NYC sanitation

NEW YORK'S STRONGEST

SMART - New Supervisors

Reference Guide

<u>Support Contacts:</u>

Smart Lab: (718) 334-9020
For issues about how to use SMART

Service Desk: (212)-291-1111
For technical issues, outages, etc.

SMART-Detach@dsny.nyc.gov

SMART Help – Click **Help Guides** on the SMART Applications Dashboard

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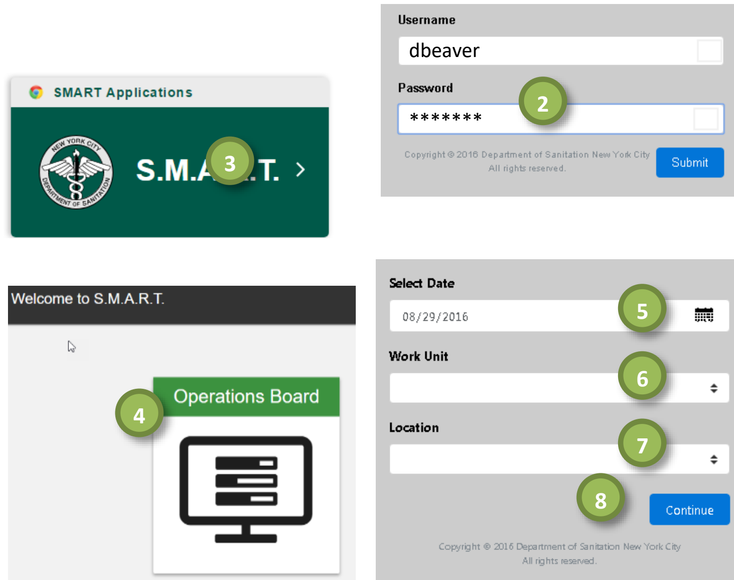
Navigation & Configuration

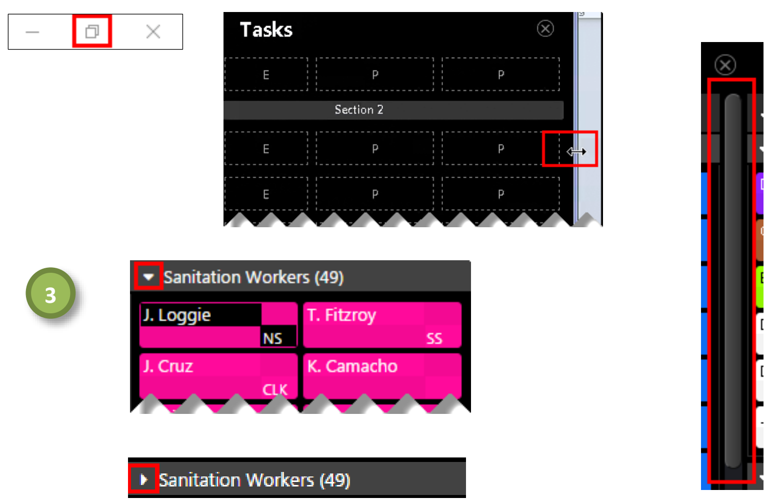
Logging into Smart

1. Using the **Google Chrome** web browser navigate to the **DSNY Home Page** (SMART only works with the Chrome browser)
2. Under the **SMART APPLICATIONS** section, click the **S.M.A.R.T.** button
3. Enter your network/email **Username** and **Password** (same as Bladerunner)
4. On the SMART Applications landing page click **Operations Board**
5. Select a desired date (defaults to the current date)
6. Select a **Work Unit** from the drop down
7. Select a **Location**
8. Click **Continue**



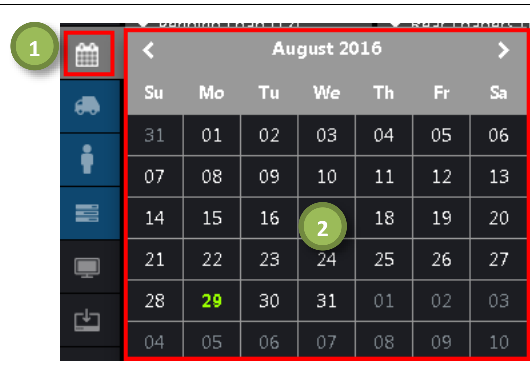
Configurations For Optimal Viewing

1. Click the Restore box in the upper right hand corner (so window is not maximized)
2. Hover the mouse over the right the edge of the window to get the two headed arrow ↔ then click and drag to expand to the right across both monitors until you can't go any further.
3. To see the full length of the panels use the vertical and horizontal bars
4. To expand a section click the right arrow button
5. To collapse a section, click the down arrow



Viewing/Switching Boards

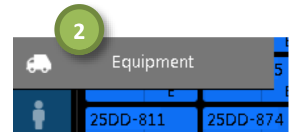
1. To view a board for a different day, click the Calendar icon
2. Navigate to the desired month (if necessary) and click a date (the board will open on a new tab)
3. Click outside of the calendar date area or click the calendar icon to close the date picker

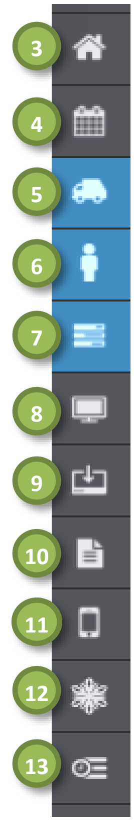


Main Menu (Navigation Pane) – Top Section

The top part of the menu applies to the OpsBoard, the bottom part below 3.0 are features that are outside of the ops board but interact with the SMART data from the board.

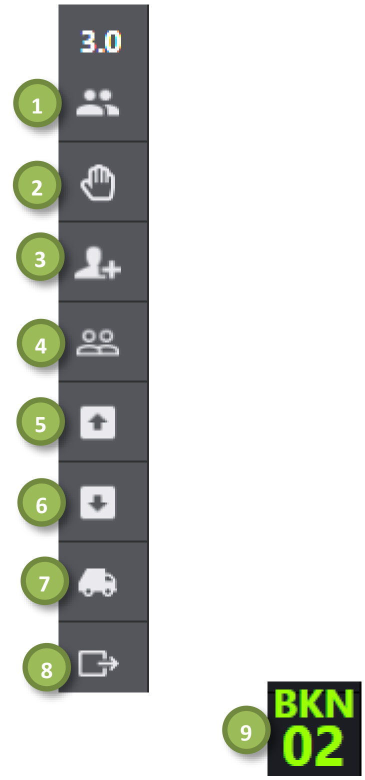
1. The date of the current board is displayed in the top left corner
2. Hover over a button to expand the label, the name of the button will appear
3. **Select Applications** – this takes you back to the SMART landing page where you can access other SMART applications
4. **Calendar** - click and select any date to go to a different board date
5. **Equipment** - opens the **Equipment Panel** to view equipment's availability and status (toggles on and off, button turns blue when on)
6. **Personnel** - opens the **Personnel Panel** to view an employee's availability/status/Seniority, etc. (toggles on and off, button turns blue when on)
7. **Tasks** - opens the **Tasks Panel** to display tasks and assigned Personnel and Equipment to each task by shift (toggles on and off, button turns blue when on)
8. **Display Board** - click to view what the board will look like in the garage when published
9. **Publish Board** - click to push a board for another day (generally tomorrow) to the SMART Display Boards in the garage
10. **Reports -** accesses SMART Reports (Chrome Browser only)
11. **Device List** – displays a list of devices assigned to vehicles and unassigned devices. Double click an equipment card on the list to open Equipment details
12. **Snow Update** – for mass snow update of equipment and for adding other agency vehicles
13. **Recent Activity** – keeps a list of who is logged into the board and changes made, and by whom





Main Menu – 3.0 Features (bottom section)

1. **Sanitation Workers Quotas** – displays the daily quotas for sanitation workers for the current location
2. **Add Volunteer** – for adding Chart Volunteers, Mandatory Charts and Vacation Volunteers
3. **Civilian Support** – for adding civilians; Mechanics, Interns and Custodians
4. **Supervisor Quotas** – displays daily supervisor quotas for the current location
5. **Plan** – to view and submit the day's plan based on the board setup
6. **Orders** – to view orders from the Boro for any changes
7. **Allocations** – for performing allocations for prior day's routes
8. **Log Out** – logs the current user out of SMART
9. The current location displays below the main menu



Changing Location (users may only have access to their own location)

1. Change the location in the URL (use SMART codes) and press **Enter**
2. You can also copy the URL, paste into a new tab and change location if you want both locations open

Equipment Panel

Viewing Equipment Details

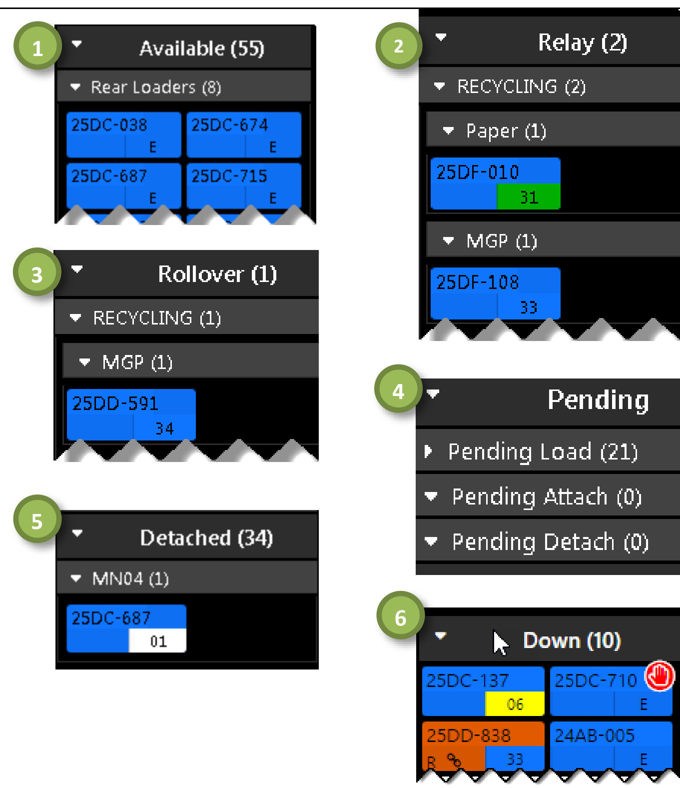
1. If panel is not open click **Equipment** on the navigation pane
2. Double click an equipment card to open (the detail panel appears over the personnel panel)
3. Each section of the details can be expanded by clicking ▶ or collapsed by clicking ▼
4. Click the **X** on the top right corner to close the details panel

NOTE: the Equipment button on the main menu can be clicked to toggle the Equipment Panel on and off

Types of Equipment Groups

There are currently 6 types of Equipment groups

1. **Available** - Available for route assignments
   - Grouped by Equipment Type
2. **Relay** - Equipment ready to go to dump or recycling center
   - Grouped by material type
3. **Rollover** - Partially empty going on another route
   - Grouped by material type
4. **Pending**
   - Load Update
   - Attach from another garage (awaiting your confirmation)
   - Detach to another garage (awaiting their confirmation)
5. **Detached** - Currently detached to another garage
   - Grouped by location
6. **Down** Trucks that are down (if there is a load on a downed truck the material type will show on the card)
   - Grouped in numeric and alphabetical order



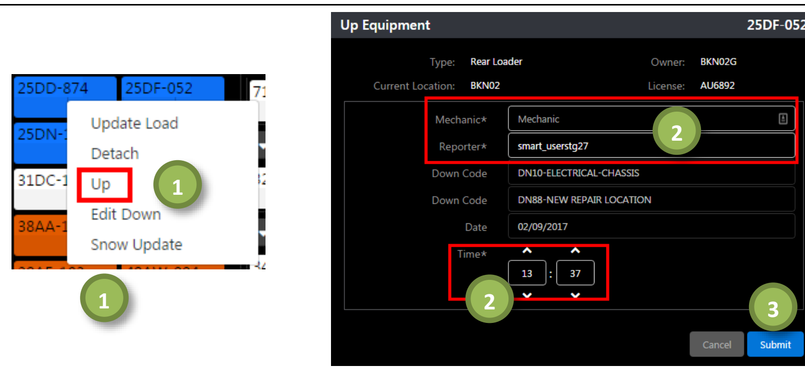
Downing Equipment

1. To **Down Equipment**, right click the equipment card in the **available** group and Select **Down**
2. Choose a **Down Code** from the drop down or type the code (up to 3 down codes can be entered)
3. Enter a **Reporter** and **Mechanic**
4. Change the **time** if necessary
5. Click **Submit**
6. To edit or add an additional down code **right click** the card of the downed equipment and click **Edit Down**
7. Make any changes to the down field and click **Submit** again. Equipment Card will move to the **Down** group
8. If **Flat Tire** is chosen for the Down Code an indicator appears so the Garage Supervisor knows that the truck can be easily brought up if tire is changed

Upping Equipment

1. Right click the equipment card and choose **Up**
2. Enter the **Mechanic, Reporter** (defaults to user) **& Time**
3. Click **Submit**

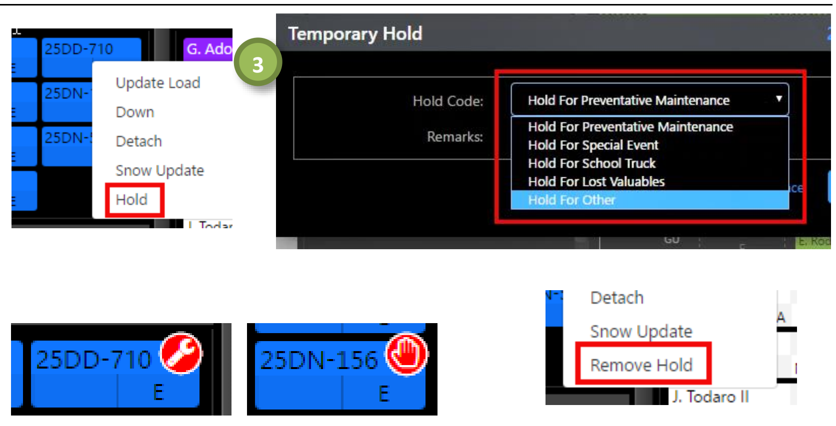
NOTE: Equipment Card moves to the **Available** group



Holding Equipment

A Hold marks equipment indicating it should not be used unless greatly needed.

1. Right click an equipment card and choose **Hold**
2. Choose a reason or choose **Hold for Other** and type in **Remarks.**
3. A **wrench** appears for PMs, a **house** for temporary housing, a **thermometer** for broken A/C and a **hand** for all others
4. Right click and choose **Remove Hold** to end

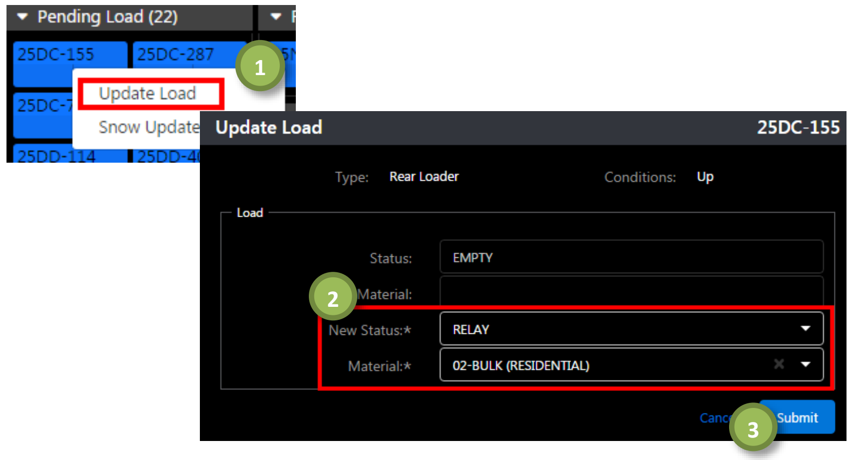


Updating Load Status (Trucks w/ bins only)

Trucks move to the Pending Load status when routes are started.

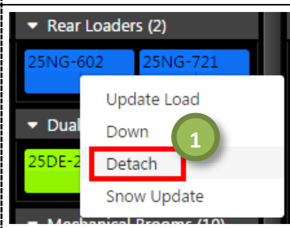
1. Right click the equipment card and choose **Update Load**
2. Enter **New Status** and **Material** (if Relay or Rollover). Trucks with 2 bins have fields for each bin.
3. Click **Submit -** equipment moves to appropriate group

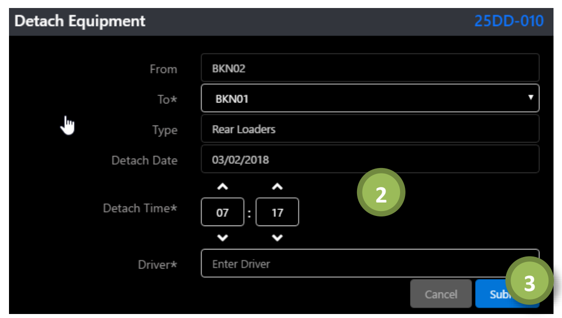
NOTE: task must be ended before truck will move to updated status (Empty, Relay or Rollover)



Detaching Equipment

1. Right click the equipment card and choose **Detach**
2. Enter **To**, **Detach Time** & **Driver** name (who delivered truck)
3. Click **Submit** - the equipment moves to the **Pending Detach** group
4. To cancel a pending detach, right click the equipment card and choose **Cancel Detach**
5. Click **Submit** to confirm (equipment card will return to Available)





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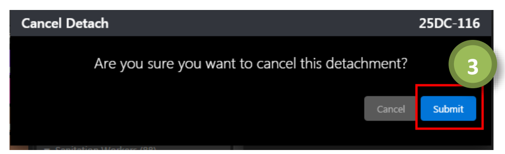
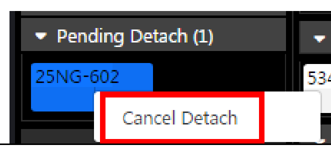
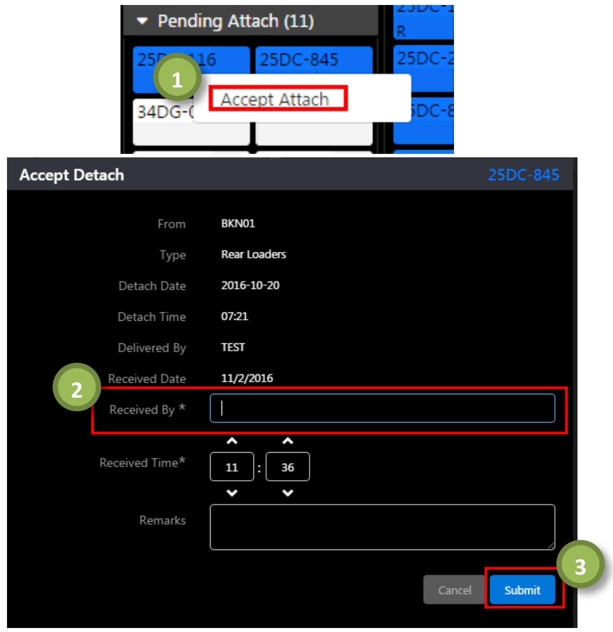




Accepting a Pending Attach

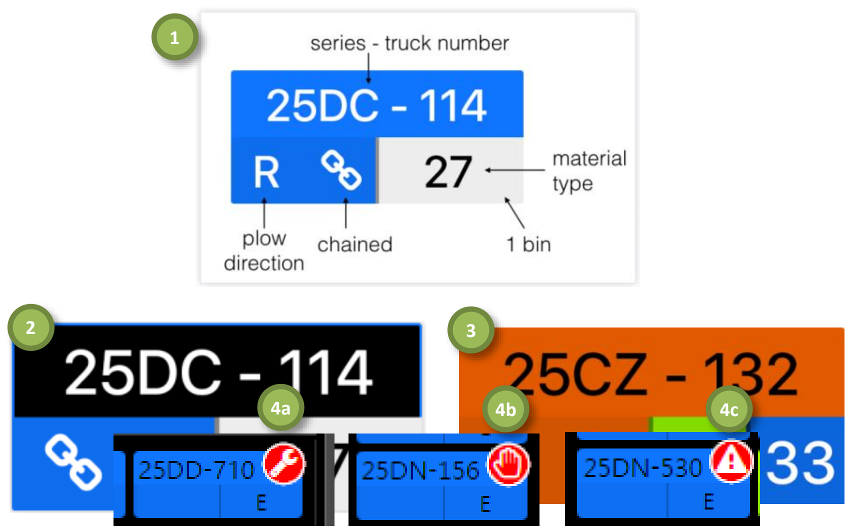
1. Right click the equipment card and click **Accept Attach**
2. Enter **Received by** and **Time** (if necessary, defaults to current time)
3. Click **Submit**



Visual Indicators

1. Visual Indicators on Equipment Cards
   - Series/Number
   - Chained
   - Plow Direction or Plow Type
   - Material Type
2. **Working Down** (Black Background)
3. Each equipment type has a different color. Orange is for Snow assigned (if not orange on a task it will not paint streets in Bladrunner nor Rastrac)
4. Additional indicators appear for:
   a. Hold for Preventative Maintenance
   b. Hold for other than PM
   c. Down for Flat Time

NOTE: If a downed truck is assigned to a future board the card on the future board will blink until corrective action has been taken.



Snow Indicators

Indicator(s) to the right of the card display snow readiness

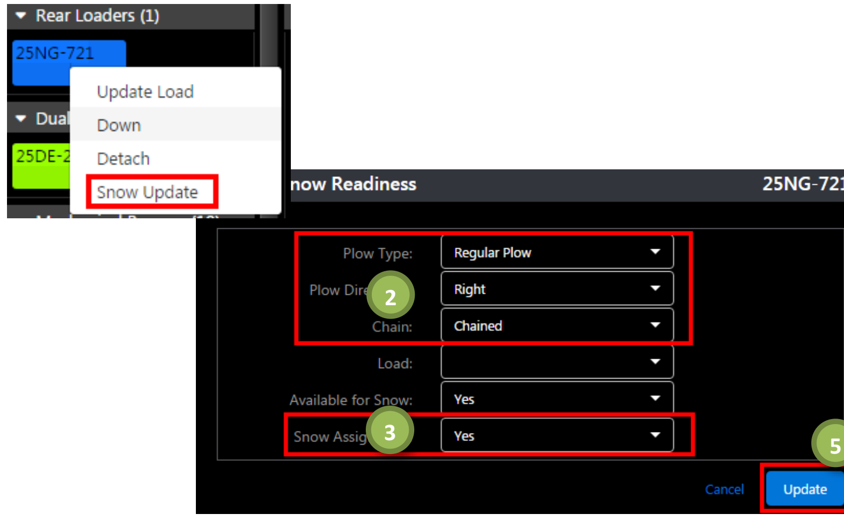
1. All equipment **Assigned to Snow** will be orange
2. If equipment is loaded with sand or salt, a 2nd indicator will display

R - right plow
L - left plow
S - straight plow
W - straight plow with wings
V - large V-plow
M - mini V-plow
C - chains
SN - loaded with sand
SL - loaded with salt

Snow Update – Single Vehicles

Only available for equipment that can be made snow ready

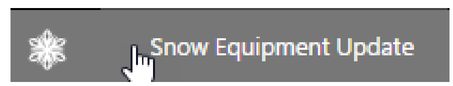
1. Right click the equipment card and choose **Snow Update**
2. Select a **Plow Type, Plow Direction,** and whether or not its **Chained**
3. Set **Snow Assignment** to **Yes** (must be done for vehicle to be tracked in BladeRunner or Rastrac) Equipment will turn Orange.
4. If the vehicle is Down the Available for Snow option will be **Working Down**
5. Click **Update**



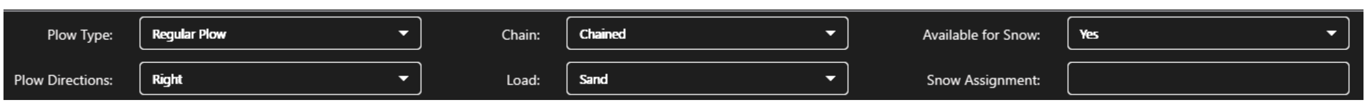
Snow Update – Multiple Vehicles

Multiple vehicles can be snow updated at the same time

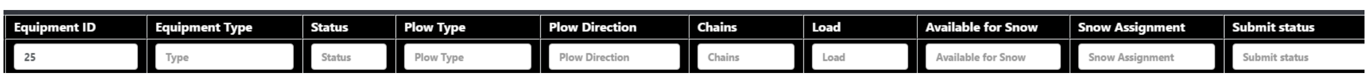
1. On the main navigation menu click the Snow Equipment Update button



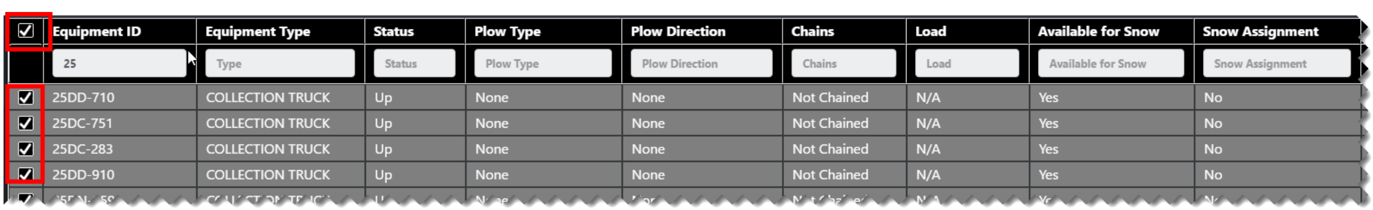
2. Choose the snow settings form the dropdowns to apply in the top section



3. Type a value into the filters in the top of the columns to narrow the list (e.g. “25” for Collection Trucks)



4. Check the box in the left most column next to each vehicle or click the box to the left of Equipment ID to select all

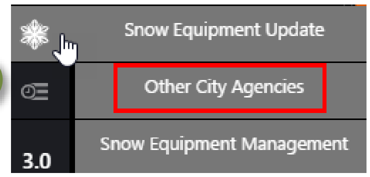


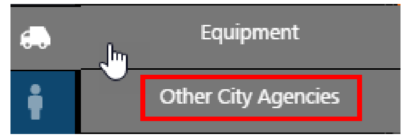
5. Click **Submit** at the top right and all vehicles will be updated. Click **Refresh** to reset all.

