

Setting Up & Using Furniture Scheduler



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About Furniture Scheduler

This feature was designed to help you better track your deliveries, installations, and other activities related to your contract furniture business. In the Scheduler window, you can easily add, change, and delete event information. You can also manage your available resources and event lists.

When scheduling events, you can:

- Add more than one event for a sales order.
- Add more than one event of the same type for a sales order.
- Create events that are independent of a sales order.
- Schedule multiple time periods for a single event.
- Schedule an event in Furniture O/E Change and Verify modes, as well as Project Management and link that event to a sales order.

Before You Begin

Before you begin using Furniture Scheduler:





- Install the latest version of DDMS software, 10.1.0 or later.
- (Optional) Set a password restricting access to the Scheduler window.
- **WARNING:** Import your data through the new EBS SQL Import Panel. You must import your file information and then set up a schedule for importing future data. Do NOT proceed with these instructions until you do so. For details, see *Using the EBS SQL Import Panel* hand-out by visiting our website at www.ddms.com/Resources/Support/faq/utilities/EBSSQLimport.pdf.



Setting Up Passwords

You can set a password for use with Furniture Scheduler. This password restricts access to the Scheduler window. The user must enter the correct password after clicking the Scheduler icon in the Furniture menu.

Assign a password and give it only to personnel with the appropriate experience and authority.


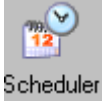
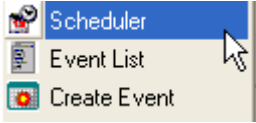
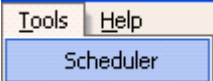
- 1 In DDMS, double-click  and then double-click .
- 2 Double-click Furniture and then double-click Passwords.
- 3 Click the Scheduler Password box, as shown in Figure 1, and enter the password to assign. You can enter up to six alphanumeric characters in this box.
- 4 When finished, click  to save your changes.
- 5 Click  to close the Parameter Editor window.

In Furniture O/E Change and Verify modes and Furniture Project Management, you can create a new event as well as view and change existing events.

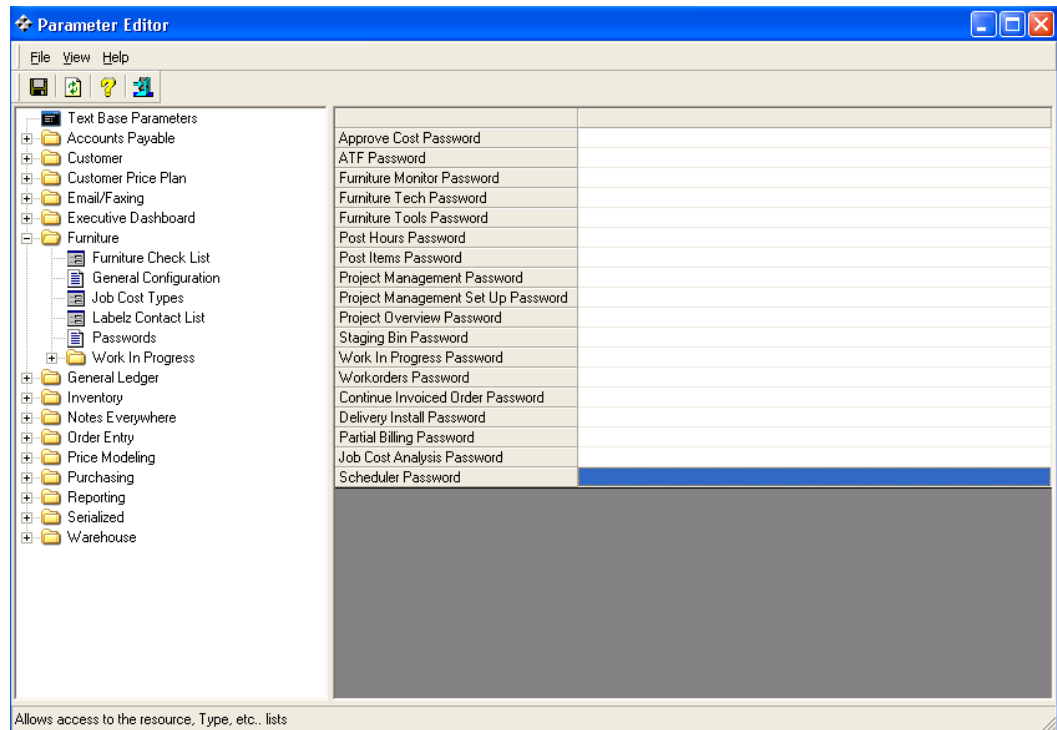
If prompted, enter the correct password.

