



How to use the Scheduler Module

The new Scheduler Module has been a very exciting development for AM-WIN. We have spent considerable time over the last 18 months developing and enhancing the Scheduler to meet the requirements of the Solar Power and Hot water Industry. We are continuing to enhance the product to include very specialised features, such as automatically calculating the Conergy rebates and discounts on a purchase order, offering the provision to print claim forms directly to Greenbank in an approved format and a specialised kit and invoice format that makes the whole estimating and invoicing process far easier and more efficient.

The Scheduler is an additional module to the main AM-WIN package and must be licensed. The best resolution for your monitor to use for this module would be 1280x1024.

Getting Started

To open up the Scheduler Module, double click on the Scheduler shortcut icon in your AMWIN shortcut folder saved on your desktop.

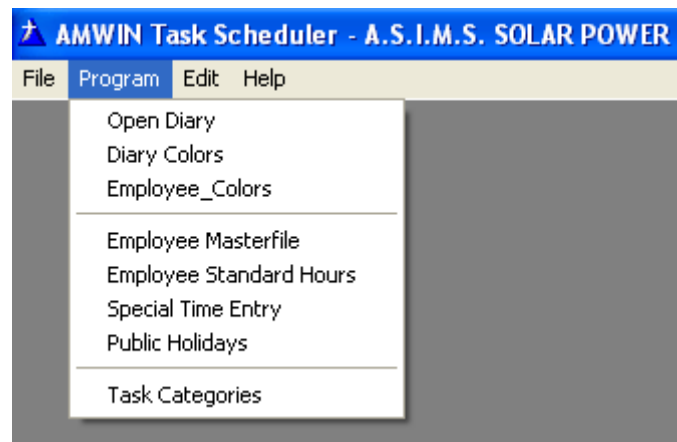


The AMWIN Task Scheduler program will open with the diary screen showing automatically at today's date.

Time	EDDY DAVIS	TED STEWARD	JEFF MASON	PETER WALLACE	PETER ABLE	STUART JONES	JOE OSMOND	ZEAN KONZAC
5:30AM								
6:00AM								
6:30AM								
7:00AM								
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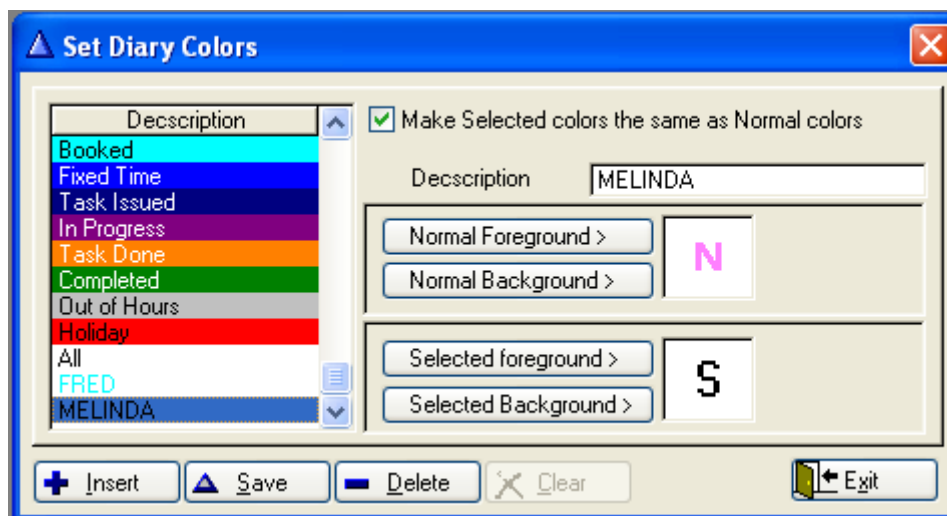
Date	Job No	Type	Cust	Description	Page	Make	Model	Init	Waiting For	Status
3/01/2009	4500	JOB	UNALLOCATED	INSTALLATION	ED110101	Edwards	100 Australia Deep Green	SI	OK	Approved
3/01/2009	4501	JOB	UNALLOCATED	CHANGEOVER	CDV10101	Edwards	L32 Australia Plate Euroalp	SI	OK	Approved
1/01/2009	4502	JOB	UNALLOCATED	WHIT0101	Conergy	AS480/S/O/EOV/E280C		SI	OK	Approved
1/01/2009	4510	JOB	MILL01	INSTALLATION	MILL01001	Conergy	AS480/S/O/EOV/E280C	SI	OK	Approved
1/01/2009	4512	JOB	LEAT01	INSTALLATION	LEAT01001	Conergy	AS480/S/O/EOV/E280C	SI	OK	Approved
1/01/2009	4515	JOB	ED101	INSTALLATION	ED101001	Conergy	AS480/S/O/EOV/E280C	SI	OK	Approved
1/01/2009	4516	JOB	EGAND01	INSTALLATION	EGAND0101	Edwards	L32 Australia Deep Green	SI	OK	Approved
14/01/2009	4518	JOB	PRGE01	SUBRE INSTALLATION	PRGE01001	Conergy	AS480/S/O/EOV/E280C	SI	OK	Approved

