

ERP

Training for TDBU

Transmission

The screenshot displays three components of the ERP software interface:

- Operations List:** A table with columns for Operation ID, Num..., and Order Type. It lists several operations, most with a checkmark icon, and one with a question mark icon.
- Image:** A photograph of a high-voltage transmission tower against a blue sky with light clouds.
- Resources Gantt [Jan/07/2010]:** A resource management window showing a list of personnel and their IDs, including Johnson, Mike M G... (28250), G Monrovia, Shelby Jr, Lee E G ... (46223), Guardado, Benjam... (40466), Burgy Jr, William D... (36350), G Montebello, and Sanchez, Hector G... (26728).

ClickSchedule Viewing

Skill Practice Workbook

Module 130102

Version 09, April 29, 2010

Prepared by TDBU Training

This workbook is designed to facilitate the ClickSchedule Viewing training module. While there are places you will be asked to write information this is not meant to serve as reference material beyond the classroom.

The ClickSchedule Viewing Reference Guide has step-by-step instructions on how to display schedule information in ClickSchedule. Please use that guide as ongoing reference material.

Revision History

Rev.	Date	Description of Revision	Contact
1	2/25/10	First draft	Steve Mitchell
2	3/04/10	Added final assessment and KC questions for lessons 4-6	Steve Mitchell
3	3/23/10	Edited all questions/activities after dry run	Steve Mitchell
4	3/25/10	Revised final assessment questions after feedback	Steve Mitchell
5	04/01/10	Revisions before pilot	Steve Mitchell
6	04/11/10	Revisions after pilot	Steve Mitchell
7	04/12/10	Knowledge Check edits after Pilot	Steve Mitchell
8	04/23/10	Modify assessment questions	Steve Mitchell
9	04/29/10	Final	Steve Mitchell

Name: _____

Training User ID: _____

ClickSchedule Log-On: Domain sce & Server <http://iocntsft07/>

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Module Introduction

Ground Rules

The following are rules to live by while attending this course.

- Everyone participates
- Respect one another's opinion
- One person speaks at a time
- Listen for understanding
- Focus on the topic
- **Return on time from breaks**
- Turn off cell phones
- Have fun!

Module Agenda

Introduction

Lesson 1: Launching and Navigating

Lesson 2: System Controls

Lesson 3: Viewing Information

Lesson 4: Links to SAP

Lesson 5: Reports

Conclusion

Course Evaluation

Final Assessment

Learning Objectives

At the end of this course, you will be able to:

- Demonstrate signing on to ClickSchedule
- Demonstrate basic ClickSchedule navigation skills
- Demonstrate accurately using the ClickSchedule commands
- Demonstrate knowledge of the system controls used by ClickSchedule
- Demonstrate creating ClickSchedule based reports and forms
- Demonstrate how to review work in ClickSchedule

Guided Walkthrough Rules

Here are the rules for demonstrations and computer work.

During Demonstrations:

- Pay attention to what is being demonstrated.
- Take notes in the Reference Guide.
- Ask questions that are relevant to what is being demonstrated.

During the Guided Walkthrough:

- Stay on the task.
- Don't work ahead.
- Ask questions about the current topic.

During the Discussions:

- Participate
- Share what you discovered.

During the Practice time:

- Stay on the task.
- Help others if you finish sooner.
- Ask a lot of questions about the practice topic.

