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### MODULE 3 – Afternoon Planning Activities

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<b>Duration</b>	Approximately 3 hours, 15 minutes.
<b>Description</b>	In this module, participants are introduced to several functions that are used when conducting planning, including: Annual Budget, Overtime Desired List (OTDL) Management, and the Weekly Schedule.
<b>Module Topics</b>	Topic 3.1: Annual Planning Topic 3.2: It's the Start of a New Quarter – OTDL Management Topic 3.3: Planning Ahead – A Week at a Glance Topic 3.4: Planning Practice Debrief: What Did You Learn?
<b>Target Skills</b>	Upon completion of this module, participants will be able to: <ul style="list-style-type: none"><li>• Discuss the various types of planning functions available in DOIS;</li><li>• Enter and modify the annual fiscal budget;</li><li>• Adjust the daily budget spread;</li><li>• Create the OTDL;</li><li>• Modify the OTDL;</li><li>• Create and modify the weekly schedule;</li><li>• Schedule a planned vacancy;</li><li>• Fill a vacancy (weekly);</li><li>• Schedule a carrier without a route;</li><li>• Use DOIS planning functions.</li></ul>

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<b>FACILITATOR NOTE</b>	<i>For the following discussion, prepare a rip-chart titled: Getting Prepared.</i>
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### Activity 3.1

### Annual Planning

#### Target Skills

Upon completion of this activity, participants will be able to:

- Discuss the various types of planning functions available in DOIS;
  - Enter and modify the Annual Fiscal Budget;
  - Adjust the daily budget spread.
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#### Introduction

##### STATE

In Activity 3.1, we discuss the Planning and Scheduling tab on the Supervisor Workbench.

- CLICK the Planning and Scheduling tab.

##### EXPLAIN

This tab contains activities related to:

- Annual Planning;
- OTDL Management;
- Weekly Scheduling.

##### EXPLAIN

Activities which allow participants to practice these functions are dispersed throughout this module. In Activity 3.4, participants have an opportunity to practice using planning and scheduling functions.

##### STATE

Let's begin by talking about the annual budget procedure in DOIS. In order to complete annual planning in DOIS, we discuss the Record Budget by Week window, where you enter the budget; and the Adjust Daily Budget Spread window, where you modify the daily budget spread when necessary.

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#### FACILITATOR NOTE

*Different offices have different budget procedures. In some offices, delivery unit supervisors are closely involved with tracking operations to daily budget numbers. While in other offices, delivery unit supervisors are not very involved in the*



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*budget process. Please be aware that the annual planning processes in DOIS may not be relevant to all participants.*

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**Discussion**  
*Annual Planning*

**ASK**  
What planning activities do you currently complete?

Possible responses include, but are not limited to:

- In accordance with the Employee Labor Manual (EL – 901) National Agreement, I post the weekly schedule the Wednesday before a service week (or the Tuesday before, if there is a holiday in the upcoming week).
- I post the OTDL at the beginning of a new quarter.

**ASK**  
Why is planning important?

Possible responses include, but are not limited to:

- OTDL creation and tracking assists in making equitable assignments and offering overtime opportunities.
- Breaking down the annual budget into weekly budgets allows for more effective management when making operational decisions (assignments, overtime, etc.).

**EXPLAIN**  
Planning assists delivery unit supervisors with decision making as well as reporting. The main window used for annual planning is the Record Budget by Week window. While it is not necessarily the delivery unit supervisor who enters the budget information into DOIS, it is important that someone enters the budget into DOIS in order for delivery unit supervisors to take advantage of the information provided in Weekly Schedule.

**Demonstration**  
*Record Budget by Week window*

**EXPLAIN**  
Let's start by navigating to the Record Budget by Week window.

- VIEW the Annual Budget area on the Planning and Scheduling tab of the Supervisor Workbench.
- CLICK the Record Budget by Week button.



### EXPLAIN

The Record Budget by Week window allows participants to complete a number of tasks. Participants can:

- Record a delivery unit's work hour budget by
  - Labor Distribution Code (LDC);
  - Planned volume by type of mail;
  - Planned possible deliveries for each Accounting Period (AP);
- Modify the service week budgets during the course of the year which would be necessary, for example, if a modified budget is sent to the delivery unit which changes previously entered data;
- View and edit the recorded budgets for the current fiscal year and the next fiscal year.

#### *Fiscal Year*

### EXPLAIN

View the Fiscal Year (FY) spin box, which is set to the current year. Participants can change to the previous or next fiscal year by clicking the up or down arrows.

- VIEW the AP spin box.

#### *Accounting Period*

### EXPLAIN

On the window, accounting period is abbreviated as AP. The AP defaults to 1. Participants can choose between accounting periods 1 - 13. AP 9 matches with the first four service weeks of the fiscal year.

- CLICK the up arrow of the AP spin box until 9 is displayed.
- CLICK Display. Budget information displays in the Budget LDC Hours grid and the Budget Volume Types grid.
- CLICK the New button in the Budget LDC Hours area.

#### *Adding a New LDC Row to the Budget*

### STATE

Clicking the New button adds a new row. Once a row has been added, you may enter budget information for a new LDC by clicking the down arrow on the LDC drop-down list box.



- SELECT LDC 28 – City-Tertiary from the LDC drop-down list box.
- PRESS the Tab key.
- TYPE 100 in the Week 1 box.
- PRESS the Tab key.
- TYPE 100 in the Week 2 box.
- PRESS the Tab key.
- TYPE 100 in the Week 3 box.
- PRESS the Tab key.
- TYPE 100 in the Week 4 box.
- PRESS the Tab key.

*Deleting a LDC from Annual Budget*

**EXPLAIN**

Participants would complete this step until all budget information has been entered. Now, let's practice deleting the information we just entered. In order to delete the information for this LDC, select the row and click delete.

- SELECT LDC 28 – City-Tertiary.
- CLICK Delete.

**EXPLAIN**

Adding or deleting a new budget volume type is exactly the same as adding or deleting a LDC.

*Adding a Volume Type to the Annual Budget*

**STATE**

Volume is added to DOIS in pieces, not feet.

- VIEW the Budget Volume Types area.
- CLICK the New button.
- SELECT Sets from the Type drop-down list box.
- PRESS the Tab key.



- TYPE 100 pieces in the volume field for Week 1.
- PRESS the Tab key.
- TYPE 100 pieces in the volume field for Week 2.
- PRESS the Tab key.
- TYPE 100 pieces in the volume field for Week 3.
- PRESS the Tab key.
- TYPE 100 pieces for in volume field for Week 4.
- PRESS the Tab key.

**EXPLAIN**

We just entered budget information for the new fiscal year. Notice the total amount of hours for the AP and for the year to date are automatically updated.

*Planned Possible Deliveries*

**EXPLAIN**

In the bottom left corner of the window is the Planned Possible Deliveries text box. This is where participants enter the daily average of Planned Possible Deliveries for the AP.

- VIEW the Planned Possible Deliveries text box.
- TYPE 10000 in the Planned Possible Deliveries text box.

*Navigating to the Next AP*

**STATE**

There are two ways to view information from another AP. One way is to click the AP drop-down list box and select an AP from 1 – 13. The second way is to click the Previous or Next AP buttons. When switching between APs, DOIS prompts you to save your work.

- CLICK the Next AP button.
- CLICK the Yes button when the Save message displays.



**STATE**

Notice in AP 10 that the Sets row we added in AP 9 is listed in AP 10 as well. When you add a LDC or volume type, it then displays for all of the following APs. If you delete any of the LDCs or volume types in an AP, they do not appear in any of the following APs.

**EXPLAIN**

You can save using the Save button or by clicking the Yes button when the save message appears when switching between APs.

**STATE**

If you leave the window before you have completed entering the budget, you can click the Save button. This allows you to enter the budget into DOIS all at once or over a period of time.

**STATE**

In order to close this window, click Close.

