Scheduler

User Manual

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Chapter 1

Welcome to Scheduler

Congratulations on choosing Samco's Scheduler! The Scheduler is a handy utility application for maintaining calendars for people, events, and resources. And with the resource profile feature turned on, you may search for any resource based on the criteria you set up.

Some practical examples include:

Personal Calendars... Track appointments and meetings for one or more people.

Delivery Schedules... Keep on top of deliveries for one or more vehicles

Internal Resources... Maintain calendars for boardrooms, equipment, and vehicles.

Service Call & Installations...Search for installers who match a certain set of criteria

Anywhere you need a calendar Scheduler fits right in.

 Installation

Scheduler installs like any other Samco application using the instructions in the Installation Guide.

After Scheduler is installed you will need to add it to each Company ID it will be accessed from. This is done through the System Functions -> Company data function. Once turned on, Scheduler will appear on the main menu.

Features and Functions

Maintains schedules for virtually an unlimited number of resources (resources being a person, place, or thing).

There are thirty user defined fields available for tracking and searching information on each resource.

Profile templates for resources may be set up with both user defined fields and capabilities. These profiles allow for detailed searches for a resource that must fit certain criteria.

Resources can be activated or deactivated. Ideal for situations where a resource is not in service.

Time intervals can vary from resource to resource (i.e. every 30 minutes, 45 minutes, 1 hour etc.).

Time reservations can be copied or moved from one day to another or one resource to another.

Scheduler can be started from anywhere in the Samco system using the F8 key.. Flexible reports are available, in detail or summary, listing the reservations for resources, sales reps, customers, orders or statuses. You can also generate an immediate list of reservations for a resource while viewing a day.

Scheduler Basics

This section steps you through the basics of setting up and starting to use Scheduler. Each function is described in further detail in the subsequent chapters.

Common Terminology

Cut.... The process of identifying a reservation is to be moved or copied to another day or resource

Mark.... Extending a reservation across more than one time interval.

Paste.... Moving or copying a "cut" reservation to another day or resource.

Reservation.... Assigning a period of time and instructions for a task to a resource.

Resource.... Any person (you and your co-workers), place (a meeting room), or thing (vehicle or equipment). Resources are set up in Scheduler and assigned a time-slot template (see below). A calendar is maintained for each resource.

Profile templates…The user defined fields and capabilities for a group of resources. For example, you may search for an installer who has a trailer, is registered with a

WCB number and is bonded.

Status reasons… The various stages of a reservation. For example, tentative vs confirmed, waiting for product, holding for customer deposit, etc.

Time-slot…. Time-slots are tables that determine what days and time intervals resource is available. Each resource is assigned a time-slot template. A time-slot template can be used for one or more resource(s).

Time intervals…. Segments of time with a start and end time. For example 08:00 - 09:00 is a 1 hour time interval. Within a Time-slot you set each time interval a resource is available for.

Setting up Scheduler

Before you can begin using Scheduler you will need to set up the control file, resources and time-slots. You may also set up resource profiles and status reasons if you have chosen these options in the control file

To set up the control file, go to *Scheduler -> F2 -> Setup -> Control File*

Answer Y/N to "Use resource profiles?" You will say "Yes" if you want to be able to search for resources based on certain criteria

If you have Accounts Payable and some of your vendors are resources, answer "Y" to "Use vendor profile types?".   For example some vendors are also installers that you sub-contract to,

If you have Payroll and some of your employees are resources, answer "Y" to "Use employee profile types?"

Answer "Yes" to "Use status reasons?" if Available/Not available is insufficient tracking for the status of a resource.

Reserving Resources

Once you have set up resources, time-slots, and profiles you will want to begin making reservations. This is done by:

bringing up the resource list. Press F8 -> S selecting or searching for the resource to make the reservation for, selecting the date to make the reservation on, selecting the time the reservation will begin at, entering in the details surrounding the reservation, and then marking the amount of time the reservation is for.

Generating Reports and Purging

Scheduler provides a report which lists in summary or detail the information for each reservation. The report criteria screen provides selection ranges for resource, date,

order number, customer number, and sales rep.

This report also allows you to purge out dated reservations from schedule file.

If you need to print off a quick report while viewing the reservations for a resource you can do so from the reservation screen.

On-Line User Manuals

If you need assistance, this user manual is available on-line and can be accessed at any time by pressing F10 (F11 under Windows).