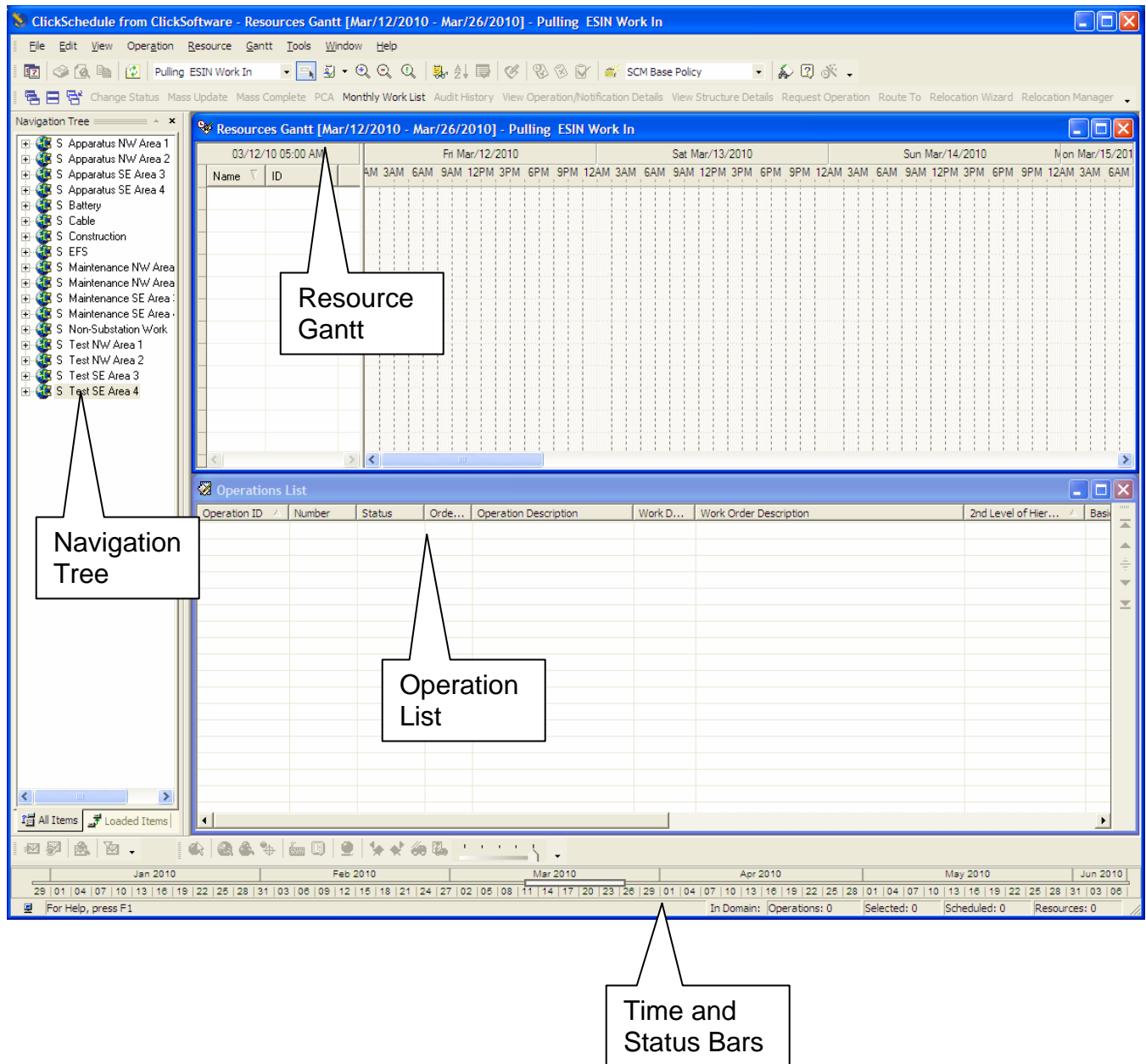
Lesson 1: Launching and Navigating

1.1 Activity – Setup Window

Make your screen look like this:

Unload Operations from the Navigation Tree

Close all windows but the three shown here



1.2 Navigation Knowledge Check

After each statement, fill in the blanks.