Accessing the Scheduler Window

There are many methods by which you can access the Scheduler window.

- In DDMS, double-click  and then double-click .
- In Furniture O/E Change or Verify modes, click the Databases menu and choose Scheduler .
- In the Furniture Project Management window, click the Tools menu and click Scheduler .

**Figure 1:
Restricting
Access to the
Furniture
Scheduler
Window**



Using the Scheduler Window

The Scheduler has been designed to let you easily view, create, and manage your scheduled events and available resources. With Scheduler, you can:

- Set Up Maintenance Types
- Set Up Show As Maintenance Types
- Set Up Resource Categories
- Set Up Resources
- Set Up Options
- Create Events
- Arrange the Scheduler View.

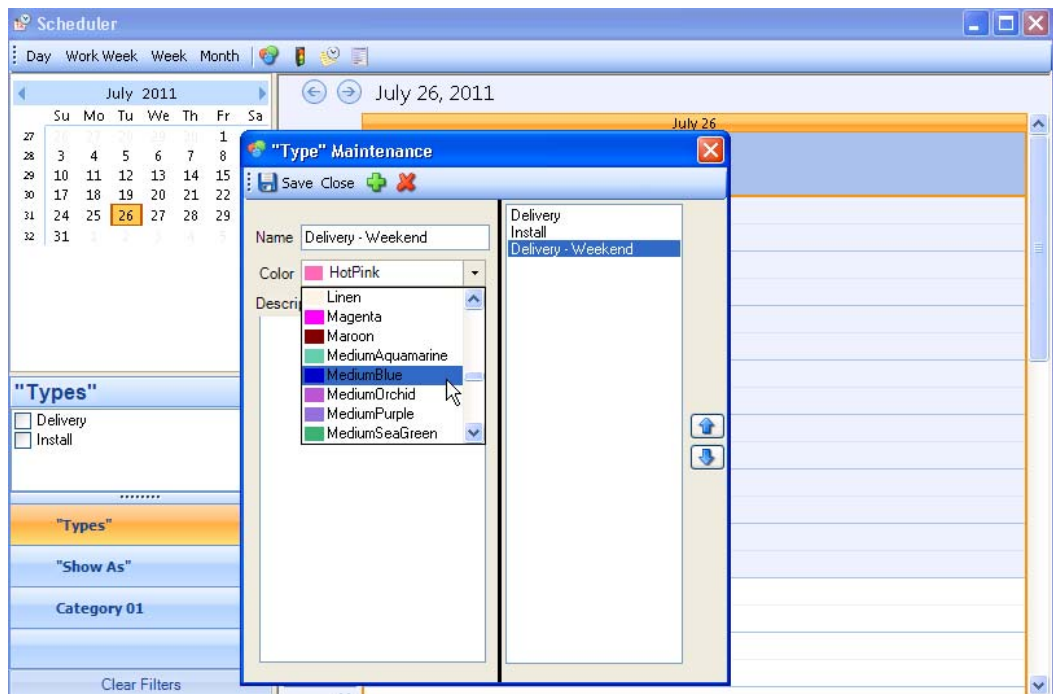
For details on using each of these features, see the appropriate headings below.

Setting Up Maintenance Types

You can add, change, and delete maintenance types in the Furniture Scheduler with one exception. The Delivery and Install maintenance types cannot be changed or deleted.

- 1 Click . The Type Maintenance dialog box opens.
- 2 Click .



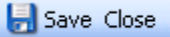
Figure 2:
Adding a
Maintenance
Type



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To change an existing maintenance type, enter the new information over the existing information. To delete, click to highlight and click



- 3 In the Name box, enter a unique name for this maintenance type, Delivery - Weekend, for example.
- 4 Click the down arrow in the Color box and choose the color to assign this type. See Figure 2.
- 5 Click the Description box and enter a description that can help you identify this maintenance type.
- 6 Click  and  to position the maintenance type in the list.
- 7 Continue adding types using Steps 2 through 6. When finished, click . Until you do so, your changes are not saved.