Samco Support

This manual, in combination with your Installation Guide, is designed to allow you to use Samco's application software without any additional help.

However, if you encounter problems you cannot resolve by referring to these manuals, you may want to get additional assistance. Your supplier should be able to provide such assistance.

Or, contact:

Samco Support

61. 7789 - 134th street

Surrey, BC Canada

V3W 9E9

Phone: (604) 597-4211 fax: (604) 597-7320

e-mail: support@samco.com

Samco provides support on a fee-for-service basis. Please ensure that you have the software release, serial number(s), operating system, payment information (Visa, MasterCard, or American Express) and other related information available when you call.

For a detailed description of Samco's support and customer services, please refer to the installation guide.

Chapter 2

Control Information

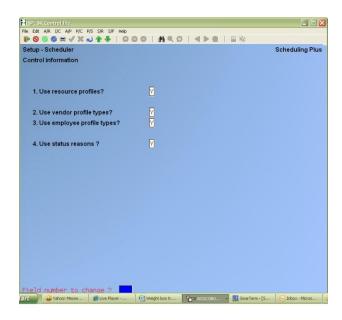The Scheduler Control file contains information about the scheduling requirements of your business.

A control file contains key information about your business operation. It is called a control file because it controls certain program functions and default values.

To Begin

From page 2 of the Scheduler menu, select *Setup*. From the *Setup* menu, select *Control information*.

This is the screen you see:

Use resource profiles?

Answer Y [ENTER] if you want to be able to search for resources based on certain criteria that you will establish later. Otherwise, answer N [ENTER].

Use vendor profile types?

An entry in this field is allowed only if you are using resource profiles. Otherwise this field is skipped. This feature is only available if you are also using Accounts Payable.

Answer Y [ENTER] if you want the system to automatically display data for a vendor in the AP vendor file for a resource that is also a vendor. This data includes the vendor number, vendor name, address, contact name, phone number, alternate phone number, email address, fax number and cell number. Otherwise, answer N [ENTER].

Use employee profile types?

An entry in this field is allowed only if you are using resource profiles. Otherwise this field is skipped. This feature is only available if you are also using Payroll.

Answer Y [ENTER] if you want the system to automatically display data for an employee in the Payroll employee file for a resource that is also an employee. This data includes the employee number, employee name, address, phone number, alternate phone number, email address, fax number and cell number. Otherwise, answer N [ENTER].

Use status reasons?

Answer Y [ENTER] if you want to use codes for identifying the status of reservations. For example, you may want to use a code for a reservation that you have scheduled but the scheduled time has not been confirmed. Otherwise, answer N [ENTER].

Make any changes as usual. The *Setup* menu is now displayed.

Changing Information that is Already on File

If you already have Scheduler control information on file, when "Field number to change?" appears, you can press [ENTER] to exit the screen.

Chapter 3

User Defined Fields

If you have answered "No" to "Use resource profiles?" in the Scheduler control file, skip this chapter.

If you have answered "Yes" to "Use resource profiles?" you will want to set up the user defined fields for the categories you would like to track for resources.

Use this selection to expand on the data that you capture for a vendor or employee type resource OR define the data that you want to capture for a resource.

If you have answered "Yes" to "Use vendor profile types?" then you need not define the vendor number, vendor name, vendor address, primary contact name, phone number, alternate phone number, email address, fax number and cell number as user defined fields.

If you have answered "Yes" to "Use employee profile types?" then you need not define the employee number, employee name, employee address, phone number, alternate phone number, email address, fax number and cell number as user defined fields.

Use this selection to define a maximum of 30 user defined fields. These fields will be available when setting up a profile template for resources. The user defined fields allow you to customize your templates to fit your specific needs.

Scheduler supports three different types of user defined fields; literal, date and code:

Literal fields are used to enter in free form text (up to 50 characters). They can be used for such things as your installer's WCB number, the equipment setup in a board

room, etc.

Date fields are 6 digit fields for date entry. For example, Last WCB clearance date.

Code fields allow you to setup a table of valid codes with a corresponding description. For example, you need to know if an installer is bonded; the code table would consist of two entries - Yes/No.