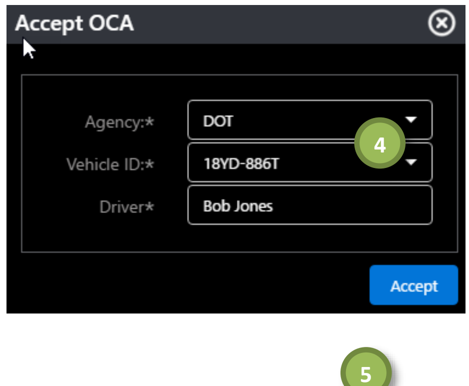
Managing OCA Vehicles

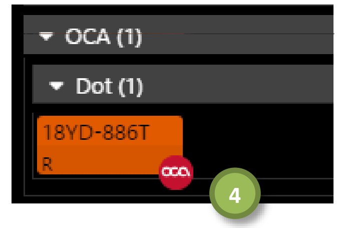
When an OCA vehicle arrives at a location it can be added to the board and will appear in the OCA group in the Available column. It will be orange and have an OCA indicator .

1. On the SMART Main Menu click the **Equipment** or **Snow Equipment** button and choose **Other City Agencies**
2. Choose the **Agency** that is providing the vehicle, the **Vehicle ID** and the **Driver**
3. Click **Accept**
4. The vehicle will appear in the Available column under the OCA group and under the agency it's from
5. When finished with the vehicle **right click** and choose **Release OCA**







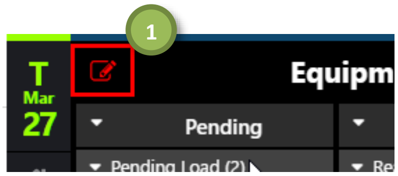


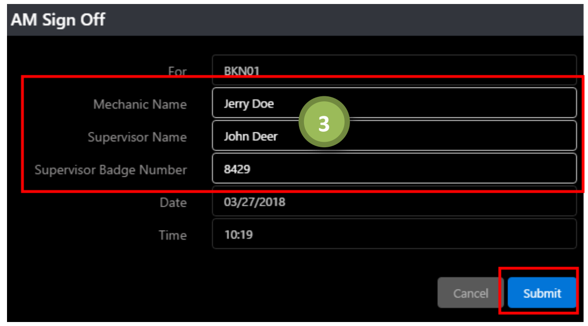
Dual Garage Equipment

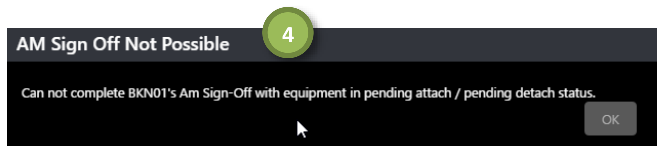
1. On the **Equipment Panel** click the drop down to the top right of the panel
2. Choose the **Garage** from the list to show the equipment for that garage
3. Assign Equipment as you normally would from the displayed panel

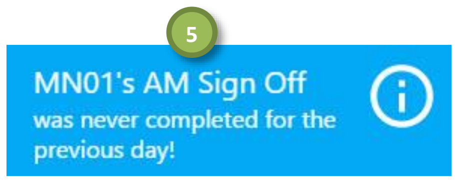
AM Sign Off

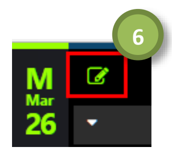
1. At 0000hrs each day a red Sign Off icon will appear in the top left of the Equipment Panel. After 0500 the icon will begin to seesaw as a reminder of Sign Off
2. Once status and location of equipment is accurate click the **AM Sign Off** button at the bottom of the Equipment panel
3. A form will appear with the location, date and time pre-populated. Add **the Mechanic Name, Supervisor Name** and **Badge #**, click **Submit**
4. If there are pending attaches/detaches a notice appears stating that AM Sign Off cannot be complete. Click **OK**, make the necessary correction and the complete.
5. If a prior days' sign off has not been completed a notice will appear in the lower right corner of the Tasks panel
6. Once sign off is completed the Sign Off icon at the top turns green.
7. The Supervisor must print the **Down Equipment Report** (replaces the 49 report in SCAN) for the mechanics and a copy emailed to the location's BME Boro Shop











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Down Equipment Report -On Location

Manhattan 1

Tuesday, March 27, 2018
as of 11:19

No.	Equipment ID	Equipment Type	Bin Status	Down Date	Down Time	# Of Days Down	Reason For Down	Down Remarks	Repair Location	Reporter	Up Date	Up Time	Reported Up By
1	25DD-882	COLLECTION TRUCK	EMPTY	03/27/2018	05:43	0days 5:35	DN19 HOIST OIL LEAK	SIDE BIN LEAK	MN01	DONNELLY			
2	25DN-102	COLLECTION TRUCK	EMPTY	03/22/2018 03/24/2018	17:18 06:21	4days 17:1 3days 4:57	DN88 NEW REPAIR LOCATION, DN91 BLOWER MOTOR	at bx mack BX MACK	MN01 MN01	butler HOANG			
3	48BB-101	HAULSTER INSERT	N/A	03/22/2018	18:08	4days 16:11	DN19 HOIST OIL LEAK	leak behind cab	MN01	butler			
4	536-043	PRESSURE WASHER	N/A	02/27/2018	05:37	28days 5:41	DN62 HEATER COIL	NO HEAT	MN01	WIGGINS			
5	537-020	PRESSURE WASHER	N/A	02/27/2018	05:36	28days 5:42	DN62 HEATER COIL	NO HEAT	MN01	WIGGINS			

Personnel

NYCsanitation
NEW YORK'S STRONGEST

Setting Personnel Status

This panel contains Employee Information, Detachment, Grounding, Unavailability, MDA, and Special Positions History.

1. Right click (or double click and choose from Action drop down) any **Personnel Card** and select a action:

   A. **Detach**:

   - Select a **Location**, **Start/End Date** for the detachment (leave the end date empty for permanent detachment)
   - Adjust the Shift Start time if necessary, end time will set automatically
   - Click **Submit –** the card will move to the detached section and in location group

   B. **MDA**:

   - Select a Start **Date**, **Type** and **Appt. Date** (if known), then select and (if known) **End Date/End Time**
   - Click **Submit -** the MDA type appears on the card

   C. **Special Position**: (for Sanitation Workers only)

   - Select the **Special Position**
   - Enter **Start/End Dates** (end date if known)
   - Click **Submit** - the special position appears on the car

   NOTE: Special positions for Officers come from assignments by FIAT

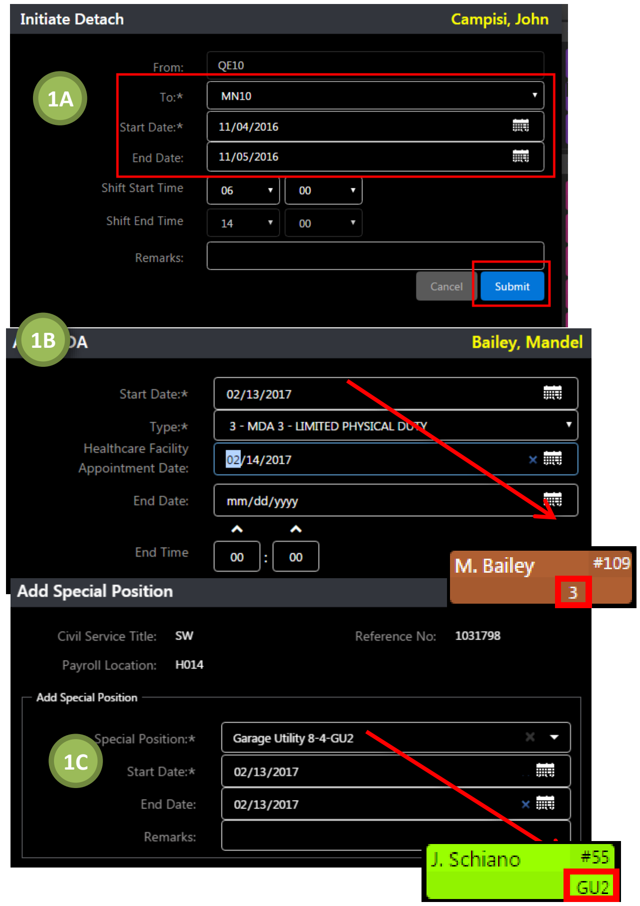
   D. **Unavailable** (other than Sick or LODI):

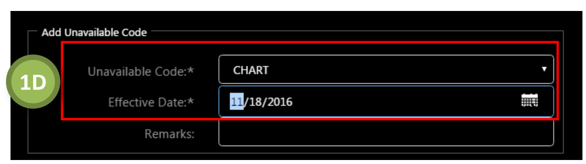
   - Select an **Unavailable Code** and **Effective Date** and **End date/Time** if applicable
   - Click **Submit**

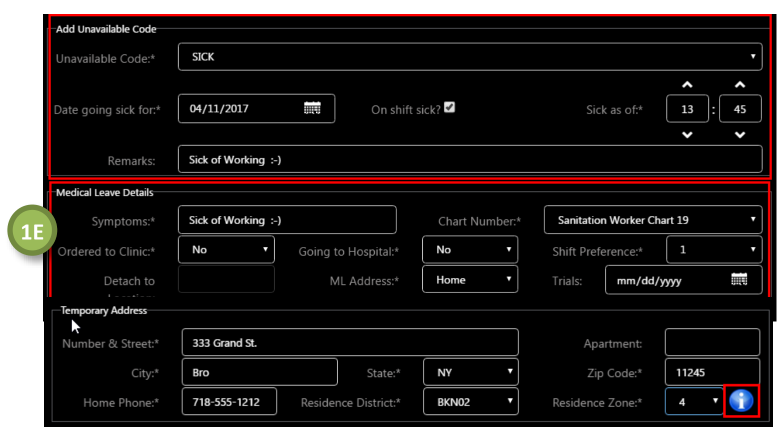
   E. **Unavailable – SICK or LODI**:

   - Select the **unavailable code** "SICK" or "LODI"
   - Enter, **date**, and **time** (if applicable), check the box **on shift sick** if the person was on their shift when they went sick
     - **Verify employee information** (address, telephone, and chart number) If person is staying at another location other than home, change the **ML Address to Temporary** and add the information. Click the info button to locate Residence Zone
   - **Enter the symptoms** and complete all other required fields and click **submit**

NOTE: Once the status changes, the personnel card will move to the respective Unavailable group on the personnel panel

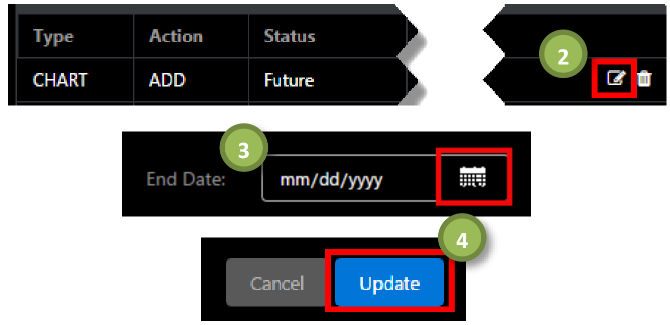






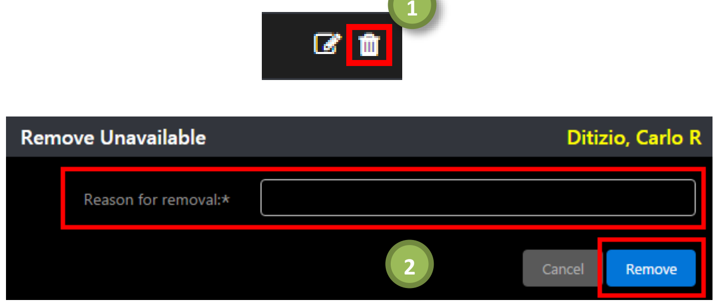
Editing Personnel Status

1. To edit personnel status, double click the personnel card to display the personnel details
2. Click the pencil icon at the far right of the desired section/row
3. Enter the **End Date** and make any other appropriate changes (Adding End Date is a resumption)
4. Click **Update**



Removing Personnel Status - NOT TO BE USED FOR RESUMPTION – only to be used if Unavailable was done in error

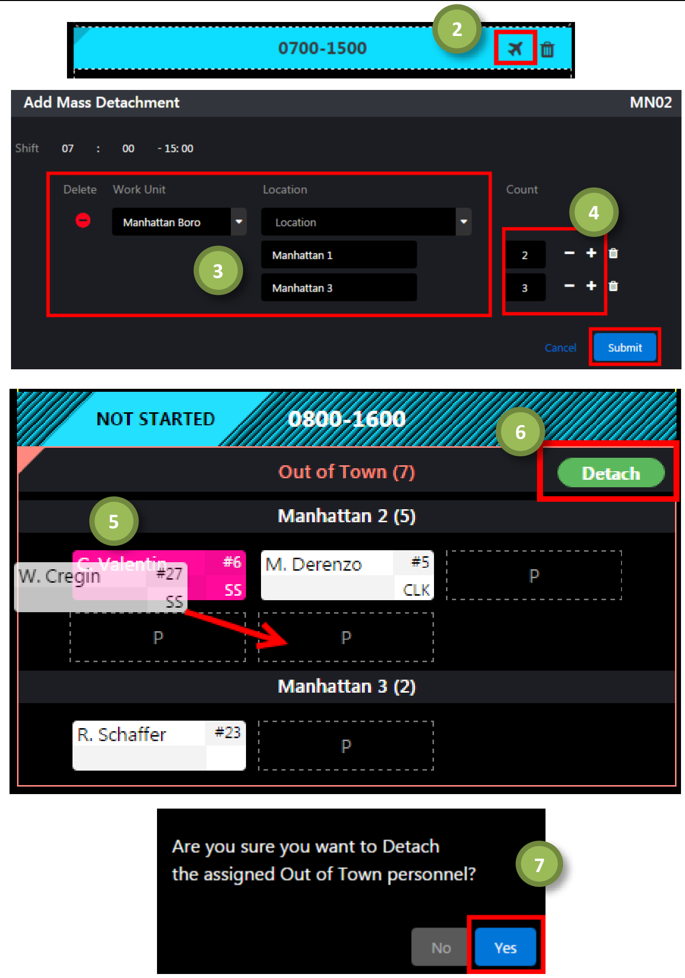
1. To remove **Unavailability**, **Detachment**, **MDA**, or **Special Position** click the **trash icon** in the appropriate row (You may need to widen Personnel Details to see edit icons.)
2. Enter **Reason for Removing** and click **Remove**
3. The action column will indicate **Removed** and the status column will indicate **Deleted**



Mass Detach Personnel

1. Go to the desired day's board and click **Edit Mode** in the Task panel.
   NOTE: cannot be done for the current day, only future boards.
2. Click the airplane icon for the shift the detachments will take place.
3. Choose the **Work Unit** and **Location(s)** for the detachment. (multiple Boros, Distincts and Units can be selected)
4. Use the − + icons to enter how many detachments there will be to each location and click **Submit**. The section will be labeled **Out of Town** and will appear on the display board.
5. Exit **Edit Mode** and begin dragging personnel cards to boxes in the locations in the **Out of Town** group
6. Once competed click the **Detach** button on the top right of the group
7. On the confirmation message click **Yes**

NOTE: Only 1 day attachments can be done with Mass Detach. For multiple date detachments refer to Setting Personnel Status, section 1A

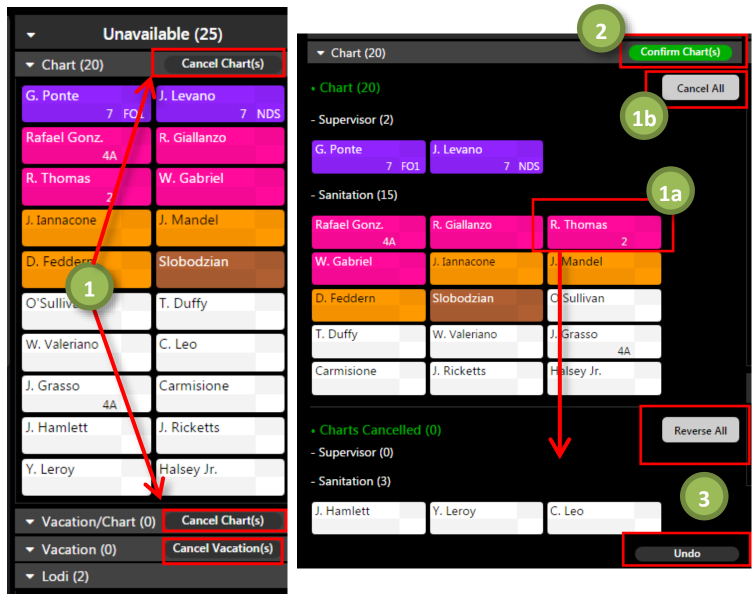


NEW YORK CITY DEPARTMENT OF SANITATION

NYC sanitation NEW YORK'S STRONGEST

Cancel Chart, Vacation/Chart, and Vacation

1. To cancel a **Chart**, **Vacation/Chart**, or **Vacation,** click **Cancel Chart(s)** next to the appropriate section then choose from the following methods:
    a. Double click the personnel card you wish to cancel the chart for - cards move to Charts Cancelled area below (repeat for each cancelled chart)
    b. Click **Cancel All** to cancel all charts
2. Click **Confirm Charts** once finished
3. Click **Undo** or **Reverse All** to move all the cards back
4. The same steps can be used for **Vacation/Chart** and **Vacation**
5. To edit chart cancellations repeat steps 1 and 2. Double click cards to move back to chart. You can also click **Reverse All**

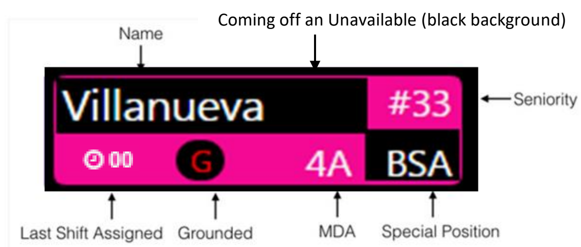


Personnel Sorting

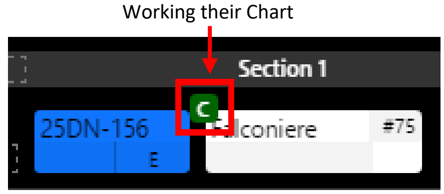
1. Click **the arrow** in the upper right hand corner of the Personnel detail panel to change/sort the order of the personnel cards
2. Sorting can be done by **Seniority**, **Reverse Seniority**, **Location Seniority** and **Last Name**

Visual Indicators On Personnel Card

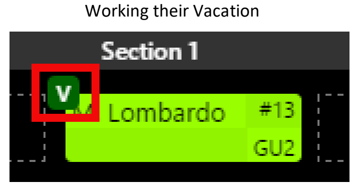
- Personnel Name
- Last Shift Assigned
- Grounded Status – Red G with a black background
- MDA Type
- Special Position – This section is
    - **Hardship (HD)** has been added and can be combined with any Tissue, NS or SS
    - **Tissue** will display if there are multiples
    - **HD** will display over NS or SS if no Tissue
    - **NS** or **SS** will only display if no Tissue nor (a special position cannot be both NS and SS)
- District Seniority Rank
- Coming off an unavailable (name & special position have black background, checkered card)
- A C on a personnel card indicates a person is working their chart
- A V on a personnel card indicates a person is working their vacation



Working their Chart



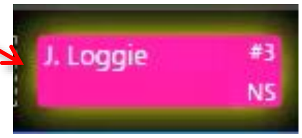
Working their Vacation



- If a person is marked unavailable without an end date and they are assigned to a task on a future board, the personnel card on the future board will Blink until removed.

NOTE: Only DSNY Safety and Training can ground or lift a grounding for personnel

Made unavailable today but assigned on future board



Personal Cards Color Rules

Color Rules for personnel card changes

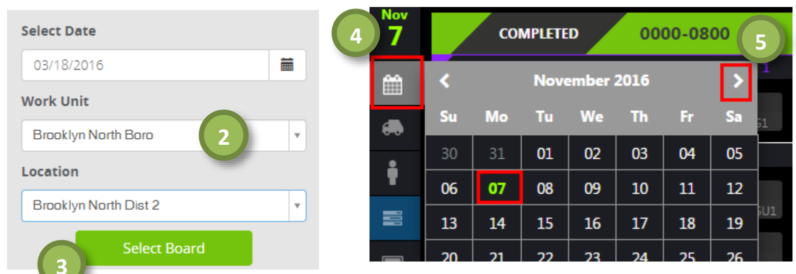
1. **Supervisors/Sanitation Workers:**
   when attached/detached will appear **salmon**
2. **Superintendent (GS1):**
   a. When detached within assigned Boro (e.g. MNBO to MN09), personnel cards will retain their **original color**
   b. When detached outside of their Boro (e.g. MNBO to SI03), personnel cards will appear in **Salmon color**
2. **Chiefs (GS2 and above) and Civilians:**
   when detached to any location, personnel cards will retain their **original color**

Tasks

Opening a SMART Board

Note: SMART boards display Equipment and Personnel for that location.

1. Log into **SMART**
2. Choose a **Date**, **Work Unit** and **Location**
3. Click **Select Board**
4. To open a board for another date (i.e. tomorrow), click the **Calendar Icon** and choose a **date** (the board for that date will open on a new tab)
5. Us the arrows to change the month



Setting up a SMART Ops Board

Tasks must be created before personnel and equipment can be assigned

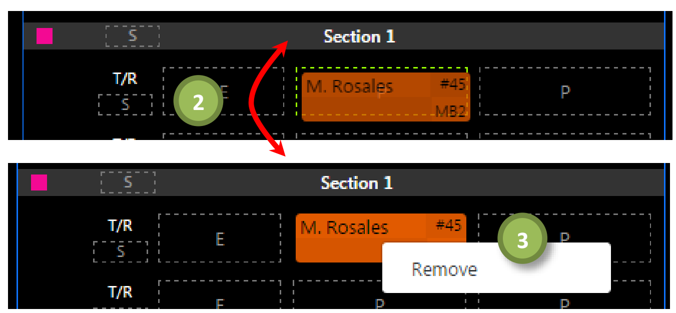
1. Click **Edit Mode**
2. There are 5 predefined **Shifts,** under the desired shift click **+ Task.** *See next section for adding shifts*
3. Choose a **Category**, **Sub-Category** and add number of routes for each section (use + -) for the **Managerial/Supervision, Sanitation Worker** and **Civilian** sections
4. Click **Submit**
5. Repeat 3-6 until all the shifts are complete.
6. To add more categories, click the **Edit Mode** button (if necessary) and click the **Edit Shift** button
7. Hover over the last category and click **+Category** then choose additional categories and subcategories
8. To delete a **Shift** or **Task** click the **trash** icon next to the shift or task you wish to delete.