- CLICK Close.

**ASK**

What questions do you have about the Record Budget by Week window?

**Walkthrough**

*Adjust Daily Budget Spread window*

**STATE**

Next we cover the Adjust Daily Budget Spread window. The information from the Record Budget by Week window is used in DOIS to spread the budget into daily allotments. This occurs when the information entered in the Record Budget by Week window updates the Adjust Daily Budget Spread window.

- VIEW the Annual Budget area.
- CLICK the Adjust Daily Budget Spread button.

**EXPLAIN**

The Adjust Daily Budget Spread window is used to view and adjust the distributed annual fiscal budget on a service day level. In DOIS, the daily spreads are calculated using a formula, which uses Same Period Last Year (SPLY) information.

**EXPLAIN**

Delivery unit supervisors may view or adjust the hours or volume of any of the weeks within the current fiscal year.



Delivery unit supervisors can view information from prior fiscal years by using the FY spin box.

- VIEW FY 2000.
- CLICK Display.

**EXPLAIN**

The information in the Budget Weeks box fills. The Budget Weeks for the fiscal year are listed on the left side of the window divided by AP and week (Wk). The SPLY column is listed next to the Week column. The SPLY column indicates what was used to calculate the daily spread percentages.

**EXPLAIN**

The budget numbers are not determined using SPLY when there is an entry to the SPLY Impact window or when there is no data available to complete the calculation. This is indicated on the window with a **N** in the SPLY column. The **N** indicates that the standard formula was used, not the formula based on SPLY data. The standard formula uses percentages for each day of the week.

**EXPLAIN**

SPLY information for last year is not entered into DOIS. For the first year that you use DOIS, there is not any SPLY information in the Adjust Daily Budget Spread window. Therefore, all entries in the SPLY column display **N**. In your second year of using DOIS, you will have SPLY information for each week unless you enter a SPLY impact, instructing DOIS not to use SPLY for that week due to extraordinary circumstances.

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**FACILITATOR NOTE**

*If participants are interested in the specific formula used to break down the weekly budget by day when SPLY is not used, refer to the formula listed in the Facilitator Guide Appendix.*

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**EXPLAIN**

All other times, the numbers for daily budgeting are determined based on SPLY. Let's select a week to practice adjusting the spread.

- SELECT the row with AP 9 and Wk 1 to view the daily budgeted LDC hours and budgeted volumes.



- CLICK the Display Spread button.

**EXPLAIN**

The daily budget information for the selected AP and week is displayed. This data is determined using a formula based on information from the Record Budget by Week window and SPLY data. Participants can make changes to the LDC budget hours for each day of the week.

*Adjust Budget*

**STATE**

Let's assume that you want to adjust the Tuesday spread number. We can make adjustments or changes in the window. While we can adjust the daily allotments to reflect differences in mail volume, we cannot change the weekly totals. Let's make changes to the Tuesday number.

- SELECT the Tuesday box for LDC 21.
- PRESS Delete to delete the current number, 67.
- TYPE 77 in the Tuesday box for LDC 21.
- PRESS the Tab key.
- VIEW the +/- column and see the change between the original and new numbers, which is +10.

*+/- column*

**STATE**

Since we changed the Tuesday budget hours to be 10 hours higher, we need to adjust the budget hours for other days of the week in order to make the daily spread equal the weekly total. When the sum of the daily spread equals the weekly total, the +/- column equals zero. You cannot save until the +/- column equals zero.

**STATE**

If we tried to save right now, we would get a message asking us to balance the daily columns so that our +/- column equals zero.

*Adjust Budget*

**STATE**

Let's adjust the numbers so that the +/- column equals zero.

- SELECT the Friday column for LDC 21.



- PRESS Delete to delete the current number, 48.
- TYPE 38 in the Friday budget hours box for LDC 21 in order to absorb the Tuesday budget hours change.
- PRESS the Tab key.

**STATE**

Now that the +/- column is equal to zero, we can save changes to this window.

*Budget Volume Types*

**STATE**

The Budget Volume Types grid works in the same way. The +/- box must be zero in both the Budget LDC Hours grid and the Budget Volume Types grid before changes on this window can be saved.

- CLICK Save.
- CLICK Close.

**ASK**

What questions do you have about the Adjust Daily Budget Spread window?

**ASK**

What are some examples of when you would use the Adjust Daily Budget Spread window?

Possible responses include, but are not limited to:

- When SPLY was not used to adjust the numbers, I would check to see if the numbers are reflective of that week.
- I would adjust the daily spread around holidays when SPLY was not used.

**Discussion**  
*Annual Planning*

**ASK**

What are the advantages of using DOIS to conduct Annual Planning?

Possible responses include, but are not limited to:

- Hours can be spread daily using SPLY.
- The budget for the year can be recorded in DOIS.



### *Budget Details Report*

#### **STATE**

In order to print reports on the information in these windows, use the Budget Detail Reports window.

- CLICK the Budget Detail Reports button.

#### **STATE**

You can print the budget by week or for each day of the week. You would then choose the FY and AP you want to view and then click the Print Preview button. For now, we are just going to click cancel.

- CLICK Cancel.

### **Activity**

#### *Annual Budget area*

#### **STATE**

Let's complete an annual budget activity. You have received an amended budget from the postmaster increasing hours for LDC – 22 in AP 9 by 200 hours. Access the FY 2000 budget in DOIS and spread the budget increase across AP 9, in order to record the extra 200 hours.

#### **STATE**

Your goal is to spread the 200 hours in AP 9 using the Annual Budget area to record changes to your annual budget.

#### **STATE**

You have seven minutes to complete this activity. Good luck!

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### **FACILITATOR NOTE**

*While participants are completing this activity, encourage them to utilize On-Line Help, the Quick Reference Guide, and CBT to answer any questions they have regarding this activity.*

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### **Activity Debrief**

#### **ASK**

How did you complete this activity? Who wants to volunteer to walk us through their steps?

- CLICK the Record Budget by Week button.
- VIEW 2000 in the FY spin box.
- CLICK the arrows on the AP spin box until AP 9 is displayed.
- CLICK Display.



- SELECT LDC 22.
- TYPE 631 hours for Week 1.
- CLICK Tab.
- TYPE 642 hours for Week 2.
- CLICK Tab.
- TYPE 632 hours for Week 3.
- CLICK Tab.
- TYPE 629 hours for Week 4.
- CLICK Tab.
- CLICK Save.
- CLICK Close.

**STATE**

Great job! Now your annual budget for Zone 1, FY 2000, AP 9 has been recorded.

**Summary**

**ASK**

What questions do you have about the annual budget procedure in DOIS?

**END OF TOPIC 3.1.**

**CONTINUE** to 3.2.



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## Topic 3.2

## It's the Start of a New Quarter – OTDL Management

### Target Skills

Upon completion of this activity, participants will be able to:

- Create the OTDL;
- Modify the OTDL.

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### Introduction

#### EXPLAIN

The Overtime Desired List (OTDL) function in DOIS makes creating the OTDL simple and quick. Using the OTDL, delivery unit supervisors can track how much overtime each employee has been offered and has worked. Overtime preferences are updated using DOIS to ensure that delivery unit supervisors have the information necessary to make overtime decisions. In a new quarter, after carriers have made preference changes, the delivery unit supervisor can easily update the list using the previous quarter's OTDL as base information.

### Walkthrough

*Overtime Desired List (OTDL) window*

#### EXPLAIN

After the two-week sign-up period has passed, the delivery unit supervisor creates the OTDL in DOIS. Instead of entering each carrier's information one at a time, DOIS allows the delivery unit supervisor to use the previous quarter's OTDL and update the changes.

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### FACILITATOR NOTE

*DOIS follows specific procedures, as defined in the National Agreement between USPS and the National Association of Letter Carriers (NALC): (Article 8), regarding the assignment and tracking of overtime.*

- CLICK the Overtime Desired List (OTDL) button.
- VIEW the Year – Quarter drop-down list box.