1. What are the two main screens in ClickSchedule?

2. Where do you see you hierarchy?

3. Where do you see the crews?

4. Do the main screens contain the same information all of the time?

5. How do you know from which Grid(s) Operations and Resources are loaded?

1.2 Navigation Knowledge Check – (continued)

6. What type of information is viewable from the Operations List?

7. What is the purpose of the Time Bar?

8. How can you determine if an operation has been scheduled?

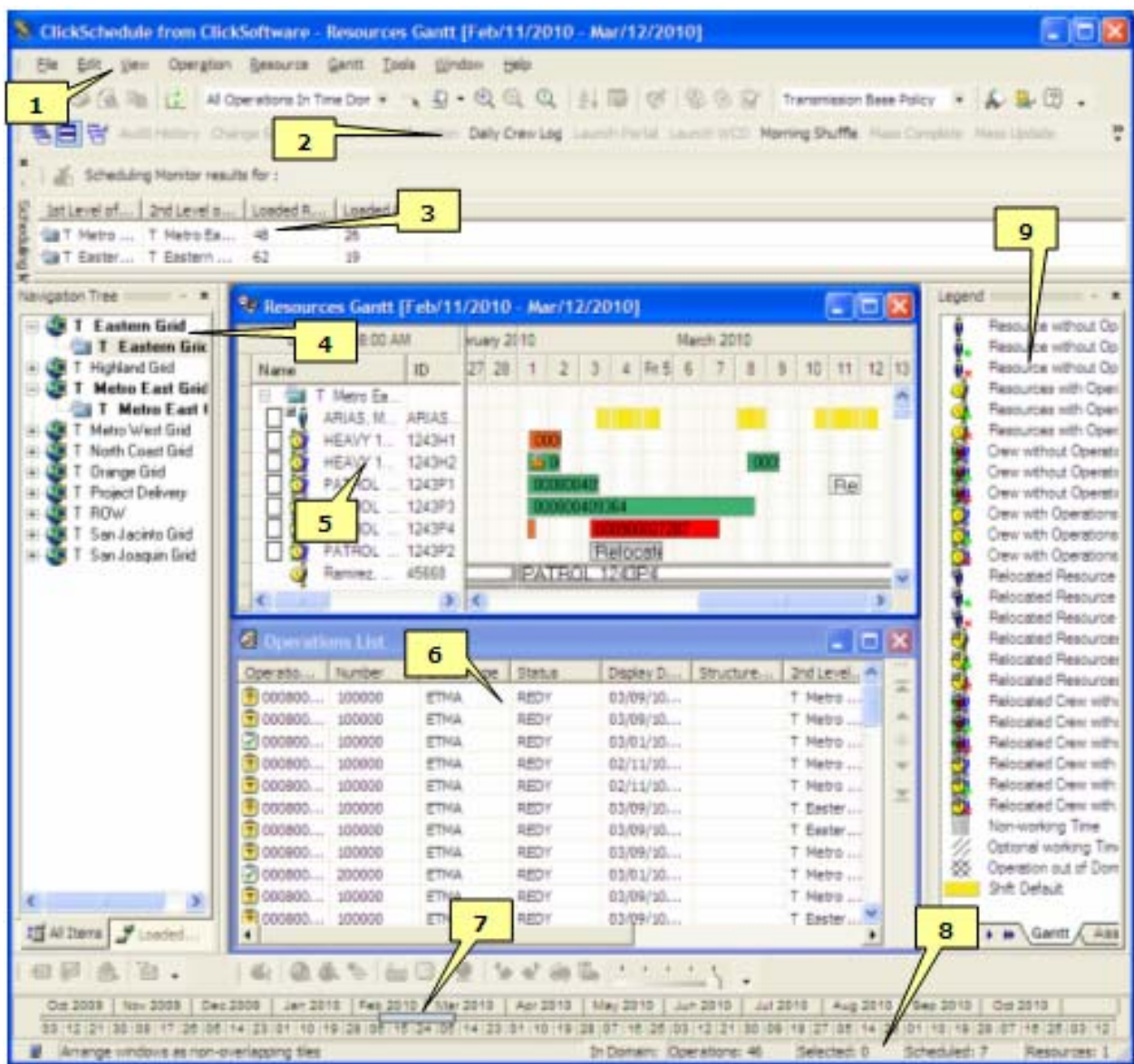
9. In the event the Resource Gantt, Operation or Navigation panels were closed, what is one way to restore them so they could be viewed?

10. How do you know which is the selected or active window? Does the active window determine which options are available from the menu and tool bars?

1.2 Navigation Knowledge Check – (continued)

11. Identify components of the ClickSchedule screen:

1	4	7
2	5	8
3	6	9



Lesson 2: System Controls

2.1 Knowledge Check – System controls

After each statement, fill in the blanks.