Before you begin using the Diary screen to schedule your tasks, you must first go through a series of set up procedures through the Program menu.



Setting Up the Scheduler

From the Program menu select **Diary Colors**. This will bring up the Set Diary Colors screen.



This screen shows a list of status' to use in the scheduler.

Booked means that task has been booked into the diary.

Fixed Time means that task has been booked for a particular time and flexibility is not negotiable.

Task Issued means that the person allocated to that task has been advised of the task.

In Progress means that the task is currently being done by the allocated person.

Task Done means that the task has been done but the job is not completed.

Completed means all tasks allocated to this job and the job has been done and completed.

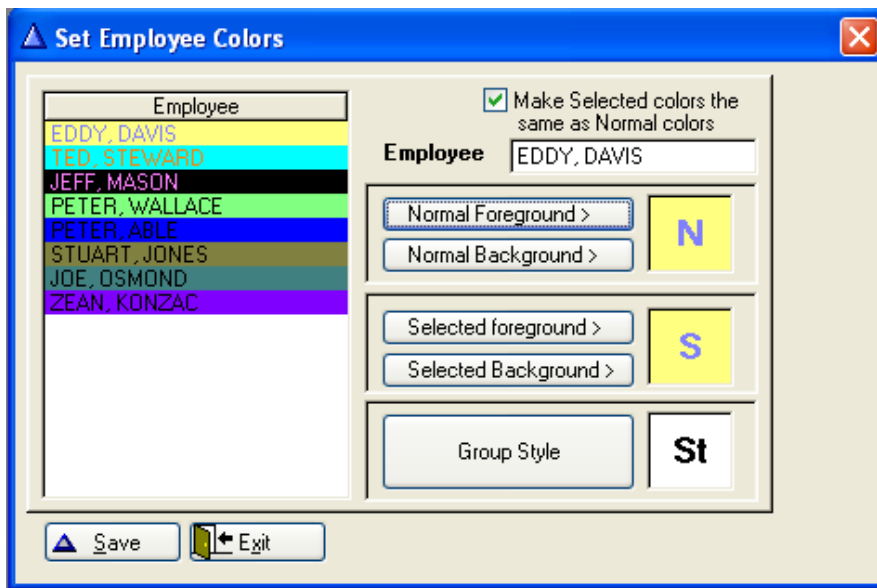
Out of hours means that the job has been booked out of the scheduled diary hours.

Holiday means that the task has been booked on a scheduled public holiday, sick day, leave day etc.

