DDMS®/DDMSPLUS®: Setting Up & Using Furniture Scheduler

Contents

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:

- Make sure you have the latest version of DDMS®/DDMSPLUS® software.

- (Optional) Set options to control viewing Scheduler detail. One can be used to allow only viewing scheduling information. This option is set using the Set User Restrictions dialog box in the Furniture Project Management window. For details, see the heading **Setting Up the View Only Option**. The second option is a password which allows the user to add, edit, and delete Scheduler Resources, Types, and Show As options. This is set using the Scheduler Password box in Furniture Parameters. For more information, see the heading **Setting Up the Access Password**. Finally, you can also limit the customer detail a salesperson can see when Scheduler Event Detail is displayed. For details, see the heading **Setting Up the Salesperson User Type Box**.

- *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 on importing data on the DDMS system, see the handout Using the EBS SQL Import Panel on the Customer Support Center. For details on importing data on the DDMSPLUS system, see Using the EBS SQL Import Panel.

Setting Up Options

You can set two options for use with Furniture Scheduler. One option is accessed through the Furniture Project Management window and restricts the user to allow only viewing Scheduler detail. The second option is a password which allows the user to add, edit, and delete Scheduler Resources, Types, and Show As options. This applies when opening the Scheduler window through the graphical Furniture menu, as well as opening the Scheduler window in Furniture O/E, and Furniture Project Management applications.

Setting Up the View Only Option

This option is accessed through the Furniture Project Management window. It restricts the user to allow only viewing Scheduler detail.

1. From the Master Menu, double-click . The Furniture Menu opens.

2. Double-click . The window opens, displaying the Template Selection list.

3. In the Module Tasks section, click Set Up Templates.

4. If prompted for a password, enter the password from the Furniture Parameter Passwords. Click OK.

5. The available options open in the Current Options section of the window.

6. Click the Set User Restrictions option. The Set User Restrictions dialog box opens.

7. This dialog box lets you limit Project Management users to only their assigned templates. You can also use this dialog box to allow the ability to only view information in the Scheduler window. To do so, click the Only View Schedule check box corresponding to the name of the user to restrict. To select more than one, hold the Ctrl key and click each box corresponding to each user's name. When finished, click Apply.
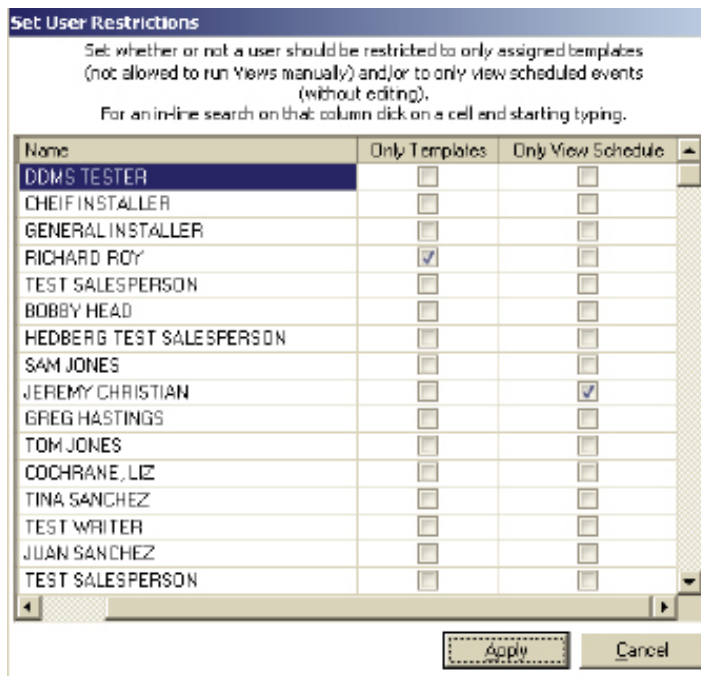

Setting Up the Access Password

This password allows accessing the Resources, Types, and Show As options in the Scheduler window. Unless the user enters the correct password, the options are unavailable.