Setting Up User defined Fields

Go to *Scheduler → F2 → Setup → User Defined Fields*

On the screen displayed you will be able to define up to 30 different fields. These fields will then be available when you setup the profile templates for resources and for the setup of the resources themselves. Enter information for each field as follows:

Field Title: Provide a description for this field

Type: C for Code, D for Date field, L for Literal

Length: This will default to 6 for Date fields and 3 for Code fields

                           For literal fields enter the maximum number of characters to allow when entering data (50 max)

Value   If the type chosen is a Code field, a window will appear to setup the table of codes

Options: TAB   Exit from window

              ENTER   Change the selected code

              F2   Begin adding new codes

              F3   Delete the selected code

              Description   Enter a description for the code (25 characters max)

Deleting Fields

To delete an entire user defined field, select the field you no longer want available, delete the title and press Enter. You will be asked if it is OK to delete the field. If some data already exists for this field, you will receive the warning that "Values of the defined fields will be deleted" Be sure that you really want to do this, so that you

do not lose valuable data.

Printing a list

Go *to Scheduler → F2 → Setup → User Defined Fields → Print*. This will print the user defined fields with their values and descriptions.

Chapter 4

Resource Profile Templates

Enter A Resource Profile Template

Go to *Scheduler -> F2 -> Setup -> Profile Templates -> ENTER*

Template: Enter a unique code for the profile template. This field supports a ? to return a list of existing templates.

Description: Enter a description of this profile template. For example, you may want to set up a profile for drivers to separate them from the profiles for installers and other employees.

Type: Enter a template type if you have elected in the control file to use either employee or vendor profiles. In this case you will have a choice of Employee, Vendor, Other or Any.

2 User Defined Columns: If you answer Y, it will place 18 user defined fields in a two column format on the template. If you are using only nine or less user defined fields, answer N for a single column of nine fields.

Width for user defined label: The label for the user defined field may be set from 5 to 15 characters; the label will come from the field title of the user defined field. (See Chapter 2 for the setup of user defined fields.) This label is what you will see as the title of the user defined field on the resource screen. Changing the size of the label allows for more room for data on one screen. User defined field titles that are longer than the label width will be truncated. Data fields longer than the available space will be truncated.

For example, the user defined field is setup as - IND OPR LICENCE   L   25 - to track an independent operator's license number that is 25 characters long.   Since the user defined field's title is 15 characters and the data to be entered is 25 characters, the column must take up at least 41 characters. You may need to adjust the label size to be sure that all the data will fit.

Capabilities available for: A profile template may be used to search for resources that have certain capabilities. For example, when a user is making a reservation for an installation of flooring, the user may need to find only those installers who have the skills to install laminate flooring. When pressing F8-S, the user will be able to search for only those installers who fit the criteria. This subset of installers may then be examined for one who is available for the job at hand.

Capabilities may be left blank for a template if these searching features are not required.

Deleting/Changing a Template

Delete a template by calling it up on the screen and pressing F3. A template may not be deleted if already in use by a resource.

If a template is changed, all resources using the template will be updated as follows:

Any new user defined field will be set to blank or zero

Any user defined field that has been removed will have the corresponding data deleted

Any new capability fields will be set to No

Printing a Template

Go to *Scheduler -> F2 -> Setup -> Profile Templates -> Print - > ENTER*

A listing for profile templates may be printed in full detail showing all user defined fields and capabilities or in brief showing template code, description and type only. You may print a single template or a range and may select to print each template in the range on a separate page.

Chapter 5

Status Reasons

Use this feature to setup the status reason codes for your reservations. For example, you may need to track whether an appointment is tentative, confirmed, waiting for product, urgent, etc.

Setting Up status reason codes

Go to Scheduler -< F2 -> Setup -> Status Reason Codes -> Enter
Enter a one - three character code and a description. You will have the following options in this screen:

TAB	Exit
ENTER	Change the selected code
F2	Begin adding new codes
F3	Delete the selected code

For example, you may want a code to indicate that the job is not to proceed until a deposit is received from the customer…..   WTG   Waiting for deposit

Printing a list

Go to *Scheduler -> F2 -> Setup -> Status Reason Codes-> Print*. This will print the list of codes with descriptions.

Chapter 6

Time slots

Entering a Time-Slot

Within Scheduler a Time-Slot is a table which defines which days of the week are available, and what time intervals are found for that Time-Slot. Time-Slots are then assigned to one or more resources.

To begin, select *Time-slot -> ENTER* from the Scheduler menu.