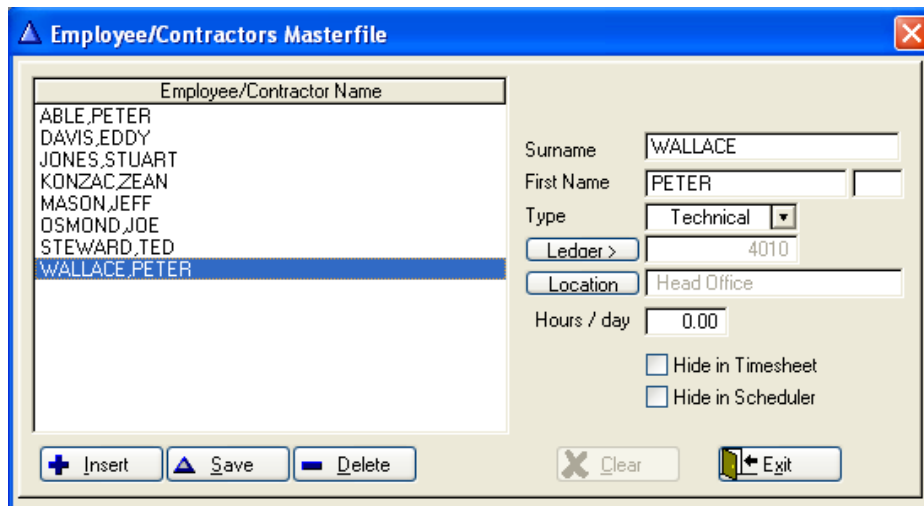
From this screen you can also insert new descriptions and work categories and customize the colours you wish to use for the new descriptions. There is no limit to the number of extra descriptions you can input. To do this you simply click on either the Normal Foreground, Normal Background, Selected Foreground and Selected Background buttons to select your customized colour for that particular description. Then when you have finished customizing the colours for that description, click on the **save button**. You can do this for each description you want to add.

You can also delete any description you have added by highlighting that particular description and then clicking on the **Delete Button**.

From the Program menu select **Employee Colors**. This will bring up the Set Employee Colors screen.



This screen shows the list of Employees which are contained in the Employee Masterfile (except those that are flagged not to be shown in the Scheduler). You can click on each employee and then customize the colours you wish to use for that employee. To do this you simply click on the employee on the left hand side, then click on either the Normal Foreground, Normal Background, Selected Foreground and Selected Background buttons to select your customized colour scheme for that particular employee. Then click on the Group Style Button to select a colour category for that employee. Then when you have finished customizing the colours for that employee, click on the **save button** and then **exit**. You can do this for each employee you want to add. From the Program menu select **Employee Masterfile**. This will bring up the Employee/Contractor Masterfile screen.



This screen shows a list of Employees to use in the Scheduler.

To add an employee, click on the **Insert Button** and enter in the employee's details on the right hand side of the screen using the relevant fields, eg Surname, First Name etc. You can select which type of employee they are, eg Technical, Admin or Sales. Click on the **Ledger Button** to select which labour ledger is allocated for that particular employee. Click on the **Location Button** to select which location they are assigned to. If you don't have multi locations then the location should be defaulted to Head Office. Insert the hours of work they do each day, eg 8 hours. You can also indicate with a tick, whether or not you wish this employee to be shown in the Scheduler Module or the Timesheet module (depending on which you have licenced to your program).

When all the employee's details have been entered, click on the **Save Button** and then **Exit**.

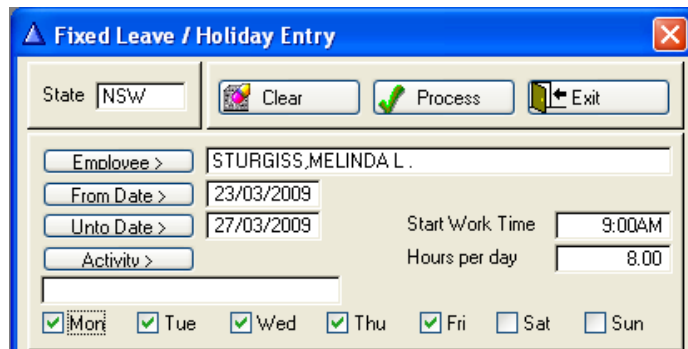
From the Program menu select **Employee Standard Hours**. This will bring up the Employee Standard Hours screen.



Enter into this screen the "Normal" standard hours your employees would work in **24 HOUR TIME**. The system will automatically convert your 24 HOUR TIME to normal hours. Eg Lunch would be entered as 13.00 and the system will automatically convert the time to 1.00pm.

Click on the **OK button** to save.