#### EXPLAIN

The Overtime Desired List (OTDL) window allows delivery unit supervisors to view or modify the current quarter, and view OTDLs from previous quarters. Use the Year – Quarter drop-down list box in order to view previous quarters.

- VIEW 2000 – 2 in the Year-Quarter drop-down



list box.

- CLICK Display.

**EXPLAIN**

The following information displays in the grid:

- Employee Name;
- OTDL Status;
- Removal Date.

If users are not in the current quarter, then the information is read only. When the user is in the current quarter, the Employee Name, OTDL Status, and Removal Date can be edited.

*Employee Name*

**EXPLAIN**

The Employee Name field is a list of employees on the OTDL for the selected quarter. This drop-down list box contains the names of all regular full-time employees in the unit.

- VIEW the Employee Name field.
- VIEW the OTDL Status field.

*OTDL Status*

**EXPLAIN**

OTDL status information for the chosen carrier is displayed in the OTDL column. The option listed is 12 which represents 12 hours of overtime. The other options are 10 (10 hours of overtime), and WA (Work Assignment only).

- VIEW the Removal Date column.

*Removal Date*

**STATE**

The Removal Date field contains the date the chosen carrier will be removed from the OTDL. Once this date has passed, the particular carrier does not appear on the next quarter's OTDL. A carrier may request to be removed from the OTDL anytime during the quarter but may be entered onto the OTDL only at the beginning of the quarter.

**STATE**

If a carrier has told you that they would like to be taken off of the OTDL, select the employee and click the Remove button. DOIS automatically places the current date in the Removal Date field.



### New OTDL

#### EXPLAIN

When the delivery unit supervisor creates the OTDL for the first time, they should enter all regular full-time carriers and their overtime preferences within the first day or two of the new quarter.

#### EXPLAIN

When you enter the Overtime Desired List (OTDL) window after a new quarter has begun, you receive a message asking if you would like to create the new OTDL based on the previous quarter's list. The baseline OTDL displays all employees on last quarter's list and their preferences. You can then make edits to the previous quarter's OTDL.

#### EXPLAIN

If you initially choose not to create the new OTDL using the previous quarter's list as a baseline, you still have the option to use the old OTDL as a baseline by clicking the Roll In OTDL button. This button rolls in the OTDL information from the previous quarter.

#### EXPLAIN

Then DOIS generates the new OTDL by using the previous quarter's list and removes those employees with a removal date that has passed.

#### ASK

What questions do you have about DOIS OTDL procedures?

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### FACILITATOR NOTE

*Take a moment to ensure everyone is ready to move on to the DOIS OTDL activity.*

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### Edit OTDL

#### STATE

In order to edit any of the fields on this window, click in the field to see the arrow for the drop-down list box.

- VIEW carrier BROOKS, J M.
- CLICK the OTDL Status field.
- SELECT 10 from the OTDL Status drop-down list box.
- CLICK Save.



**EXPLAIN**

The new information entered for BROOKS, J M's overtime is now saved. This information is updated in the Carrier Information List window (covered in Module 2), which helps delivery unit supervisor's determine which carriers are working overtime and their overtime status.

*Add a New Employee*

**EXPLAIN**

Now, let's add a new employee to the OTDL.

- CLICK the New button.
- CLICK in the Employee Name field.
- CLICK the down arrow in the Employee Name drop-down list box.
- SELECT WHITE, B S.
- CLICK the OTDL Status field for WHITE, B S.
- CLICK the down arrow in the OTDL Status drop-down list box.
- SELECT 12.
- CLICK Save.

**EXPLAIN**

The delivery unit supervisor may view this information at any time during the year using the Overtime Desired List (OTDL) window or the Carrier Information List window.

**Activity**

*Overtime Desired List*

**REFER** to page 16, Overtime Desired List, in your Participant Guide.

**STATE**

Please take a moment to follow along as I read the scenario.

**STATE**

Assume it is the start of a new quarter and you have just taken down the OTDL. There are three preference changes and one new addition:

- AMINA, T C wants 12 hours of overtime instead of 10.
- FIELDS, M J wants 12 hours of overtime instead of 10.



- DURKE, J P wants to be on Work Assignment instead of 12.
- CHUNG, N T wants to be added to the OTDL at 10 hours of overtime.

*Goal*

**STATE**

Your goal is to create the OTDL for the new quarter. Assume you clicked the Yes button when you received the message asking if you wanted to use last quarter's OTDL as a baseline. Use information from the last quarter to generate a new OTDL. Then make the preference changes and add the new employee to the list. You have five minutes to complete this activity.

**ASK**

Do you have any questions about the activity before we get started?

**STATE**

Great! Let's get started.

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**FACILITATOR NOTE**

*While participants are completing this activity, encourage them to utilize On-Line Help, Quick Reference Guides, and CBT to answer any questions they have regarding this activity.*

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**Activity Debrief**

**ASK**

How did you change carrier overtime preferences? Who wants to volunteer to walk us through their steps?

Possible responses include, but are not limited to:

- SELECT the OTDL Status field for AMINA, T C.
- SELECT 12 from the OTDL Status drop-down list box.
- SELECT the OTDL Status field for FIELDS, M J.
- SELECT 12 from the OTDL Status drop-down list box.
- SELECT the OTDL Status field for DURKE, J P.



- SELECT WA from the OTDL Status drop-down list box.

**STATE**

Great! Thank you.

**ASK**

How did you add a new carrier to the OTDL? Who wants to volunteer to walk us through their steps?

*Add a New Carrier*

- CLICK the New button.
- SELECT CHUNG, N T from the Employee Name drop-down list box.
- SELECT 10 from the OTDL Status drop-down list box.
- CLICK Save.
- CLICK Close.

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**FACILITATOR NOTE**

*Add the following to the DOIS Advantages Rip-chart:  
Complete the new quarter's OTDL in ten minutes.*

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**Discussion**

*Activity*

**ASK**

How long does it normally take to create a new OTDL?

**ASK**

How long did it take you to complete the activity?

**REMIND** participants that overtime information from this window pre-fills other important windows in DOIS, such as the Carrier Information List window.

**ASK**

What questions do you have about the activity?

**ASK**

Why else is it important to enter OTDL information into DOIS?

Possible responses include, but are not limited to:

- It is fast and simple to create an OTDL for the new quarter when you are using information from the last quarter.



- DOIS automatically tracks Overtime (OT) assignments which helps manage overtime.

## Discussion

### *Overtime Tracking window*

#### **STATE**

The OTDL Management area allows delivery unit supervisors to create and modify the OTDL for the current quarter and print an Overtime Worksheet.

#### **EXPLAIN**

The Overtime Tracking window is used to view how many times overtime was offered and how much overtime was worked or not worked by the carrier. The information from the Overtime Tracking window also fills the Overtime Worksheet.

#### **ASK**

Why is tracking overtime important?

Possible responses include, but are not limited to:

- Delivery unit supervisors are responsible for maintaining overtime.
- Carriers can file grievances if the amount of overtime they worked is not within 10% of the average overtime worked.

#### **STATE**

Great! Now let's take a look at the window.

## Walkthrough

### *Overtime Tracking window*

#### **EXPLAIN**

The Overtime Tracking window allows users to view a list of overtime opportunities and hours worked by a carrier in a given quarter. Previously, this information would be updated periodically. With DOIS, the timekeeping interface provides updated information to DOIS every time a carrier works overtime. This allows delivery unit supervisors to have accurate overtime information on their carriers at any time.

#### **STATE**

If you have not already done so, click the Close button on the Overtime Desired List window.

#### **ASK**

Is everyone back on the Planning and Scheduling tab of the Supervisor Workbench?

- CLICK the Overtime Tracking button on the Planning and Scheduling tab of the Supervisor Workbench.



- VIEW 2000 – 2 from the Year – Quarter drop-down list box.