1. From the Master Menu, double-click .

2. Double-click ![Parameters] .

3. Double-click Furniture and then, double-click Passwords.

4. Click the Scheduler Password box and enter the password to assign. You can enter up to six alphanumeric characters.

5. When finished, click 💾 to save your changes.

6. Click 🔌 to close the Parameter Editor window.
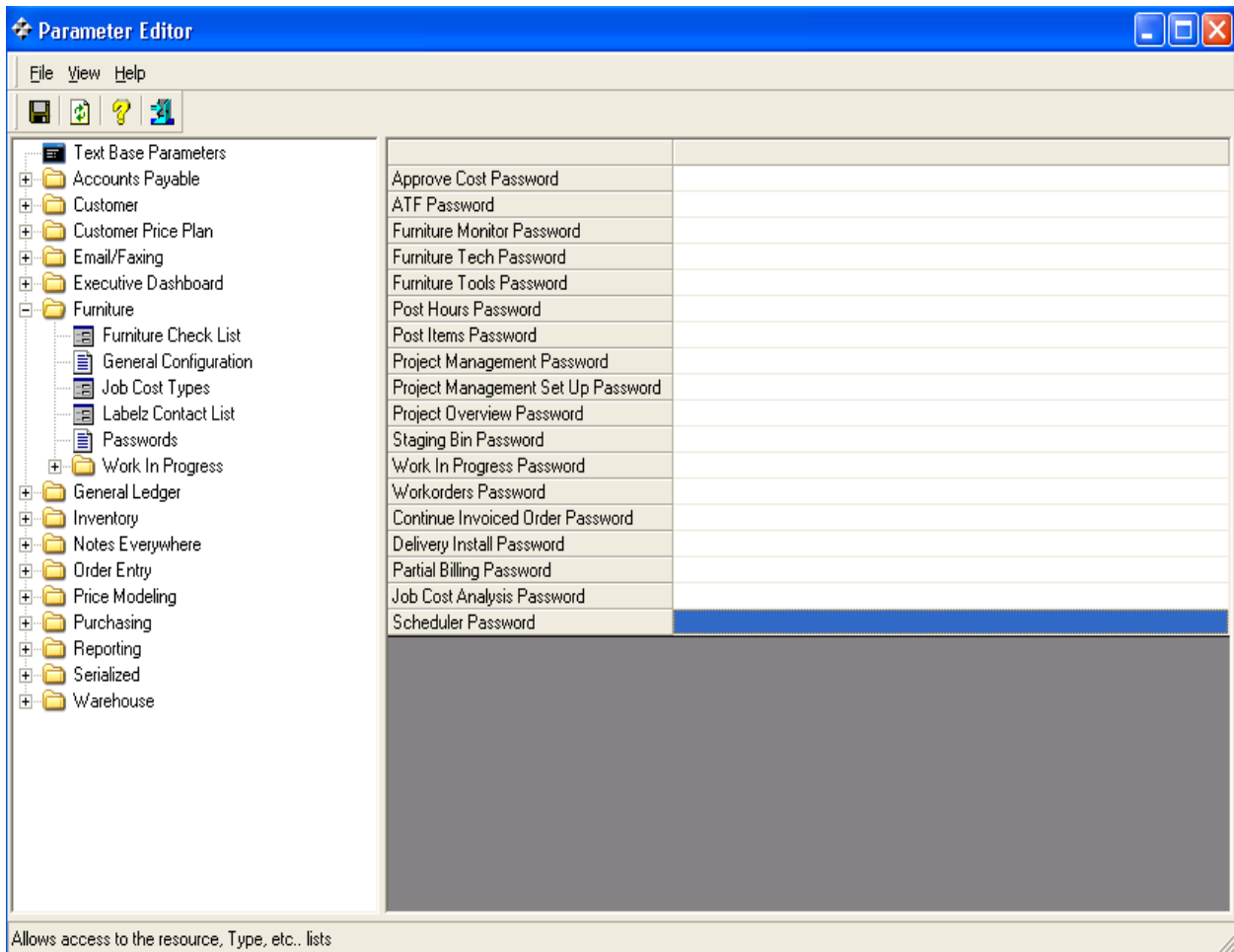
Setting Up the Salesperson User Type Box

The User Type box in the Salesperson Master tab lets you specify that salespersons be allowed to only view their customer information. This box also applies when viewing customer information in the Scheduler Event Detail window.

