Contents

Preface v

Contents of CD-ROM xv

Part I Preliminaries

1 Introduction 3
1.1 Planning and Scheduling: Role and Impact 3
1.2 Planning and Scheduling Functions in an Enterprise 8
1.3 Outline of the Book 11

2 Manufacturing Models 19
2.1 Introduction 19
2.2 Jobs, Machines, and Facilities 21
2.3 Processing Characteristics and Constraints 24
2.4 Performance Measures and Objectives 28
2.5 Discussion 32

3 Service Models 37
3.1 Introduction 37
3.2 Activities and Resources in Service Settings 40
3.3 Operational Characteristics and Constraints 41
3.4 Performance Measures and Objectives 43
3.5 Discussion 45

Part II Planning and Scheduling in Manufacturing

4 Project Planning and Scheduling 51
4.1 Introduction 51
4.2 Critical Path Method (CPM) 54
4.3 Program Evaluation and Review Technique (PERT) 58
4.4 Time/Cost Trade-Offs: Linear Costs 61
4.5 Time/Cost Trade-Offs: Nonlinear Costs 68
4.6 Project Scheduling with Workforce Constraints 69
4.7 ROMAN: A Project Scheduling System for the Nuclear Power Industry 72
4.8 Discussion 76

5 Machine Scheduling and Job Shop Scheduling 81
5.1 Introduction 81
5.2 Single Machine and Parallel Machine Models 82
5.3 Job Shops and Mathematical Programming 84
5.4 Job Shops and the Shifting Bottleneck Heuristic 87
5.5 Job Shops and Constraint Programming 93
5.6 LEKIN: A Generic Job Shop Scheduling System 102
5.7 Discussion 109

6 Scheduling of Flexible Assembly Systems 115
6.1 Introduction 115
6.2 Sequencing of Unpaced Assembly Systems 116
6.3 Sequencing of Paced Assembly Systems 122
6.4 Scheduling of Flexible Flow Systems with Bypass 127
6.5 Mixed Model Assembly Sequencing at Toyota 132
6.6 Discussion 135

7 Economic Lot Scheduling 141
7.1 Introduction 141
7.2 One Type of Item and the Economic Lot Size 142
7.3 Different Types of Items and Rotation Schedules 146
7.4 Different Types of Items and Arbitrary Schedules 150
7.5 More General ELSP Models 159
7.6 Multiproduct Planning and Scheduling at Owens-Corning Fiberglas 162
7.7 Discussion 164

8 Planning and Scheduling in Supply Chains 171
8.1 Introduction 171
8.2 Supply Chain Settings and Configurations 173
8.3 Frameworks for Planning and Scheduling in Supply Chains 178

8.4 A Medium Term Planning Model for a Supply Chain 184
8.5 A Short Term Scheduling Model for a Supply Chain 190
8.6 Carlsberg Denmark: An Example of a System Implementation 193
8.7 Discussion 197

Part III Planning and Scheduling in Services

9 Interval Scheduling, Reservations, and Timetabling 205
9.1 Introduction 205
9.2 Reservations without Slack 207
9.3 Reservations with Slack 210
9.4 Timetabling with Workforce Constraints 213
9.5 Timetabling with Operator or Tooling Constraints 216
9.6 Assigning Classes to Rooms at U.C. Berkeley 221
9.7 Discussion 224

10 Scheduling and Timetabling in Sports and Entertainment . 229
10.1 Introduction 229
10.2 Scheduling and Timetabling in Sport Tournaments 230
10.3 Tournament Scheduling and Constraint Programming 237
10.4 Tournament Scheduling and Local Search 240
10.5 Scheduling Network Television Programs 243
10.6 Scheduling a College Basketball Conference 245
10.7 Discussion 248

11 Planning, Scheduling, and Timetabling in Transportation .. 253
11.1 Introduction 253
11.2 Tanker Scheduling 254
11.3 Aircraft Routing and Scheduling 258
11.4 Train Timetabling 272
11.5 Carmen Systems: Designs and Implementations 279
11.6 Discussion 283

12 Workforce Scheduling 289
12.1 Introduction 289
12.2 Days-Off Scheduling 290
12.3 Shift Scheduling 296
12.4 The Cyclic Staffing Problem 299
12.5 Applications and Extensions of Cyclic Staffing 301
12.6 Crew Scheduling 303
12.7 Operator Scheduling in a Call Center 307
12.8 Discussion 311

Part IV Systems Development and Implementation

13 Systems Design and Implementation 319
13.1 Introduction 319
13.2 Systems Architecture 320
13.3 Databases, Object Bases, and Knowledge-Bases 322
13.4 Modules for Generating Plans and Schedules 327
13.5 User Interfaces and Interactive Optimization 330
13.6 Generic Systems vs. Application-Specific Systems 336
13.7 Implementation and Maintenance Issues 339

14 Advanced Concepts in Systems Design 345
14.1 Introduction 345
14.2 Robustness and Reactive Decision Making 346
14.3 Machine Learning Mechanisms 351
14.4 Design of Planning and Scheduling Engines and Algorithm Libraries 357
14.5 Reconfigurable Systems 360
14.6 Web-Based Planning and Scheduling Systems 362
14.7 Discussion 365

15 What Lies Ahead? 371
15.1 Introduction 371
15.2 Planning and Scheduling in Manufacturing 372
15.3 Planning and Scheduling in Services 373
15.4 Solution Methods 375
15.5 Systems Development 377
15.6 Discussion 378

Appendices

A Mathematical Programming: Formulations and Applications 383
A.1 Introduction 383
A.2 Linear Programming Formulations 383
A.3 Nonlinear Programming Formulations 386
A.4 Integer Programming Formulations 388
A.5 Set Partitioning, Set Covering, and Set Packing 390
A.6 Disjunctive Programming Formulations 391

B Exact Optimization Methods 395
B.1 Introduction 395
B.2 Dynamic Programming 396
B.3 Optimization Methods for Integer Programs 400
B.4 Examples of Branch-and-Bound Applications 402

C Heuristic Methods 413
C.1 Introduction 413
C.2 Basic Dispatching Rules 414
C.3 Composite Dispatching Rules 417
C.4 Beam Search 421
C.5 Local Search: Simulated Annealing and Tabu-Search 424
C.6 Local Search: Genetic Algorithms 431
C.7 Discussion 433

D Constraint Programming Methods 437
D.1 Introduction 437
D.2 Constraint Satisfaction 438
D.3 Constraint Programming 439
D.4 OPL: An Example of a Constraint Programming Language 441
D.5 Constraint Programming vs. Mathematical Programming 444

E Selected Scheduling Systems 447
E.1 Introduction 447
E.2 Generic Systems 447
E.3 Application-Specific Systems 448
E.4 Academic Prototypes 448

F The Lekin System User's Guide 451
F.1 Introduction 451
F.2 Linking External Algorithms 451

References 459

Notation 489

Name Index 493

Subject Index 501