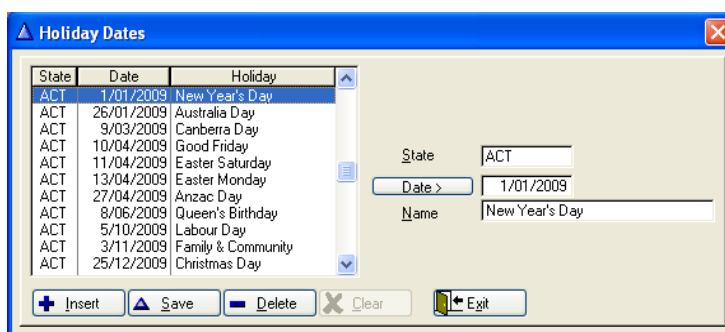
From the Program menu select **Special Time Entry**. This will bring up the Fixed Leave/Holiday Entry screen.



This screen allows you to enter batch entries for Annual leave, sick leave, Carers leave and other special leave for multiple dates in the Scheduler. This particular function relies on the **STATE FIELD** in the **CONTROL FILE** to work properly.

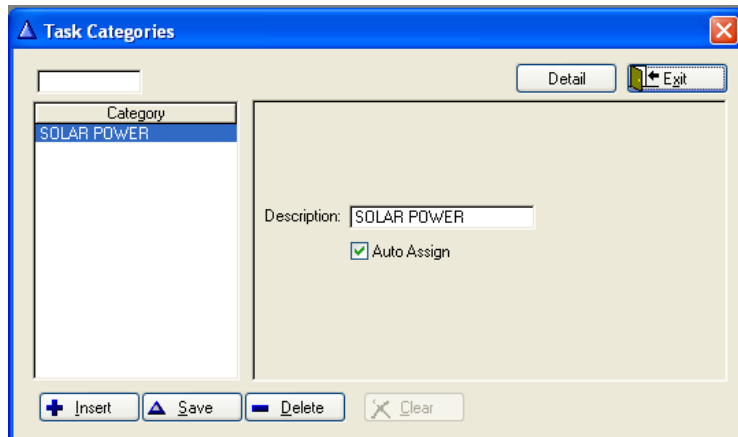
To enter these multiple entries into the scheduler, select the employee from the Employee Button. Then select the dates from the From and Unto Date buttons. Then select the Activity, eg Annual leave, sick leave, Carers leave etc. Enter in the Start Work time eg 9.00am and enter the hours per day this employee usually works. Then select the days which are relevant to that employee's regular working schedule and the leave will be entered on those days between the From and Unto Dates. Then click on the **Process Button** and exit.

From the Program menu select **Public Holidays**. This will bring up the Holiday Dates screen.



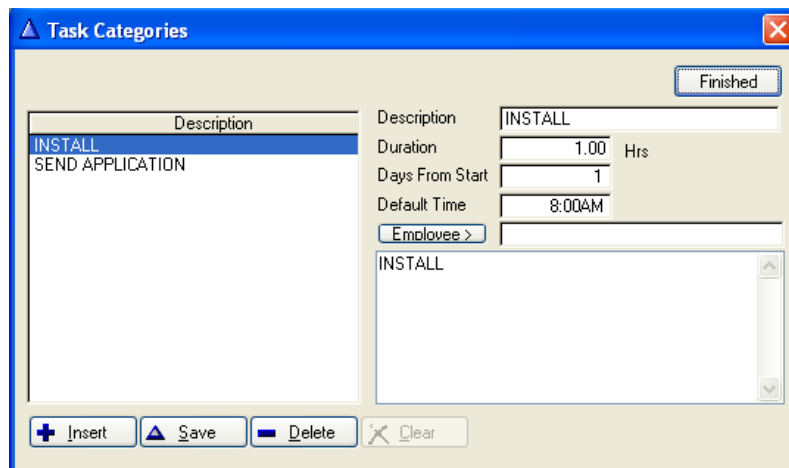
From this screen you can enter in all the public holidays for each state of Australia so the system knows when you enter a job on one of these dates it will know that it is a public holiday and will alert you of this conflict. To enter these dates, click on the Insert Button, Enter the State eg NSW. Click on the Date button to select the appropriate holiday date, then in the Name field, indicate what public holiday it is, eg New Years Day. Then click on the Save button. Once you have entered all of your public holidays into the system, click on the Exit button.