Note: You can view and create salesperson aliases in the Salesperson database. Setting up salesperson aliases allows you to restrict which customers a salesperson can view. When querying customers, the salesperson only sees the customers assigned to his or her salesperson number. To allow the salesperson to view additional customers, assign a salesperson alias. For more information, see the topic **About Salesperson Aliases** in your online documentation

To restrict salespersons to only viewing their customer detail, you must first:

• Set the Restrict Salesperson Access to their Customers Only parameter in the text-based (LHY) Salesperson Parameters screen to Y. After setting this parameter, we recommend that you rebuild the customer index files.

• Set the Set Order Writer in Main Menu field in the (L0) Global Master Parameters screen to Y.

To set the User Type box:

1. From the Master Menu, double-click Salesperson .

2. Select the salesperson to change.

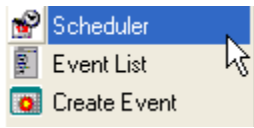3. Click the down arrow in the User Type box and choose Salesperson.

4. Click 🖫 to save your changes.

Accessing the Scheduler Window

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

• From the Master Menu, double-click Furniture and then double-click Scheduler.

• 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.
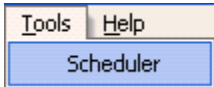
Using the Scheduler Window

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.

Note: Before performing these tasks in the Scheduler window, you must enter the password. When prompted, enter the correct password from Furniture Parameters. For details, see the heading **Setting Up the Access Password** earlier in this handout.

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 .

