **Length** fields.

Step 13. Select the **Recurrence** tab.

> If the task occurs only once, do not complete the **Recurrence** tab and proceed to **Step 16**.

Step 14. Complete the fields on the **Recurrence** tab.

Field	Description
Start Date	Enter the start date of the task.
Frequency	Select the frequency of the task. Options include: • Hourly • Daily • Weekly • Monthly • Yearly Additional options are presented based on your selection. For example, if you select the daily option, you can specify whether the task occurs every weekday or at set intervals.
End Date	Enter the end date of the task. If the task occurs indefinitely, select the 'No end date' option. Otherwise, specify an end date or end the task after a set number of iterations.

Step 15. Click [Create Recurrence]. The new recurrence rule is displayed in the **Recurrence Rules** pane.

Step 16. Select the **Notifications** tab. The **Default Schedule Notifications** settings for the task type are displayed.

Step 17. Enter the required notification window for the task in the **Notification Window** field. Enter the number of hours before the task is scheduled to begin, where the email alert should be generated. The notification is only sent if the task does not meeting one or more of the resource requirements.

Step 18. Select the time zone corresponding with the location of the task.

Step 19. Select the personnel that must be notified for this task if the task requirements are not met from the **Personnel to notify via Email** drop-down list.

Step 20. Select the **Review & Save** tab. The **Additional Information** (if applicable) and **Resource Validation** panes are displayed.

Step 21. Review the **Additional Information** pane. This pane contains the list of required custom fields contained on the **Additional Information** tab which are incomplete.

Step 22. Review the **Resource Validation – Resources** pane. Click the resource name to display the resource details (Roster Data, Recency Information, Experience, etc.).

Step 23. Review the **Resource Validation – Task Rules** pane.

Field	Description
Task Rules	The **Task Rules** column validates whether the assigned resources met the resource requirements for the task. For example, if the task requires a pilot to be endorsed on the A109 aircraft type and the assigned pilot does not have this endorsement, the ✖ icon is displayed in **Task Rule** column.
	The ✔ icon indicates that the assigned resources meet the resource requirements for the task.
	The ✖ icon indicates that the assigned resources do not meet the resource requirements for the task.
	The ❓ icon indicates that the assigned resource has not been toured to the base location associated with the task.
	To tour a resource from this view, click the icon in the **Task Rules** column to display the **Tour Resources** dialog box.

Step 24. Review the **Resource Validation – Rostered** pane.

Field	Description
Rostered	The **Rostered** column validates whether the assigned personnel resources have been rostered for **'Duty'** or **'Standby'** shifts. For aircraft resources, the **Rostered** column validates whether the assigned aircraft is online (based on the Aircraft Register). The ✔ icon indicates that the assigned resources are rostered (personnel) or online (aircraft) for the duration of the task. The ✖ icon indicates that the assigned resources are not rostered (personnel) or online (aircraft) for the duration of the task and the task requires the resources to be rostered. This option is specified via **Manage > Setup… > Scheduling** and by selecting the **Task Types** tab. Next, click the pencil icon corresponding with the task type and select the **Ensure Resources are Rostered** tick box. The ❓ icon indicates that the assigned resources are not rostered (personnel) or online (aircraft) for the duration of the task but the task does not require the resources to be rostered. To roster a resource from this view, click the icon in the **Rostered** column to display the rostering dialog box.

Step 25. Review the **Resource Validation – Overlap** pane.

Field	Description
Overlap	The **Overlap** column validates whether the assigned resources have been assigned another task where the times overlap with the current task.
	The ✔ icon indicates that the assigned resources do not have overlapping tasks.
	The ✖ icon indicates that the assigned resources have overlapping tasks and this is not permitted in the Task Type setup. This option is specified via **Manage > Setup... > Scheduling** and by selecting the **Task Types** tab. Next, click the pencil icon corresponding with the task type and select the **Don't Allow Resources To Multi-Task** tick box.
	The ❓ icon indicates that the assigned resources are not rostered (personnel) or online (aircraft) for the duration of the task but the task does not require the resources to be rostered.

Step 26. Review the **Resource Validation – WP** (Work Practice) pane.

Field	Description
WP	The **WP** column validates whether the assigned resources met the work practice rules associated with the rostered shift.
	The 🟢 icon indicates that the assigned resources are within the work practice limits.
	The 🟠 icon indicates that the assigned resources are approaching the work practice limits.
	The 🔴 icon indicates that the assigned resources have exceeded the work practice limits.