1. How is a Compatible Unit used?

2. How do Units of Work impact ClickSchedule?

3. What does REDY status mean?

4. Can a maintenance operation that has a WORK status be changed to FCM\P in ClickSchedule?

5. Identify these 4 statuses types based on the color indicated:









2.1 Knowledge Check – (continued)

6. A Unit of Work (UOW) includes the following components:

A. _____

B. _____

C. _____

7. MAT stands for _____

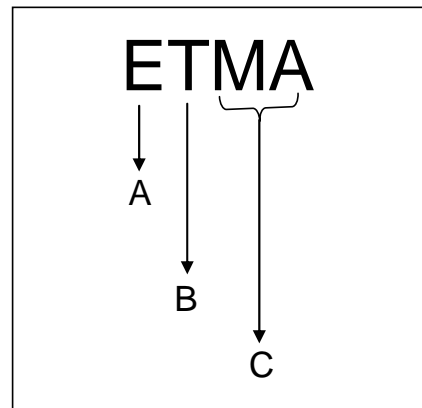
8. What is the purpose of work order types in ClickSchedule?

9. Define the following:

A. _____

B. _____

C. _____



10. List four order types common to Transmission:

Lesson 3: Viewing Information

3.1 Activity – Practice Searching

Refer to pages **64 to 85** of the **Reference Guide** to complete the steps required to search for work in ClickSchedule.

Use the **Operations Explorer** or feel free to try another search method we discussed today.

1. Locate **Operation ID**: _____

What is the Order Type? _____

What is the Status? _____

What does the status mean?

How did you find the operation information?

2. Locate **Operation ID**: _____

What is the Order Type? _____

What is the Status? _____

What does the status mean?

How did you find the operation information?

3.1 Activity – (continued)

Fill in the blanks for each of the items listed below:

3. Locate **Resource** ID: _____

What is the Resource Type? _____

If it is a crew what is the crew size? _____

Where is the Resource Located?

How did you find the resources information?

3.2 Knowledge Check

Fill in the blanks for each of the items listed below:

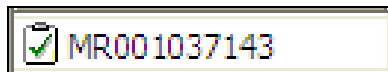
1. How does scheduled work appear in the Resources Gantt?

2. How do you view operation details?

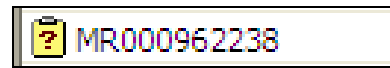
3. Which operation is unscheduled? (Mark a check beside the correct answer.)

A _____ B _____

A



B



4. The _____ command allows you to search for operations either inside or outside the loaded domain.

3.2 Knowledge Check – (continued)

5. What is the purpose of the **Filter drop down** shown on the toolbar?

6. The **Zoom In** and **Zoom Out** commands are used for what purpose?

7. Can operations be sorted by multiple parameters? _____

8. The **Copy Call ID** is used for what purpose?

9. How can you determine which resources are allocated to a specific crew?

10. Name two (2) pieces on information displayed on the **Status Bar**:

Lesson 5: Reports

5.1 Knowledge Check

After each statement, fill in the blanks.

1. When would you want to use an Audit History?

2. What information is included in the Audit History?

3. True or False? History can be saved in the system indefinitely.

- True False

5.1 Knowledge Check– (continued)

Answer Two (2) of the questions below regarding the **Daily Crew Log** report

4. Explain what information is contained in the **Daily Crew Log** report

5. In the event an error message is generated while configuring the **Daily Crew Log** report, what step in the process may have been overlooked?

6. Is it possible to see both crew and contractor data in the same **Daily Crew Log** report? _____

7. Name three (3) selection criteria that would be typically be used when configuring the **Daily Crew Log** report,

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Conclusion

Resource Information

The following resources are available to assist you with your learning:

- The Portal is your online resource for:
 - Training Materials
 - Transaction Documentation (BPPs or Work Instructions)
 - Super User Information

- Contact Learn ERP for any additional ERP Training related questions
 - learnERP@sce.com

- To contact the IT Service Desk for password & technical problem resolution
 - PAX 51234 [Internal]

- To contact the Employee Information Center for HR-related questions
 - PAX 23456 [Internal]

- SONGS Personnel contact the SONGS Service Desk for password & technical problem resolution
 - PAX 82999 [Internal]

Course Evaluation

From within SCE, access the class evaluation using the following Portal path:

> About Me

> ERP Training Info (left side)

> ERP Training (left side)

> ERP Classroom Training Support (right side)

> TDBU End User Training Survey (right side)

Please refer to your lead trainer for the following information:

- Business Line
- Course Name
- Module Name
- Lead Trainer Name

Be sure to hit submit when you are finished!