*Carrier*

**EXPLAIN**

Only carriers on the OTDL for this quarter are listed in the OTDL Carriers drop-down list box.

- SELECT KANTER, S J from the OTDL Carriers drop-down list box.

*OTDL Status*

**EXPLAIN**

The OTDL Status field changes when a carrier is selected. The OTDL Status field displays Work Assignment.

- CLICK Display.

**EXPLAIN**

Clicking the Display button pre-fills the Overtime Tracking grid with the following information for KANTER, S J:

- Date – dates of overtime opportunities are listed with the most current date first and the earlier dates following below;
- Worked Opps – number of times the carrier worked overtime. This information is automatically calculated based on the clockring download from timekeeping;
- Worked Hrs – number of hours of overtime the employee actually worked. This is automatically calculated based on the clockring process;
- Exception Opps – number of overtime opportunities that the carrier did not work. This information is pre-filled from the Record Overtime Exception window, which was covered in Module 2;
- Exception Hrs – number of hours of overtime that were offered but not worked by the carrier. This information is pre-filled from the Record Overtime Exception window;
- Reason for Exception – reason the carrier did not work the overtime offered. This information is pre-filled from the Record Overtime Exception window. You may use the scroll bar to view all information entered under Reason for Exception field.

**EXPLAIN**

All information in this window is updated automatically using



clockrings from the timekeeping system. After the clockrings are uploaded into DOIS from the timekeeping system, overtime information is updated in DOIS. This ensures that information in DOIS is accurate.

**STATE**

DOIS follows all overtime rules in the Joint Contractual Agreement Manual (JCAM). If a carrier works overtime on their own route, it is not tracked on the overtime equity window. In order to track that overtime, you would have to manually edit the overtime tracking window. For more information on overtime rules in DOIS, refer to On-Line Help.

*Total Row*

**EXPLAIN**

Under the grid, there is a row with the total for each column. This allows the delivery unit supervisor to view the total amount of overtime opportunities offered in the delivery unit, total number of hours accepted, and total number of opportunities declined.

**ASK**

What are some advantages of the Overtime Tracking window?

Possible responses include, but are not limited to:

- I have carrier overtime information, including how many opportunities were offered to a carrier, how many opportunities they worked, and the amount of hours worked.
- It is faster than updating a spreadsheet every week.

**EXPLAIN**

The Overtime Worksheet contains the information listed on this window. This report can be available for review in the delivery unit for carriers to verify their overtime information. You can open the report from the Supervisor Workbench in the OTDL Management area.

*Edit Overtime*

**EXPLAIN**

When a carrier works overtime, all overtime information is updated directly from your timekeeping system. The delivery unit supervisor can edit and delete information on this window if necessary. In cases where carriers are working unscheduled overtime on many different routes, it is necessary to verify that the number of opportunities listed on the Overtime window is accurate. If the opportunity listed is incorrect, it is possible to edit the overtime information.



**EXPLAIN**

When you use the Edit Overtime function, the timekeeping load will not update data for that day. There will be a difference between overtime information in DOIS and the timekeeping system when edits are made. In order to ensure your timekeeping data is correct, you should make updates directly to your timekeeping system.

- CLICK Close.

**ASK**

What questions do you have about the Overtime Tracking window?

**Summary**

**STATE**

We have covered two important windows: Overtime Desired List (OTDL) window and Overtime Tracking window. One of the major advantages of DOIS OTDL functions is that it helps delivery unit supervisors view carriers' current overtime status and allows them to make equitable overtime decisions. Another advantage is that information entered in the Overtime Desired List (OTDL) window and the Overtime Tracking window is used in other windows, such as the Weekly Schedule window, Carrier Information List window, and Daily Assignments window.

**END OF TOPIC 3.2.**

**CONTINUE** to Topic 3.3.



### Topic 3.3

### Planning Ahead – A Week at a Glance

#### Target Skills

Upon completion of this activity, participants will be able to:

- Create and modify the weekly schedule;
  - Schedule a planned vacancy;
  - Fill a vacancy (weekly);
  - Schedule a carrier without a route.
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#### Introduction

##### STATE

We are now beginning Activity 3.3: Planning Ahead – A Week at a Glance. In this activity, we cover the Weekly Schedule window, which allows you to view all of routes in the delivery unit and the carriers assigned to those routes. From the Weekly Schedule window, you can:

- Create vacancies;
- Assign replacement carriers to both regular and miscellaneous routes;
- Record carrier absences and route vacancies;
- View budget hour information;
- View carrier data;
- Print the weekly schedule.

#### Discussion

##### *Weekly Planning*

##### ASK

How do you complete weekly planning now?

Possible responses include, but are not limited to:

- Use an Excel spreadsheet;
- Write the schedule on a piece of paper;
- Use a calendar.

##### EXPLAIN

The Weekly Schedule window allows you to plan assignments for the upcoming week. Information is displayed one week at a time.

##### ASK

On what day of the week do you complete the weekly



schedule?

**EXPLAIN**

In DOIS, the earliest the weekly schedule can be completed in a given service week is on a Tuesday because the Weekly Schedule Batch job is run on Monday evenings. This is due to the fact that the schedules days off (SDOs) for all carriers do not come in from the timekeeping system until users run the timekeeping load on Mondays.

**EXPLAIN**

There is an exception to this rule. When a holiday falls on a Monday, the Weekly Schedule Batch is not run until Tuesday evening. On holidays, there are no users in the unit to run the timekeeping load, which means the SDOs are not loaded until the next business day, which is Tuesday. Consequently, you will not be able to work on the weekly schedule for the upcoming service week until the Wednesday morning following a Monday holiday.

**ASK**

What questions do you have regarding when you can complete the weekly schedule in DOIS?

**Walkthrough**

*Weekly Schedule window*

**STATE**

Let's take a look at the window. Please complete the steps with me as I demonstrate how to create a weekly schedule.

- CLICK the Weekly Schedule button.

*Special Inspection Warnings window*

**STATE**

When opening the Weekly Schedule window, the Special Inspection Warnings window pops-up to inform you which routes meet the requirements for a special inspection (criteria and guidelines for special inspections may be found in the M-39). The window allows you to proactively identify which of your routes may need special inspections. You can open the Special Inspections Report by clicking the Special Insp. Reports... button on this window.

- CLICK Close.

**STATE**

The Weekly Schedule window opens. All of the information you need to create a weekly schedule is listed on this window. Let's take a look at the different fields.



---

*View Next Week button*

**EXPLAIN**

The Weekly Schedule window opens for next week. In order to view the weekly schedule for the current week, click the View Current Week button in the top left corner of the window.

- CLICK the View Current Week button.

**STATE**

Notice that the button at the top of the window now changes to read View Next Week. The window displays the days left in the current week.

**STATE**

In the Weekly Schedule window, the first day you can plan for is tomorrow and the last day that you can plan for is Friday of the next service week.

---

**FACILITATOR NOTE**

*If the supervisor is planning on a Saturday, Sunday, or Monday, the last day for which they can plan is the Friday of the current service week.*

---

**STATE**

The Weekly Schedule window allows you to view both the current service week and the next service week for your delivery unit. However, you cannot view the current service day since you view current day information using the Workload Status window. You can use this window to manage carrier assignments in your delivery unit.

*Regular Routes*

**EXPLAIN**

When you open the Weekly Schedule window, the Regular Routes view opens. Notice that Regular Routes is displayed in the title bar at the top of the grid. The Regular Routes view includes the following fields:

- Route;
- Regular Carrier;
- Each day of the week (Saturday through Friday).

**EXPLAIN**

If the regular carrier is out for a day, then the name of the replacement carrier is listed in the box, which corresponds to the correct route and day the carrier is out of the unit. If a replacement carrier has not been assigned, then <Vacant> is



listed in the box, which corresponds to the route and the day of the week the route is vacant. For example, for route xx006, DANIELS, P E is listed as the replacement carrier.