Setting Up Show As Maintenance Types

To change an existing show as maintenance type, enter the new information over the existing information. To delete, click to highlight and click



You can add, change, and delete show as maintenance types in the Furniture Scheduler with one exception. The Estimated and Actual maintenance types cannot be changed or deleted.



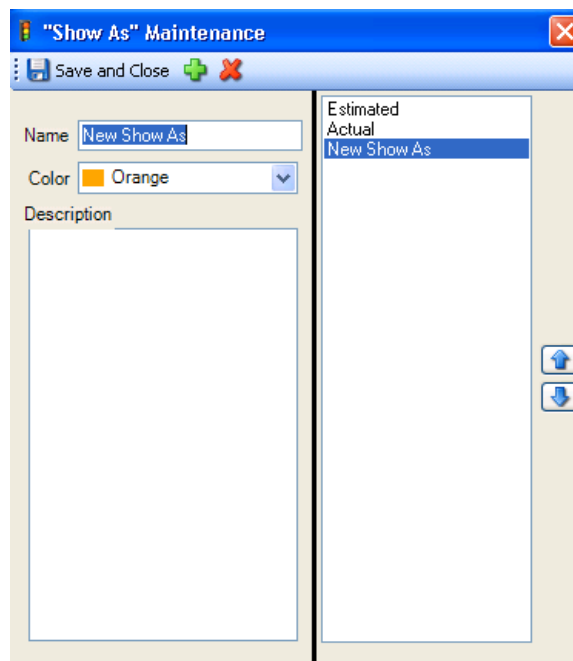



- 1 Click . The Show As Maintenance dialog box opens.
- 2 Click .
- 3 The cursor moves to the Name box, as shown in Figure 3. Enter a unique name for this show as maintenance type.
- 4 Click the down arrow in the Color box and choose the color to assign.


Figure 3:
The Show As
Maintenance
Dialog Box









- 5 Click the Description box and enter a description.
- 6 Click  and  to position the show as maintenance type in the list.
- 7 Continue adding types using Steps 2 through 6. When finished, click . Until you do so, your changes are not saved.

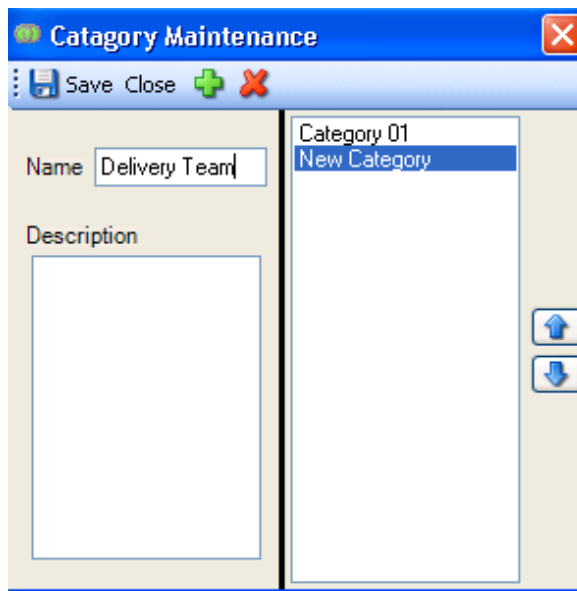
Setting Up Resource Categories


When setting up resources, you can select a category, Delivery Teams and Installation Teams, for example.

To change an existing category, enter the new information over the existing information. To delete, click to highlight and click .

- 1 Click . The Resource Maintenance dialog box opens.
- 2 Click . The Category Maintenance dialog box opens.
- 3 Click .
- 4 In the Name box, enter a unique name for this category. See Figure 4.
- 5 Click the Description box and enter a description.
- 6 Click  and  to position the category in the list.
- 7 Continue adding categories using Steps 3 through 6. When finished, click . Until you do so, your changes are not saved.






**Figure 4:
The Category
Maintenance
Dialog Box**



To change an existing resource, enter the new information over the existing information. To delete, click to highlight and click .