Step 27. Click [Save]. The **Create Task** dialog box is closed and the task is displayed in the scheduler.

Changing Task Resources

Step 1.   Select **Operations > Scheduling > Scheduler**. The **Scheduler Roster** is displayed.

Step 2.   Right-click on the required task.

Step 3.   Click [Edit].

The **Edit Task** dialog box is displayed.

If the task is linked to a series of tasks, you must select whether you wish to change the resources for the single task, change resources for the entire series of tasks or change resources

Step 4.   Select the **Resources** tab.

Step 5.   Modify the resources as required.

Step 6.   Select the **Review & Save** tab.

Step 7.   Review the **Additional Information** and **Resource Validation** panes for the task to ensure all required information is completed and there are no conflicts with resource requirements.

In the example below, the resource (Matthew Black) assigned to the PIC role has not been rostered for a corresponding duty, but is allocated to the task.
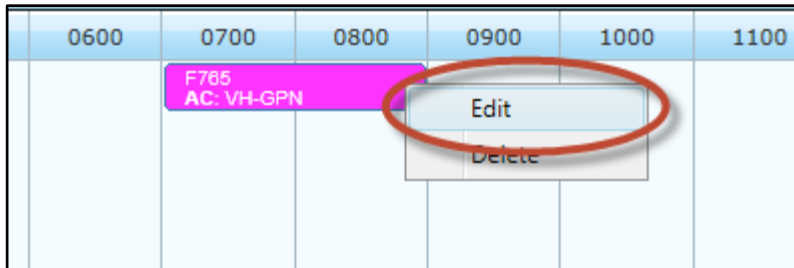

Step 8. Click [Save] to confirm the task changes.

Editing Tasks

The process of editing tasks varies depending on whether the task is linked to a series of tasks or is a single task.
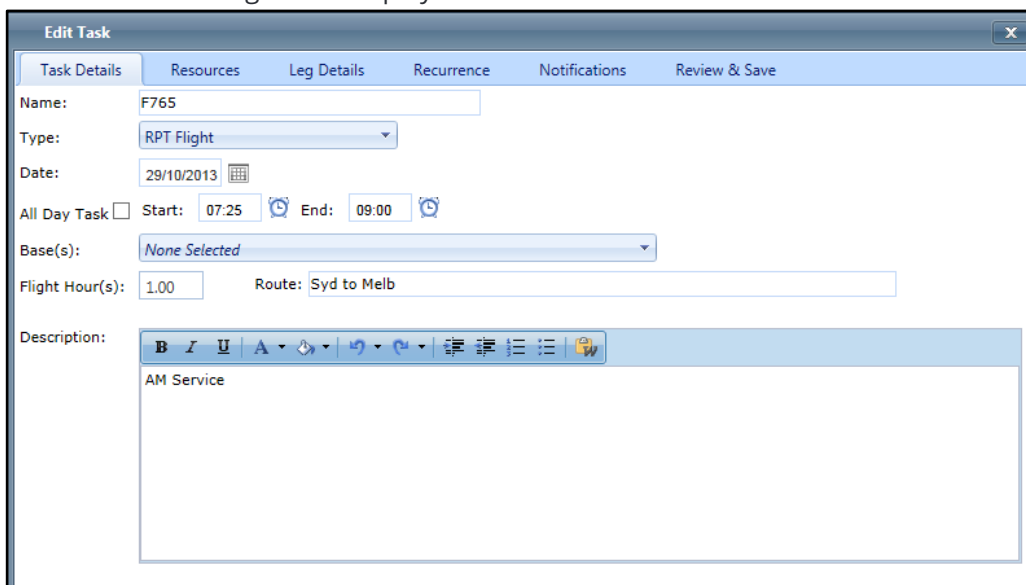
Edit a Single Task

Step 1.   Select **Operations > Scheduling > Scheduler**. The **Scheduler** screen is displayed.

Step 2.   Right-click on the required task.

Step 3.   Click [Edit].

The **Edit Task** dialog box is displayed.
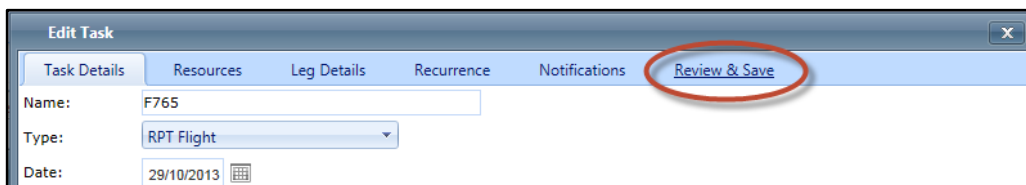
Step 4.   Modify the required fields.