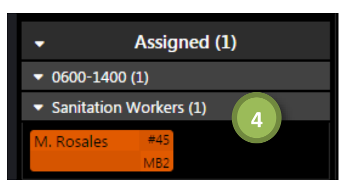
NOTE: To end a task click T/R next to the task to open task details and click the **end task** check box

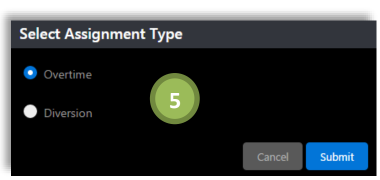
Adding Personnel to a Task

1. To add personnel, click and drag a **Personnel Card** from the personnel panel to a **"P"** slot
2. You can drag a personnel from one tasks to an empty slot in another task (prior to starting the shift)
3. To remove a card from a task, right click and choose **Remove** (prior to starting the shift)
4. **Assigned Personnel** can be added to additional tasks by dragging their **Personnel Card** from the **Assigned** group to another task on the board.
5. Select an assignment type from the pop up: **Overtime or Diversion** and click **Submit**

NOTE: Before the shift is started you can drag a personnel card to an empty slot on another task. Once a shift is started only Replacements can be done to change assignments. *See Replacements section later in this guide.*

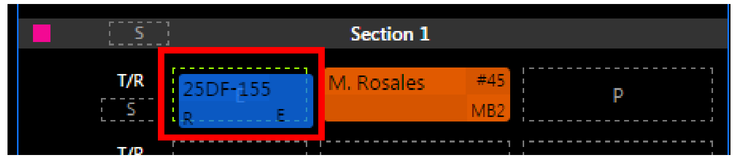






Adding Equipment to a Task

To add equipment, click and drag an Equipment Card from the **Available, Relay**, or **Rollover** groups to an **E** slot on task.

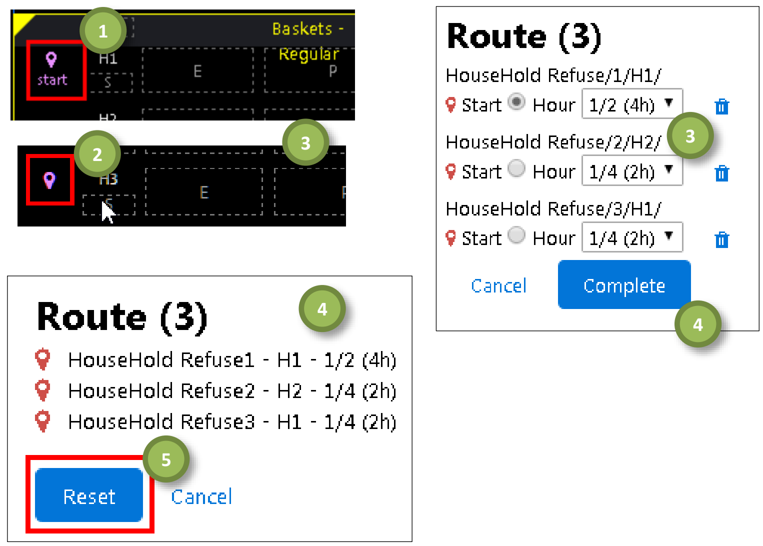


Partial Routes (edit mode)

1. While in **Edit Mode** hover the mouse pointer to the left of the task until the **Start** marker appears (tasks must have no assignments)
2. Hover over the start marker for the next task of the partial route (continue as necessary)
3. On the **Route** pop up adjust the fraction as desired

NOTE: To remove a partial task click the trash icon before clicking Complete

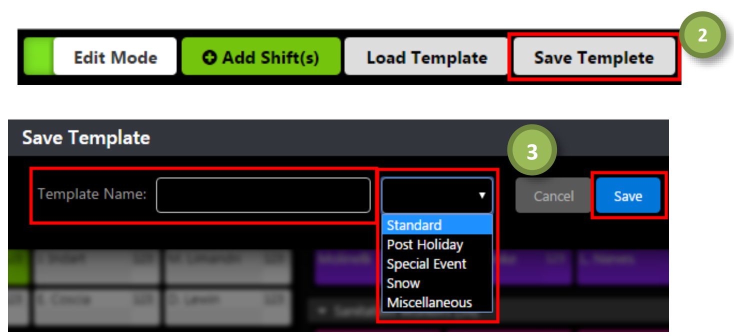
4. Click **Complete**
5. To unlink partial routes click any partial route icon and click **Reset** (assignments will remain on the first task only)



Creating a Template (Edit Mode)

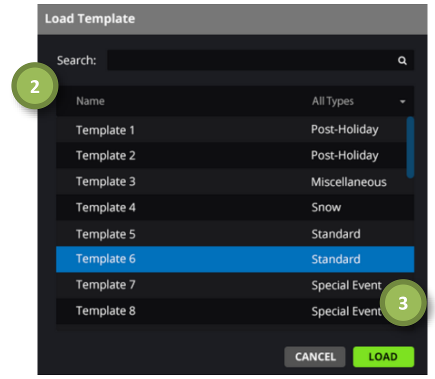
Any Ops board can be saved as a template. The templates contain only tasks, not assignments.

1. Create a board with all tasks for a particular day's setup
2. In **Edit Mode** click the **Save Template** button
3. Enter a **Template Name** and choose a **Template Type** from the drop down and click **Save**



Loading an Existing Template (Edit Mode)

1. Go to a future board and into Edit Mode, then click **Load Template**
2. Search or select the template from the list
3. Click **Load** (shifts and tasks will be loaded w/o assignments)



Loading Personnel

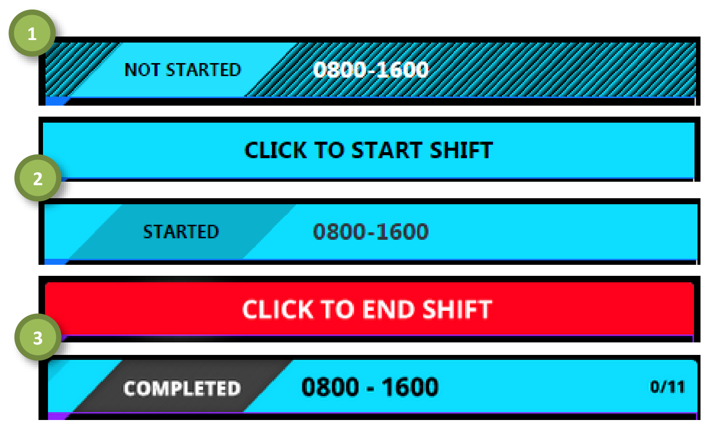
Personnel can only be loaded to future board dates from the prior day

1. In **Edit mode,** click **Load Personnel** (Loads from previous board's date. Personnel that were assigned on the prior day's board will appear on the same tasks. If the task a person was assigned to on the prior day's board is not on the current board, the person will appear in Available/Unassigned)
2. Fill in the personnel assignments where missing

Manual Start/End of Shifts

Once a shift is started the remove option on a tasks will no longer be available. Task start times will be set to the time the shift was started. End times will populate the End Shift time or the End Task time if ended individually. Time In/Time Out times can be edited. **SEE** Carting Book QRG for more details.

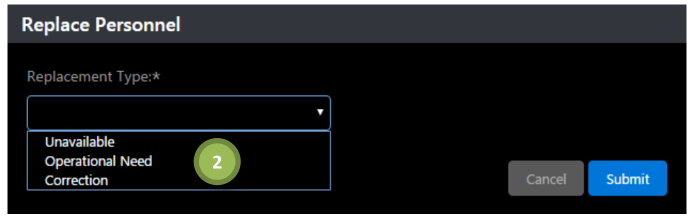
1. Setup tasks on a shift, banner will display **NOT STARTED**
2. Once tasks are final hover over the shift banner and **CLICK TO START SHIFT**. Equipment on the tasks will immediately move to **Pending Load** and **STARTED** will display
3. When shift is over hover over the banner and **CLICK TO END SHIFT**. Vehicles will gray out and banner will display **COMPLETED**

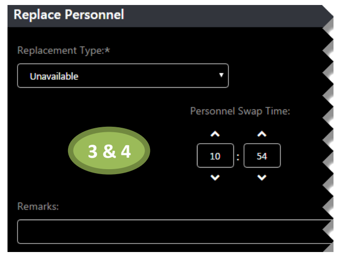


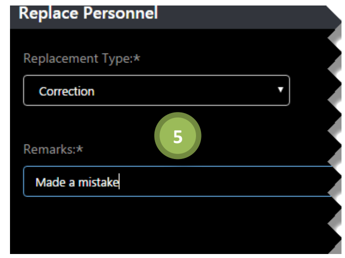
Replacements – Personnel

All replacements except corrections will populate the Carting Book

1. Drag a personnel card over a personnel card currently on a task
2. Choose an option from the drop down:
3. **Unavailable**
   - Enter swap time and Remarks
   - The Replaced Personnel Card will turn **Grey** in the **Available/Unassigned** column indicating it person must be made unavailable
4. **Operational Need**
   - Enter swap time and Remarks (reason)
5. **Corrections** – wrong person assigned
   - Remarks are required
6. Once information is entered click **Submit**
7. If adding from **Unavailable** you will also get the option for Next Day or Overtime

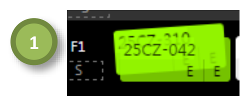


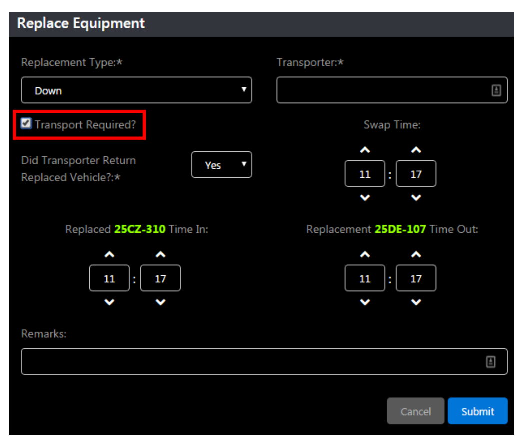




Replacements – Equipment

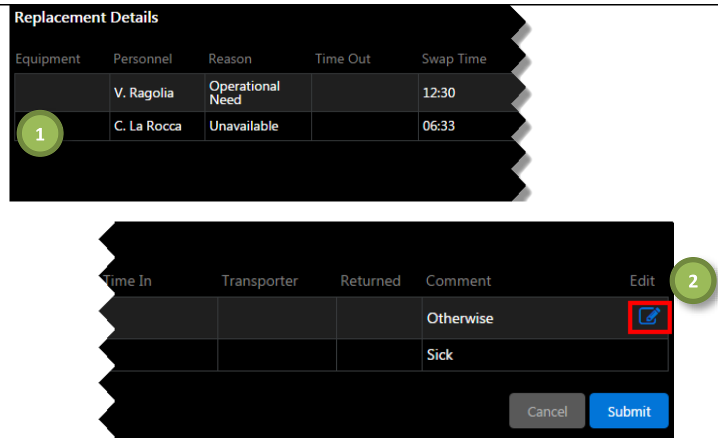
1. Drag an available vehicle directly onto a vehicle on a task
2. Select a **Replacement Type** from the drop down:
   a) **Relay**
      - Enter **Replaced** time in and **Replacement** time out
      - Enter Remarks if desired
   b) **Down – No transport**
      - Enter **Replaced** time in and **Replacement** time out
      - Bin vehicles move to **Pending Load** group
      - Non bin vehicles move to **Available**
      - Card turns **Grey** indicating needs to be **Downed**
   c) **Down – Transport Required**
      - Same as above but check Transport Required
      - Did Transporter Replaced Vehicle? (if "No" remarks are required)
      - Enter name of **Transporter**
      - Enter **Swap Time**
      - If known enter **Replaced** time in and **Replacement** time out (can be added later)
   d) **Capacity –** same as Down, doesn't gray out
   e) **Operational Need –** Same as down, doesn't gray out
   f) **Correction –** to resolve incorrect placement
      a. Enter Reason remarks (required)
3. Click **Submit**





Replacement History

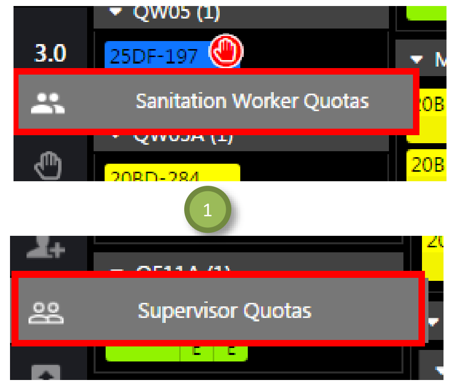
1. Personnel and Equipment Replacement History will show in the Task Details
2. Click the Edit button to enable editing (only most recent replacement is editable per type)
3. Different options will appear depending on the reason
4. Click the ✓ to complete or ⊖ to cancel

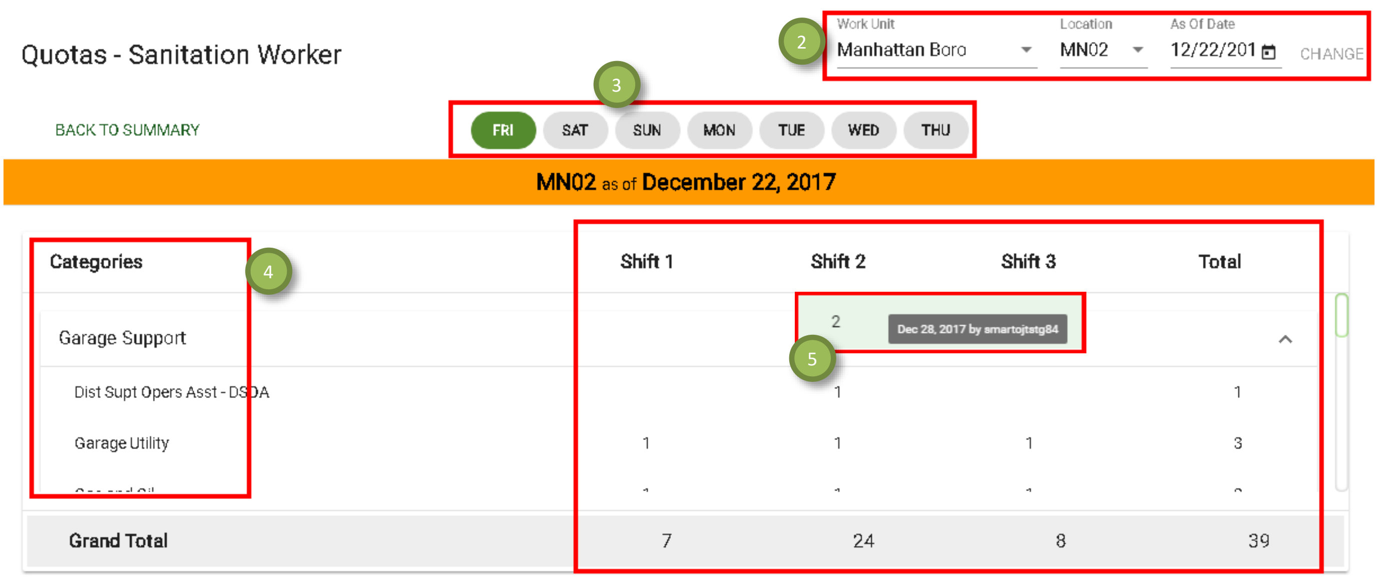


Manpower

Viewing Quotas

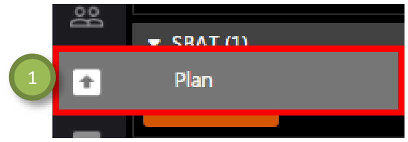
1. On the **Ops Board Menu** (left side) click **Sanitation Worker Quotas** or **Supervisor Quotas**
2. The **Work Unit**, **Location** and **As of Date** will default to that of the current board. This can be changed; select **Work Unit, Location** and **As of Date**, click **CHANGE**
3. Select the day you want to view quotas for (does not affect As Of Date)
4. Subcategories appear on left and posted Quota per shift on right, scroll down to view all Subcategories (categories will only appear if there are quotas for that category)
5. Hover over a number to see when it was last updated and by whom.
6. The process is the same for viewing **Supervisor Quotas**



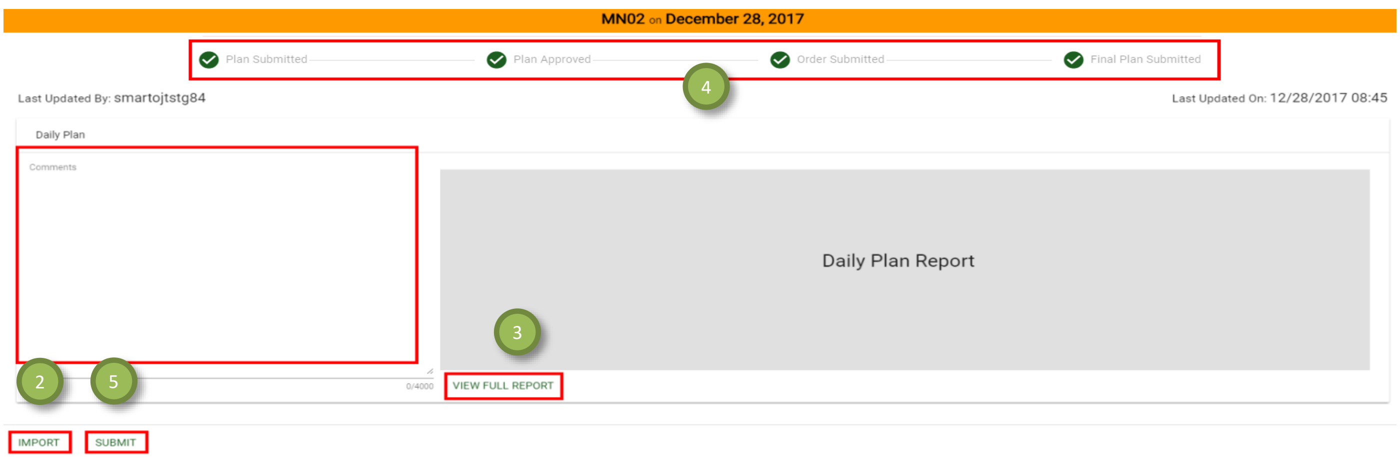


Submitting the Plan

1. On the **Ops Board Menu** (left side) click **Plan** – the plan is based on the ops board setup
2. Click the **Import** button at the bottom left to import tasks from the board and add comments as desired.
3. To view the Daily Plan Report click **View Full Report** (eventually a summary will appear in the gray box)
4. The numbers at the top show the progress of **Plan Submitted**, **Plan Approved**, **Orders Submitted** and **Final Plan submitted** (if the plan is rejected #2 will read Plan Rejected)
5. Click the **Submit** button on the bottom left to submit initial plan (status changes to Plan Submitted)



Initial Plan should be submitted as you would your 21 (Day's plan)



Viewing Orders/Setting Final Plan

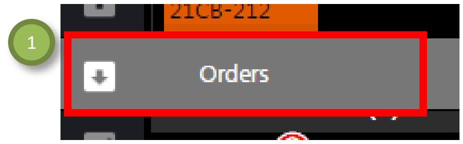
1. On the **Ops board Menu** (left side) click **Orders** (26 screen in SCAN)

2. View **Detachments**, **Attachments** appear automatically

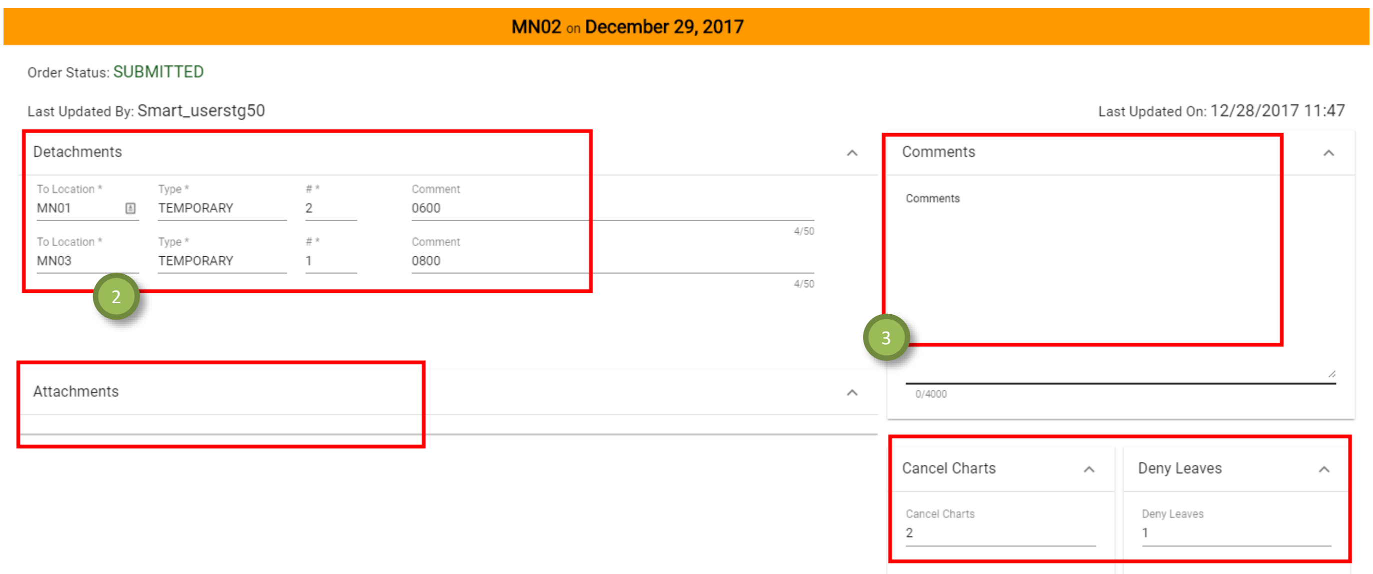
3. Read any **Comments Chart Cancellations** and **Leave Denials** appear at the bottom right

4. **Adjust Plan or add Jobs** to the Ops board as per the orders

5. Return to the **Plan** (see page 2) and click **IMPORT** to update the changes made to the board then click **Submit** to send final plan (27 screen in SCAN)



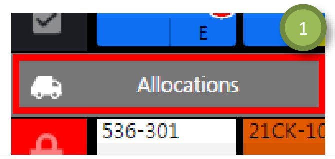
Final Plan should be submitted by end of dayline



Work Complete - Allocations

Importing Routes/Tasks

1. On the **Ops Board Menu** (left side) click **Allocations**
2. Routes will be imported automatically based on the board you are currently on. (this replaces the 05 screen in SCAN, routes are pulled form SMART board)
   Routes can also be imported manually from the allocation screen by clicking **IMPORT ROUTES.** Enter **Work Unit, Location** and **Date** then click **IMPORT**.
3. Type the **Series** and **Vehicle #** for the allocations (no need to use Tab key)
4. Drag the **Route(s)** from the left into the middle paring window
5. Drag the corresponding **Receipt(s)** in from the right into the pairing window