Setting Up Resources

You can add, change, and delete your available resources in the Scheduler window. Resources include your delivery and installation teams, for example. When scheduling events, you must take into account the resources you have available. This helps prevent scheduling conflicts and so on.

- 1 Click . The Resource Maintenance dialog box opens.
- 2 Click .
- 3 Click the down arrow in the Category box and choose the category for this resource, Delivery Teams, for example.
- 4 In the Name box, enter a unique name for this resource. See Figure 5.
- 5 Click the Description box and enter a description.
- 6 Click  and  to position the resource in the list.
- 7 Continue adding resources using Steps 2 through 6. When finished, click . Until you do so, your changes are not saved.

Setting Up Options


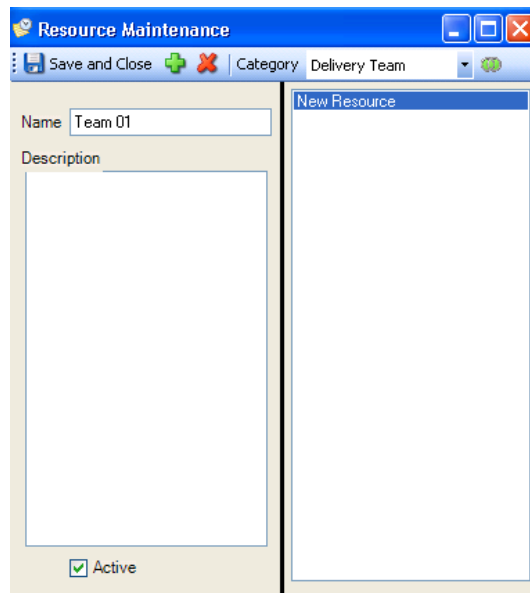
- 1 Click . The Options dialog box opens.
- 2 Click the down arrow in the Start of Day box and choose the beginning time of each work day. This box defaults to 7:00AM.



Figure 5:
The Resource Maintenance Dialog Box



- 3 Click the down arrow in the End of Day box and choose the ending time of each work day. This box defaults to 7:00PM.
- 4 Click the down arrow in the First Visible Time box and select the time to display first in the calendar, 8:00AM, for example. This box defaults to 12:00AM.
- 5 Click the down arrow in the First Week Day box and select the day when your business begins the week, Monday, for example. This box defaults to Sunday.
- 6 Click the Show Work Time Only option to only display the time when your business is operational, 9:00AM to 5:00PM, for example.
- 7 Click Save and Close. Until you do so, your changes are not saved.

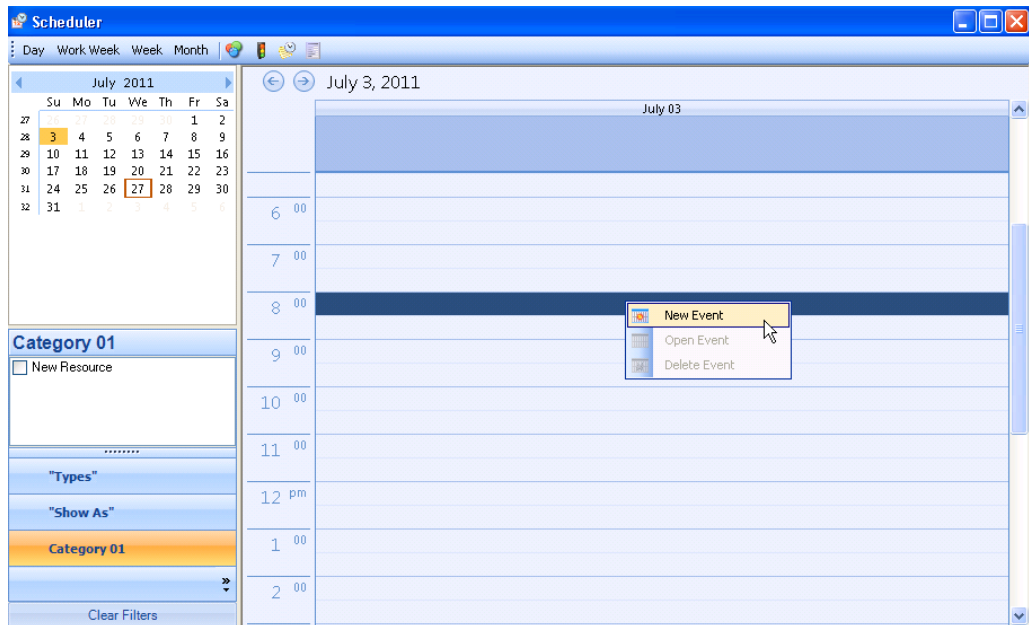
Creating Events

You schedule new events using the Event Detail dialog box.