Step 5.   Select the **Review & Save** tab.

Step 6.   Review the **Additional Information** and **Resource Validation** panes for the task to ensure all required information is completed and there are no conflicts with resource requirements.

In the example below, the resource (Matthew Black) assigned to the PIC role has not been

rostered for a corresponding duty, but is allocated to the task.

Step 7. Click [Save] to confirm the task changes.

Edit a Series of Tasks

Step 1. Select **Operations > Scheduling > Scheduler**. The **Scheduler** screen is displayed.

Step 2. Right-click on the required task.

Step 3. Click [Edit].

The **Edit a recurring appointment** dialog box is displayed.

Step 4.   Select the required option.

Option	Description
Edit only this occurrence	Select this option to only edit the selected task.
Edit the series	Select this option to edit the selected task and all other scheduled tasks linked to this series. For example, if you schedule a task with re-occurrence rules (Daily, Weekly etc), by selecting this option all tasks created by the re-occurrence rule for the selected task will also be edited.
Edit appointments from this point on	Select this option to edit the selected task and all other scheduled tasks linked to this series from the selected date. For example, if you schedule a task with re-occurrence rules (Daily, Weekly etc), by selecting this option all tasks created by the re-occurrence rule for the selected task will also be edited commencing on the scheduled date for the selected task.

Step 5.   Click [OK]. The **Edit Task** dialog box is displayed.
Step 6.   Modify the required fields.
Step 7.   Select the **Review & Save** tab.
Step 8.   Review the **Additional Information** and **Resources Validation** panes for the task to ensure all required information is completed and there are no conflicts with resource requirements.
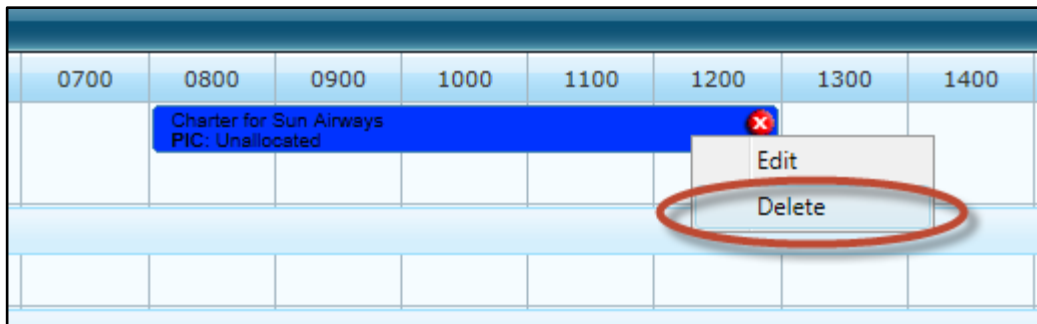Step 9.   Click [Save] to confirm the task changes.

Deleting Tasks

The process of deleting tasks varies depending on whether the task is linked to a series of tasks or is a single task.

Delete a Single Task

Step 1.   Select **Operations > Scheduling > Scheduler**. The **Scheduler** screen is displayed.

Step 2.   Right-click on the required task.

Step 3.   Click [Delete].

The **Confirm Delete** dialog box is displayed.
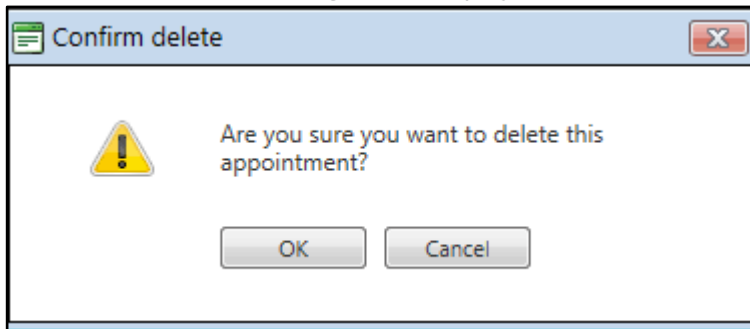
Step 4.   Click [OK]. The selected task is removed from the **Scheduler** screen.

Delete a Series of Tasks

Step 1.   Select **Operations > Scheduling > Scheduler**. The **Scheduler** screen is displayed.