Allocations can only be done for ended tasks

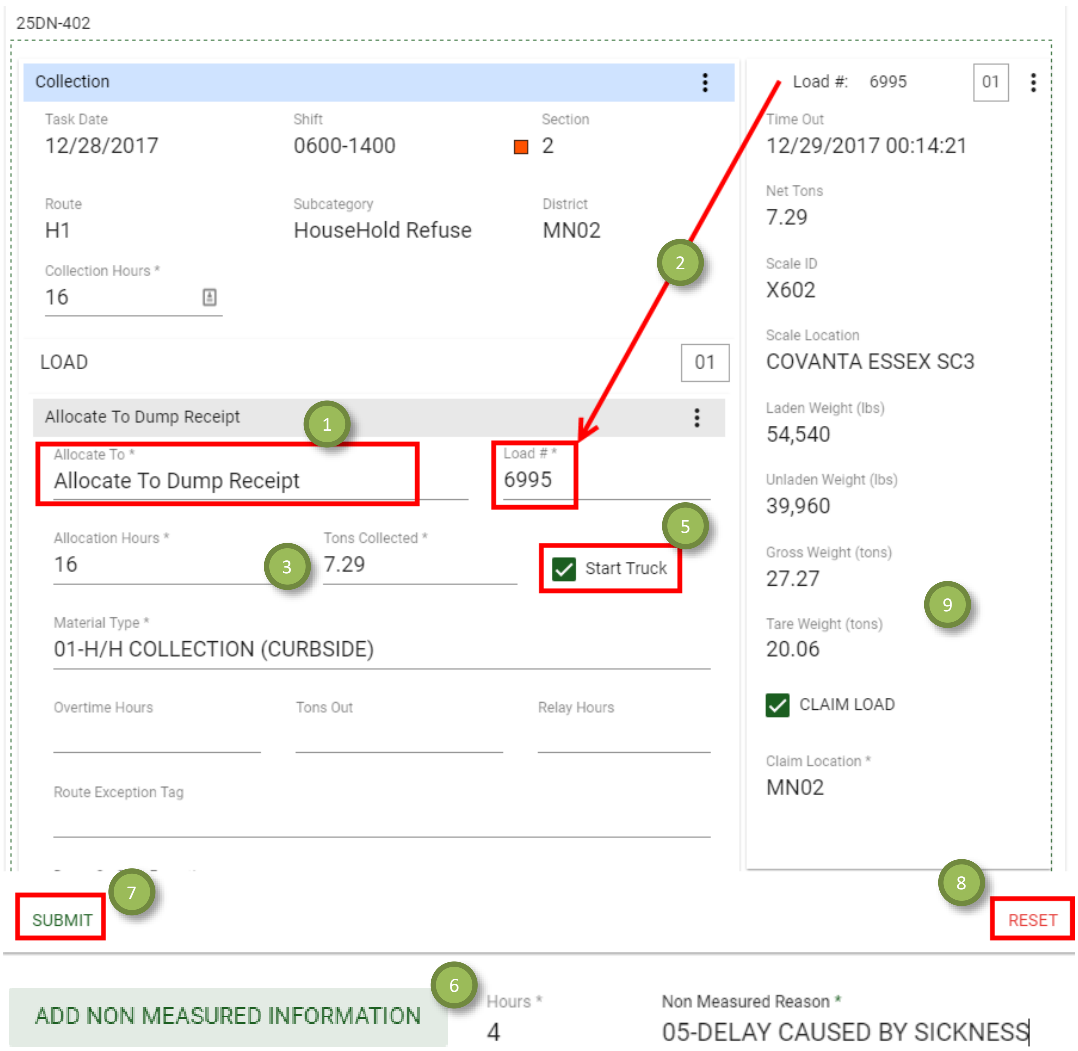
Creating an Allocation

1. Choose **Allocate to Dump Receipt** from the Allocate To: drop down

NOTE: Choose **Allocate to a Shopload** for loads that do not dump in a day (can be married to a dump receipt at a later time)

2. Select the **Load #** (same as Receipt)
3. Adjust **Collection Hours** and **Allocation Hours** if necessary
4. Click the **Start Truck** checkbox
5. Fill in other fields as necessary (same info as 21 screen in SCAN)
6. If necessary, click **ADD NON MEASURED INFORMATION** and add lost **Hours** and **Non Measured Reason** (Allocation Hours + Non Measured should equal Collection Hours)
7. Click **SUBMIT** to finish
8. Click **RESET** to clear the window and cancel the Allocation
9. Click the **Claim Load** on the receipt if desired

NOTE: Both bins of a split body can be allocated separately to their own receipts from one route



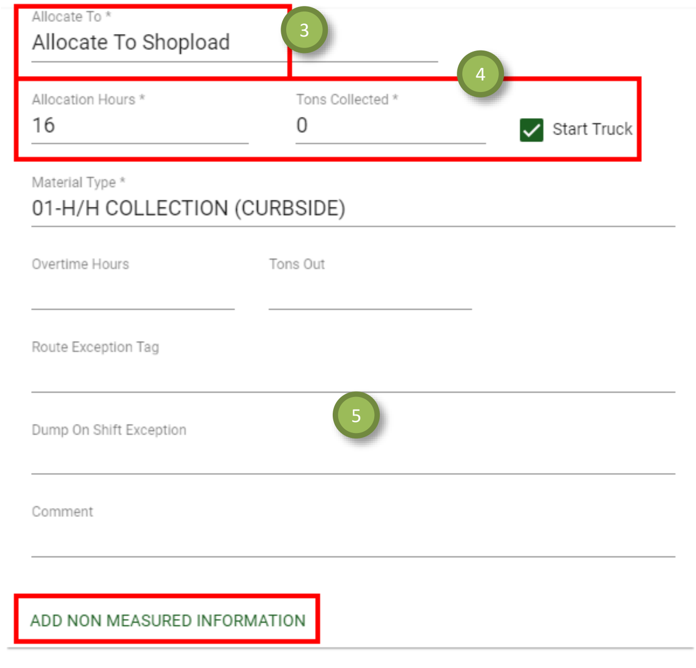
Allocating a Shop Load

For vehicles with a load that did not dump the day of collection (rollovers, down vehicles, etc.)

1. In the **Allocations** application type the **Series** and **Vehicle #**
2. Drag the **Route(s)** into the allocation area
3. In the Allocate To field choose **Allocate to Shopload**
4. Adjust the **Allocation Hours** and estimate the **Tons Collected** and click **Start Truck** if applicable
   (Material Type can also be changed if necessary)
5. Add any additional information as needed including **NON MEASURED INFORMATION**
6. Click **Submit** (shop loads will appear at the top of the routes column)

To Add Routes to an Existing Shopload

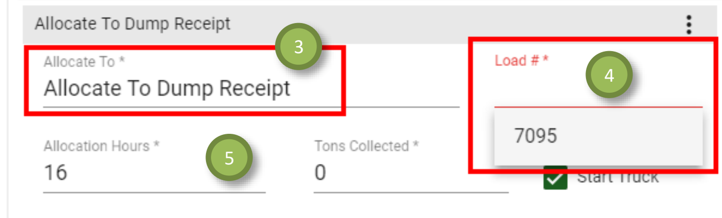
7. A link will appear on the Route card; ***Please click to add new routes to this shopload***. Click the link to add the route back into the allocation area
8. Drag the **next route** into the allocation area and choose **Allocate to a Shopload**
   (if there are already multiple routes on a shopload all the routes will move into the allocations area together once you move one)
9. Click **Submit**



Pairing a Dump Receipt with a Shopload

Once a Shoploaded vehicle dumps, the allocation must be changed to Allocate to Dump Receipt. In cases where there have been multiple allocations to a Shopload there will be multiple routes that will be allocated to 1 dump receipt.

1. In the **Allocations** application type the **Series** and **Vehicle #**
2. Click the **>** to add new routes to this Shopload in the allocation area
3. For the first route choose **Allocate** to **Dump Receipt**
4. Choose the **Load #**
5. Repeat steps 3 and 4 for each route adjusting the estimated **Tons Collected** for each as well as the **Allocation Hours** (if necessary)



Allocation Scenarios

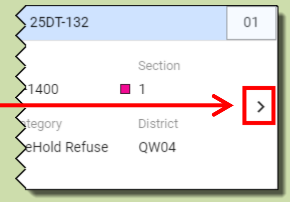
Below are typical allocation situations and frequently used functions. While performing allocations there may be a need to update. A created receipt is automatically replaced when the scale site creates and transmits an electronic version. Below are walkthroughs of various scenarios encountered while allocating. Note that for each of these scenarios it is assumed that Routes have been imported from the desired Ops Board, and the desired date allocations are being done for.

Scenario	Actions
Rear Loaders - **Simple Allocation** **1 Route → 1 Receipt** A rear loader is on one collection route and has dumped once. There will be one route and one dump receipt.	1. **Search** for the Truck 2. **Drag the Route** into the pairing window 3. **Drag the Receipt** to the pairing window 4. Choose **Allocate to Dump Receipt** 5. Choose the **Load #** 6. If it's a Start Truck, click the **Start Truck** checkbox 7. On the Dump Receipt click the **CLAIM LOAD** checkbox (change the district if necessary) 8. If needed, update information; (Tons Out, Relay Hours, Route Exemption Tag, Dump on Shift Exception, and Comments) 9. Click **SUBMIT**
2 or More Dumps for a Route **1 Route → 2 Receipts** A rear loader on a collection route dumps twice (or more). There will be one route and a receipt for each dump.	1. **Search** for the truck 2. **Drag the route** from the left and **drag dump receipts** from the right (they will be in order of which ocurred first no matter what ordered to dragged them in) 3. Choose **Allocate to Dump Receipt**

	4. Choose the **first Load#** 5. If it's a Start Truck, Click the **Start Truck** checkbox 6. If needed, update information; (Tons Out, Relay Hours, Route Exemption Tag, Dump on Shift Exception, and Comments) 7. Click **Add Allocations** 8. Chooose **Allocate to Dump Receipt** 9. Choose the **second Load #** 10. **Adjust Allocation Hours** and for each dump as needed 11. If needed, update information; (Tons Out, Relay Hours, Route Exemption Tag, Dump on Shift Exception, and Comments) 12. On the Dump Receipt click the **Claim Load** (change the district if necessary 13. Click **SUBMIT**
Allocating to Other District/Sections A truck gets set-up for one Route on the Ops Board in one district and is sent to service another district. This route needs to be allocated to the district where the collection occurred. If multiple Districts or Routes need a "piece" of the receipt use the **Add Allocation** Feature to add the additional routes covered. The Add Allocation will be used to record these routes/sections and the hours and weight estimated for each. For any additional Routes/Sections, repeat steps 4 thru 7	1. **Search** for the Truck 2. Drag the **Route** to the pairing window 3. The comments field in the task details on the Ops Board should contain information about the Sections/Routes covered but if not they can be found on the 350 4. After allocating the starting route to the dump receipt, click **Add Allocation** and choose **Allocate to Other District/Section** for any subsequent routes needing allocation 5. **Confirm** and **Select** the corresponding **Load #** 6. Add the **District, Section** and **Route** 7. Adjust the **Allocation Hours** and estimated **Tons Collected**
Allocating Mop Ups, Special Events Etc. - Across Multiple Routes/Sections A truck set-up for one Route on Ops Board and goes to another Route, Section Or District (*Help or Mop-up Trucks that only have one route built on the SMART Board*) This allows the allocations to be associated with the district(s) where the collection occurred. If multiple Routes need a "piece" of the receipt use the **Add Allocation** Feature to add the additional routes covered	1. **Search** for the Truck 2. **Drag the Route** and the **Receipt** into the pairing window 3. Choose **Allocate to Other District/Section** 4. Required Fields for **District**, **Section** and **Route** appear. Fill in the information 5. All else is the same as any other allocation 6. If **multiple Districts/Sections** are covered use the **Add Allocation** feature, choose Allocate to Other District/Section Required Fields for **District**, **Section** and **Route** appear. Fill in the information

Split Bodies **1 Route → 2 Receipts** A dual bin truck completes a route picking up two different material types then dumps. There will be a receipt for each side/dump.	1. **Search** for the Truck 2. **Drag the Route** and the **2 Receipts** into the pairing window 3. For the **Large Side** (first bin) choose **Allocate to Dump Receipt** 4. Choose the **first Load #** and if it's a Start Truck, click checkbox for **Start Truck** 5. Click **Claim Load** on the Dump Receipt 6. For the **Small Side** (second bin) choose **Allocate to Dump Receipt** 7. Select the **second Load #** 8. Adjust **Allocation Hours** as needed 9. If needed, update information; (Tons Out, Relay Hours, Route Exemption Tag, Dump on Shift Excetion and Comments) 10. Click **Claim Load** on the Dump Receipt 11. Click **SUBMIT**
Split Bodies **1 Route → 1 Receipt** A split body on a route dumps from one side and the other side is not used or a split body on a route dumps a single material type from both sides. There will be one dump receipt. If the other side is used for a different material type but not dumped, it must be allocated to a Shopload (covered later in this guide)	1. **Search** for the Truck 2. **Drag the Route** and the **Receipt** into the pairing window 3. For the **Large Side** (first bin) choose **Allocate to Dump Receipt** (assuming this was the bin that was used) 4. Choose the **Load #** 5. If it's a Start Truck click checkbox for **Start Truck** 6. For the **Small Side** (second bin) for Allocate To: click **Not Used** 7. Adjust **Allocation Hours** 8. If needed, update information; (Tons Out, Relay Hours, Route Exemption Tag, Dump on Shift Excetion and Comments) 9. Click the **Claim Load** checkbox on the Dump Receipt 10. Click **SUBMIT**
Partial Routes **2+ Routes → 1 Receipt** A partial route will have multiple routes and 1 receipt. When routes are added to the pairing window the Allocations Hours are split evenly. When the receipt is added and load numbers are chosen for the routes the Tons Collected will also be split evenly. Both Allocation Hours and Tons Collected can be corrected as needed.	1. **Search** for the Truck 2. **Drag the Routes** and the **Receipt** into the pairing window 3. For the **first route** choose **Allocate to Dump Receipt** 4. Choose the **Load #** 5. If it's a Start Truck, click the **Start Truck** checkbox 6. For the second route choose **Allocate to Dump Receipt** 7. Choose the **same load number** as the previous route 8. If it's a Start Truck, click the **Start Truck** checkbox 9. Perform steps 6 & 7 for any additional routes

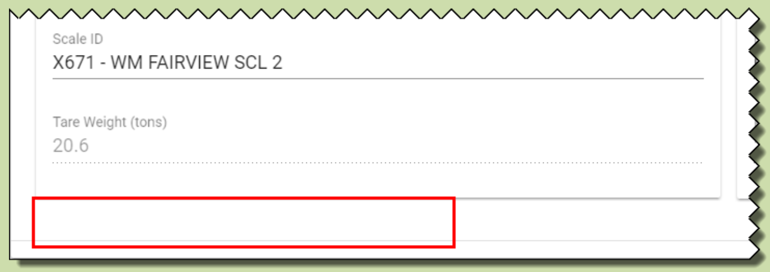
	10. The **Allocation Hours** and **Tons Collected** will be split evenly, correct them as needed
½ to MLP – 1 Truck (splitting weight) **2 Routes – 1 Receipt** On a half route to MLP with 1 truck, the two routes will be paired with 1 receipt. As with any partial route the weights will be divided evenly but should be adjusted to estimate the actual weight for each. ***NOTE:*** *All cleaning functions must have the section they are being allocated to, entered within the allocation, because the Ops Board does not provide it.*	1. **Search** for the Truck 2. **Drag the Routes** and the **Receipt** into the pairing window 3. On the **first route** choose **Allocate to Dump Receipt** 4. Choose the **Load #** 5. Check the **Start Truck** checkbox 6. Repeat steps 3 and 4 for the **second route** (same load #) 7. Adjust the **Allocation Hours** and **Tons Collected** for both 8. Click the **Claim** checkbox on the receipt and click **SUBMIT** to complete
½ to MLP – 2 trucks **2 Routes – 2 Receipts** On a half route to MLP with a different truck on the MLP there will be 2 routes and 2 receipts if the second truck dumps (otherwise you will need to allocate the second truck to a Shopload). The Allocation Hours should be adjusted and the Tons Collected estimated for each Shopload.	1. **Search** for the Truck 2. **Drag both Routes** (2 different truck numbers) and both **Receipts** (if both trucks dumped) into the pairing window 3. On the **first route** choose **Allocate to Dump Receipt** 4. Choose the **Load #** from the corresponding receipt and check **Start Truck** 5. On the **second route** (if truck dumped) choose **Allocate to Dump Receipt** 6. Choose the **Load #** from the second receipt. 7. Adjust the **Allocation Hours** and **Tons Collected** for both 8. Click the **Claim Load** checkbox on the Dump Receipt and 9. Click **SUBMIT**
Shoploads – Rear Loader Collection trucks that don't dump (for whatever reason) need to be allocated. They should be allocated to a Shopload with estimated Tons Collected. Once they do dump the Shopload should be corrected and paired with the dump receipt.	1. **Search** for the Truck 2. Drag the **Route** into the pairing window 3. Choose **Allocate to Shopload** 4. Adjust **Allocation Hours** and estimate **Tons Collected** as necessary

	5. If it's a Start Truck, click the **Start Truck** checkbox if applicable 6. Click **SUBMIT**
Pairing Shoploads **Allocating to Dump Receipt** Once a truck (or side, in the case of split bodies) has been dumped after being Shoploaded the dump should be corrected and allocated to a dump receipt. The Shoploaded dump is added back into the pairing window and then the Allocate To: option is changed to Allocate to Dump Receipt. ***NOTE:*** *Shoploaded routes will appear at the top of the Routes column and be identified by an arrow and the message: Please click to add new routes to this Shopload on the card*	1. **Search** for the Truck 2. A Truck that has been allocated to a Shopload will have an arrow to the right of the card. **Click the arrow** to move the truck into the pairing window.  3. Drag the **Receipt** into the window 4. Change the **"Allocate to:"** option to **Allocate to Dump Receipt** and choose the **Load #** 5. Continue as with any other allocation to a receipt
Truck Goes down w/ Load - Replacement Truck Dumps If a truck on a route goes down with a load and is replaced, the down truck is allocated to a Shopload. The replacement truck that dumped is allocated to a receipt. Both trucks will appear in the Routes column of the screen. ***NOTE:*** *When correcting a Shopload in this scenario, if you add either one of the trucks back to the pairing window both trucks associated with the route will move together*	1. **Search** for either the down truck or replacement truck (both will appear) 2. **Drag both trucks** (same route) into the Pairing Window 3. For the **downed truck**, **Allocate to a Shopload** as per instructions above adusting **Allocation Hours** and **Tons Collected** 4. For the **replacement truck**, **Allocate to Dump Receipt** and adjust **Allocation Hours** and **Tons Collected** 5. When the down equipment is eventually dumped, follow the steps previously detailed in the Pairing Shoploads scenario
Split Body Goes Down on Shift In this case both sides would be allocated to Shoploads. *There is no need for Down Equipment or Cars to be used*. If there is a replacement truck, follow the same procedures as previous section allocating both sides to corresponding dump receipts.	1. **Search** for the Truck 2. Drag the **Route** into the pairing window 3. For each bin, **Allocate to Shopload** 4. Adjust Al**location Hours** and **Tons Collected** for each 5. If and where applicable, click the **Start Truck** checkbox
Split Body - 1 Side Dumps/1 Side Rolled Over A Split Body only dumps one side; this side can be allocated to the dump receipt. The second side did not get dumped; this side should be allocated to a	1. **Search** for the Truck 2. Drag the **Route** into the Pairing window 3. Drag the **Dump Receipt** into the window

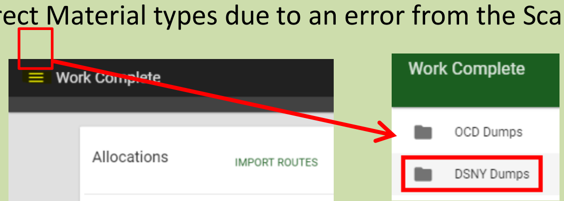
Shopload. When a down dual bin dumps, correct the allocation as previously described.	4. **For the bin that dumped, Allocate to Dump Receipt** 5. Select the **Load #** 6. Adjust the **Allocation House** and **Tons Collected** 7. If and where applicable, click the **Start Truck** checkbox 8. For the down bin **Allocate to Shopload** adjusting the **Allocation Hours** and **Tons Collected**
Add Routes to Existing Shoploads - Rollover Routes Rollovers will often go multiple days without dumping. Each day the load added to the truck must be allocated to a Shopload. This creates a connection between the routes making it easier to allocate once the truck has dumped. When the dump occurs, all Shoploads will be changed to Allocate to Dump Receipt; it will be the same receipt for all. Estimated Tons Collected will be adjusted for each & must add up to the Net Tons on the receipt.	1. **Search** for the Truck 2. For the Rollover truck that will not be dumping choose **Allocate to Shopload** and adjust the **Allocation Hours and estimate the Tons Collected** as necessary 3. The card for that Truck/Route will have a reminder: *Please click to add new routes to this Shopload*. Click the route to add it back into the allocation area 4. Drag the next route into the window with the first one and choose **Allocate to Shopload** and enter the estimated **Tons Collected** and **Allocation Hours** as necessary 5. Repeat steps 3 and 4 for each addition 6. Click **SUBMIT**
Pairing Rollover Shoploads - Allocate to 1 Dump Receipt For rollovers covering multiple routes over multiple days that then dumps, the allocation for each route will need to be changed to Allocate to Dump Receipt. There will be 1 dump receipt for all the routes.	1. **Search** for the Truck 2. Click the › on the Route card and all assocated routes will move into the allocation area 3. For each route change the Allocation To field to **Allocate to Dump Reciept** 4. Select the **Load #** 5. Enter the estimated **Tons Collected** for each route and adjust **Allocation Hours** if necessary 6. If needed, update information; (Tons Out, Relay Hours, Route Exemption Tag, Dump on Shift Excetion and Comments) 7. Click **SUBMIT**
Allocating ROROs/EZ-Packs Last load doesn't dump When the last load of a RORO or EZ Pack does not dump it needs to be Allocated to a Shopload. The prior loads are Allocated to a Dump Receipt. This is a change from what was done in SCAN and doing this correctly will reduce headaches and save time. ***NOTE:** Failure to Allocate an undumped load to a Shopload will require you to Deallocate the receipts from the prior loads and add the last load. Done*	1. **Search** for the Truck 2. Drag the **Route** into the Pairing window 3. Drag each **Dump Receipt** into the Pairing window 4. Allocate to the **first Dump Receipt** 5. Click **Add Allocations** and allocate to the next Dump Receipt choose the correct **Load #**, repeat as necessary 6. After the last pairing with a Dump Receipt click **Add Allocations** again and choose **Allocate to Shopload** 7. Adjust the **Allocation Hours** and estimate the **Tons Collected** as necessary

correctly the Shopload just has to be edited to Allocate to a Dump Receipt.	8. Once the last load has dumped, **return to Allocations**, locate the Truck 9. **Add the Route back** into the Pairing window 10. Change the Allocate To: option to **Allocate to a Dump Reciept** 11. Choose the **Load #** from the new receipt 12. If needed, update information; (Tons Out, Relay Hours, Route Exemption Tag, Dump on Shift Excetion and Comments) 13. Click **SUBMIT**
District Entered Dumps - **Creating and Allocating** In circumstances where a truck has dumped but for whatever reason there is no electronic receipt available, a District Entered Dump can be created using the information on the handwritten receipt. The required fields are marked with an *. Once created, pairing a Route with a District Entered Dump is the same process as pairing with an electronic Dump Receipt. Once an electronic receipt becomes available the District Entered Dump will automatically be replaced and paired with the route.	1. In the Allocations window click **Add Dump** at the top right (required fields are marked with an "*") 2. Enter the **Truck information**(Series and Vehicle #) 3. Choose a **Material Type** 4. Enter the **Scale ID**, a **Load #**, **Dump Date** and the **Hour**, **Minutes** and **Seconds** from **OUT TIME** on the paper Dump Receipt 5. Choose the **Original Source** 6. Enter the **Laden Weight** and **Unladen Weight** 7. Click **SUBMIT** 8. Click **Allocate** at the bottom left which takes you into the Allocation window 9. **Drag the Route** into the Allocation area and then the **District Entered Dump** which is indicated by a 10. Complete the allocation as you normally would when **Allocating to Dump Receipt** 11. **Claim** the load if desired and click **Submit**
Editing a District Entered Dump Before it's allocated, a District Entered Dump (which is indicated by a), can be edited including all data that was originally entered. Once allocated only the Allocation Details can be updated. To edit the District Entered Dump the allocation would have to be Deallocated. Also if a dump is claimed only the Allocation Details can be changed.	1. In the **Work Complete** application click the menu Work Complete at the top left and choose **DSNY Dumps** 2. Search for the **Equipment ID**, **Load #** or **Scale ID** 3. Use the **Status** filter to show dumps of a specific status or all dumps 4. Choose a **Work Unit**, **Location** and **Dump Date** as desired 5. Only Unallocated & Unclaimed dumps will have the Edit icon , click the icon to edit 6. Make any desired changes and click **Submit** 7. If there is a need to edit after allocated, access the details of the dump and click **Deallocate** at the bottom. Make the desired changes and click **Submit**. The allocation will have to be re-created.