- 1 You can access the Event Detail dialog box using each of the following:
 - In the Scheduler window, right-click the date in the calendar. Choose New Event. See Figure 6.
 - In Furniture O/E Change or Verify modes, click the Databases menu. Click  Create Event.
 - In the Furniture Project Management window when using Order, Summary, and Item Level views, under Current Options, click  Create Event.

In the Furniture Project Management Current Options section, you can also choose to View Event List and View Event Detail.

Figure 6:
Creating a New Event



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- 2 The Event Detail dialog box opens. When accessed from Order Entry and Project Management, the Event Detail dialog box displays the default information for the order selected, as shown in Figure 7.

In the Appointment and Scheduling Assistant tabs, complete the following information to create the event.


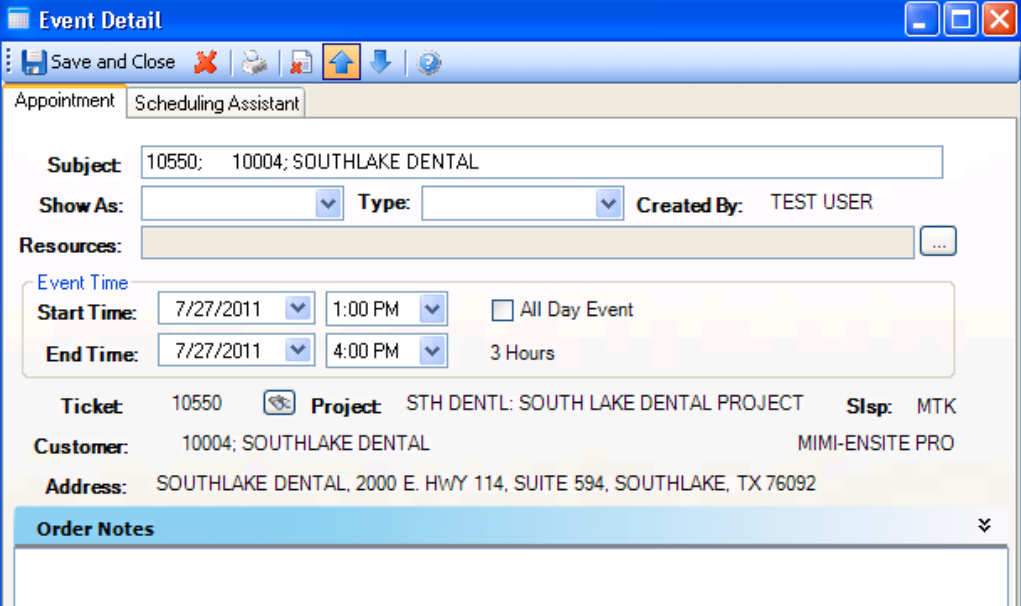
- 2.1 Click the Subject box and enter the description for this event, Special Delivery Tomorrow, for example. This box is required.
- 2.2 Click the down arrow in the Show As box and select the Show As Maintenance type, Estimated or Actual, for example. This box is required.
- 2.3 Click the down arrow in the Type box and choose the maintenance type, Delivery or Install, for example. This box is required.
- 2.4 Click the Resources box and select the resources to be used for this event or click  to query, Team 01, for example.
- 2.5 Choose the beginning and ending date and time for this event.
 - Click the down arrow in the Start Date/Time boxes and select date and time when this event should begin.
 - Click the down arrow in the End Date/Time boxes and select the date and time when this event should end.
 - If this event requires the entire day to perform, click the All Day Event box.

Figure 7:
The Event
Detail
Appointment
Tab



Event Detail

Appointment | Scheduling Assistant

Subject: 10550; 10004; SOUTHLAKE DENTAL

Show As: [v] **Type:** [v] **Created By:** TEST USER

Resources: [...]