From the Program menu select **Task Categories**. This will bring up the Task Categories screen.



Task Categories is like a kit of tasks and it includes all tasks involved with a particular job category. You can enter a new job category by clicking on the Insert button and typing in your description. Then hit the Save button. (You can auto assign all tasks included in that category when a job is created. Click on the **Auto Assign** option.)

To see a more detailed list of the tasks involved with a job category, we highlight the category of Solar Power and click on the **Detail button**. You can then see that this particular kit of “Solar Power” is made up of other tasks, eg Installation; Send application.



If we highlight the task in the description column you can either modify that task or insert a new task which would be applicable to that job category. For example, you can change the duration of this task from 1 hour to 3 hours or change the days to start this particular task from the beginning of the job to another day, or change the default time to start this particular task to a later or earlier time, to allocate an employee to this task or to write any notes relevant to the job by filling in the relevant fields with the amended information. When you are finished, click on the Save button and then Finished to exit from the screen.

To insert a new task, click on the Insert Button and enter the relevant information into the Description, Duration, Days from Start, Default Time and Employee fields and then click on the Save Button to save and then the Finished button to exit.

Using the Open Diary Scheduler

From the Program menu select **Open Diary**. This will bring up the Employee List Diary screen for that day. The diary is run based on a day starting from 6.00am until 6.00pm.

You will note that all public holidays will be greyed out along with all sick leave, annual leave and other leave. Sundays have an alert message upon clicking on that date or when entering a task on a Sunday.

You have several different views to choose from. You have a daily, weekly and monthly view of your employees and all the tasks included in the scheduler along with a view for 5, 6, 7, 8, 9, 10 or single employees at any one time.

Daily View

The daily view shows all scheduled tasks allocated to each employee for between 5 and 10 employees shown on the scheduler screen at any one time. If you have more than 10 employees, then to see their scheduled tasks in the diary, use the **Previous Employee** and the **Next Employee Buttons** to advance along. There is also an option to see a single view of any one employee. This view shows the scheduled tasks for that particular employee in more detail.

Weekly View

The weekly view shows all scheduled tasks allocated to each single employee over a particular weekly period. You can choose which employee you wish to view from the Employee dropdown menu located on the left hand side of the screen and you can choose your weekly view from the weekly view dropdown menu located on the right hand side of the screen. From this Weekly view dropdown menu, you have the choice to view the diary on a 5 day, 6 day or 7 day basis. You can use the Arrow Buttons to advance along the dates of any week. There is also the option to see a single day view of any one employee. This view shows the scheduled tasks for that particular employee on a particular day in more detail.

Monthly View

The monthly view shows all scheduled tasks allocated to all employees over a particular monthly period. You can filter the information down by ticking whichever employee and their related tasks you wish to view on the screen. You can select more or less options depending on what information you wish

to see at any one time. You can also view which tasks are scheduled in that monthly period by Groups. Click on the **Group Employees option** at the top right hand side of the monthly view screen and you can then select to see all tasks relating to any job category listed there. You can use the Arrow Buttons to advance along the dates of any month.

Scheduler Display View and Refresh Button

You can change the way the tasks are viewed in the scheduler by what you consider to be the most important information to be viewed. You can choose to view your tasks by Desc/Address, Contact/Address, Address, Times/Addresses or Names/Addresses. After you have made your selection from the drop down Display menu, click on the Refresh button to refresh the view according to your preference.

Task Allocations Tab

This is a list of all unallocated tasks entered into the scheduler which currently have not been allocated to an employee or to a job. To allocate these tasks, click and drag the appropriate task to the chosen employee and drop the task onto the allocated time slot. You will then be asked to choose a status for this task of either Booked, Fixed Time, In progress or Completed. Make your selection and then the task will be placed into the scheduler. To place a current job in the diary into unallocated you can either click on the heading of the task and drag into the unallocated list box or you can open the task and change the status to Unallocated.