Incorrect Material Type on Dump Receipt There may be times there is a need to change the material type on a dump receipt. Before allocation is completed the dump record can be updated.	1. Follow steps 1 through 4 in the previous section 2. Click the Edit icon to access the dump 3. Change the **Material Type** and click **Submit** 4. If already Allocated click **Deallocate** 5. If claimed click **Unclaim** 6. Change the **Material Type** and click **Submit** 7. **Allocations and Claims** will need to be re-done
Deallocating a Dump There may be times there is a mistake that requires a correction and you may need to Deallocate, make any corrections then Re-Allocate.	1. On the **Work Complete** menu choose **DSNY Dumps** (see page **Error! Reference source not found.Error! Bookmark not defined.** View/Edit Dumps), follow the instructions to locate a dump**Error! Reference source not found.Error! Reference source not found.Error! Reference source not found.** 2. On the Dump Card click the **View Details** icon 3. Click **DEALLOCATE** at the bottom left  4. Click **ALLOCATE** at the bottom left to return to the Allocations screen 5. **Re-create the allocation** making necessary changes 6. Click **SUBMIT**
Correcting Task information for Tasks/Routes that are already Allocated. If a Task on the Ops Board is labeled incorrectly or has an incorrect Subcategory, etc., the Dump will have to be Deallocated and the task will need to be corrected or re-created on the Ops Board. Then the route(s) have to be re-imported into the Allocations application and a new Allocation created.	1. Locate the Dump, access the details and click **DEALLOCATE** (as in the previous section) 2. Go to the **Ops Board** and make necessary changes to the **Task/Route** 3. Return to the **Allocations** application (can access from Work Complete menu) 4. **Import** the Routes for the location and date 5. Search for the specific Truck and **re-create the Allocation**
Request a Replacement Dump Receipt If the dump receipt is lost and a new receipt is required.	It is still necessary to fill out and submit the **DS-66R** form to request a new receipt
Incorrect Information on Dump Receipt	It is still necessary to fill out and submit the **DS-68** form to report incorrect information on a dump receipt.
Claim a Dump **In DSNY Dumps** Generally dumps are generally claimed while being allocated by checking Claim Dump on the receipt. Dumps can also be claimed in the DSNY Dumps section of the Work Complete application.	1. While in the **Work Complete** application click the menu and choose **DSNY Dumps** 2. Search for **Equipment ID, Load # or Scaled ID** 3. The **Status**, **Work Unit**, **Location** and **Dump Date** filters can also be used for locating a dump 4. Click the **View Details icon** on the dump card

	5. Click **CLAIM** at the bottom left and change **Claim Location** if necessary 6. Click **SUBMIT**
Unclaim a Dump **In DSNY Dumps** Dumps can be unclaimed by access the Dump card in DSNY Dumps in the Work Complete application.	1. While in the **Work Complete** application click the menu and choose **DSNY Dumps** 2. Search for **Equipment ID, Load # or Scaled ID** 3. The **Status**, **Work Unit**, **Location** and **Dump Date** filters can also be used for locating a dump 4. Click the **View Details icon** on the dump card 5. Click **UNCLAIM,** you will see a confirmation message, click **Yes** to complete
No Claim, Allocate/Deallocate nor Edit options Appearing on a Dump Record This means the scale for this dump record has already been closed. The only way to make changes is to **contact SWM** and have them **Re-Open** the scale. To verify go to **Scale Sign Off** and filter for **Location**, **Dump Date** and **Closed** status to view the closed scales	
Deleting a Route If a piece of equipment is assigned to a route and never gets loaded/used there will be no reason to do an allocation for this assignment. For example there are Multiple cut downs set up on a cleaning function but you only load 3 out of the 4. You need to leave the task on the Ops board but if you don't want it to always appear in the allocation screen as Unallocated you can delete the assignment using the icon. If this delete option is used and you do need to allocate a receipt to the assignment. The Ops Board will need to be modified by deleting the existing task, then rebuilding the same task and Importing the tasks into the allocation screen.	1. On the Ops Board Menu (left side) click **Allocations** 2. Routes get imported automatically based on the SMART board or location and date selected. (this replaces the 05 screen in SCAN, routes are pulled form SMART board) 3. Type the **Series** and **Vehicle #** for the truck to allocate. 4. Click the garbage can to delete the route that will never have a dump receipt 5. Click **Yes** on the confirmation message to remove the route from the Allocation screen. This cannot be reversed without replacing the task from the Ops Board

While performing allocations in SMART, if you need to correct Material types due to an error from the Scale, you



need to make those corrections using DSNY Dumps.

If the Truck number is wrong on the receipt, while you're in the allocation screen click on ADD DUMP in the top right corner and create a manually entered receipt using the correct truck number.

These corrections need to be made in the computer and a DS 68 Form still need to be filled out in triplicate and processed with the dump receipts. All DS66A or 66R still get used when necessary as well.

For Material Type corrections see the **Incorrect Material Type on Dump Receipt**

Section on page 11.

For creating dumps see District Entered Dumps - **Creating and Allocating**

see page 10.

Claiming a load after Allocation Completed

In the event the load was forgotten to be claimed Or the claim location needs to be changed.

1. Go to **DSNY Dumps** and type in the vehicle with the dash separating the series and vehicle number
2. Change the status to **Allocated**, and to further narrow down your results, select the dump date.
3. Once you find the vehicle that you forgot to claim, click on the green circle , this will bring up the dump details screen
4. From here click **CLAIM** at the bottom, a new pop up will ask you what location do you want to claim this to. Type in your location and hit **SUBMIT**.

Searching for an Existing Shopload

Shoploads do not disappear from the route side of the allocation screen until it is completely allocated.

Your shoploaded vehicle will show different from the other vehicles. You will see message at the bottom of the route stating "please click to add new routes to this shopload" there will also be a symbol ">" on the right side of the route

In the **Allocation** screen Type the **Truck I.D.** to search for the existing shopload

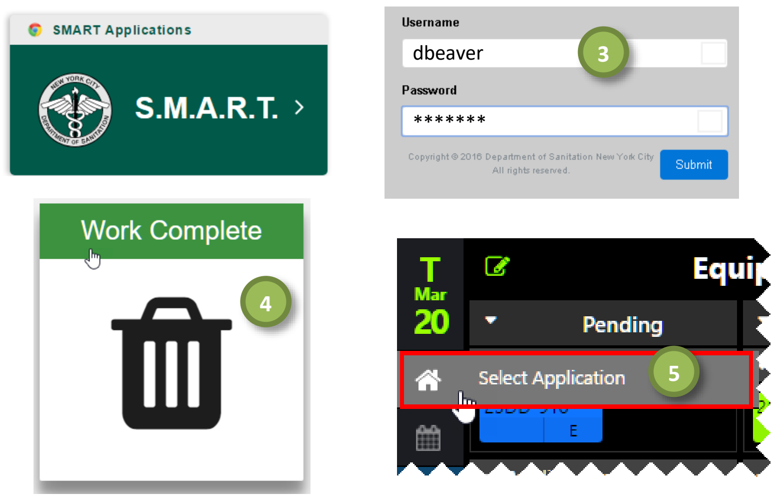
Shoploaded routes will appear at the top of the Routes column and be identified by an arrow and the message: Please click to add new routes to this Shopload on the card

Adding comments to a completed allocation or editing Hours, Weights,Starts etc. . If comments are needed but weren't entered at the time of allocation they can still be added without deallocating/unclaiming. This holds true for overtime hours, tons out, relay hours, exceptions, and changing a start truck.	1. Go to **DSNY Dumps** and type in the **Vehicle with the dash** separating the series and vehicle number 2. Change the status to **Allocated and Claimed**, and to further narrow down your results, you can select your work unit, location and or dump date. 3. Once your allocated truck is found, click on the green circle , this will bring up the dump details screen 4. From here click on the **EDIT** button at the bottom, then click on **Allocation Details**. Clicking detail will pull up the work you previously completed for this vehicle, from here you can enter comments you may have previously forgotten. The only data you are currently not able to edit are the following… • Task Date • Shift • Route • Subcategory • Section (when it's in a section on the opsboard) • District
Modified Routes A modified route occurs when an already completed allocation has the route associated with it changed in any way on the Ops Board (route is renamed, truck is changed etc.). When you re-import the routes, the task that was originally allocated will now be showing up again as "modified". You need to deallocate it and remove it before allocating the new adjusted versions of the task. **NOTE:** ***Allocations marked "modified" imply a*** **discrepancy** ***in data and cannot be left uncorrected.***	1. Click on the modified route, it will drag everything back into the paring window 2. Click on the 3 vertical dots on the dump receipt and click **Remove** 3. Click on the 3 vertical dots on the route and click **Remove**. Once both are removed, the modified task will disappear. **NOTE: Allocated routes that necessitate adjustments made to the Ops Board should be DEALLOCATED PRIOR to making the adjustment, in order to avoid the "modified" status and the corrective steps listed above.**

Work Complete – DSNY Dumps

Accessing DSNY Dumps

1. Using the **Google Chrome** web browser navigate to the **DSNY Intranet Home Page**
   (SMART only works with the Chrome browser)
2. Under the **SMART APPLICATIONS** section, click the **S.M.A.R.T.** button
3. Enter your network/email **Username** and **Password** (same as Bladerunner)
4. On the SMART applications page click **Work Complete**
5. From the **Operations Board** you can also click the **Select Application** to access the SMART Applications page, click **Work Complete**



DSNY Dump Record Cards

1. Click the green button to access dump details
2. The bottom border of the card displays the status

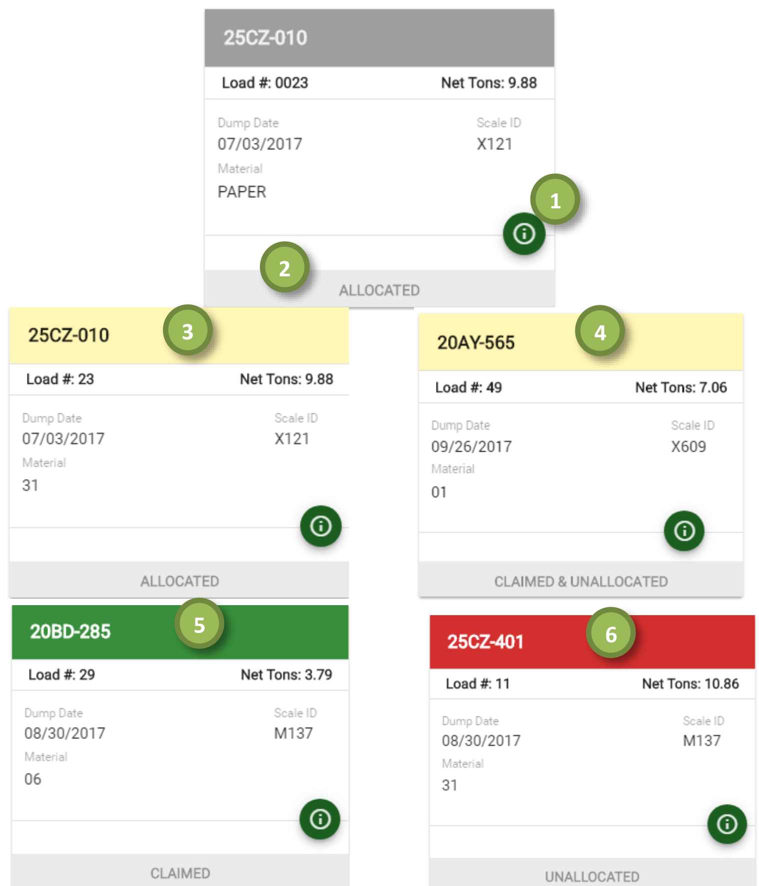
Banner Colors designate status:

Yellow: Allocated & Unclaimed

Yellow: Claimed & Unallocated

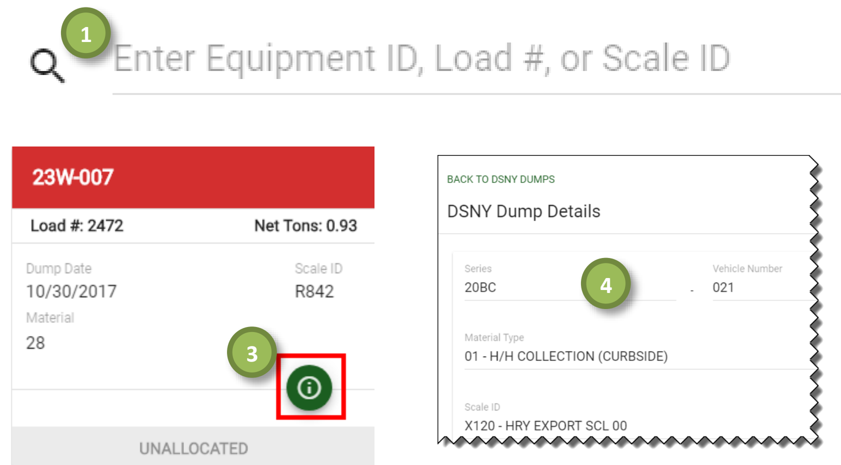
Green: Claimed & Allocated

Red: Unallocated & Unclaimed



Searching/Viewing DSNY Dumps Records

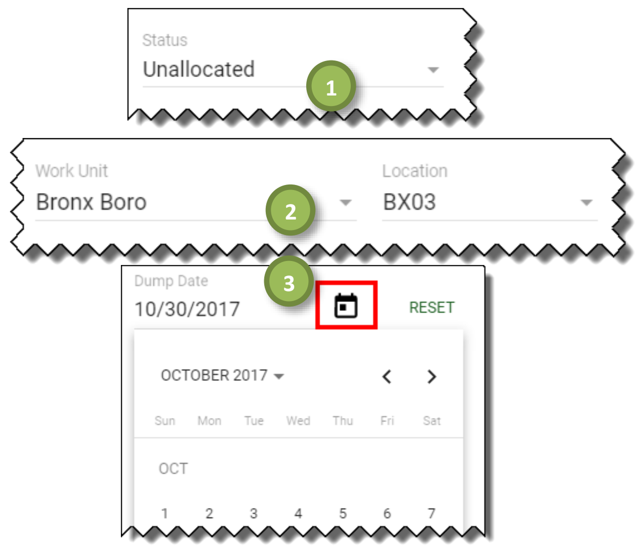
1. On the upper left-hand side enter your search criteria, you can search by:
   - Equipment ID
   - Load #
   - Scale ID
2. Your results will display below
3. Click the view details button to view dump details
4. The dump details will display on screen



Filter DSNY Dump Records

You can filter by status, work unit, location and dump date

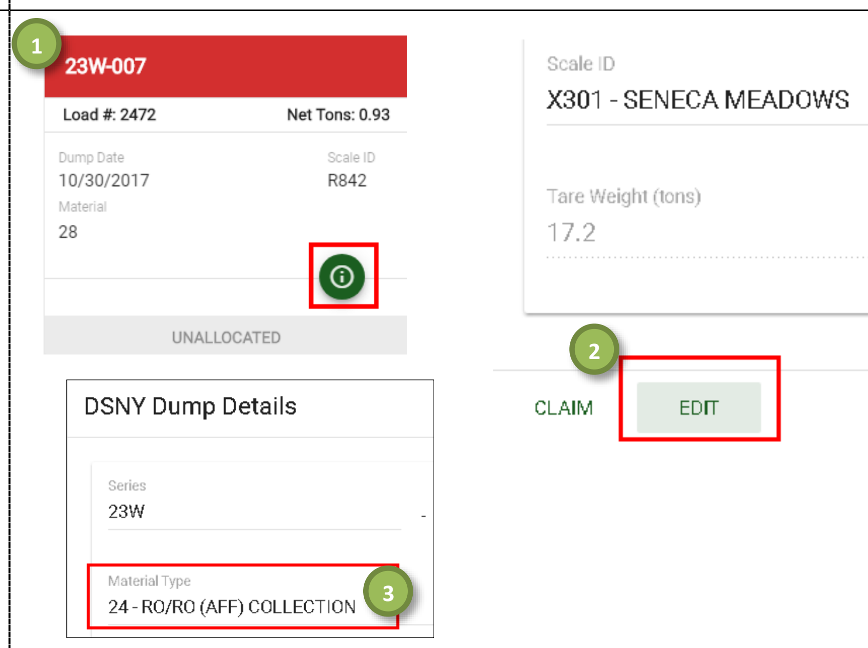
1. To filter by **Status,** select one of the following:
   - All
   - Unallocated
   - Allocated
   - Claimed
   - Claimed & Unallocated
2. Click the drop down to filter by **Work Unit, Location** and **Dump Date**
3. Use the date picker to choose the **Dump Date**



Edit DSNY Dump Records

Only SWM can edit the Net Tons

1. Click the **view details** button to view dump details
2. On the lower left hand side click **edit**
3. Only the **Material Type** and **Net Tons** can be edited
4. Click in the **Material Type** field and hit back space to show other material types
5. Click **Submit** to save your changes

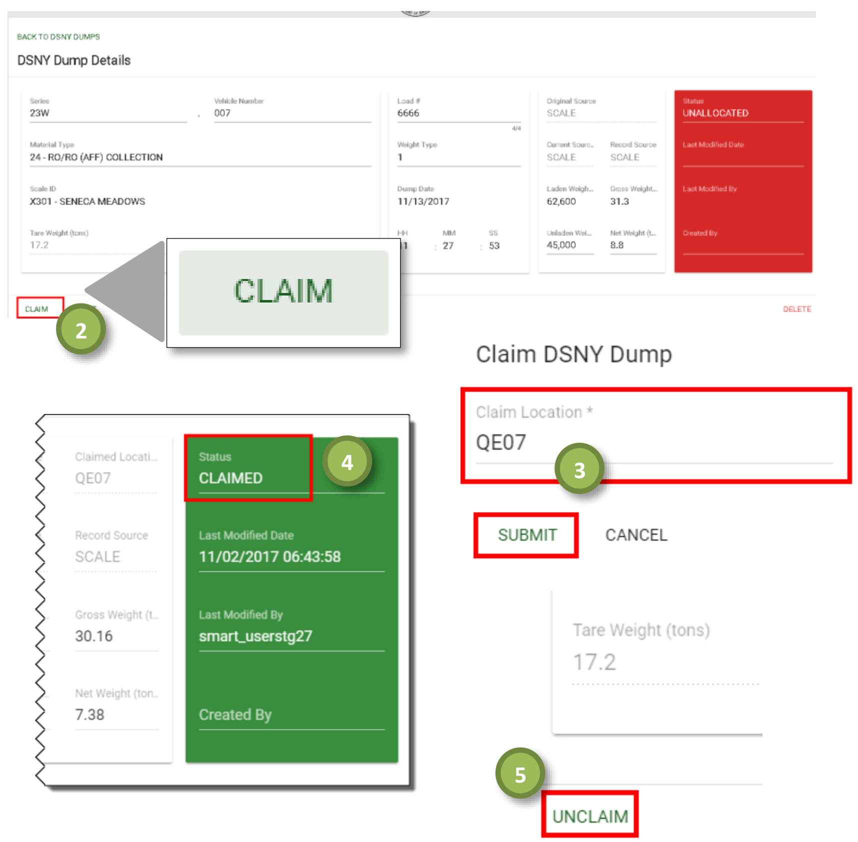


Claim/Unclaim a Record

Dump records with the status Allocated or Unallocated can be claimed.

1. Click the **view details** button
2. Click the **CLAIM** button if the record Is Allocated (but not claimed) or Unallocated
3. Choose the **Claim Location** from the drop down and click **SUBMIT** (there is no restriction on the location selection)
4. Status will be updated to **CLAIMED**
5. The **CLAIM** button will be replaced by an **UNCLAIM** button

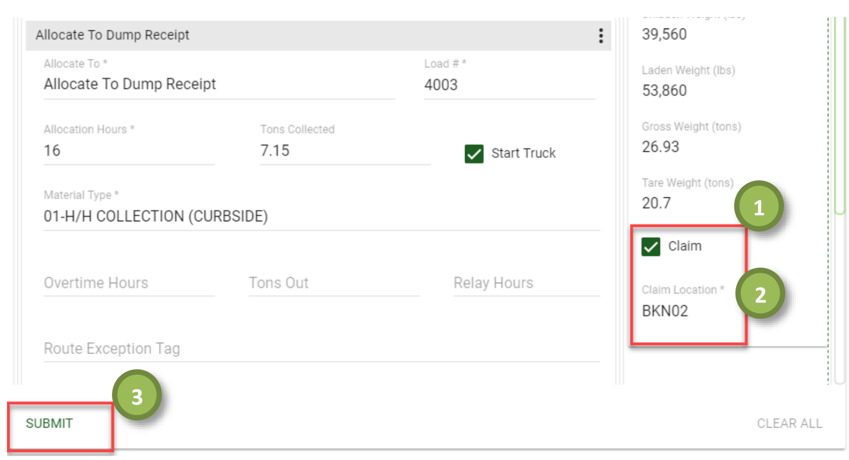
IMPORTANT NOTE: A user **will not** be able to Un-claim a dump after the Scale has been signed off for the dump date. Contact SWM to re-open scale should you need to Un-claim after sign off



Claim a Record – From Allocations

A user can perform an Allocation and a Claim at the same time.

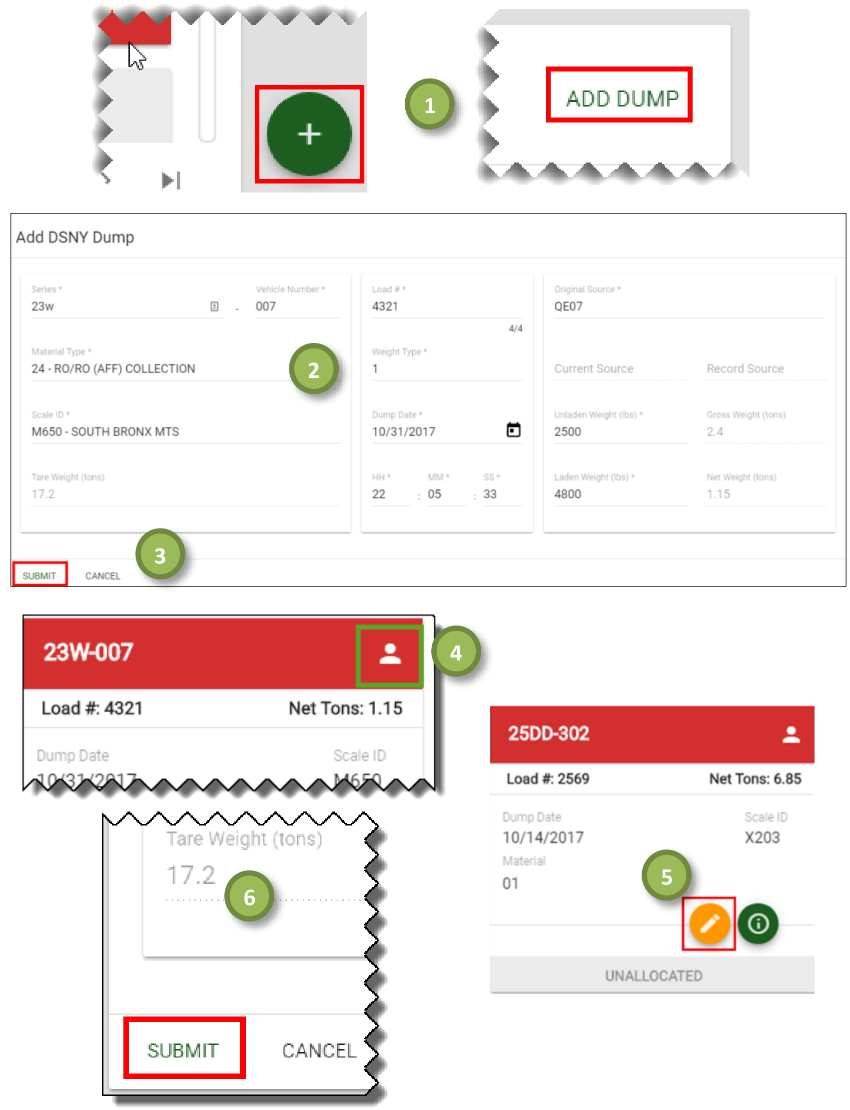
1. In the allocation area, click the **Claim** checkbox on the **Dump Receipt**
2. The location defaults to the location you are currently allocating to which can be changed
3. Click the **SUBMIT** button.