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Final Assessment


Please take a few moments to complete the final knowledge assessment for this module by answering the multiple choice questions below.

1. Where can you view the hierarchy in ClickSchedule?
 - a. Resources Gantt
 - b. Navigation Tree
 - c. Operations List
 - d. Scheduling Monitor Bar

2. Where can you view the crews in ClickSchedule?
 - a. Resources Gantt
 - b. Navigation Tree
 - c. Operations List
 - d. Scheduling Monitor Bar

3. The _____ provides information about how an operation was handled throughout its lifetime.
 - a. Resources Gantt
 - b. Operations Explorer
 - c. Audit History
 - d. Scheduling Monitor Bar

4. By looking at the hours of work assigned in the _____, you can determine whether assigned hours of work have gone into overtime.
 - a. Schedule Monitor
 - b. Status Bar
 - c. Operations List
 - d. Resources Gantt

5. How would you navigate screens to view more information about the resources you use?
- Tools > Options > Resource Fields
 - View > Scheduling Monitor Bar > Resource Fields
 - View > Other Windows > Legend
 - Tools > Operations Explorer > Values
6. What does this status indicate?  (orange)
- APRV
 - WORK
 - CANC
 - FCMP
7. An operation with a status of REDY indicates:
- The work has been allocation to a resource
 - All obligations for work have been met
 - The work is in progress
 - All of the above
8. The fields of information displayed on the Operation Explorer_____.
- stays the same.
 - mirrors what is displayed on the Operation List.
 - can be changed from the explorer.
 - can be reordered in the explorer.
9. Which window would you bring into view to see the list of the statues and assigned color codes?
- The Views Bar
 - The Messages Window
 - The Scheduling Monitor Bar
 - The Legend

10. The ISCREW column on the Resources Gantt is primarily used for?
- Displaying the size of the crew
 - Displaying the number of crew members
 - Displaying the crew type
 - Sorting the resources, so that all crews can be seen together instead of alphabetically
11. Jobs in CANC status appear _____ in color.
- Gray
 - Yellow
 - Blue
 - Orange
12. ETIN is a Transmission work order type that represents a(n):
- SAP/DPI (Manual Upload)
 - Service Request
 - Inspection
 - Maintenance
13. The specific number of days you can view at any one time in ClickSchedule is known as the:
- Time Domain
 - Work Status
 - Operations List
 - Resource Allocation Calendar
14. When would you want to use an Audit History?
- To view changes made to a trouble order form
 - When assigned resources must be reallocated
 - When an operation you scheduled is now showing as unscheduled
 - To review trends and plan for future scheduling needs

15. The first step in linking to an operation's SAP notification information is to:
- Click on Operations Explorer
 - Select an operation
 - Click on View Operation/Notification Details
 - Log into SAP
16. What steps would you take to find operations with a specific status code?
- Tools > Operations List > Find By: Drop Down > Find What: Status
 - View > Operations List > Find By: Drop Down > Find What: Status
 - Tools > Operation Explorer > Find By: Drop Down > Find What: Status
 - View > Other Windows > Operations > Find By: Drop Down > Find What: Status
- 17.. To print a repair notification, you must first:
- Log into SAP
 - Select an ETMA operation
 - Click on View Structure Details
 - Launch the wizard
18. Use the _____ to see operations details.
- Time slider
 - Work order
 - Task form
 - Status bar
19. Work first appears in ClickSchedule when:
- Grid Manager sends a notification to SAP
 - Planning Supervisor approves it
 - Auto-scheduling assigns it
 - Design managers begin work on obligations

20. If an operation was out of view in the Operations List, how might you most quickly find it:
- Changing the Time Domain
 - Loading data from the Grid to which the operation belongs
 - Use the Find Operation command on the tool bar
 - Use the Operation Explorer command on the tool bar

Scoring

A	B	C
# Correct Responses	Total Possible	Percentage Score (A/B * 100)
_____	20	_____%

Congratulations!