Enter the following information for each Time-Slot:

1. Time-slot   Enter a unique code for the Time-Slot you are setting up. If the code you enter matches that of an existing Time-Slot, the information for that Time-Slot will be displayed for you to make changes to. Follow the screen instructions. NOTE: This field cannot be changed once it is entered.

2. Description   Enter a description for the Time-Slot.

3. Available day   Enter a Y for each day of the week that a resource using this Time-Slot is available.

4. Start-time End-time   Enter the starting and ending time intervals in 24 hour time. A maximum of 99 time intervals can be entered for each Time-Slot.

For example, if you want to use 1 hour time intervals for a resource that is available from 8:00am to 6:00pm you would enter in the following start and end times:

Start-time	End-time
0800	0900
0900	1000
1000	1100
1200	1300
1300	1400
1400	1500
1500	1600
1600	1700
1700	1800

If you want to enter in an hour for a lunch break you would simply omit a time interval.

Important NOTE: Avoid changing the time intervals for a Time-Slot as this will affect any reservations made for a resource.

Deleting a Time-Slot

Important NOTE: Do not delete a Time-Slot that is already assigned to a resource. If you do happen to delete a Time-Slot be sure to add a new one and change each resource the deleted Time-Slot referred to.

To delete a Time-Slot, display the Time-Slot to be deleted and press F3.

Printing a List of Time-Slots

Select Time-slot -> Print   Enter a range of time-slots to print.

Chapter 7

Resources

A resource is a person, place, or thing for which you will be making reservations for. This chapter discusses how to add new resources, make changes to existing resources, delete a resource, and print off a resource list.

Entering a Resource

To begin, select Resources -> Enter from the Scheduler menu. Enter the following information for each resource:

1. Resource code

   Enter a unique code for the resource you are setting up. If the code you enter matches that of an existing resource, the information for that resource will be displayed for you to make changes to.

   NOTE: This field cannot be changed.

2. Description

   Enter a description for the resource.

3. Time-slot code

   Enter the time-slot table that applies to this resource. When making reservations for this resource, these days available and time intervals are used.

   Important Note: You should avoid changing the time slot for a resource since any reservations made will be affected.

(See the chapter titled Time-Slots for details.)

4. Status

Enter A if the resource is available for making reservations. If the resource is out of service you may change the field to N. When a resource is "not-available", reservations cannot be entered for it.

5. Profile Template

If you have chosen in the Scheduler Control File, to use resource profiles, you will enter the appropriate profile for this resource. This field supports a ? to return a list of all profile templates. You may press F1 for "none".

Press F5 to enter the profile information about the resource. This includes a description, the user defined fields, and the capabilities in the template.

The vendor type profile requires the entry of a valid vendor number. The name, contacts, phone number, fax, email, and cell number of the vendor setup in Accounts Payable will be defaulted.

The employee type profile requires the entry of a valid employee number. The employee's address and phone number will be defaulted.

If a N is entered in the heading capability, all entries will default to N, but may be changed by the user.

The notes entry is accessed by F6; this is standard free form text box with 18 lines of 70 characters.

Printing a Resource Listing

Select a range of resources to print in summary or detail. The detail listing includes the profiles of each resource.

Chapter 8

Reservations

The whole idea behind Scheduler is to allow you to enter and view calendars for people, places, and things. If you have set up resource profiles, you may also use Scheduler to search for a resource that fits a certain set of criteria. In this chapter we will show you how to work with reservations; including adding a new reservation, changing an existing reservation, moving a reservation, copying an existing reservation, and printing off a quick reservation list.

Resource listing

To begin, the main Scheduler calendar is accessed by pressing [F8] -> [S]

If you have answered Yes to "Use resource profiles?" in the Scheduler control file, a window appears that allows you to select the profile template to do a search on. The template field supports a ? to return a list of resource profile templates. You may press TAB to view all resources. You may also press F7 to search for a resource based on customer or job site data. For example, you may need to search for employees who work evenings and are able to install ceramic tiles … or with Estimating, a customer phones and wants to know when the carpet is being installed.

Once the resource listing is displayed, on the left hand side of the list is an "x" which identifies the currently selected resource. On the right hand side is the status of the resource. When the status is "N" for not available, the resource's calendar can only be viewed. The following keys are available for navigating through the resource listing:

F1   Next page of resource listing

ShF1   Previous page of resource listing

F3   Search for a resource by resource code

F4   Display the calendar for the resource selected

F5   View the profile for the selected resource (If resource profiles are
              active, check Scheduler control file)

F6   Extended search for a resource based on the capabilities of the resource
              (If resource profiles active)

F7   Search for a resource based on customer or job site (ship-to) data (with
              Estimating)

Viewing the calendar

Notice that the current day selected is hi-lighted.