### ASK

What questions do you have about the Regular routes view of the Weekly Schedule?

### STATE

Let's take a look at the Regular Routes view of the Weekly Schedule that is currently displayed on your screen. When a cell is blank, then the regular carrier is working on that route for that service day. If vacant is written in the cell, then the regular carrier is not going to be in and a replacement carrier has not been assigned. If split appears in the cell, then there is one carrier working the office portion of the route and a different carrier assigned to the street portion. If a carrier name appears in the cell, then the carrier specified is covering that route for that service day.

---

### FACILITATOR NOTE

*On the Weekly Schedule window, <VACANT> is written in a cell in the following situations:*

- *No one is assigned to the entire route;*
- *No one is assigned to the office portion of the route, but there is a carrier assigned to the street portion;*
- *No one is assigned to the street portion of the route, but there is a carrier assigned to the office portion of the route.*

---

### EXPLAIN

In order to help delivery unit supervisors balance their hours for the week, the following information is placed at the bottom of the window:

- **Base** – The number of hours the route has been assessed at base or the regular number of hours it should take the regular carrier to work the route.
- **Budget** – The total budgeted hours for the day based on information from the Adjust Daily Budget Spread window.
- **Projected** – Projected hours for the day based on SPLY.

---

### FACILITATOR NOTE

*If participants are interested in the specific formula used to*



---

*calculate the projected hours, refer to the formula listed in the Facilitator Guide Appendix.*

---

**ASK**

How does having this information in one window help you?

Possible responses include, but are not limited to:

- Instead of looking at different reports and spreadsheets for these important pieces of information, they are listed here.
- I can view the budget, base, and projected hours, which help me make better assignment decisions.

---

**FACILITATOR NOTE**

*LIST the following advantage on the DOIS Advantages Rip-chart: Making scheduling decisions based on data.*

---

**STATE**

There are four windows that you can open from the Weekly Schedule window.

- Print Preview;
- Create Vacancy...;
- Assign Replacement...;
- Route Warnings...

**ASK**

What functions can be completed using each of these buttons?

Possible responses include, but are not limited to:

- Print Preview – Allows participants to view the Weekly Schedule report.
- Create Vacancy – Allows participants to create a vacancy.
- Assign Replacement – Allows users to assign a replacement carrier for the route.
- Route Warnings – Allows users to view which routes may require a special inspection in the near future.

---

**FACILITATOR NOTE**

*In order to access the options on the Weekly Schedule floating*



---

*menu, participants can either right click on a route or they can select Options from the DOIS Menu Bar.*

---

*Right-click options*

**STATE**

In order to save time, we encourage you to use the right-click menu to access functions for the Weekly Schedule window. As we discuss this window, I am going to direct you to various cells on the window. Each time I do this, I am going to reference the route number that appears on the left of the grid. Then I will reference the day of the week that appears at the top of the grid.

- RIGHT-CLICK in the cell for route xx009 on Wednesday.

**EXPLAIN**

There are four options that come up when you right-click on a route. From the floating menu, you can complete the following actions:

- Quick Assign;
- Assignment Details;
- Create Vacancy;
- Show.

---

**FACILITATOR NOTE**

*These right-click items can also be accessed by selecting Options from the DOIS menu bar.*

---

*Quick Assign*

**EXPLAIN**

Let's talk about each of these options in more detail.

- SELECT Quick Assign from the Floating Menu.

**EXPLAIN**

Quick Assign opens the Assign Replacement window and allows participants to assign a replacement for the route quickly. Notice, the route is pre-filled with route xx009 since that is the route we right-clicked. The other fields on this window are Carrier Name, Section (which includes office, route, or all), and the Date From and Date To that you are covering. In order to accept the replacement, you would click OK.



- SELECT SHIELDING, B M from the Carrier Name drop-down list box.
- SELECT Primary from the Section drop-down list box.
- VIEW 05/10/2000 in the Date To and Date From spin boxes.
- CLICK OK.

**STATE**

We just assigned SHELDDING, B M to cover route xx009 on Saturday.

**STATE**

The benefit of the Quick Assign function is that you are able to gather enough information from the Weekly Schedule window to make an assignment without the need to see further details.

- RIGHT-CLICK in the cell for route xx001 on Wednesday.

*Assignment Details*

**EXPLAIN**

Another right-click option includes Assignment Details.

- SELECT Assignment Details from the floating menu.

**EXPLAIN**

The Route Daily Details window opens.

**ASK**

What is the information you can view on this window?

*Answer:*

- Route;
- Date;
- Regular Carrier for the route;
- Work Status for the regular carrier;
- Current Assignment – contains information on who is currently assigned to cover the route and the carrier name.



**EXPLAIN**

From the Current Assignment area, participants can assign someone to cover the route. By clicking the Assign button, participants view the Assign Carriers window. Participants can also quick assign. By clicking the Quick Assign button, participants view the Assign Replacement window, which we just saw. Finally, participants can remove a carrier already assigned to the route from this window.

- CLICK Close.

*Create Vacancy*

**EXPLAIN**

Create Vacancy is the next option on the Weekly Schedule floating menu. When you select it, the Create Vacancy – 3971 window appears just as it does when you select it from the Supervisor Workbench.

*Show*

**EXPLAIN**

The final option on the Weekly Schedule floating menu is Show. Show leads to a cascading menu with a number of other options.

- RIGHT-CLICK in the cell for route xx001 on Wednesday.
- SELECT Show on the floating menu.

**EXPLAIN**

By selecting Show, a number of other options appear. Currently, Regular Routes is selected. This confirms that we are viewing Regular Routes in the delivery unit. Now let's view the Miscellaneous Routes in the delivery unit.

- SELECT Miscellaneous Routes from the cascading menu.

**EXPLAIN**

Notice that Miscellaneous Routes is now displayed in the title bar at the top of the grid. Now, the Weekly Schedule window is organized by Miscellaneous Routes.

**ASK**

What are some examples of miscellaneous routes?

Possible responses include, but are not limited to:

- Collection Routes;



- Relay Routes;
- Special Deliveries.

---

**FACILITATOR NOTE**

*If asked, DOIS does not support rural routes. DOIS interfaces with the timekeeping system, which is used for city routes only. DOIS does not interface with RTAPS (Rural Time and Attendance System), which is used for rural routes.*

---

**STATE**

Let's return to the Regular Routes view.

**ASK**

Who would like to walk us through the steps?

*Answer:*

- RIGHT-CLICK in the cell for route xx027 on Wednesday.
- SELECT Show from the floating menu.
- SELECT Regular Routes from the cascading menu.

**STATE**

The next option on the cascading menu is Carrier Work Status. When you select this option, the screen will split and carrier work status information appears in the bottom half of the grid while the top half of the grid still displays Regular Routes.

- RIGHT-CLICK in the cell for route xx001 on Wednesday.
- SELECT Show from the floating menu.
- SELECT Carrier Work Status from the cascading menu.

**EXPLAIN**

The Weekly Schedule window is now arranged into two sections. The title bar at the top of the grid now reads Regular Routes/Carrier Work Status. The top half of the window shows the Regular Routes view that we talked about earlier. The



bottom half of the window shows the Carrier Work Status view that is organized by Type of route and Carrier Name.

- SCROLL down in the bottom half of the grid displaying Carrier Work Status.

### STATE

You can see that the assignments for your regular carriers, carrier technicians T-6, and PTFs are displayed. The advantage of this view of the Weekly Schedule window is that you can view the routes that are vacant and carriers who do not have an assignment, at the same time.

### STATE

Notice that the Carrier Work Status grid either contains route numbers or <UNASSIGNED>. The route numbers indicate the route the carrier is assigned to for the day and <UNASSIGNED> indicates the carrier is scheduled to come in, but does not have an assignment. In addition, the Carrier Work Status grid could also contain <MULTIPLE>. This indicates that the carrier is working on multiple routes that day. If the cell is blank, then the carrier is absent for the day.