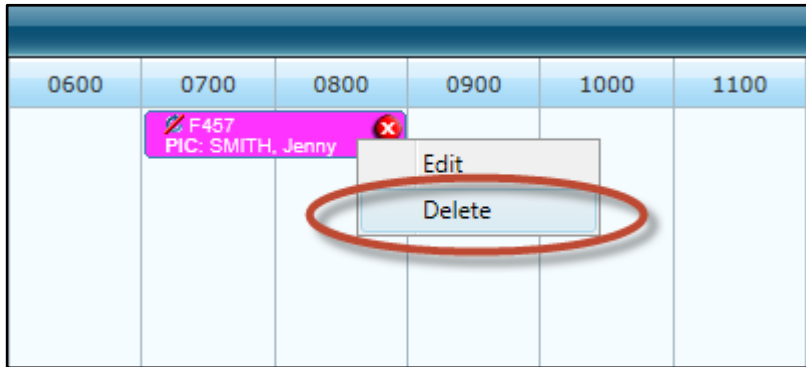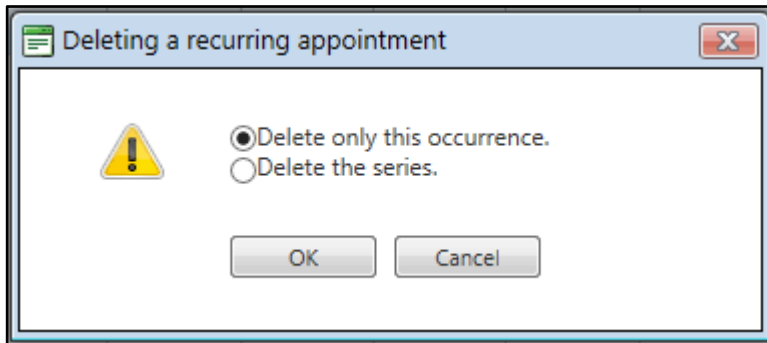Step 2.   Right-click on the required task.

Step 3.   Click [Delete].

The **Delete a Recurring Appointment** dialog box is displayed.

Step 4.   Select the required option.

Option	Description
Delete only this occurrence	Select this option to only delete the selected task.
Delete the series	Select this option to delete the selected task and all other scheduled tasks linked to this series. For example, if you schedule a task with re-occurrence rules (Daily, Weekly etc), by selecting this option all tasks created by the re-occurrence rule for the selected task will also be removed.

Step 5.   Click [OK]. The selected task(s) are removed from the **Scheduler** screen.

Using the Scheduler Register

The Scheduler Register provides users with an alternative view of the Scheduler.

The Filters

There are a number of filters users can select to view the scheduler register in the desired format.

Filter	Description
Task Date	Select the **Today** option (default) to view all tasks scheduled for today. Alternatively, select the **After or On** option to view tasks scheduled for a particular period by entering the desired dates in the date fields.
Task Type	Use the **Task Type** filter to view selected task types in the schedule register. The default option is 'All' tasks.
Personnel	Use the **Personnel** filter to view tasks corresponding with selected personnel in the schedule register. The default option is 'All' personnel.
Home Bases	Use the **Home Bases** filter to view tasks corresponding with selected bases in the schedule register. The default option is 'All' bases.
Aircraft	Use the **Aircraft** filter to view tasks corresponding with selected aircraft in the schedule register. The default option is 'All' aircraft.
Allocation Status	Use the **Allocation Status** filter to view tasks corresponding with a selected status in the schedule register. For example, if you are reviewing tasks which have not had resources assigned, you may filter out the 'Full Allocated' option and only include 'Unallocated' and 'Partially Allocated' tasks. The default option is 'All' allocation statuses.

In addition to the standard filters featured above, users can also apply filters based on data contained in custom fields. To do so, select the required custom field in the **Add New Filter** drop-down list and click [Add].

The Columns

There are a range of columns users can select to view in the Schedule Register. This is a personal setting and is maintained for each user, until further changes are made.

Filter	Description
Task Name	Select the **Task Name** option to view the **Task Name** column in the schedule register.
Task Type	Select the **Task Type** option to view the **Task Type** column in the schedule register.
Task Start	Select the **Task Start** option to view the **Task Start** column in the schedule register.
Task End	Select the **Task End** option to view the **Task End** column in the schedule register.
Home Bases	Select the **Home Bases** option to view the **Home Bases** column in the schedule register.
Description	Select the **Description** option to view the **Description** column in the schedule register.
Resources	Select the **Resources** option to view the **Resources** column in the schedule register.
Status Colour	Select the **Status Colour** option to view the **Status Colour** column in the schedule register.
Status	Select the **Status** option to view the **Status** column in the schedule register.