Create/Edit District Entered Dump

District entered dumps can be created when the Dump Receipt is not available for whatever reason. These will automatically be replaced by electronic dump receipts once available.

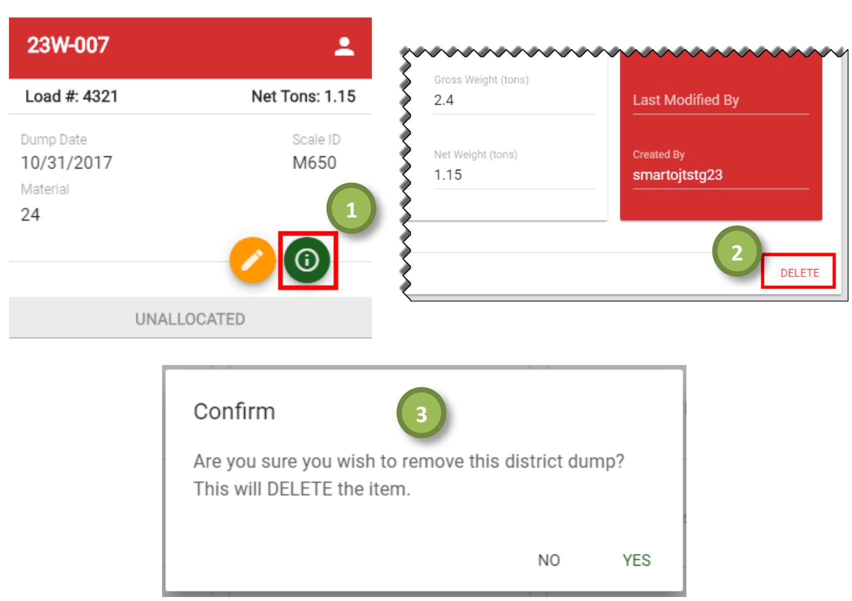
1. On the **DSNY Dump Screen** click the + button at the bottom right
   OR
   On the Allocations page click Add Dump
2. Fill in the values for all required fields marked with an **"*"** (Gross Weight & Net Weight are calculated automatically)
3. Click the **SUBMIT** button to complete
4. **District Entered Dumps** will have a person icon on the right side of the card
5. To edit an unclaimed/unallocated District Entered Dump click the **EDIT** icon
6. Make the desired changes and click the **SUBMIT** button on the bottom left



Delete District Entered/Scale Dump Record

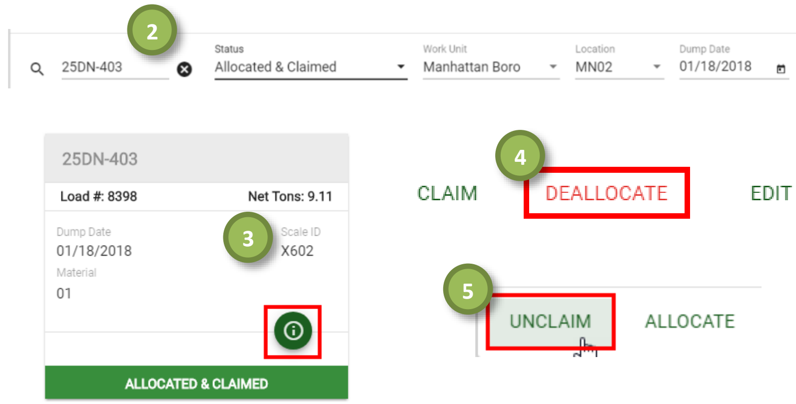
A user will be able to delete an existing district entered dump that is not allocated or claimed

1. Click the **Dump Details** icon for the District Entered Dump
2. Click the **DELETE** button on the bottom right
3. A confirmation message will appear, click **Yes** to move forward or **No** to cancel



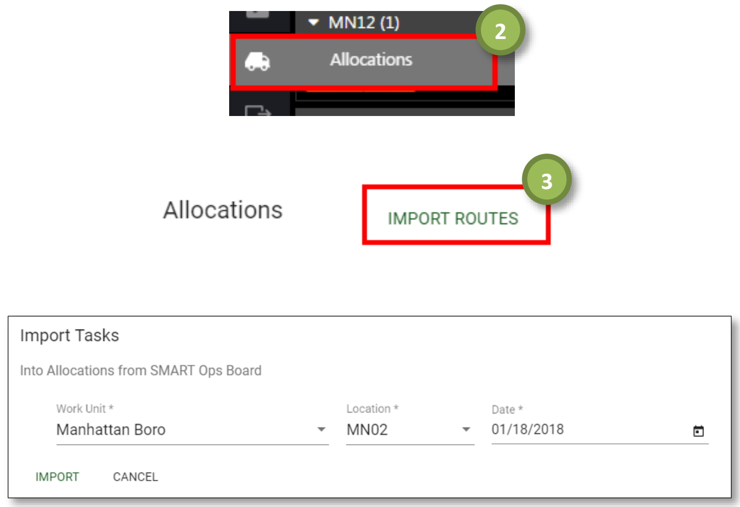
De-allocating and Un-claiming

1. Access DSNY Dumps as described earlier in the guide
2. Search for the dump to de-allocate using Equipment ID, Load # or Scale ID
3. Click the view details icon to access the dump details
4. Click **DEALLOCATE** at the bottom left and choose **Yes** on the confirmation
5. Click **UNCLAIM**



Making Corrections and Re-Allocating

1. Return to the OpsBoard and make corrections to the Task/Route as needed
2. Click **Allocations** on the OpsBoard main menu (routes should import automatically unless Allocations is already open)
3. If necessary, click **IMPORT ROUTES** for the location and day the changes were made
4. Follow procedures to allocate as you normally would for performing an Allocation

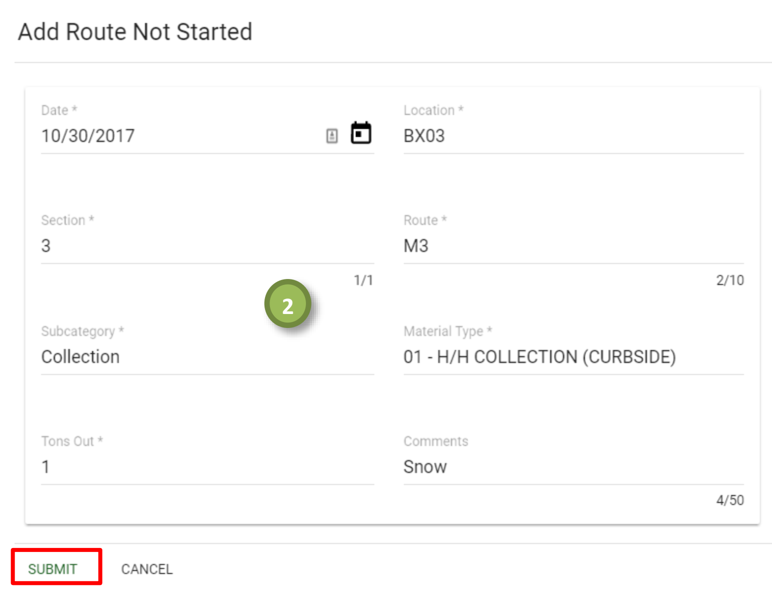


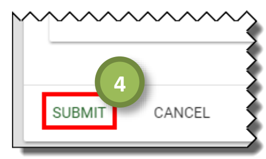
Work Complete – Routes Not Started

Add/Edit Routes Not Started

1. To add routes manually click the + button on the bottom right
2. Complete all required fields then click **SUBMIT** (fields with an "*" are required)
3. To Edit a Route Not Started open the route and click the **EDIT** button at the bottom
4. Make desired changes to the route and click **SUBMIT**

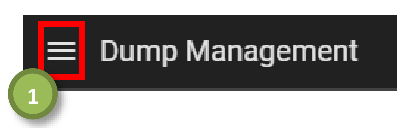
NOTE: the Submit button will not be available if all required field are not completed

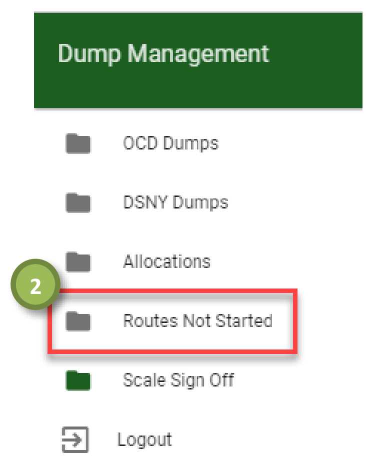


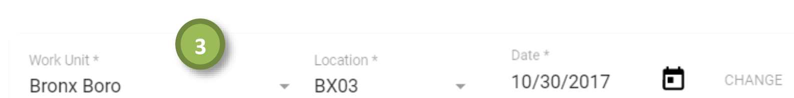


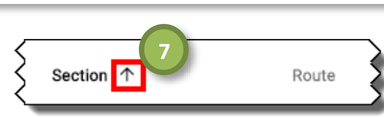
View/Sort Routes Not Started

1. Click the **Dump Management** menu icon
2. On the menu, click **Routes Not Started**
3. Select the **Work Unit, Location** and **Date** of routes you would like to view
4. A list of un-started routes will be displayed (if entered)
5. To view a route click on the row for that route
6. Click **BACK TO ROUTES NOT STARTED** (at top left) to go back to the list
7. To sort click a Column Heading and click the arrow ↓ to sort by that column, click again to sort in the opposite direction (can sort by all except Date and Location)









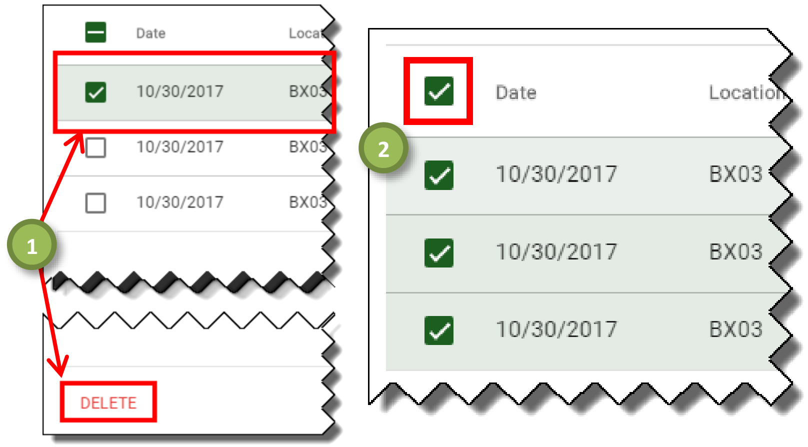
Mass Delete Routes Not Started

4. To delete a route click the check box at the beginning of the row and click **DELETE**

Multiple rows can be selected and deleted

Click the check box to the left of the Date column to select all the routes and click **DELETE**

A confirmation message will appear, click Yes to delete.



Reports

Accessing Reports

1. From the SMART OpsBoard click the **Reports** button on the main menu
   OR
2. On the DSNY Home page click the **S.M.A.R.T** icon and then click **Reports** (you can also click the Select Aplication button and choose Reports)

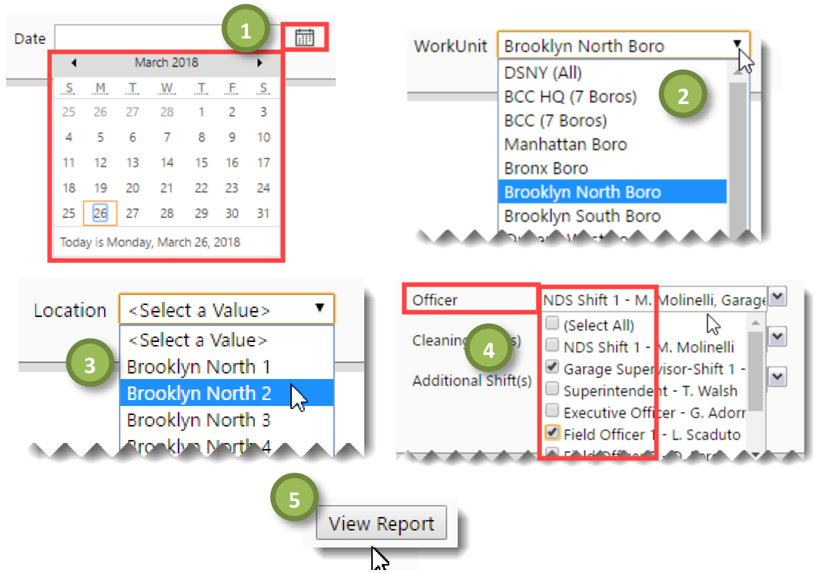
Click a report under the desired category to launch

Running Reports

Common parameters/options are:

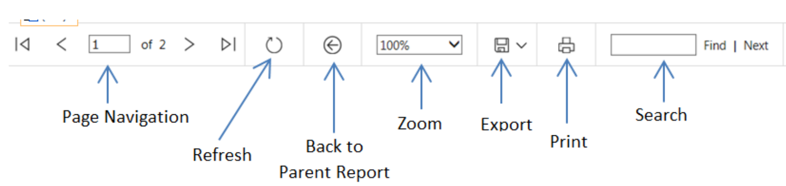
1. **Dates** – Start, End etc. Click the date picker icon and click a date on the calendar. Use the arrows ▸ to change months.
2. **Work Unit** – choose form the drop down, Boros and other units
3. **Location** – If Boro selected for Work Unit this will be districts in that Boro
4. **Other Options** – other options will appear on different reports such as Title or Equipment Type. They are drop down lists. Lists with check boxes allow multiple choices.

Click the **View Report** to run the report



Navigating Reports

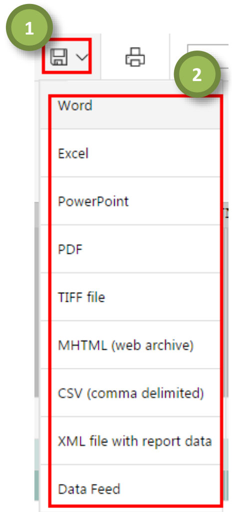
1. Enter a number or click the arrows to navigate to the next page
2. Click the **Refresh** button to refresh the report
3. Click the **Back** button to return to the parent report
4. **Zoom** enlarges the report
5. Click export to **Export** the report into a more desired file type such as excel, word, ppt, pdf etc.
6. Click **Print** to send the report to your printer
7. The **Search** feature allow you to search for words within the report

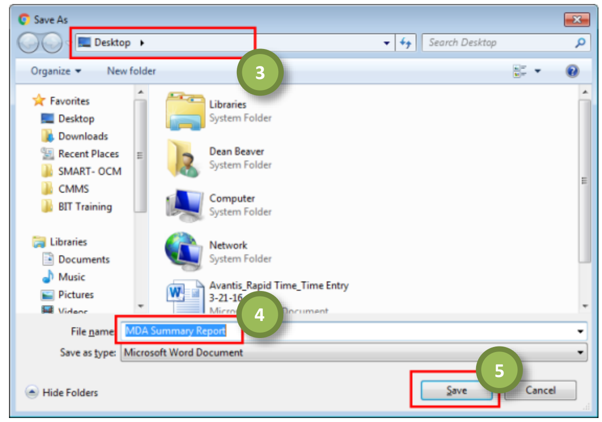


Exporting Reports

1. Click the Export Button
2. Choose from the list of format options
3. Choose a **Location**
4. Type a file name
5. Click **Save**

   OR – depending on your browser settings the file may appear as a box in the bottom left corner.
6. Click the box to open the file
7. Go to File/Save As and follow steps 3, 4 and 5



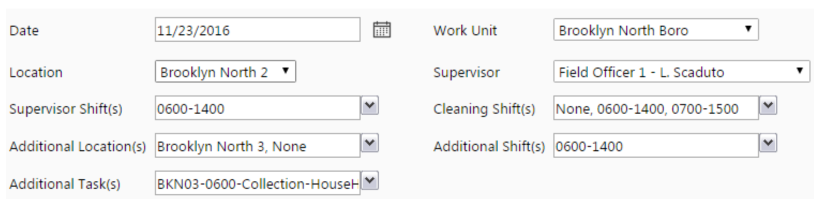


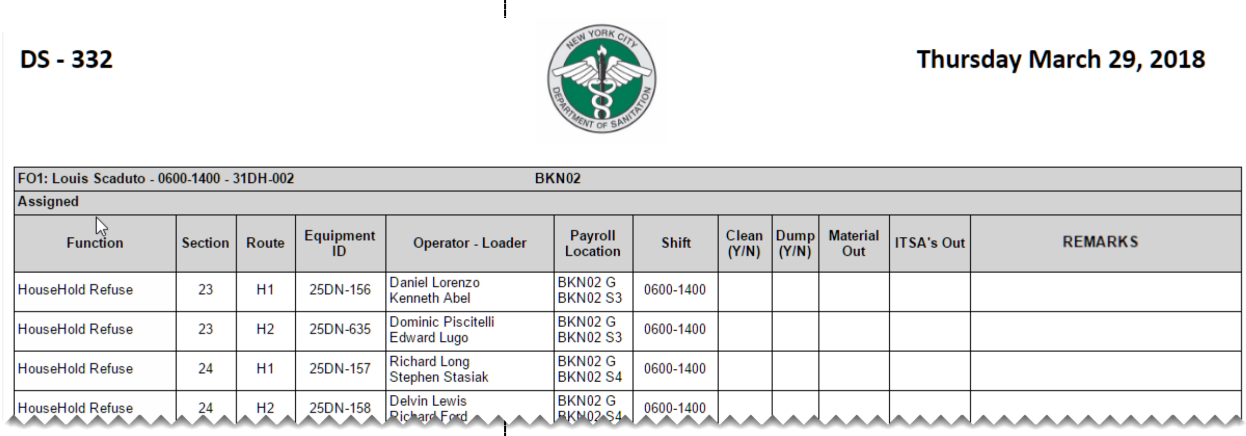
DS-332

The Supervisor can now print the 332 report from SMART using data from the board showing activity for the day including routes, equipment and personnel assignments

1. Select **Date**
2. Select **Work Unit**
3. Select **Location**
4. Select **Supervisor**
5. Choose **Supervisor Shift**
6. Choose **Cleaning Shift**
7. Choose **Additional Locations**
8. Choose **Additional Shifts** (8 & 9 will be required if additional locations are chosen)
9. Choose **Additional Tasks**
10. Click **View Report**

NOTE: If cleaning shifts are chosen they will appear on the second page





DS - 332 **Thursday March 29, 2018**

FO1: Louis Scaduto - 0600-1400 - 31DH-002 BKN02

Assigned

Function	Section	Route	Equipment ID	Operator - Loader	Payroll Location	Shift	Clean (Y/N)	Dump (Y/N)	Material Out	ITSA's Out	REMARKS
HouseHold Refuse	23	H1	25DN-156	Daniel Lorenzo Kenneth Abel	BKN02 G BKN02 S3	0600-1400					
HouseHold Refuse	23	H2	25DN-635	Dominic Piscitelli Edward Lugo	BKN02 G BKN02 S3	0600-1400					
HouseHold Refuse	24	H1	25DN-157	Richard Long Stephen Stasiak	BKN02 G BKN02 S4	0600-1400					
HouseHold Refuse	24	H2	25DN-158	Delvin Lewis Richard Ford	BKN02 G BKN02 S4	0600-1400					

The Carting Book Report

Created to replace the physical Carting Book which records Tasks/Routes, Equipment/Personnel assignments, Time In/Time Out, Replacement info etc. ***SEE** the **Carting Book QRG** for more detail*

1. Select a **Start** and **End Date**
2. Select a **Work Unit**
3. Select a **Location** (generally a district)
4. Click **View Report**

NOTE: the **Start Shift** feature in SMART publishes these details to the report and replacements update the report as they are made.

Carting Book - Brooklyn North 2 **Thursday, March 29, 2018**

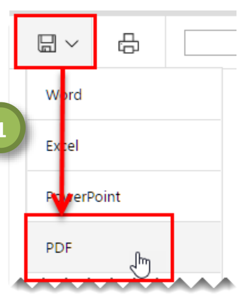
0000-0800

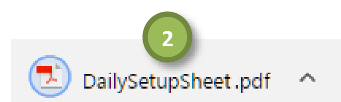
#	Shift	Section	Route	Type Of Work	Vehicle Code	Vehicle Type	Title	Operator	Loader	Time Out	Swap Time	Time In	Replacement Info	Comments
1	0000-0800	BKN02	NDS	NDS Shift 1	32CR-109	SUPERVISORY 4X4	SUPV	Michael J. Molinelli	-	0036	-	0758	-	-
2	0000-0800	BKN02	G1	Garage Supervisor-Shift 1	-	-	SUPV	Kevin J. Neuner	-	-	-	-	-	-
3	-	-	-	Detachment	25DC-810	COLLECTION TRUCK	SW	POMA	-	0135	-	-	-	To: BKS06
4	0000-0800	BKN02	GU	Garage Utility		-	SW	Eddie J. Rodriguez	-	-	-	-	-	-
5	0000-0800	BKN02	RLY	Relays	25DN-156	COLLECTION TRUCK	SW	Kerrilynn Vona (BKS06)	-	0053	-	0342	RELAY	-
6	0000-0800	BKN02	RLY	Relays	25DE-230	DUAL-BIN COLL TRUCK	SW	Kerrilynn Vona (BKS06)	-	0342	-	0543	-	-
7	0000-0800	BKN02	H4	Public Buildings Refuse	25DN-157	COLLECTION TRUCK	SW	Joseph Dolce	Valentino Davis	0005	-	0542	-	-

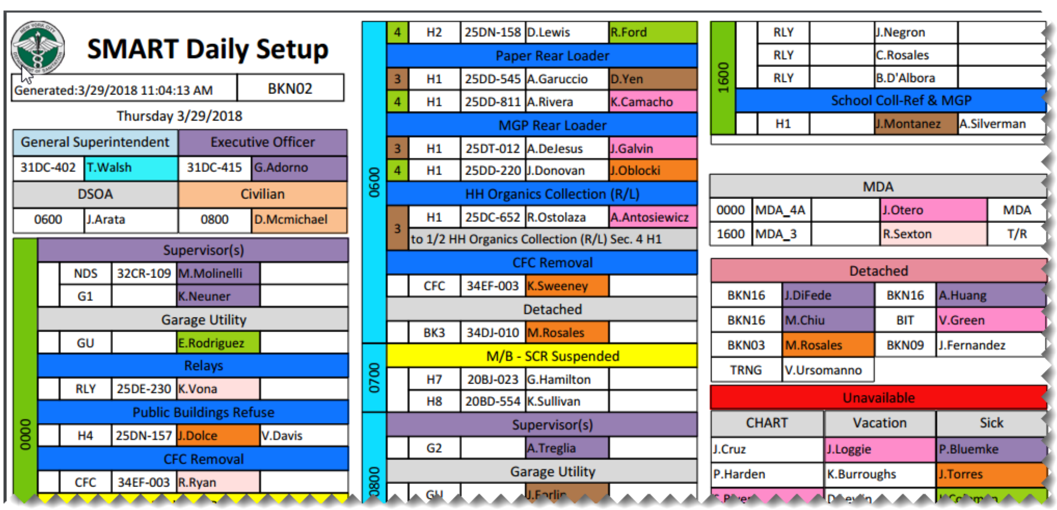
Daily Setup Sheet

Smart board report for setting up the paper board if SMART is unavailable. Shows shifts, assignments, detached, unavailable, etc.