### STATE

By using the multiple views, we can see which carriers are available to cover route xx005 on Wednesday. Let's assign BLAIR, KM to cover route xx005 for Wednesday.

### ASK

Who can walk us through how to assign a carrier to cover a route?

Possible responses include, but are not limited to:

- RIGHT-CLICK in the cell for route xx005 on Wednesday.
- SELECT Quick Assign.
- SELECT BLAIR, K M from the Carrier drop-down list box.
- SELECT Primary from the Section drop-down list box.
- VIEW 05/10/2000 in the Date To and Date From spin boxes.



- CLICK OK.

**EXPLAIN**

The cascading menu also allows you to access the Absence List.

- RIGHT-CLICK in the cell for route xx001 on Wednesday.
- SELECT Show from the floating menu.
- SELECT Absence List from the cascading menu.

**EXPLAIN**

The Regular Routes/Carrier Work Status grid is replaced with the Absence List. The Absence List is used to determine which carriers are out for the day. This window lists the carrier name, carrier type, vacancy type, and the number of hours they will be absent. If a carrier is not going to be absent for an entire day, then the type of absence and the hours the carrier is out are displayed.

- VIEW the absence for DAVIDSON, R B on Thursday.

**STATE**

If a carrier is not absent, you can use the Absence List window to delete the vacancy. Note that deleting the vacancy adds the carrier back into the unit but not onto their assigned route. If you delete a vacancy, the carrier appears as scheduled without an assignment. You must assign that carrier to a route for the day.

- DOUBLE-CLICK in the cell which contains a vacancy for DAVIDSON, R B for Thursday (Annual Leave 5 hours).

**STATE**

If we were going to delete this vacancy, we would click the Delete Vacancy button. Do not complete this step now.

**ASK**

How would you assign the carrier to their route after deleting a vacancy?



*Answer:* I would use the Quick Assign or the Assign Replacement windows.

- CLICK Close.
- RIGHT-CLICK in the cell for AMINA, T C on Wednesday.
- SELECT Show from the Floating Menu.
- SELECT Regular Routes.
- RIGHT-CLICK in the cell for route xx001 on Wednesday.
- SELECT Show from the floating menu.

**ASK**

What are the three last options at the bottom of the cascading menu?

Possible responses include, but are not limited to:

- Sunday;
- Scheduled Hours;
- Vacant Routes Only.

**ASK**

What functions can we complete using these buttons?

Possible responses include, but are not limited to:

- Sunday – Allows participants to view the Weekly Schedule for Sunday.
- Scheduled Hours – Allows participants to view the totals of what they scheduled. The totals appear in a third row under Budget and Projected at the bottom of the Weekly Schedule window.
- Vacant Routes Only – Allows participants to view only those routes that are vacant.
  - SELECT Vacant Routes Only.

**STATE**

By selecting the Vacant Routes Only view, you can see any



route that has vacancies for this service week.

**ASK**

Who can remind us how to view the Carrier Work Status?

*Answer:*

- RIGHT-CLICK in the cell for route xx001 on Wednesday.
- SELECT Show from the floating menu.
- SELECT Carrier Work Status.

**STATE**

Notice you can now view your vacant regular routes as well as your carrier work status information.

**ASK**

How will this help you make assignment decisions?

*Answer:* I can quickly see only those routes that are vacant.

**ASK**

How can I return to the Regular Routes view, without also viewing the Carrier Work Status?

- RIGHT-CLICK in the cell for route xx003 on Wednesday.
- SELECT Show from the floating menu.
- SELECT Vacant Routes Only.

**ASK**

How would I remove the Carrier Work Status view from the window?

Possible responses include, but are not limited to:

- RIGHT-CLICK in the cell for route xx003 on Wednesday.
- SELECT Show from the floating menu.
- SELECT Carrier Work Status.



### STATE

Great job! Let's return to the buttons on the bottom of the Weekly Schedule window:

- Print Preview;
- Create Vacancy...;
- Assign Replacement...;
- Route Warnings...

### EXPLAIN

We discussed how the Print Preview button allows participants to view and print the Weekly Schedule report. The Create Vacancy... button allows participants to create a vacancy. And, the Route Warnings... button allows users to view which routes may require a special inspection in the near future. Let's now focus on the Assign Replacement... button.

### *Assign Carriers window*

### STATE

The Assign Replacement... button at the bottom of the Weekly Schedule window allows you to assign a replacement carrier for a vacant route.

### STATE

We are now going to assign a replacement carrier for route xx009. Please complete the steps with me as I walkthrough assigning a replacement carrier.

- CLICK in the cell for route xx009 on Thursday.
- CLICK the Assign Replacement . . . button.
- SELECT Primary in the Section drop-down list box.

### EXPLAIN

The Assign Carriers window opens. Some important pieces of information are listed at the top of the window:

- Route;
- Section (office, street, primary);
- Date From;
- Date To.

There are three tabs on the Assign Carriers window:



- Scheduled Regulars (Scheduled Regulars without Assignments);
- Flexible Carriers (reserve carriers, PTFs, transitional employees, and casuals);
- Regulars with Scheduled Day Off (Regulars with a Scheduled Day Off).

*Scheduled Regulars tab on  
Assign Carriers window*

**EXPLAIN**

We cover each of these tabs in detail starting with the Scheduled Regulars tab.

**ASK**

What are the columns on this tab and what do each of them mean?

---

**FACILITATOR NOTE**

*Encourage participants to use On-Line Help, if necessary, to define the following columns.*

---

*Answer:*

- Carrier Name – Name of the possible replacement carriers who are scheduled but have not been assigned to a route.
- Type – Carrier’s employee type.
- Assigned Route – Route assigned to carrier.
- Schedule Start Time – Time the carrier is assigned to arrive.
- Date Last Cased – Date that this carrier last cased this route.
- Date Last Carried – Date this carrier last carried this route.
- Days Cased Route – Number of days the carrier has cased this route in the last six months.
- Days Carried Street – Number of days the carrier has carried this route in the last six months.

**ASK**

What questions do you have about the information on this tab?

- CLICK the Flexible Carriers tab.



*Flexible Carriers tab on  
Assign Carriers window*

**STATE**

The Part Time Flexible Carriers tab contains the same columns as the previous tab.

- CLICK the Regulars with Scheduled Day Off tab.

*Regulars with Scheduled  
Day Off tab on Assign  
Carriers window*

**ASK**

What columns are listed on this tab that were not listed on the previous tabs and what do they refer to?

*Answer:*

The columns are:

- OTDL Status – Lists the carrier's OTDL status;
- OT Hours – Lists how many hours the employee has worked in overtime;
- OT Opps – Lists how many times overtime opportunities were offered to the carrier.

**ASK**

Why are these columns on the Regulars with Scheduled Day Off tab?

Possible responses include, but are not limited to:

- It is helpful to know which carriers are on the OTDL so you know who to call first when you need a regular on their scheduled day off.
- It is important to offer all carriers on the OTDL overtime opportunities.
- It is helpful to know if one carrier did not receive any opportunities while another received many opportunities.

*Select a Replacement*

**STATE**

In following with United States Postal Service practices, the tabs are set up in the order you would assign a replacement carrier. Let's select a replacement carrier.

- CLICK the Scheduled Regulars tab.
- SELECT BLAIR, K M.
- CLICK OK.



- VIEW BLAIR, K M in the Replacement carrier field for route xx009.

**ASK**

What questions do you have about the Assign Carriers window?

**ASK**

What is another way to assign BLAIR, K M to the route without using the Assign Replacement . . . button.

*Answer:* Right click and use Quick Assign.

**STATE**

Notice on route xx011 and xx012 on Thursday, the Weekly Schedule window displays SPLIT.

- DOUBLE CLICK the box containing route xx011 and the column containing Thursday.