3. In the Name box, enter a unique name for this maintenance type, Delivery - Weekend, for example.

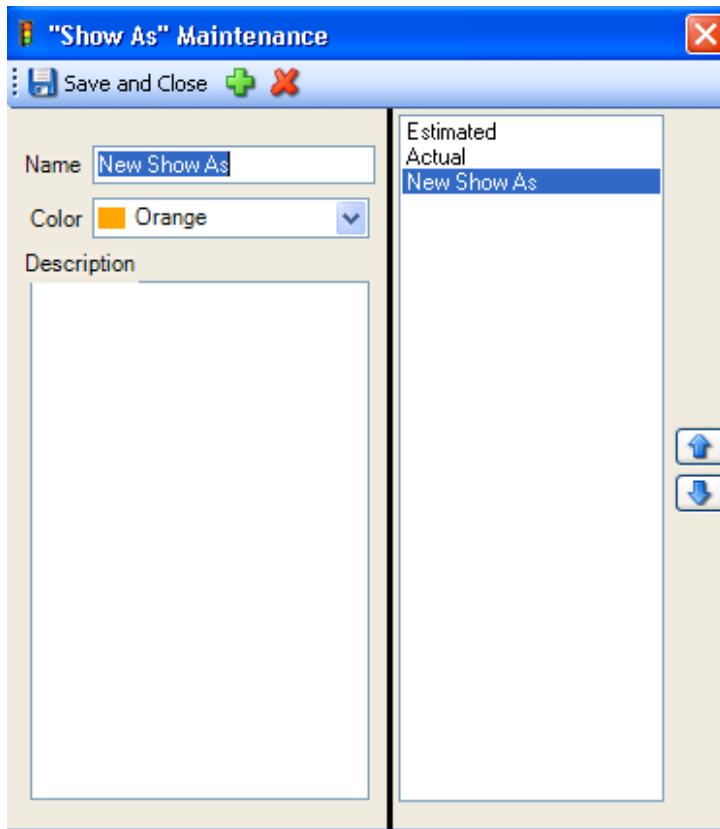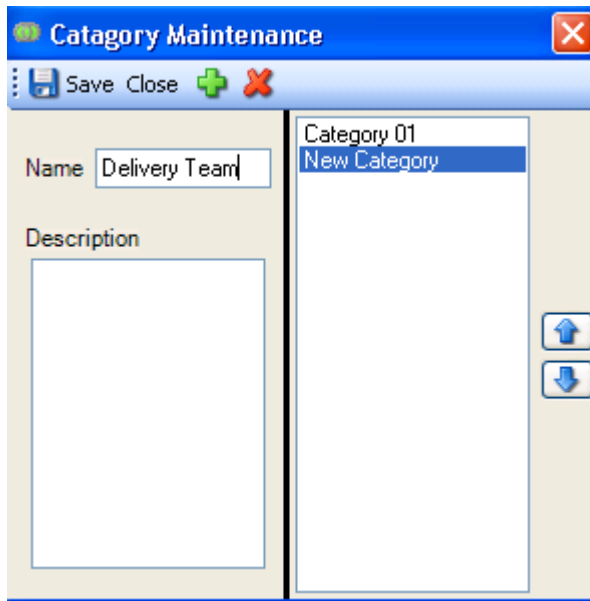4. Click the down arrow in the Color box and choose the color to assign to this type.
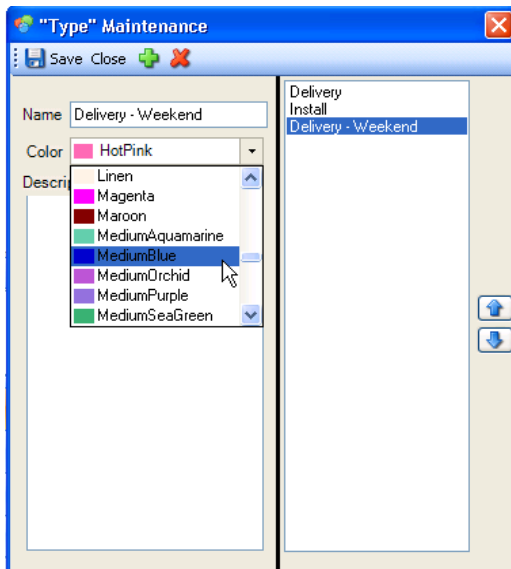
5. Click the Description box and enter a description that can help you identify this maintenance type.

6. Click ⬆ and ⬇ to position the maintenance type in the list.

7. Continue adding types using the instructions in **Step 2** through **Step 6**. When finished, click 💾 Save Close . Until you do so, your changes are not saved.

Setting Up Show As Maintenance Types

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. Enter a unique name for this show as maintenance type.
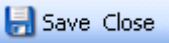
4. Click the down arrow in the Color box and choose the color to assign.

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 the instructions in **Step 2** through **Step 6**. When finished, click .

Setting Up Resource Categories

When setting up resources, you can select a category, such as Delivery Teams and Installation Teams.

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.