The Warnings and Conflicts list box shows a list of tasks that are in conflict such as when bookings are made on an unavailable day or when a double booking occurs.

The ** which appear on the scheduler indicates a conflict with any of the bookings and these details are shown under the Warnings Tab.

To Do/Warnings Tab

You can sort your employees into a special order in the diary screen depending on who is working with whom. For example, if you wish to view in the diary all the people who work together, you can manually sort them into that order. Eg, If one person has an apprentice, then you would place them side by side on the scheduler so that it is easy to see what tasks have been allocated to both of them. To sort the employees, highlight the employee you wish to move and use your **Control + Arrow keys** to select the position in the scheduler. You can also sort your employees by Surname (will sort alphabetically), by Employee number (will sort by employee number in masterfiles) or by time available (will show who has task availability from least to most).

The TO DO list is a list of tasks to be done which may not necessarily be allocated to a job. You could enter into this TO DO list, reminders,

appointments and the like. To view the TO DO list for an individual employee, click on the TO DO List for Button and select the employee and then the list box will show all of the TO DO item tasks for that employee. If you click on the Expand List button, you will see a more detailed list of the TO DO tasks for that employee.

Temporary Hold Tab

This list box shows a list of all tasks modified, moved, status changed or the like JUST FOR THAT DAY. This is a quick and easy listbox reference to find jobs that have been dealt with that day without the need to scroll down many jobs in the Jobs Tab or the Unallocated Tab.

PLEASE NOTE: This listbox is cleared when the system is logged off and only holds information for that day. This is a temporary memory hold.

Job Tab

This listbox shows a list of all jobs which have been created. You can see the details of each job by highlighting the job and right clicking on the job to either Insert or Change. This will open up the job. If you click on Change, you can view, change, add or delete things from the job (except the posted entries). If you click on the insert option, you can still view, change, add or delete things from the job invoice but you are also given the option to insert a new task for that job into the scheduler.

You can sort the listbox by two options. All will give you all jobs created in Amwin which have been approved but are still waiting for something. Unallocated will give you the unallocated jobs only.

Scheduler Buttons

The Legend Button brings up the Set Diary Colour Screen.

The Task List Button brings up a summary of all the tasks that have been entered into the scheduler. You can choose which date you require and this screen will give you a list of the tasks for that particular date. You can also select a job and this screen will show you a list of all tasks relevant to that job. There is also a filter dropdown box together with individual buttons where you can sort through the tasks either by All, Unallocated, Estimate, Booked, Fixed Time, Task Issued, In progress, Task Done, Completed, Out of hours or Overdue.

The Job List Button brings up a listbox with all of the jobs that have been entered into the scheduler. You can sort this job list and filter the list down by using the dropdown box together with individual buttons to sort through the jobs either by Estimates, Approved, Unallocated, urgent, To finalise, Maintenance and Project.

On Hold Waiting For Button brings up a listbox with all of the jobs that have been entered into the scheduler that are currently on hold waiting for something to happen. You can sort this job list and filter the list down by using the dropdown box together with the individual buttons to sort through the jobs either by All, Ok, Customer, Parts, Information or Estimate.

Required for Tasks Button brings up a listbox with all of the parts that are currently outstanding to be delivered for each of the tasks due to be done for a particular job. You can sort this parts list and filter the list down by using the dropdown box together with the individual buttons to sort through the parts list to get a list of either All Parts Outstanding, All parts Due to be delivered today, All parts Due to be delivered Soon or parts that are now Overdue.

Customer File Button is a quick access from the scheduler screen to the Customer Masterfiles. This allows you to do standard functions such as job invoicing, sales orders, check enquiries, make a payment, do payment enquiries, look at job items, check sales reports on stock, check history for that customer and do simple reports for aged balances without having to swap to the main Amwin module.

Supplier File Button is a quick access from the scheduler screen to the Supplier Masterfiles. This allows you to do standard functions such as check purchase history for that supplier, check enquiries, make a payment, check payment enquiries, do a product report, do a credit return and do simple reports for aged balances without having to swap to the main Amwin module.