1. Select **Start** and **End Date**
2. Select **Work Unit**
3. Select **Location**
4. Click **View Report**
5. For easier viewing and printing click the **Export** button on the toolbar and choose **PDF**
6. In the bottom left had corner click the document to open



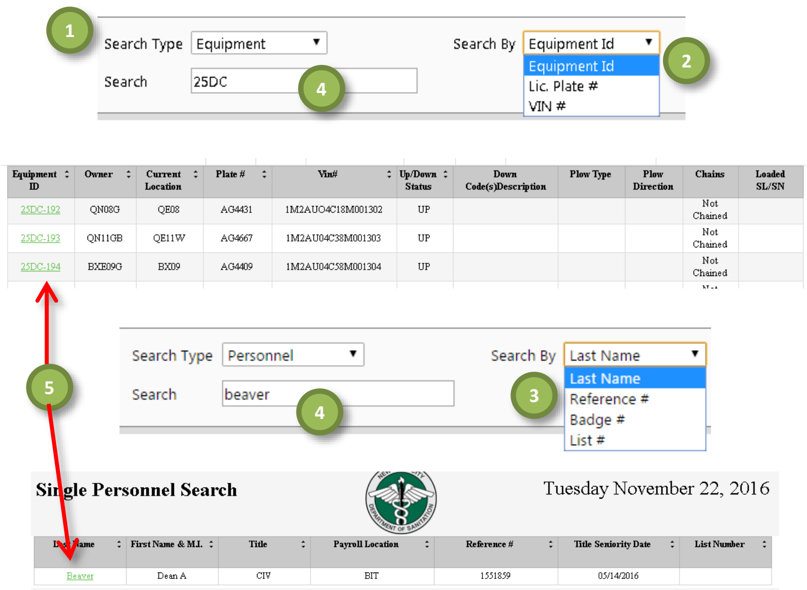




Equipment or Personnel Search

You can now search for both Equipment and Personnel in the same place

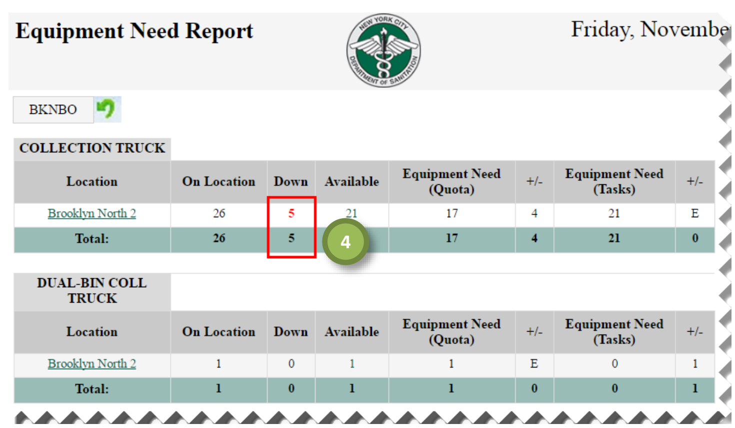
1. Choose **Search Type**: Equipment or Personnel
2. For Equipment, for **Search By** choose:
    - Equipment ID
    - Lic. Plate #
    - Vin #
3. For Personnel, for **Search By** choose:
    - Last name
    - Reference #
    - Badge #
    - List #
4. Type a value in the **Search** window (partial values can be entered, e.g. entering 25DC for Equipment ID will return all 25DC trucks)
5. Click the hyperlinks to see details
6. Use the back arrow



Equipment Need

Shows equipment on site, # down, # available, difference from Quota and Need (# down can be clicked to view detail, if location is "Boro" can drill down to districts)

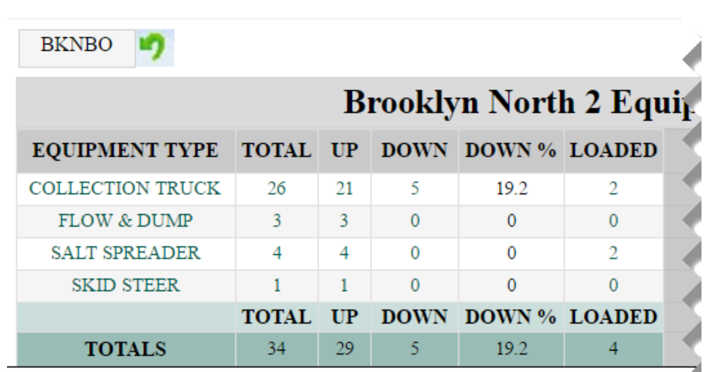
1. Select **Date**
2. Select **Work Unit**
3. Select **Location**
4. Click **Down** numbers or location links to drill down to details



Equipment Status

For viewing equipment that is Up, Down & Loaded.

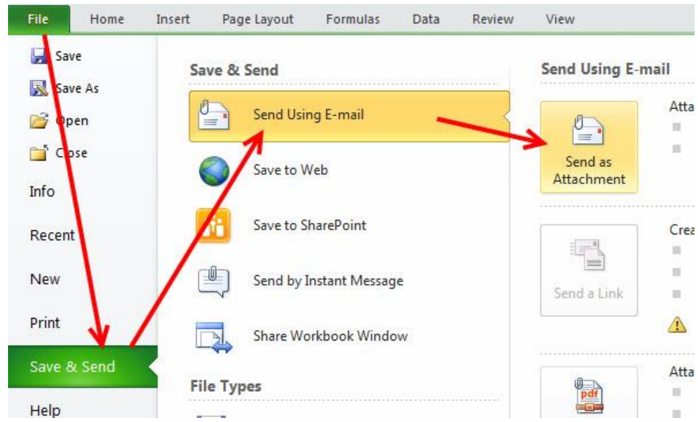
1. Select **Work Unit**
2. Select **Location**
3. Select **Current Location/Owner**
4. Select **Equipment Type**
5. Click **View Report**



Down Equipment - On Location

Shows down equipment at a specific location that is then emailed to BME

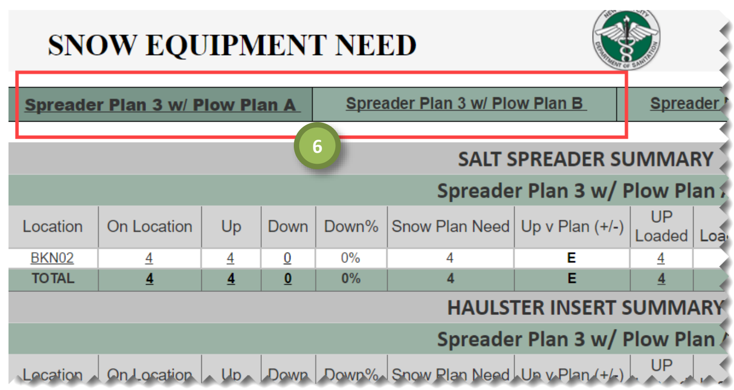
1. Select **Work Unit**
2. Select **Location**
3. Click **View Report**
4. **Export to Excel** (see Export Reports section)
5. In Excel go to **File / Save & Send / Send Using E-Mail / Send As Attachment**
6. In **Outlook** add the e-mail address and click **Send**



Snow Equipment Need

Shows snow equipment needed based on Snow Plan for specific locations by equipment type.

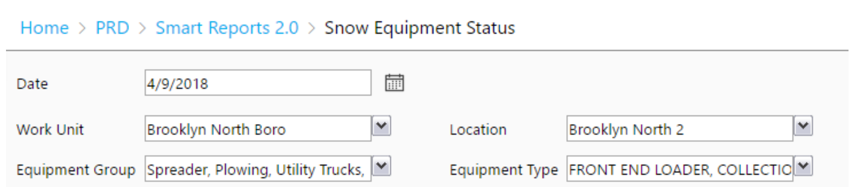
1. Select **Work Unit**
2. Select **Location**
3. Choose **Snow Plan**
4. Choose **Snow Equipment Group**
5. Click **View Report**
6. Click a tab for the other Plans to view

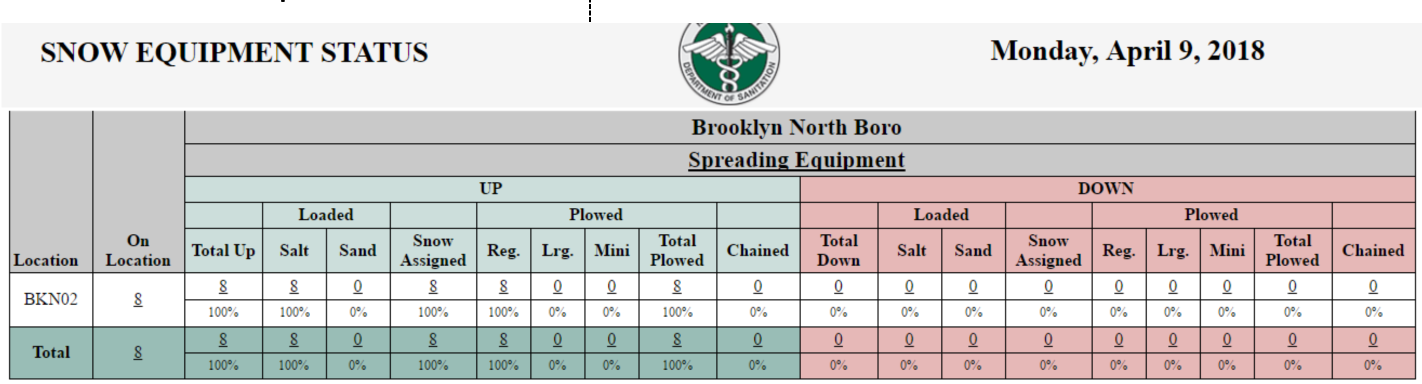


Snow Equipment Status

Shows the status (Up/Down) of snow equipment at a specific location by equipment type.

1. Select **Date**
2. Select **Work Unit**
3. Select **Location**
4. Choose **Equipment Group**
5. Choose **Equipment Type**
6. Click **View Report**





SNOW EQUIPMENT STATUS — **Monday, April 9, 2018**

Brooklyn North Boro — **Spreading Equipment**

Location	On Location	UP: Total Up	UP Loaded: Salt	UP Loaded: Sand	UP Loaded: Snow Assigned	UP Plowed: Reg.	UP Plowed: Lrg.	UP Plowed: Mini	UP Plowed: Total Plowed	UP: Chained	DOWN: Total Down	DOWN Loaded: Salt	DOWN Loaded: Sand	DOWN Loaded: Snow Assigned	DOWN Plowed: Reg.	DOWN Plowed: Lrg.	DOWN Plowed: Mini	DOWN Plowed: Total Plowed	DOWN: Chained
BKN02	8	8	8	0	8	8	0	0	8	0	0	0	0	0	0	0	0	0	0
		100%	100%	0%	100%	100%	0%	0%	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Total	8	8	8	0	8	8	0	0	8	0	0	0	0	0	0	0	0	0	0
		100%	100%	0%	100%	100%	0%	0%	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

District Productivity (202)

Shows dump information for specific date, location and material type by shift

1. Select **Date**
2. Select **Work Unit**
3. Select **Location**
4. Selection **Material Type**
5. Click **View Report**

Date 4/6/2018 Work Unit Brooklyn North Boro

Location Brooklyn North 2 Material Type 01 - H/H COLLECTION (CURBSIDE)

District Productivity Report - 202
Material Type - 01

Friday, April 6, 2018

BKN02 - Summary									
Type	Start Truck	Finish Trucks	# of Loads	Tons	Avg Tons/Truck	Routes Not Started	Tons Out	OT Hours	LT Hrs
Regular	10	10.00	10.00	78.85	7.89	-	-	-	-
Adjusted	10	10.00	10.00	78.85	7.89	-	-	-	-

Shift 2																		
Section	Route	Equip.ID	Scale ID	WT	Dump Date	Dump Time	Load #	Relay?	Start Truck	LT Reason	LT Hrs	Finish Trucks	# of Loads	Tons	Tons Out	TAG	Avg Tons/Truck	Comments
BKN021	F1	25DN-042	X220	1	04/06/2018	12:08:52	3496	N	1		-	1.00	1.00	8.93	0.00		-	
BKN021	F2	25DN-159	X220	1	04/06/2018	11:09:42	3492	N	1		-	1.00	1.00	6.27	0.00		-	
BKN021	F3	25DN-157	X220	1	04/06/2018	11:05:26	3490	N	-		-	0.50	0.50	4.01	0.00		-	
BKN021 Totals									**2**		**0.00**	**2.50**	**2.50**	**19.21**	**0.00**		**7.68**	

Claimed Dump Report

Shows Claim information for dumps for specific date and location

1. Select **Date**
2. Select **Work Unit**
3. Select **Location**
4. Click **View Report**

Claimed Dump Report

Friday, April 6, 2018

Summary - BKN02			
Scale ID	Material Type	Loads	Net Tons
R201	45	1	3.61
Total (R201)		**1**	**3.61**
R872	33	3	16.97
Total (R872)		**3**	**16.97**
R910	31	4	22.12
Total (R910)		**4**	**22.12**
X220	01	10	78.85
	87	2	4.15
Total (X220)		**12**	**83.00**
Grand Total		**20**	**125.70**

Details - BKN02								
Scale ID	Material Type	Dump Time	Load Number	Equipment ID	Laden Wt. (lbs)	Unladen Wt. (lbs)	Net Tons	Claim Status
R201	45	03:05:58	7284	25DK-211	50,300	43,080	3.61	C
	Total (45)		**1 Load**				**3.61**	
Total (R201)			**1 Load**				**3.61**	
R872	33	11:01:34	1839	25DC-652	51,020	39,560	5.73	C
	33	11:07:48	1841	25DD-771	53,680	41,320	6.18	C

Collection P Report

Shows a summary of Start/Finish trucks and load information for a date range, location and material type

1. Select Start **Date**
2. Select **End Date**
3. Select **Work Unit**
4. Select **Location**
5. Select **Material Type**
6. Click **View Report**

Collection 'P' Report - BKN02
Material Type: 01 - H/H COLLECTION (CURBSIDE)

	BKN02	Totals
Backlog		
12-8	3	3
Day	0	0
4-12	0	0
Collection		
12-8	4	4
Day	45	45
4-12	1	1
Total Start Trucks	**53**	**53**
Total Finish Trucks	52.75	52.75
Total Loads	54.00	54.00
Total Tons	449.52	449.52
Tons/Trucks	8.52	8.52
Additional Information	**BKN02**	**Totals**
Backlog		
Trucks	2.85	2.85
Tons	24.30	24.30
Non Scale Loads	0	0.00
Shop Loads	0	0.00

Truck Productivity Report

Shows detailed information on activity of a specific truck

1. Select **From Date** (range will be from date chosen to current date)
2. Type in **Series**
3. Type in **Vehicle Number**
4. Click **View Report**

Truck Productivity Report
35DN-042

Dump Date	Dump Time	Load	Scale ID	Net Tons	Material Type	Collection Date	Shift	Se
04/06/2018	12:08:52	3496	X220	8.93	01	04/06/2018	2	BK
04/07/2018	11:34:56	3553	X220	9.59	01	04/07/2018	2	BK
04/07/2018	19:43:18	1990	R872	0.97	33	04/07/2018	3	BK

From: Friday, April 6, 2018

ift	Section	Route	Start Truck	Allocation Hours	Tons Collected	Non-Measured Hours
	BKN021	F1	S	16	8.93	-
	BKN021	S1	S	16	9.59	-
	BKN021	S1	-	2	0.97	-

Print Equipment Cards

Backup when SMART is not available.

1. Select **Work Unit**
2. Select **Location**
3. Select **Equipment Type**
4. Click **View Report**

NOTE: Cards will be duplicated side by side so they can be folded in half to be double sided on the paper board

Owner-BKN02 **25DC-027** **COLLECTION TRUCK**	Owner-BKN02 **25DC-027** **COLLECTION TRUCK**

Print Personnel Cards

Backup when SMART is not available. Also useful for printing cards for Out of Towners

1. Select **Date**
2. Select **Work Unit**
3. Select **Location**
4. Select **Personnel** (out of towners w/ shift will be options)
5. Select **Name** (choose specific personnel)
6. Click **View Report**

NOTE: Personnel cards will be duplicated the same as Equipment cards

SW

MB

J. Dolce

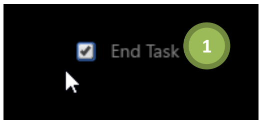
Appt: 03/31/87 **List # 1325.00**

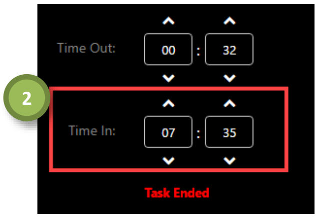
Payroll Loc.& Sec. - BKN02 Ref. # 0232110 Badge # 7987

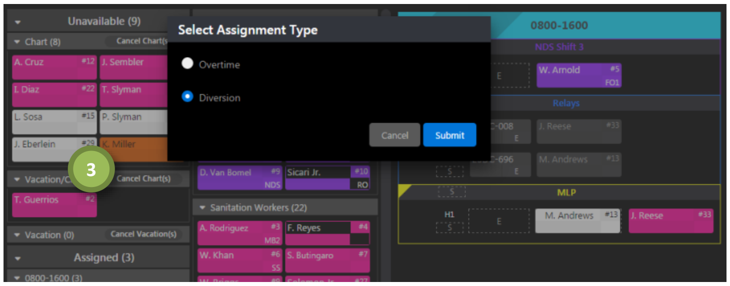
Personnel Diversions

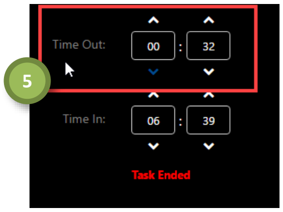
Use this procedure for Personnel diverted to a new task

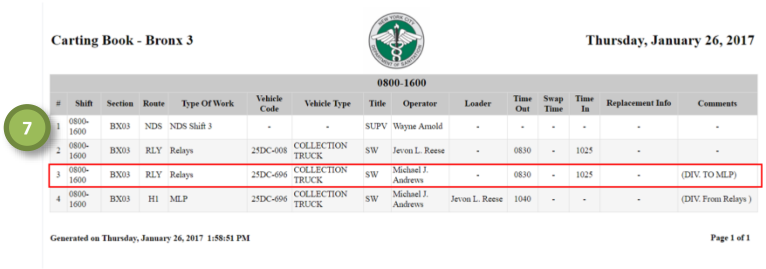
1. For Personnel being diverted, end any tasks the employee is assigned to
2. Update the Time In for the ended tasks and add comments (i.e. - Div. to MLP)
3. Create the new tasks that the personnel will be diverted to
4. Drag diverted personnel from the assigned column to the new task and choose Diversion" when prompted
5. Assign Equipment to the task
6. Update time out to reflect the beginning of the new tasks and add comments (i.e. - DIV. From Relays)
7. Diversion displayed in the carting book











Carting Book - Bronx 3 | **Thursday, January 26, 2017**

0800-1600														
#	Shift	Section	Route	Type Of Work	Vehicle Code	Vehicle Type	Title	Operator	Loader	Time Out	Swap Time	Time In	Replacement Info	Comments
1	0800-1600	BX03	NDS	NDS Shift 3	-	-	SUPV	Wayne Arnold	-	-	-	-	-	-
2	0800-1600	BX03	RLY	Relays	25DC-008	COLLECTION TRUCK	SW	Jevon L. Reese	-	0830	-	1025	-	-
3	0800-1600	BX03	RLY	Relays	25DC-696	COLLECTION TRUCK	SW	Michael J. Andrews	-	0830	-	1025	-	(DIV. TO MLP)
4	0800-1600	BX03	H1	MLP	25DC-696	COLLECTION TRUCK	SW	Michael J. Andrews	Jevon L. Reese	1040	-	-	-	(DIV. From Relays)

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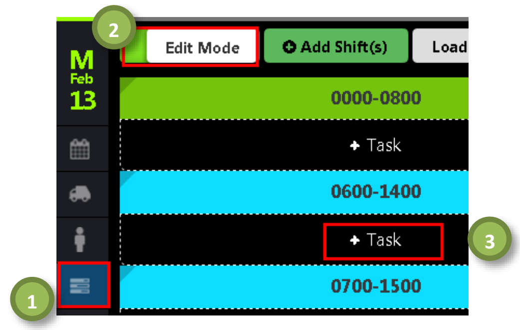
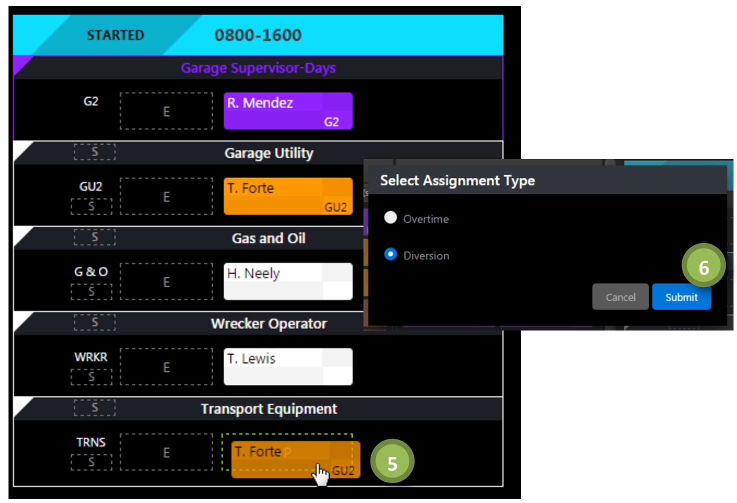
Adding a GU Task

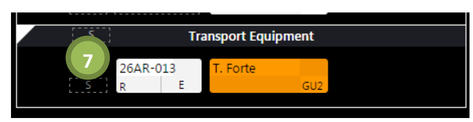
Use this procedure if a G.U. is performing a function that requires them to leave the garage with equipment for carting book accuracy. (i.e. Transporting equipment, Supply Pickup/Delivery, Relays etc.)

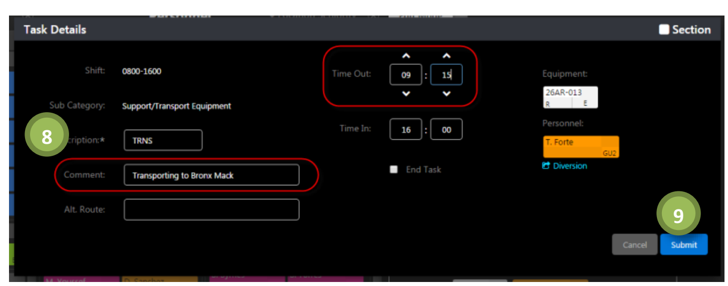
1. Click the **task panel** icon
2. Click the **edit mode button** on the upper left hand corner
3. Next, click the **"+ Task**" link, complete all the required fields for the task you wish to add
4. Click the **edit mode** button to exit edit mode
5. **Drag GU personnel** (from the assigned column) on to the new task.
6. On the dialog box that appears, choose **Diversion** and click **Submit**
7. **Drag the equipment** that the G.U. will be using onto the task.
8. Under **task details**, update the Time Out of the Equipment, add comments and upon completion of the task, select **end task**.
9. Click **Submit**

Note: The Time IN will automatically update to the time you make this edit, if you need to adjust it, adjust manually.