5. Click the Description box and enter a description that can help you identify this category.

6. Click ⬆ and ⬇ to position the category in the list.

7. Continue adding categories using the instructions in **Step 3** through **Step 6**. When finished, click 💾 Save Close

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.
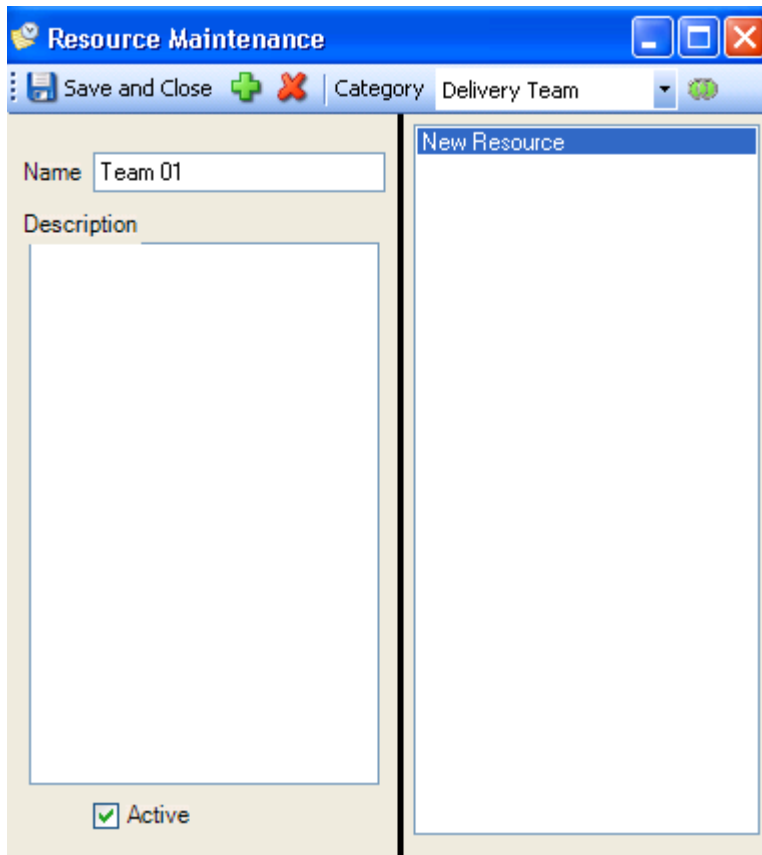
5. Click the Description box and enter a description.

6. Click ⬆ and ⬇ to position the resource in the list.

7. Continue adding resources using the instructions in **Step 2** through **Step 6**. When finished, click 💾 Save Close

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.

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 the Use Location Limits box to specify that the system only display events for your general ledger and/or inventory locations.

8. If you check the Use Location Limits box, click the corresponding G/L Locations and Inventory Locations boxes to specify the locations to view. Separate each location with a comma, 1, 2, 3, for example.

    If the Use Location Limits box is selected, when scheduling events, the system shows resources for all locations. This prevents you from accidently scheduling allocated resources.

    If the location for an order is later changed in O/E, you may need to view all locations before you can view or edit the scheduled event.

9. 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.
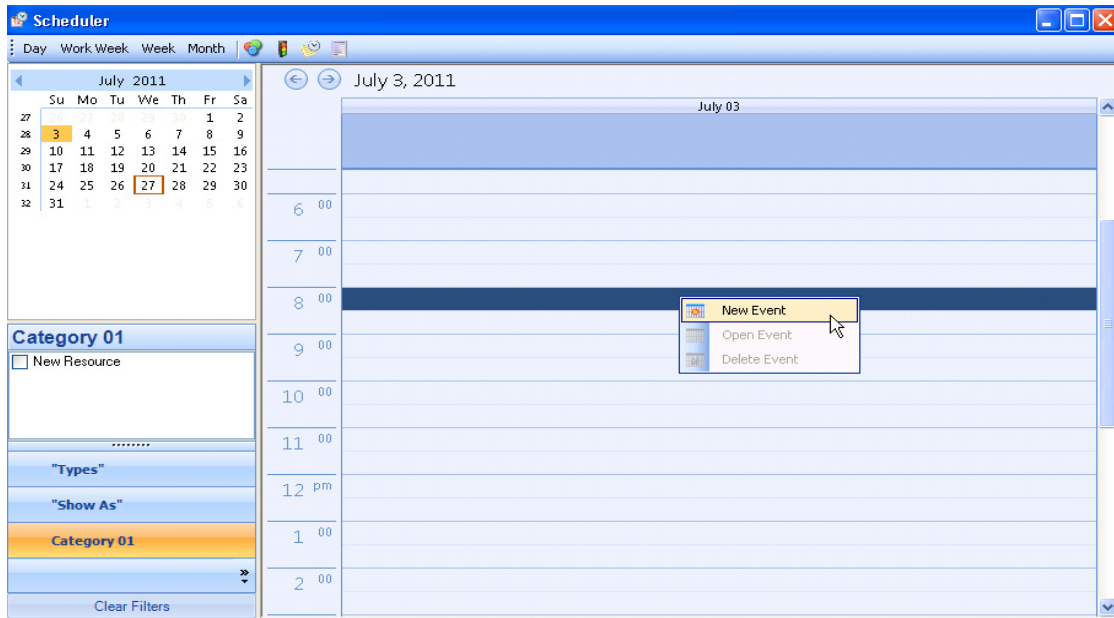
    • In Furniture O/E Change or Verify modes, click the Databases menu. Click [Create Event].