Event Time

Start Time: 7/27/2011 [v] 1:00 PM [v] All Day Event






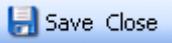
End Time: 7/27/2011 [v] 4:00 PM [v] 3 Hours


Ticket: 10550 **Project:** STH DENTL: SOUTH LAKE DENTAL PROJECT **Slsp:** MTK

Customer: 10004; SOUTHLAKE DENTAL MIMI-ENSITE PRO

Address: SOUTHLAKE DENTAL, 2000 E. HWY 114, SUITE 594, SOUTHLAKE, TX 76092

Order Notes [v]

- 2.6 Click  to select the ticket to which this event applies. To remove the ticket from the event, click .
 - 2.7 Click the Order Notes box and enter any special notes for this event, Delivery to Second Floor, for example.
 - 2.8 Click the Scheduling Assistant tab. This tab can help you manage your available resources. The event displays the time in pale gold. Active resources display under their category on the left. Select a resource in the list to assign this event. See Figure 8.
 - 2.9 You can use this tab to change the time of an event. This is useful when you have scheduling conflicts. If two or more conflicts exist for a specific time period, the system displays a tool tip listing the subject of each conflict. Click the Start Date/Time and End Date/Time boxes to change the beginning and ending dates and times.
 - 2.10 Click  and  to position the events in the list.
 - 2.11 Click  to print the event list.
- 3 Continue adding events. When finished, click . Until you do so, your changes are not saved.

To delete an existing event, click .

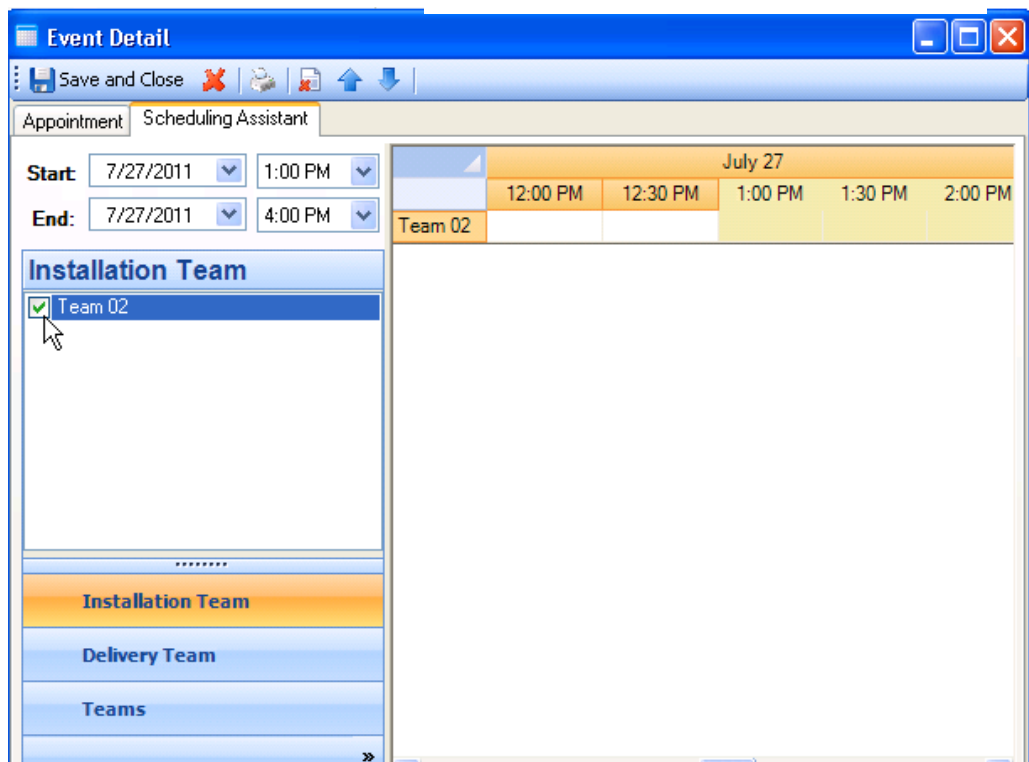




Figure 8:
The Event Scheduling Assistant Tab

Arranging the Scheduler View

The Scheduler window can be arranged to display the information in many different ways.