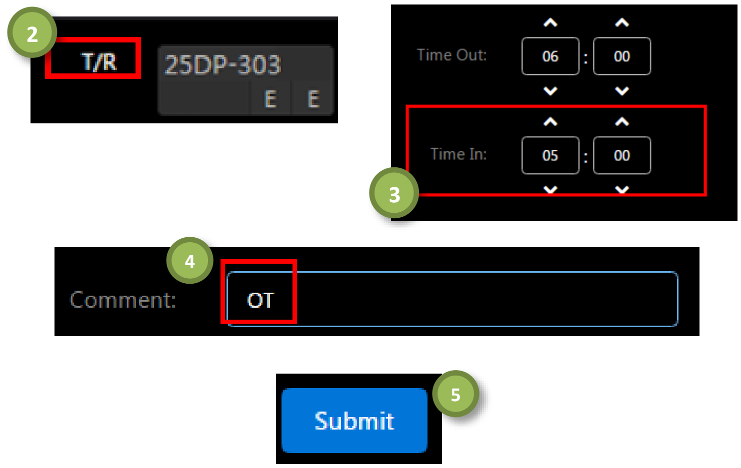




Overtime: Currently Assigned Task

Use this procedure if personnel is performing overtime on their **current task**

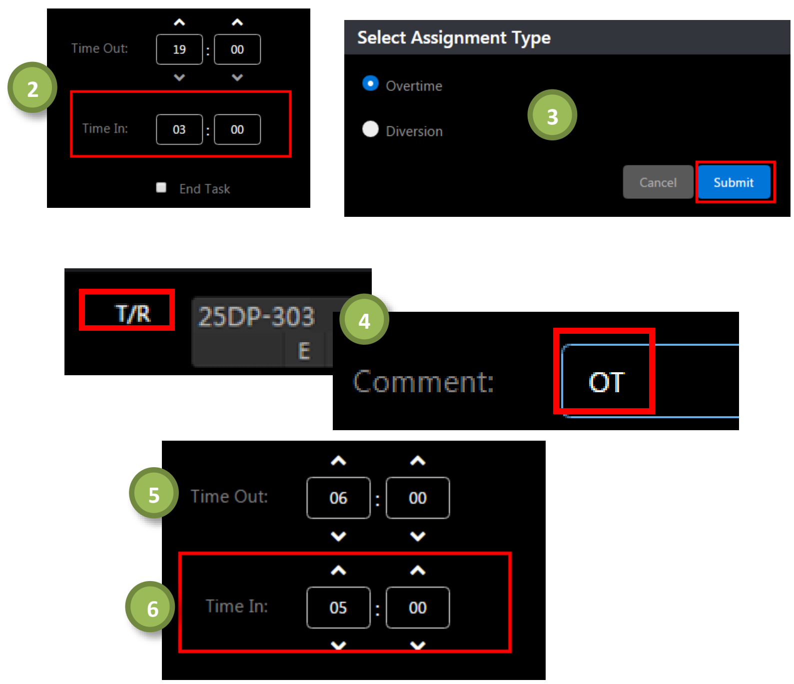
1. On the existing task(Do not create a new task), click the **T/R** link to launch the task details dialog box
2. Edit the **End Time** of the task to reflect the amount of overtime being done
3. In **Task Details** add **Comments** indicating that personnel is working “**OT**”
4. Click **Submit** to save your changes



Overtime: New/Different Task

Use this procedure when Personnel is performing **overtime on a new task**

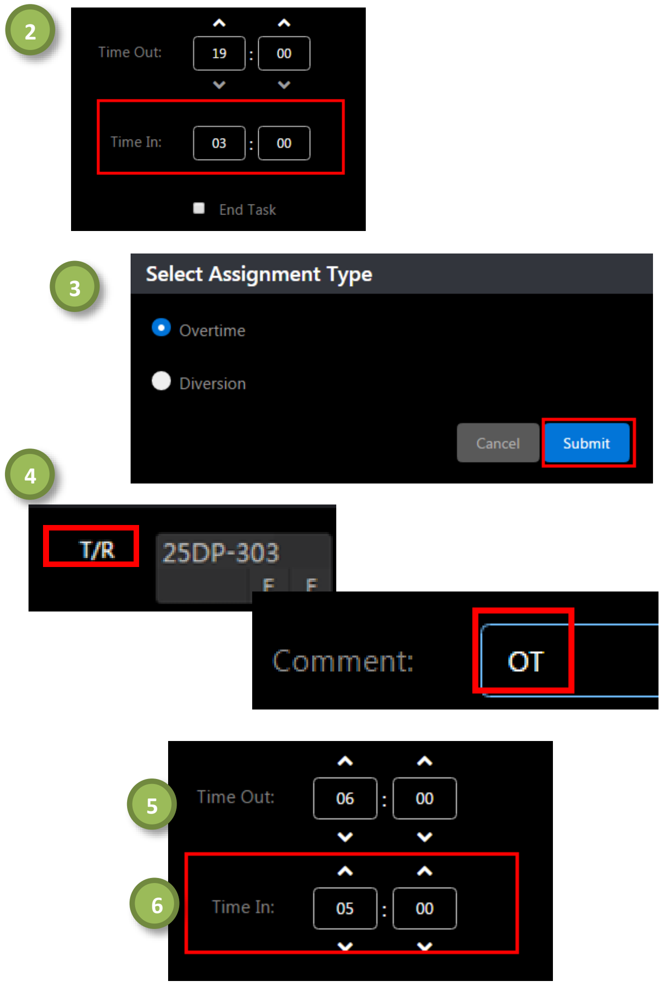
1. End original task and edit **End Time**
2. Create a **new task** on the same shift personnel was originally assigned to
3. **Drag personnel** from the assigned column to the new task and select "**Overtime**" as the **Assignment Type**,
4. **Click the T/R, In the task details** enter **comments** indicating this is an overtime task
5. Edit **time out** (time equipment left and overtime began)
6. **End the shift** when the overtime task is complete and edit the **Time In** to reflect all overtime hours



Overtime: Multiple Tasks

Use this procedure when Personnel will **switch overtime tasks** and perform overtime on multiple tasks

1. End initial OT task and edit the **end time**
2. Create a **new task** on the same shift personnel was originally assigned to
3. Drag personnel from the assigned column to the new task and select "**Overtime**" as the Assignment Type,
4. In the task details, enter **comments** indicating it's an overtime task
5. Edit **time out** (reflecting the time the piece of equipment left the premise and overtime continued)
6. **End the shift** at the end of the overtime and edit the **Time In** to reflect overtime hours

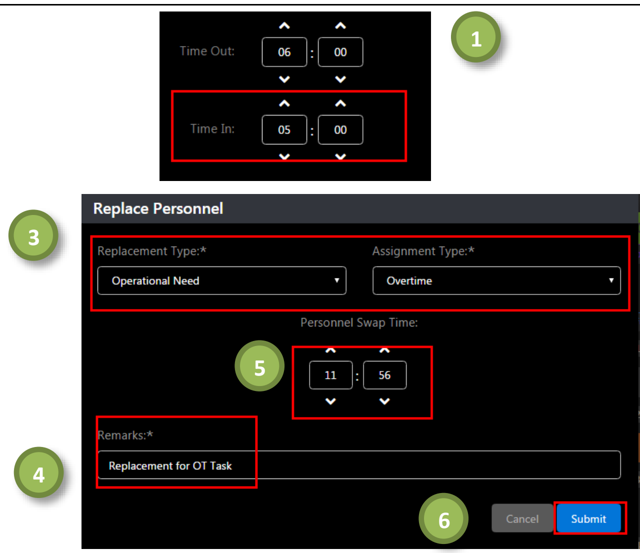


Overtime: Personnel Replacement

Use this procedure if there is **personnel replacement on the OT task**

1. Edit the **Time In** of the task to reflect the amount of overtime being done
2. Drag the Personnel replacement onto personnel being replaced
3. Select **"Operational Need"** as the **Replacement Type** and **"Overtime"** as the **Assignment Type**
4. Enter **Remarks** indicating a "**replacement for OT task"**
5. Update **Personnel Swap Time** accordingly
6. Click **Submit**

Note: The personnel replaced will become unavailable/unassigned



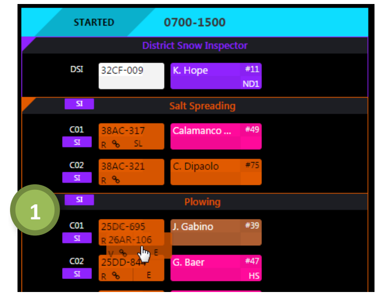
Equipment Replacement

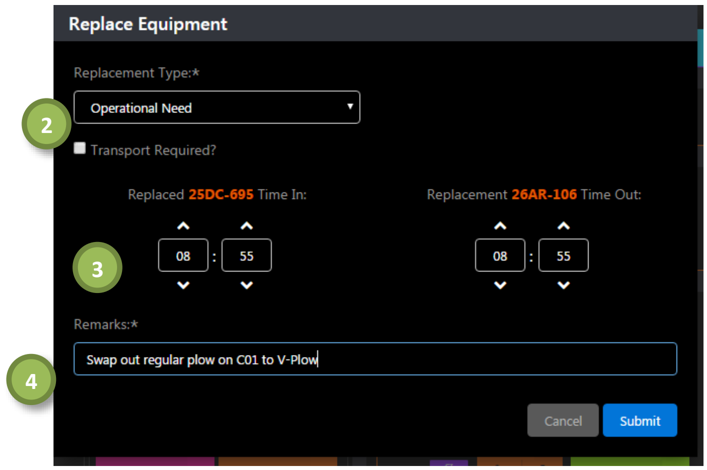
Use this procedure to **replace equipment when Personnel and route remain the same**. (i.e. Truck to Open Dump Truck [cut down] with a Large V- Plow).

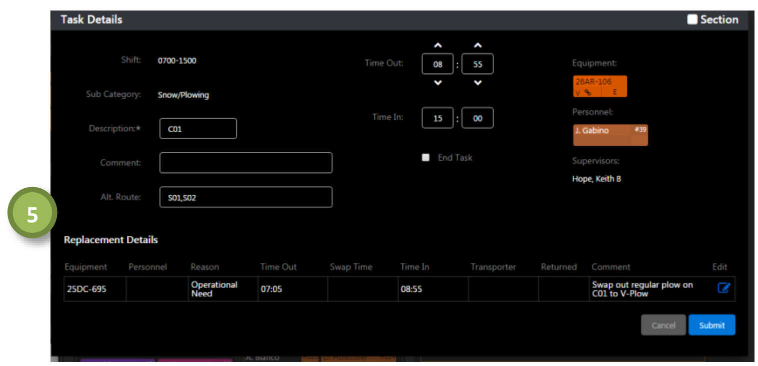
1. Drag the new equipment onto the equipment to be replaced
2. For replacement type, select **Operational Need** in the drop down.
3. Enter the **time in** (original plowing truck 25DC-695) and **time out** (Equipment w/ V plow 26AR-106)
4. Enter remarks
5. Task Details will reflect the original plow assigned & times.

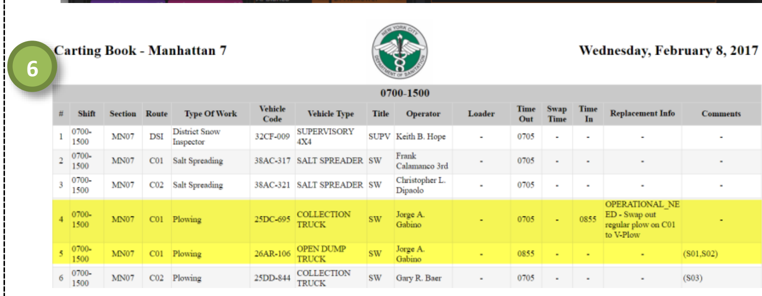
Note: The New vehicle will show on the task panel next to route C01. (Small triangle indicates replacement)

6. The carting book will populate a row record for the original assigned plow, with Time Out and Time in, as well as a new row for the new equipment assignment.





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Carting Book - Manhattan 7

Wednesday, February 8, 2017

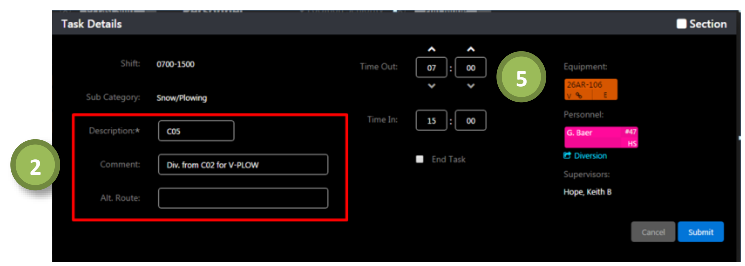
#	Shift	Section	Route	Type Of Work	Vehicle Code	Vehicle Type	Title	Operator	Loader	Time Out	Swap Time	Time In	Replacement Info	Comments
0700-1500														
1	0700-1500	MN07	DSI	District Snow Inspector	32CF-009	SUPERVISORY 4X4	SUPV	Keith B. Hope	-	0705	-	-	-	-
2	0700-1500	MN07	C01	Salt Spreading	38AC-317	SALT SPREADER	SW	Frank Calamanco 3rd	-	0705	-	-	-	-
3	0700-1500	MN07	C02	Salt Spreading	38AC-321	SALT SPREADER	SW	Christopher L. Dipaolo	-	0705	-	-	-	-
4	0700-1500	MN07	C01	Plowing	25DC-695	COLLECTION TRUCK	SW	Jorge A. Gabino	-	0705	-	0855	OPERATIONAL_NEED - Swap out regular plow on C01 to V-Plow	-
5	0700-1500	MN07	C01	Plowing	26AR-106	OPEN DUMP TRUCK	SW	Jorge A. Gabino	-	0855	-	-	-	(S01,S02)
6	0700-1500	MN07	C02	Plowing	25DD-844	COLLECTION TRUCK	SW	Gary R. Baer	-	0705	-	-	-	(S03)

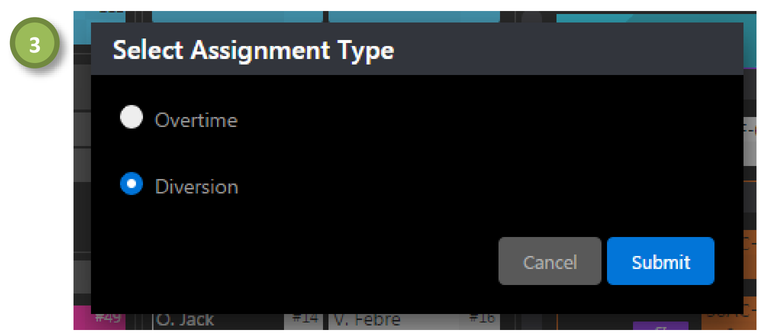
Personnel Diversion - Snow

Use this procedure when Personnel are already assigned a route and are **being diverted to a new route** and assigned new Equipment

1. Create a new **plowing task**
2. Update the **task description & Alt. Route fields** to show the new routes and enter comments to show which task the Sanitation worker was diverted from.
3. Drag **personnel card** from the assigned group onto the new task, when prompted select **Diversion** and click **submit.**
4. Assign new **Equipment** and a **Supervisor** to the new task.
5. Once the task is complete update the **Time Out**

Note: Follow the **personnel replacement** instructions if someone is taking over the task otherwise end the original task and update **time in**

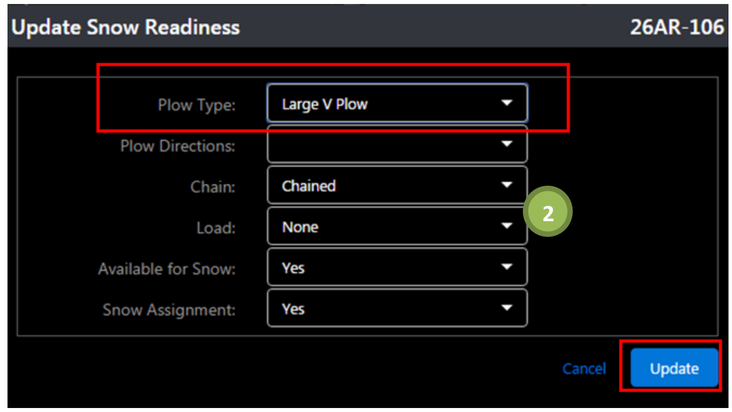


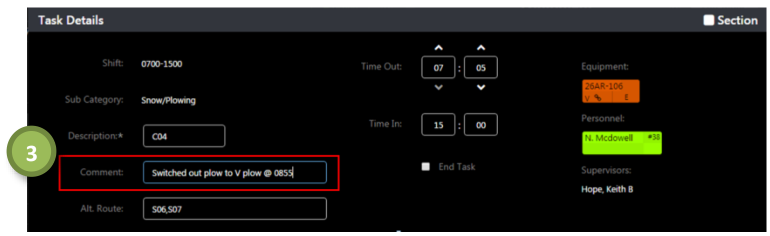


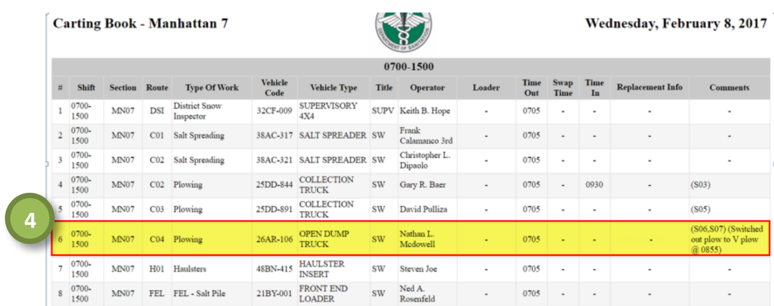
Snow Update on Equipment

Use this procedure when **updating snow equipment on the same truck** with same route/equipment/personnel

1. Click the truck to be updated, and from the action menu, select snow update
2. Change plow type from Regular, to Large or Mini V. and click **Update**
3. Enter **Comments** in the task details with time plow was switched
4. The carting book will have one row record for the route, displaying the comment with pertinent info.







Carting Book - Manhattan 7 — **Wednesday, February 8, 2017**

#	Shift	Section	Route	Type Of Work	Vehicle Code	Vehicle Type	Title	Operator	Loader	Time Out	Swap Time	Time In	Replacement Info	Comments
0700-1500														
1	0700-1500	MN07	DSI	District Snow Inspector	32CF-009	SUPERVISORY 4X4	SUPV	Keith B. Hope	-	0705	-	-	-	-
2	0700-1500	MN07	C01	Salt Spreading	38AC-317	SALT SPREADER	SW	Frank Calamanco 3rd	-	0705	-	-	-	-
3	0700-1500	MN07	C02	Salt Spreading	38AC-321	SALT SPREADER	SW	Christopher L. Dipaolo	-	0705	-	-	-	-
4	0700-1500	MN07	C02	Plowing	25DD-844	COLLECTION TRUCK	SW	Gary R. Baer	-	0705	-	0930	-	(S03)
5	0700-1500	MN07	C03	Plowing	25DD-891	COLLECTION TRUCK	SW	David Pulliza	-	0705	-	-	-	(S05)
6	0700-1500	MN07	C04	Plowing	26AR-106	OPEN DUMP TRUCK	SW	Nathan L. Mcdowell	-	0705	-	-	-	(S06,S07) (Switched out plow to V plow @ 0855)
7	0700-1500	MN07	H01	Haulsters	48BN-415	HAULSTER INSERT	SW	Steven Joe	-	0705	-	-	-	-
8	0700-1500	MN07	FEL	FEL - Salt Pile	21BY-001	FRONT END LOADER	SW	Ned A. Rosenfeld	-	0705	-	-	-	-

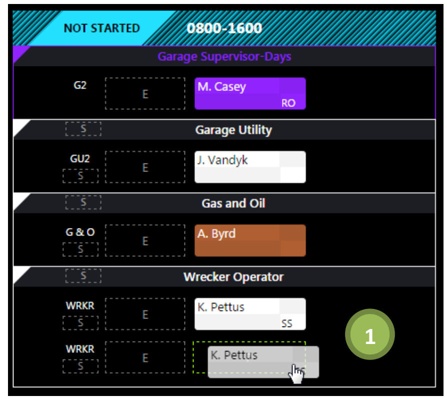
Wrecker Operator Diversion

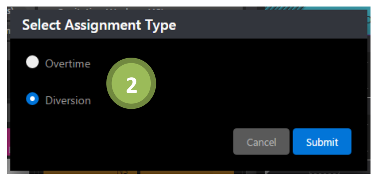
Use this procedure if a wrecker operator needs to be diverted. (i.e. towing, transporting etc.)

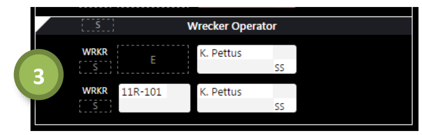
Important: All jobs that require a wrecker operator to switch to a new task must have a new **task** created

1. Create a New Wrecker Operator task, and drag the wrecker operator from the assigned column into the new task
2. For **assignment type**, select **diversion** and click **submit**
3. Drag the **equipment** that will be utilized for the tow job (wrecker, or car carrier), onto the newly created wrecker task.
4. In the **task details**, update the Time Out of the wrecker, and add a **comment** with details regarding the job. (e.g. “Towing 25DC-105 from the field”)
5. Upon completion of the task, under details click **end task**.
6. Click **Submit**

Note: When you click end task the **time in** will update to the time you ended the task. Correct time if necessary.







Appendix A – Suggested Task Descriptions

COLL / RECYC / CLEANING TASKS	T/R
Coll/RecycBasket/MLP/MB/ HandBm	Day Letter & Route Number M1,T1,W2,H3,F4,S5
Relays	RLY
Intern	ASW
ASW	ASW
BackpackBlower	BPB
Basket Removal	REM
Basket Replacement	REPL
Basket Washing	WASH
FEL and/or Cut Down	F/CD
Homeless Cleaning	HOME
Leaves (Not Recycling)	LVS
Mechanical Flusing	MBFL
Short Dump from Other	SDMP
Short Dump/Street Dirt	SDMP
Supplemental-Hand Brooms	HB
Vendor Program	VEN
Self Help (Community Cleanup)	SELF
Basket/Pickup-Delivery	DEL
Parades/Events	EVT
Special Clean Up	SPEC
Stadium Clean Up	STAD

SUPERVISION TASKS	T/R
Dstrict Superintendent	DS
Garage Supervisor-Shift1	G1
Garage Supervisor-Days	G2
Garage Supervisor Shift3	G3
FieldOfficer1	FO1
Field Officer2	FO2
Field Officer3	FO3
FieldOfficer 4	FO4
Field Officer 5	FO5
Field Officer 6	FO6
Field Officer 7	FO7
Field Officer 8	FO8
Field Officer - Shift 1	NDS1
Night District Super	NDS3
Executive Officer	XO
Cleaning Officers	CO
Intern / ASW	ASW
Deputy Chief	DC
Litigation_supv.	LIT
Salt/Scale-Receiving	SALT
Summons Officer	SUMM
Order to HCF - Supv.	HCF
Admin Superindendent	ADMN
Command Ctr/OEM/MTA	COMM
Containerized Officer	CON
District Snow Inspector	DSI
Dump Supervisor	DUMP
ERD Superintendent-Admin	ERD

SUPERVISION TASKS	T/R
ERD Superintendent-Field	ERD
ERD supervisor-Admin	ERD
ERD Supervisor-Field	ERD
Green Market	GM
Hired Equipment - Admin	HIR
Hired Equipment-Supervisor	HIR
Labor Management Supv	LMS
Parades/Events	SPEC
SCR Clearing	CLR
Snow Dump	SD
Snow Melter	SM
Hauling/Piling	HAUL
Special Cleanup	SPEC
Stadium Clean-Up	SDCU
Surplus Supervisor	OVER
Truck Measuring	TM
Other-Supv.	OTH
Litigation-Supt.	LIT
Other-Supt.	OTHR
Dept Trials/OATH-Supv.	OATH
Dept Trials/OATH-Supt.	OATH
Order to HCF - Supt.	HCF
Order to EEO - Supv.	EEO
Order to EEO - Supt.	EEO

SNOW TASKS	T/R
Salt Spreading	C1/S1/T1/BIKE (Depending on route #)
Plowing	C1/S1/T1/BIKE (Depending on route #)
Pre-Position Equipment	C1/S1/T1/BIKE (Depending on route #)
OCA (other city agency) routes: PKS1 / DOT2 etc	
Plow & Chain G.U.	P&C
SCR Clearing	SCR
Bus stops/Cross walks	XWLK
FEL - Salt Pile	PILE
Piling/Hauling - FEL	HAUL
Plow Repair	PLOW
Dump Supervisor	DUMP
Clean Spreaders	CSPR
FEL-Clearing	FEL
FEL-Plowing	FEL
Hand Shoveling	HAND
Piling/Hauling-Privates	CIV
Plowing-Privates	CIV
SaltDomeSecurity	MDA or SEC
Salt Hauling	HAUL
Salt Loading	LOAD
Salt Receiving	SALT
Sand Hauling	HAUL
Snow Blocking	BLOK
Snow Clerk	SCLK
Snow Hauling	HAUL
Snow Melter	MELT
Squad Leader	SQDL
Traffic Control	TRAFF
Truck Measuring	TMES
Unload Spreading Equipment	UNLS
Piling/Hauling-Open Back Truck	HAUL
ERD TASKS	**T/R**
ERD Storm Debris	DEBR
ERD Barricades	BRCD
ERD Wood	WOOD
ERD Standby	STBY
ERD Refuse	(ROUTE #)
ERD Recycling	(ROUTE #)
ERD Cleaning	(ROUTE #)
ERD Hauling	HAUL
Dump Supervisor	SUPV
ERD Surplus	OVER

SUPPORT TASKS	T/R
DSOA	DSOA
Civilian Clerk	CIV
Garage Utility	GU
Gas and Oil	GO
Wrecker Operator	WRK
Administration	ADMN
Blockade Duty	BLOK
Dept Trials/OATH	OATH
Drug and Alcohol Testing	(SEE SOP)
Labor Management-S/W	LMGT
Litigation	LITG
Messenger	MAIL
Order to HCF	HCF
Order to EEO	EEO
Porter	PRTR
Snow Training	TRNG
Surplus	ABLE
Tire Transport	TIRE
Training-Other	TRNG
Transport Equipment	TRNS

SURPLUS TASKS	T/R
Over	ABLE
Detached	(LOC DETACH PERSON IS GOING TO)