The following keys are available for navigating through the calendar:

^   Move up to the same day for the previous week. (Up Arrow)

V   Move down to the same day for the next week (Down Arrow)

F1, >   Move forward to the next day.

F2, <   Move back to the previous day.

PgUp   View the next month.

PgDn   View the previous month.

F5   View the profile of the resource selected (If resource profiles active)

F6   View the schedule for all resources for the day selected

ENTER   View the calendar and reservations for that day.

TAB   Exit the calendar view

In the screen to display all resources (F6 at the calendar), press:

F1   Next times if time slots cover more than one screen.

F2   Toggle between full screen and half screen view. Half screen will show more resources

F4   Toggle between all resources and only those available

F6   Pick layout for display of resources' schedules by:

            Customers, Order Nos (if Billing), Time Slots, Statuses

F7   Next day for all resources

ShF7   Previous day for all resources

>   Move to next resource in window

<   Move to previous resource in window

PgUp   View the next screen of resources

PgDn   View the previous screen of resources.

ENTER   View the reservations for selected resource for that day

TAB   Exit the resource schedule view

View/Enter A Reservation

Note that the time intervals displayed on a daily calendar are specific to the time-slot assigned to the resource. The status column indicates an "X" for a reservation and an "M" for additional time marked for the reservation. If you have chosen to use status reasons in the Setup, you will see a second status column. This will be the user defined status reasons. For example, X C in the status column means that the time has been reserved and confirmed with the customer (where C has been set up in Status Reasons as C=Confirmed).

The left hand side of the screen displays the time slots available for making reservations, while on the right hand side the details for the reservation are displayed.

On this screen the following keys are available:

^   Move up to the previous time slot

v   Move down to the next time slot

F1	Page down (if more than 1 page of time intervals)
F2	Page up (if more than 1 page of time intervals)
F3	Delete a reservation (this can only be done beside the time-slot marked with an X in the Status column)
F4	Add a new reservation or edit an existing reservation
F5	Mark additional time for the previous reservation
F6	Select the marked reservation for moving or copying
F7	Paste the selected reservation into the time slot for moving or copying
P	Print a schedule list, for selected time slot or entire day
TAB	Exit the day view

To make a new reservation move the " * " to the time-slot the reservation will begin at and press F4 or enter. The cursor will move to the right hand box for entering details about the reservation.

Enter the following information for a new reservation:

Important NOTE: You do not have to enter information for all fields since they are for information purposes only. In other words you can leave any field blank if you wish to do so.

Service Order: If you are using the Estimating module, you may enter the service work order that you are scheduling. This field supports a ? to return a list of service work orders.

Type: If you are using the Estimating module, you may enter the line type for the service work order you are scheduling. This field supports a ? to return a list of line types, or press ENTER for "none".

Cust #: Enter the number for the A/R customer this reservation is for or press ENTER to leave this field blank. If you enter an A/R customer number some of the fields will default to the values in the customer's record.

Tel: Enter a telephone number, leave it blank, or press ENTER to use the phone-1 number from the customer's record.

Name: You have 4 lines in this field to enter a name / address / description for the reservation. You can also press ENTER to accept the customer's name and address.

Order #: If you are using Scheduler for dispatching delivery trucks or making site

visits for installations, you would enter the order # from Point of Sale or Order Entry. You may also enter the ship-to information if it is different from the customer data. If you call F8, Scheduler when you are in an order, the order field and customer information will be automatically populated

Reason: If you have set up status reasons, you may enter the code here or press ? to see a list of reasons. Eg. Confirmed, tentative, waiting for deposit, etc.

Sls rep: Enter the sales rep responsible for this reservation, leave it blank, or press ENTER to accept the default sales rep for the customer.

Notes: In the lower half of the window you can enter in up 9999 lines of notes regarding the reservation, with the first 10 lines being displayed.