**STATE**

The Route Daily Details window opens. Notice there is a different carrier assigned to the office and street portions of the route. When this occurs, the weekly schedule window displays SPLIT.

- CLICK Close.

**ASK**

What questions do you have about anything we have covered so far?

**Activity**

*Weekly Schedule*

**STATE**

Next, we are going to complete a scenario activity.

**REFER** to page 16, Weekly Schedule, in your Participant Guide.

**STATE**

Follow along as I read the scenario.

**STATE**

In this scenario, the delivery unit supervisor should create a new weekly schedule. HARRISON, J J has requested other leave for 05/16/2000 and 05/17/2000 of next week. On 05/16/2000, mail volume is expected to be low.



**STATE**

Your goal is to create a weekly schedule, filling the vacant route with a scheduled regular for 05/17/2000. Due to expected low mail volume on 05/16/2000, you should leave the route vacant for that day. After you have created the weekly schedule, print it so that you can post it in the delivery unit.

**ASK**

What questions do you have about the activity before we get started?

**STATE**

Great! Let's get started.

---

**FACILITATOR NOTE**

*While participants are completing the activity, walk around the room and provide help. Make sure participants use On-Line Help, the Quick Reference Guide, and CBT if necessary.*

*Following this activity, ask two participants to share how they completed the activity. Also, ask them why they chose the steps that they did. Thank them for their answers.*

---

**Activity Debrief**

**ASK**

How did you complete this activity? Who wants to volunteer to walk us through their steps?

- CLICK the View Next Week button.
- CLICK the Create Vacancy... button.
- SELECT HARRISON, J J.
- SELECT Other Leave as the Vacancy Type.
- SELECT Full Day.
- VIEW 05/16/2000 in the Date From field.
- SELECT 05/17/2000 in the Date To field.
- CLICK Save.
- CLICK No on the *Generate 3971?* message box.
- CLICK Close on the Create Vacancy - 3971



window.

- VIEW the Weekly Schedule window.
- RIGHT CLICK on the row containing route xx012 on the column containing Wednesday.
- SELECT Show from the floating menu.
- SELECT Vacant Routes Only.
- RIGHT CLICK on the row containing route xx012 on Wednesday.
- SELECT Show from the floating menu.
- SELECT Carrier Work Status.
- VIEW the Carrier Work Status window.
- RIGHT CLICK on the row containing route xx012 on the column containing Thursday.
- SELECT Quick Assign from the floating menu.
- SELECT BURNS, G R from the Carrier Name drop-down list box.
- SELECT Primary from the Section drop-down list box.
- VIEW 05/17/2000 in the Date To and Date From spin boxes.
- CLICK OK.
- VIEW the Carrier Work Status window.
- VIEW the vacant route does not have a replacement carrier because of low mail volumes.
- CLICK the Print Preview button.
- VIEW the Next Week radio button is selected.
- CLICK the Print Preview button.
- VIEW the weekly schedule and verify that all of



the information for route xx012 is correct on the report.

**ASK**

Did anyone complete the steps in a different order?

**ASK**

What questions do you have about the activity?

- CLICK the **X** (close) button on the DOIS Preview Report window.
- CLICK Close on the Weekly Schedule window.

**EXPLAIN**

In addition to the Weekly Schedule, there are a number of other windows that can help with weekly planning activities. We cover these windows briefly. For more information on any of these windows, use On-Line Help.

*Daily Assignment*

**STATE**

Using the Daily Assignment window, you can change carrier's start times and assign AM overtime.

*Assign AM Overtime*

**STATE**

You can also assign AM overtime using the Assign AM overtime window in the Weekly Schedule area.

- CLICK the Regular Work Assignments button.

**Walkthrough**

*Regular Work Assignments*

**STATE**

There may be times when you want to make more permanent changes to work assignments than the Weekly Schedule will allow. The Regular Work Assignments window may be used to enter these types of long-term assignments. Instead of making the same updates to the weekly schedule each week, you can use the Regular Work Assignments window in order to make the same assignment for a longer period of time.

**STATE**

In the example, BROOKS, J M on route xx002 does not work on route xx002 on Saturdays. Every Saturday, SHELDING, B M covers route xx002. Instead of assigning SHELDING, B M each week on the Weekly Schedule, you can use the Regular Work Assignment window in order to automatically assign SHELDING, B M to cover route xx002 every Saturday.

- VIEW the row containing carrier BROOKS, J M.



**STATE**

Notice BROOKS, J M is not working on Saturday. Also, notice SHELDING, B M is assigned as the Primary carrier for route xx002 on Saturdays. This assignment runs automatically each week until you choose to delete the assignment. When you open the Weekly Schedule window, this assignment is already made. You do not have to update the assignment on the Weekly Schedule window each week, DOIS automatically does that for you.

**STATE**

Let's practice using this window. In this example, route xx016 is consistently burdened and needs an hour of office assistance each day from MILLER, K P. The delivery unit supervisor is in the process of completing a minor adjustment on the route, but in the meantime, wants to create a regular work assignment for this route. Please record the new work assignment in DOIS.

**ASK**

What is the first step I would take to create a regular work assignment?

*Answer:*

- CLICK the New button.

**ASK**

What type of assignment would I choose?

*Answer:*

- SELECT Office Aux from the Assignment Type drop-down list box.
- VIEW 1:00 in the Duration spin box.

**STATE**

Every day, MILLER, K P provides assistance to route xx016.

- SELECT MILLER, K P from the Carrier drop-down list box.
- SELECT route xx016 from the Route drop-down list box.



### **STATE**

MILLER, K P provides auxiliary assistance each day of the week, except Saturday and Sunday.

- CLICK the Monday checkbox in the Service Day Options area.
- CLICK the Tuesday checkbox in the Service Day Options area.
- CLICK the Wednesday checkbox in the Service Day Options area.
- CLICK the Thursday checkbox in the Service Day Options area.
- CLICK the Friday checkbox in the Service Day Options area.

### **STATE**

Notice that there are three scheduling options on the New Regular Work Assignment window. If Replace Matching Assignments checkbox is selected, the carrier's assignment will override other carriers who might be assigned to this route on that day. If the Schedule Carrier if Unscheduled checkbox is selected then the carrier will be scheduled to work even if that carrier was previously not scheduled. In order for the new assignment to run automatically each week, you should select the Auto Submit checkbox.

- CLICK the Auto Submit checkbox.
- CLICK OK.

### **STATE**

If you do not select the Auto Submit checkbox, then you must click the Submit button in the bottom center of the Regular Work Assignments window each time you set up a regular work assignment. You would use this Submit button when the work assignment you created occurs infrequently. Remember that you must complete this step prior to the week you want the assignment to occur.

### **EXPLAIN**

Notice the new row with MILLER, K P providing office auxiliary assistance to route xx016. When MILLER, K P is no longer



required to offer assistance, you would click Delete in order to delete this work assignment. Do not complete this step at this time.

– CLICK Close.

**ASK**

What questions do you have regarding the Regular Work Assignments window?

**Summary**

**ASK**

What advantages can we add to the DOIS Advantages Rip-chart?

Possible responses include, but are not limited to:

- I can fill vacancies depending on available carriers and decide which carrier is best suited to cover this route.
- I can decide to leave a route vacant based on low mail volumes.
- I can schedule carriers to come in early if I think there will be high mail volumes.
- All the information I need to complete a weekly schedule is listed on the window. I can make my decisions based on information right in front of me.

**STATE**

Weekly Planning in DOIS allows you to make scheduling decisions based on a number of different factors. By having all of this information in one place, creating the weekly schedule is simple. Now we are going to complete a longer scenario activity that requires you to use all of the different planning functions in DOIS.