Choosing Day includes 12:00AM to 11:30PM.
Choosing Work Week excludes weekends.
Selecting Week displays the entire week.
Choosing Month displays one month at a time.

- Click the day of the month to view information on that specific day.
- Click **Day Work Week Week Month** to change the calendar view to a specific day, the work week, the entire week or the entire month.
- Click  and  to view the previous or next day, work week, entire week, or month.
- Click and hold Ctrl. Then click each date to view, July 1st, July 9th, and July 23rd, for example.
- Click Types and Show As to view and filter your list of maintenance types shown. If you don't filter the list, all events for the selected time period display. Click Clear Filters to remove all the filters set.

Viewing the Event List

When changing and verifying furniture orders or viewing project management detail, you can view your event list with minimal steps.

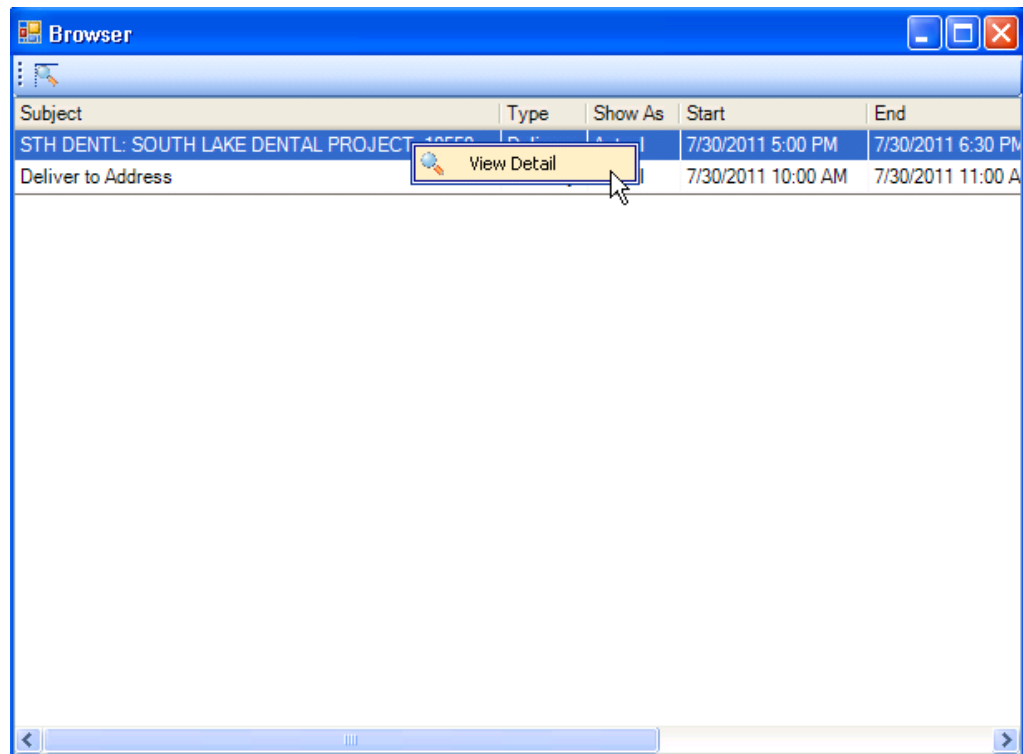


Figure 9:
Viewing the
Event List in
Furniture Order
Entry




- 1 To access the event list:
 - In Furniture Order Entry Change or Verify modes, click the Databases menu and select  Event List.
 - In the Project Management when using Order, Summary, and Item Level views, under Current Options, click  View Event List.
- 2 The list of events for the selected order are shown. You can view and change details for an event by selecting the event to change. The event opens in the Scheduler. To do so, click the event and click . You can also click the event and right-click. Choose View Detail. See Figure 9.
- 3 In addition to viewing and changing events, in Furniture O/E, the system prompts the order-taker when orders containing scheduled events are specified to be deleted. See Figure 10. This prompt appears when all line items on the order are selected for deletion.

Figure 10:
The Warning
Prompt in
Furniture Order
Entry