Step 1. Select **Operations > Scheduling > Schedule Register**. The **Schedule Register** screen is displayed.

Step 2. Modify the filters as required in the **Filters** pane.

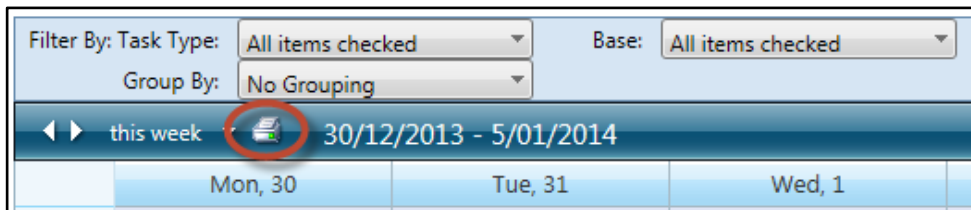Step 3. Click [Apply].

Printing the Schedule

There are a number of print options available to users to print and view the schedule in the desired format. The print option is available on the **My Schedule** pane on the **Home** screen and in the **Scheduler** screen.

Step 1. Select **Operations > Scheduling > Scheduler**. The **Scheduler** screen is displayed.

*Alternatively, you can access the print options by clicking the printer icon in the **My Schedule** pane on the **Home** screen.*
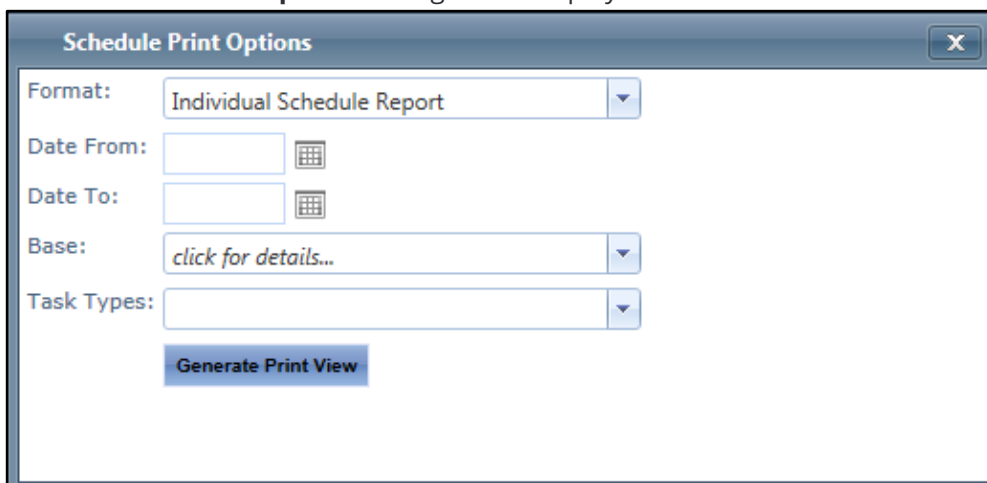
Step 2. Click **Print** [🖶] in the scheduler ribbon.

The **Schedule Print Options** dialog box is displayed.

Step 3. Select the desired print format from the **Format** drop-down list.

Options	Description
Individual Schedule Report	Select the **Individual Schedule Report** to view detailed scheduled task information for a selected date range. This print option includes the following fields: Date, Time, Task Duration, Task Type, Task Name, Base, Allocated Resources, Route, Description and any custom field values.
Personnel Schedule Report	Select the **Personnel Schedule Report** to view resources (personnel and aircraft) scheduled for tasks grouped by base location for a selected date range. Resources are listed vertically and their assigned tasks are displayed for each date.
Task Schedule Report	Select the **Task Schedule Report** to view resources (personnel and aircraft) scheduled for tasks grouped by base location for a selected date range. Tasks are listed vertically and their assigned resources are displayed for each date.

Step 4. Select the required date range in the **Date From** and **Date To** fields.
Step 5. Select the required bases from the **Base** drop-down list.
Step 6. Select the applicable task types to include in the report from the **Task Types** drop-down list.
Step 7. Click [Generate Print View].

> *To view scheduled tasks assigned to only you, proceed to **Step 7** without completely **Step 5** and **Step 6**. The system automatically detects all your assigned tasks for the selected date range.*