**END OF TOPIC 3.3.**

**CONTINUE** to Activity 3.4.



### Activity 3.4

### Planning Practice

#### Target Skills

Upon completion of this activity, participants will be able to:

- Use DOIS planning functions.
- 

#### Introduction

##### STATE

In this topic, you use DOIS to work on a realistic planning scenario. You are given a scenario and a goal of completing planning activities for the upcoming quarter and the upcoming week. I am going to be walking around and providing assistance as necessary.

---

#### FACILITATOR NOTE

*Provide all DOIS facilitators with a copy of this activity.*

---

**REFER** to page 17, Planning Practice, in your Participant Guide.

##### STATE

Please follow along as I read the scenario.

#### Participant Goals

##### STATE

In this activity, you are expected to use DOIS as you would in your delivery unit. All of your mail volume is entered, however, you still have routes to cover and decisions to make for the day. In addition, your Participant Guide contains additional planning activities that you need to complete. Each participant should evaluate their workload and create the weekly schedule to accomplish the following:

- Maximize productivity of carriers based on projected mail volume for the day;
- Cover any vacancies left in your unit;
- Pivot any available routes.

#### Resources

##### EXPLAIN

It is FY 2000, AP 9, quarter two, and week one. You have On-Line Help, your Quick Reference Guide, and your Participant Guide to help you to complete the tasks in this scenario.

##### EXPLAIN

In this activity, you have complete freedom to use DOIS



yourself! You are responsible for all decisions that you make to create a weekly schedule and update the OTDL.

**STATE**

You have 30 minutes to complete the activity.

**ASK**

What questions do you have about the activity before we begin?

---

**FACILITATOR NOTE**

*The Participant Guide contains:*

- *Weekly Schedule scenario;*
- *Overtime Equity scenario;*
- *AM overtime scenario.*

*While participants are completing the activity, walk around the room and provide help. Make sure participants use On-Line Help and the Quick Reference Guide if necessary.*

*Allow participants 30 minutes to complete the activity. Then prepare to walkthrough the answer with participants.*

---

**Possible Scenario  
Answers**

*Weekly Schedule window*

*Create Vacancy – 3971  
window*

**Schedule Vacancy**

First, schedule a vacancy for CLARKSON, D M who is going to be out from 05/13/2000 to 05/17/2000 of the next week.

- VIEW the Supervisor Workbench.
- CLICK the Planning and Scheduling tab.
- CLICK the Weekly Schedule button.
- CLICK Close on the Special Inspection Warnings window.
- SELECT the row which contains route xx007 and the column containing Saturday.
- CLICK the Create Vacancy... button.
- VIEW CLARKSON, D M in the Carrier Name drop-down list box.



- SELECT Annual Leave from the Vacancy Type drop-down list box.
- VIEW the Full Day radio button.
- VIEW 05/13/2000 in the Date From spin box.
- CLICK the up arrow on the Date To spin box until 05/17/2000 is displayed.
- CLICK Save.
- CLICK the No button to the *Generate 3971?* message box.
- CLICK Close on the Create Vacancy – 3971 window.

*Assign a Replacement window*

**Saturday**

- RIGHT CLICK on the row containing route xx007 and the column containing Saturday.
- SELECT Show from the floating menu.
- SELECT Vacant Routes Only.
- RIGHT CLICK on the row containing route xx007 and the column containing Saturday.
- SELECT Show from the floating menu.
- SELECT Carrier Work Status.
- RIGHT CLICK on the row containing route xx007 and the column containing Saturday.
- SELECT Quick Assign from the floating menu.
- SELECT BURNS, G R from the Carrier Name drop-down list box.
- SELECT Primary from the Section drop-down list box.
- VIEW 05/13/2000 in the Date To and Date From spin boxes.



**Monday**

Repeat process for Monday, 05/15/2000. Select carrier, BLAIR, K M.

**Tuesday**

Repeat process for Tuesday, 05/16/2000. Select carrier, SHELDING, B M.

**Wednesday**

Leave Wednesday vacant. Plan to cover Wednesday by pivoting or calling in a PTF.

**ASK**

What is your analysis of the unit's overtime based on this report?

Possible responses include, but are not limited to:

- Some carriers have worked many overtime opportunities while others have not worked any.
- Carriers may not have been offered overtime due to an extended illness or limited light duty status.

**ASK**

How did you assign MILLER, K P AM overtime?

Possible responses include, but are not limited to:

- CLICK the Assign AM Overtime button on the Planning and Scheduling tab of the Supervisor Workbench.
- CLICK the up arrow in the Date field until it reaches 05/15/2000.
- SELECT MILLER, K P from the Carrier drop-down list box.
- SELECT route xx016 from Route drop-down list box.
- CLICK the up arrow in the Duration spin box until 1:00 is displayed.
- CLICK OK.



**ASK**

What other decisions did you make in your delivery unit?

Possible responses include, but are not limited to:

- Covered the vacancy for route xx005.
- Covered the office vacancy for route xx004.
- Adjusted my overtime and undertime.

**ASK**

How many of you were able to balance the overtime and undertime in your delivery unit?

---

**FACILITATOR NOTE**

*At the end of the scenarios, lead the group in a debrief of the scenario activities. Encourage participants to discuss how they completed the steps. If one participant has an interesting way to complete the activity, allow them to use the facilitators computer, and demonstrate it. Use facilitation techniques to guide the discussion and stay within the allotted time.*

*Use your judgment when deciding which questions would be most appropriate to ask participants. Your choice of questions should depend on the amount of time remaining for this module, as well as the interest of the participants.*

---

**Activity Debrief**

**ASK**

- How did you achieve the scenario goals?
- What was easy or difficult about the activity?
- What DOIS functions were new or confusing?
- How did DOIS assist in making effective planning decisions in the Weekly Schedule window?
- How did you use Performance Support (On-Line Help, Quick Reference Guide, and facilitators)?
- What parts of the DOIS planning windows were particularly helpful?
- What lessons do you wish to share with the group?

**Summary**

**STATE**

Thanks! That was a great discussion.



**END OF ACTIVITY 3.4.**

**CONTINUE** to the Module 3 Debrief.



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**Debrief**

**What Did You Learn?**

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**Introduction**

**EXPLAIN**

We have covered a lot of material today. Now we debrief day one. This debrief activity provides an opportunity for participants to identify their major learning points in Modules 1 – 3.

---

**Discussion**

**STATE**

On a separate sheet of paper, identify and list two major learning points from the materials we covered today.

---

**FACILITATOR NOTE**

*Allow participants a few minutes to think about their learning points and note it on their separate sheet of paper.*

---

**ASK**

Who would like to share their learning points with the group?

Possible responses include, but are not limited to:

- How to pivot;
- How to assign assistance;
- How to assign overtime;
- How to create a weekly schedule;
- How to assign assistance while completing weekly planning;
- How to adjust leave office time;
- How to change report time of a carrier;
- Where to find budget information in DOIS when completing a weekly schedule.

**ASK**

At this stage, is there anything that would further prepare you to use DOIS?

---

**FACILITATOR NOTE**

*LIST participant responses on the Getting Prepared Rip-chart.*

---



**STATE**

You all did a great job!

**ASK**

How are you going to use DOIS to complete planning activities when you return to your delivery unit?

Possible responses include, but are not limited to:

- Use the Weekly Schedule window to print the schedule for the week.
- Adjust daily spread to account for high or low mail volumes.
- Use the Overtime Desired List (OTDL) window to create the OTDL for the quarter.

**Summary**

**STATE**

In Module 3, you practiced planning activities for the year, quarter, week, and day. Earlier today we covered daily functions in DOIS.

**ASK**

What questions do you have about any of the material we covered today?

**EXPLAIN**

Tomorrow we are going to learn more about DOIS! We start the day with a Performance Support activity. Then we complete a more detailed scenario activity using the functions in DOIS that we practiced today and that you will use on a daily basis. We end the day with a discussion on route information in DOIS and then a debrief. Have a great evening and I'll see you tomorrow morning!

**END OF MODULE 3.**

**END OF DAY 1.**