Managing Tasks in the Diary

Once you have gone through all the set up procedures, you can then start adding tasks to the diary.

To do this you right click on a timeslot under the employee that you need to add a task to and a menu will appear. You will get the choice to Insert, Change, Delete, Send to, On hold, Cut, Paste, Clone to, SMS or Email a task.

Inserting a Task

When you right click your mouse anywhere on the diary screen you get the option to Insert. Left click on the Insert option and you get a further menu to choose either a Task, a job, an estimate, a purchase order or a To do item.

To insert a Task left click on the Task menu and the Insert New Task screen will appear.

From this screen you can select the employee you wish to allocate this particular task to by clicking on the employee button and making your selection. You can allocate this task to a particular job by clicking on the Job/Est Button. You can then fill in all the relevant fields such as contact numbers, addresses and allocating this task a particular date, time, duration and description. Choose a status from the drop down status field. You have several choices.

Unallocated means that the task has not been allocated to an employee or has not been allocated a time or a day.

Estimate means that the task will be an estimate.

Booked means that task has been booked into the diary.

Fixed Time means that task has been booked for a particular time and day and flexibility is not negotiable. To move a fixed time appointment you would need to answer an alert message to make sure you were aware that the time and date were specially agreed to.

Task Issued means that the person allocated to that task has been advised of the task.

In Progress means that the task is currently being done by the allocated person.

Task Done means that the task has been done but the job is not completed.

Completed means all tasks allocated to this job and the job has been done and completed.

You can also set an alarm to go off to remind you of this particular task. Click on the Active Alarm option to activate this feature.

Once you have filled in all the relevant information for this task you can click on the **OK button** to save your information and it will drop this task into the diary screen.

Inserting a Job

To insert a Job left click on the Insert Job menu and the Job Invoicing screen will appear.

From here you can enter additional details, change, edit or modify any job details to this particular job, save and close. At this point you will be able to Insert a new task into the scheduler for that new job you have created. Once you have entered in your details, click on the Ok button to save and drop the task into the diary screen.

Inserting an Estimate

To insert an estimate left click on the Insert Estimate menu and the Estimate screen will appear.

From here you can enter a new estimate with additional details, change, edit or modify any job details in the estimate, save and close. At this point you will be able to Insert a new task into the scheduler for that new estimate you have created. Once you have entered in your details, click on the Ok button to save and drop the task into the diary screen.

Inserting a Purchase Order

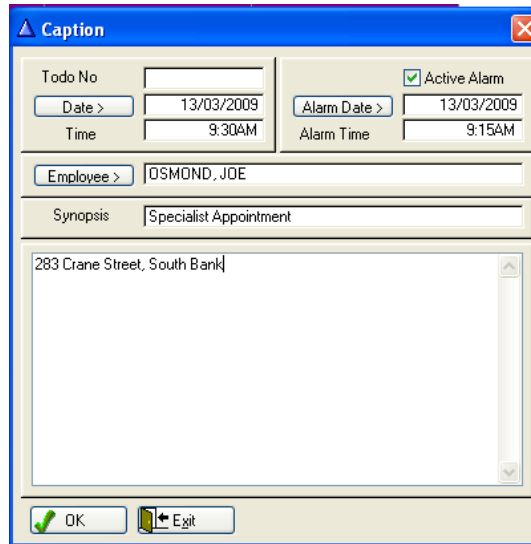
To insert a purchase order left click on the Insert Purchase Order menu and the Purchase Order screen will appear.

From here you can enter a new purchase order, change, edit or modify any details in the purchase order, save and close.

Inserting a To Do

To insert a To Do left click on the Insert To Do menu and the To Do screen will appear.

From this screen you can enter the relevant details such as the To Do reference number, select the date the To Do must be completed by, activate an alarm if necessary, allocate the To Do to an employee and write a brief description of what the To Do task entails.



You can see a list of the To Do's from the To Do/Warnings Tab.

Changing a Task, Job or Estimate

To change a Task, Job or Estimate left click on the Task you wish to change and from there you can select to change either a task, job or estimate.