Special keys available while editing the notes include:

^	Move up to the previous line
v	Move down to the next line
PgUp	Page up (if there are more than 10 lines of notes)
PgDn	Page down (if there are more than 10 lines of notes)
F1	Insert a line between 2 lines
F2	Add more lines
F3	Delete the current line
TAB	Complete the entry and exit

Created by:

Lst-chng-by:

These two fields are maintained by the system to show which user ID created the reservation and who last made a change to it.

Once the initial reservation is completed you may want to mark off additional time slots for the reservation; i.e. if the meeting will last 3 hours you will want to mark off enough time slots for the meeting. This is done by moving the " * " to the next adjoining time slot and pressing F5 - an M appears in the *Status* column for the time slot. You can mark as many adjoining time-slots as you want for a reservation.

Moving or Copying a Reservation

To move or copy an existing reservation to another time-slot (same day or another day) or different resource, do the following from the left hand window while viewing a daily calendar:

1.   Select the reservation by pressing F6 beside the time slot with the "X" in the Status column. The screen will then display the message that the time-slot has been selected and to press ENTER to continue.

2.   Go to a calendar time slot on the same day, different day, or even for a different resource and press F7 to paste.

3.   To move the selected reservation enter M; to make a copy of the selected reservation enter C; or enter N to exit.

If there are not enough adjoining time-slots available for the selected reservation, you will not be allowed to copy or move the reservation. The reservation remains selected until it is copied or moved, or until you exit out of the Scheduler calendar.

Changing a Reservation

From the left hand time slot window of the daily calendar, hi-light the reservation you want to make changes to, and press F4. The cursor moves to the right hand details window for you to make any necessary changes.

Printing a Reservation List

From the left hand window of the daily calendar you can print either one reservation or all reservations for the day by entering P.

Chapter 9

Schedule Reports

The Schedule Report is a flexible way for you to list the reservations made for one or more resources. In addition to the reporting, it also allows you to purge out dated reservations. The report printed will show by resource code; the date, time range, order number, customer data, sales rep, and user that created the reservations and the user that last changed it. You may also print the detail of the reservation itself.

To begin, select Schedule report from the Scheduler main menu.

Enter the following report criteria:

1. Starting resource

2. Ending resource

Enter a range of resources to print schedules for. Press F1 in both fields for First to Last.

3. Starting date

4. Ending date

Enter a range of dates to print schedules for. Any reservation date falling outside of this range will not be included. Press F1 in both fields for First to Last.

5. Starting order #

6. Ending order #

Enter a range of orders for reservations to be included on the report. Any reservation with an order outside of this range will not be included. Press F1 in both fields for First to Last.

7. Starting customer #

8. Ending customer #

Enter a range of customers that reservations are for to be included on the report. Any reservation with a customer outside of this range will not be included. Press F1 in both fields for First to Last.

9. Starting sales rep

10. Ending sales rep

Enter a range of sales reps that reservations are for to be included on the report. Any reservation with a sales rep outside of this range will not be included. Press F1 in both fields for First to Last.

11. Starting reason

12. Ending reason

Enter a range of status reasons that reservations are to included on the report. Any reservation with a status reason outside of this range will not be included. Press F1 in both fields for First to Last.

13. New page for resource ?

Answer Y f you want each resource schedule to be separated by a page break.

14. Print schedule details

Answer Y if you want all details for each reservation printed on the report.

15. Purge ?

Answer Y if you want all of the reservations matching the above criteria to be purged from the calendars. Be sure that you want to do this as the history of reservations may be useful to you. For example, you want to send a service rep to a plant to service the fork lift; after checking the customer reservation history, you decide to send the same rep that has previously serviced this site.

Once you have completed entering the report criteria, select the printer to send the report to.

Scheduler Status Report

If you do not have the Estimating Module, please skip this section. If you are using the service work orders from Estimating, this report is very useful to check the status of the material required for each installer and to schedule installers for the time required for each job.

The Scheduler Status Report is similar to the Schedule Report, but allows for the service work order range to be chosen instead of the order numbers. This report shows by date and resource code; the date, service work order and description, job site (ship-to) information, customer data, sales rep, stock status, work units, reservation type, and installer's instructions. It provides sub-totals of work units for both the resource and the date.

The stock status is determined as:

n/a   No stocked items of this type

Stocked   All items of this type are stocked

Order   Not all out of stock items have been ordered

Date   All items have been ordered or on backorder, but all are not yet
                       in stock. Date is expected arrival date of last item to arrive into
        stock

This stock status is calculated from the Billing/Order Entry order and from the Purchasing Plus purchase order. The Billing/OE line item should reference the applicable PO.