    • 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.)

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.

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 the 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.

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.

continue to next page

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.
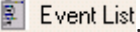
Arranging the Scheduler View

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

• Click the day of the month to view information on that specific day. Choosing Day includes 12:00AM to 11:30PM.

• Click to change the calendar view to one specific day, the work week, the entire week, or the entire month. Choosing Work Week excludes weekends. Selecting Week displays the entire week. Choosing Month displays one month at a time.

• 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.

1. To access the event list:

   • In Furniture Order Entry Change or Verify modes, click the Databases menu and select .

   • In the Project Management when using Order, Summary, and Item Level views, under Current Options, click .

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.
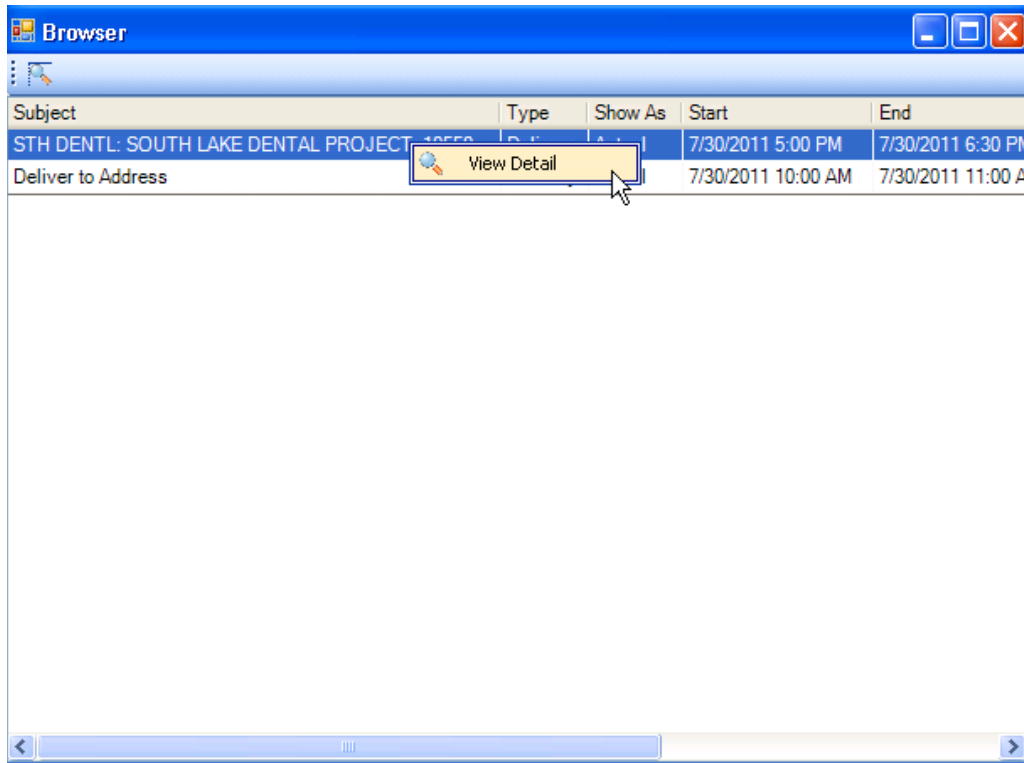
3. In addition to viewing and changing events, in Furniture O/E, the system prompts the order-taker when orders containing scheduled events are specified to be deleted. This prompt appears when all line items on the order are selected for deletion.