Once you have selected what you wish to change, then either the Change Task screen, job invoicing or estimate screen will appear. Make your changes and modify as desired. Then click on the save/exit button to save your changes.

To delete a Task

To delete a Task left click on the Task you wish to delete and from there you can select to delete a task. You will be asked to confirm that you wish to delete this highlighted task. You can then answer yes or no.

There is no provision in the scheduler to delete jobs. Jobs must be deleted from the main AMWIN module.

Task Grouping to a Job List

You have the option to send a task to Unallocated, Urgent Job, To Finalise, Maintenance or Project job lists.

Unallocated means that the task has not been allocated to an employee or has not been allocated a time or a day.

Urgent Job means that this task has now become part of an urgent job that needs to be done as soon as possible.

To Finalise means that this job is now ready to be finalized.

Maintenance means work that is regular but is not necessary to be booked for a particular day or time.

Project means that this particular job is a very huge job, which may take a lengthy period of time to complete and will entail a large amount of tasks to be allocated to particular employees as part of that particular job.

To allocate a task and a job to a particular job group, right click on the task, select Send to and then choose which particular job list you wish to allocate that task and job to.

You can then see these jobs in each group by clicking on the relevant buttons under the Job List section of the scheduler.

Placing a Task on hold

You can place a job on hold if you are waiting on a particular event to happen. The job and task may need feedback from a customer, or may need parts to be ordered or delivered, perhaps you need more information to complete the task or an estimate has been given and is awaiting acceptance.

To place a job or task on hold, right click on the task, select On Hold and then choose which group you wish to allocate this task to. For example; you could allocate the task to either Customer, Parts, Information or Estimate.

Cut and Paste a Task

You can cut and paste tasks to and from different parts of the scheduler. Right click on the task you wish to move, select Cut and then right click on the time and date you wish to move the task to and select paste.

Cloning a Task

You can clone a task quickly and easily to other employees or to another date. Right click on the task and select Clone To and then select either Employees or Dates.

You could clone certain tasks to other employees. For example if you have an apprentice working with a tradesman. You could clone the task to both employees as it would be assumed that they would be working together on the same job. Another example would be if an employee was off sick you could quickly and easily move all tasks allocated to that sick employee to another employee for that day.

You could clone certain tasks to different dates. For example if you had a big project that was to be done over a period of time, you could clone that same task for a certain period eg a week.

Sending SMS

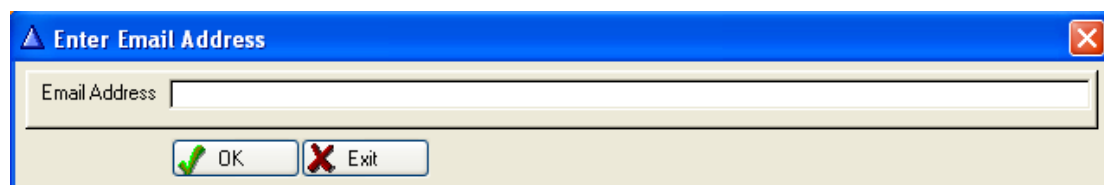
To send an SMS message, right click on the task and select SMS. You can choose to send an SMS message either to the Customer, Bill To, Task Contact or Employee giving them urgent details in relation to that task.

When you select the SMS option, the SMS screen will appear. Simply type in your message and click on the Send SMS button. The other details such as phone number and customer details, Bill to details, Task Contact or Employee details are already populated in the screen for you.

Sending Email

To send an Email message, right click on the task and then select Email. You can choose to send an Email message either to the Customer or to the Bill to giving them urgent details in relation to that task.

When you select the Email option and choose whom you wish to email, the Enter Email address box appears.



You enter in your email address and click on the Ok button, the system will open up an email with that address in your email program. Just enter in the details of your email and click on the send button.

General

The Red Bar that you see on the diary screen indicates the time that has passed and where the time is right now. As the time goes by each day the bar progresses down the screen.

Once you have entered in the tasks into the scheduler screen you are also able to click and drag and drop each task around the scheduler screen as much as you like.