Work units is calculated by adding the total quantity of item "*LAB" for this line type. The reservation type is the line type description, while the instructions are the instructions for this line type from the service work order.

Appendix A

Initializing Data Files

Initialize" means to create a new data file. When you initialize a data file which already exists, any information in it is completely erased, and the file is newly created.

This function allows you to initialize one or more data files. You probably will never need to initialize data files. But this function is included just in case.

If you suspect you have a "corrupted" (fouled up) data file, don't initialize it without first checking with your supplier and attempting other recovery actions (see the next appendix titled File Utilities for information on rebuilding corrupted data files).

CAUTION

Don't use this function unless you really want to initialize a data file. Any data file initialized will have its information completely erased.

To begin,

From the operating system prompt, change into your Samco top-level directory and type.

SRINIT

NOTE: If you are running under Xenix/Linux/HPUX/AIX or a similar operating system and are logged on as root / superuser, replace the above command with

./SRINIT

Enter the company ID you wish to initialize Scheduler data files for. All Scheduler data files are as follows:

Resource File   RSRCFL.DAT

Schedule Detail File   SCHDTL.DAT

Schedule Header File   SCHHDR.DAT

Scheduled Time File   SCHTIM.DAT

Time-Slots File   TIMSLT.DAT

Scheduler Code File   SRCODS.DAT

Scheduler Auxiliary File   SRAUXF.DAT

Scheduler Control File   SRCTLF.DAT

Scheduler Template File   SRTMPF.DAT

Scheduler Profile File   SRPROF.DAT

Answer Y for each file you want to initialize, or press ENTER to default to skip initializing a file.

A brief description of each Scheduler file is shown below.

1. Resource File

The resources (people, places, or things) which are set up in the Resource function. Calendars are managed for each resource.

2. Schedule Detail

Stores the notes for each reservation.

3. Schedule Header

This file stores the customer number, order number, name/address, sales rep, created by, and last changed by information for each reservation.

4. Scheduled Time

A list of reservations including the resource, the date, and the time slot.

5. Time Slot File

Maintains the information entered in the Time-slot function.

6. Scheduler Codes

Maintains the information for the status reasons.

7. Scheduler Auxiliary File

Maintains the information entered in the User Defined Fields.

8. Scheduler Control File

Maintains the information entered in the Control File.

9. Scheduler Profile Template File

Maintains the information for the status reasons.

10. Scheduler Profile File

Maintains the information for the resource profiles.

To Exit

When initialization is complete, the operating system prompt reappears.

Appendix B

File Utilities

This function will allow you to:

- •Recover the data files that have become corrupted (fouled up).

- •Recover disk space by rebuilding data files with purged or deleted records that are still taking up space.

- •Export your data into a format that can be used by many popular spreadsheet, word processing and data base programs.

Corrupted data files

Data file corruption does not occur very often, but you do need to be aware of it just in case one of your data files does become corrupted. This can occur for only a handful of reasons. The most common being:

The power to your computer gets turned off when you are using your Samco applications.

Your hard disk has developed a defect.

Corrupted data files can't be used reliably afterward, and any attempt to use them causes unusual error messages and you are removed from running the Samco applications.

If this occurs, or if you begin to get unusual results while using your software and suspect that there may be a corrupted data file, you should get technical support.

Your supplier or an independent professional may be able to provide this support. If not, contact Samco Software Inc.'s support department directly (there may be a fee).

Samco's Help Desk is 604-597-4211. Or support@samco.com

Handling data file corruption does not mean that all of the data in the file is no longer usable. Usually, just a few of the records in the file have become corrupted.

In File Utilities, the function Rebuild a file will take out the good records in the data file, place these in a temporary file, and then replace the old file with the good records. In addition to this, any deleted or purged records which are taking up disk space will also be permanently removed and the file compressed to its physical size.

To Begin

Select File Utilities from the second page of the Scheduler main menu.

Export a File

Export a file function is used to export data files from the internal format to a "flat" ASCII file. The data file(s) is read in and an output file is created in the Samco root directory with the name "xxxxxxnn.EXP"; where 'xxxxxx' is the file name, and where 'nn' is the company number the file came from. (If you are running under Linux you will also have the option of appending a drive designation to the front of the file.)

To begin, select Export a file from the File utilities sub-menu.

Please select file:

Resource File   RSRCFL.DAT

Schedule Detail File   SCHDTL.DAT

Schedule Header File   SCHHDR.DAT

Scheduled Time File   SCHTIM.DAT

Time-Slots File   TIMSLT.DAT

Scheduler Code File   SRCODS.DAT

Scheduler Auxiliary File   SRAUXF.DAT

Scheduler Control File   SRCTLF.DAT

Scheduler Template File   SRTMPF.DAT

Scheduler Profile File   SRPROF.DAT

Enter the number, from the list provided, of the file to be converted to ASCII format, or use one of the options:

Options: F1   To export "All" files.

Please enter device for export file

Enter the drive letter of the device that the ASCII version of the data file will be written to, or use the option:

Option: F1   If you either (a) do not want to append a drive letter prefix to the file name (Linux only), or (b) want the file created on your hard drive.

For LINUX users

The drive letter entered here will be attached to the front of the file name. The letter A is recommended for consistency. The ASCII backup file name in the Samco root directory will read A:xxxxxxnn.EXP.

Alternatively, if you do not want to add a drive letter, press F1 for "none".

For WINDOWS network users

The drive letter entered here will be the drive that the ASCII backup file will be written onto.

NOTE: If you choose to export "All" files, the screen will move immediately into displaying the file and record being backed up. It skips past the "(C) CREATE NEW EXPORT FILE OR (A) ADD RECORDS TO EXISTING EXPORT FILE", "STARTING FILE KEY", and "ENDING FILE KEY" prompts

The following will be displayed only if you did not select "All" files at the "Please select file" prompt or the file allows for a key range:

Enter the following data:

1. Starting file key

2. Ending file key

Enter the starting and ending file keys for the data file selected for export, or press for "First" and "Last". Up to 37 alphanumeric characters may be entered. Unless you know the exact key for the records in the data file it is recommended that you press .

When you have completed all entries the following prompt will appear:

(C) create new export file or (A) add records to existing export file

Enter to create a new export file and over-write any pre-existing ASCII export for this data file, or enter to add the records selected for conversion to any pre-existing ASCII export file on the device specified.

After selecting which type of file to create the screen then clears and the ASCII file name is displayed along with a counter of the number of records exported.

If you had selected "All" at the "Please select file", it is assumed that you wish to create a new export file. After the "Any change ?" prompt, the screen clears and the ASCII file name is displayed along with a counter of the number of records exported for all files.

The Export a File menu reappears after the file(s) selected has been exported so that you may choose another file.

After you have completed running the convert routine, press TAB at the "Please select file" prompt. A window will appear for you to select how to print the export log.

Restore a file

This function is used to restore one of more of the listed data files from the "flat" ASCII file format to the internal format. The exported file is read in and an output file is created in the company sub-directory with the name "xxxxxx.DAT". Where "xxxxxx" is the file name.

From the File utilities menu select Restore an exported file. Enter the following information for either active or inactive files:

Please select file

Enter the file number, from the list provided, of the file to be restored from an ASCII export format, or use the option:

Option: F1   To restore "All" exported files.

Please enter device for exported file

Enter the drive letter of the device that the ASCII version of the data file will be read from, or use the option:

Option: F1   If you either (a) did not append a drive letter prefix to the file name (Linux only), or (b) the file(s) reside on your computer's default hard drive.

For LINUX users

This is the drive letter attached to the front of the file name. For example, if the file to restore is A:xxxxxxnn.EXP, you would enter ▢ here. If no designation is at the beginning of the file press F1 for "none" For WINDOWS network users

The drive letter entered here will be the drive that the ASCII export file resides on.

Please enter the device size in kilobytes:

Enter the size of the disk the ASCII export files are on.

 (C) Create New Data File Or (A) Add Records To existing Data File

Enter the following information for either active or inactive files:

Please select file:

Enter the file number, from the list provided, of the file to be restored from an ASCII export format, or use the option:

Option: F1   To restore "All" exported files.

Please enter device for exported file

Enter the drive letter of the device that the ASCII version of the data file will be read from, or use the option:

Option: F1   If you either (a) did not append a drive letter prefix to the file name (Linux only), or (b) the file(s) reside on your computer's default hard drive.

For LINUX users

This is the drive letter attached to the front of the file name. For example, if the file to restore is A:xxxxxxnn.EXP, you would enter A here. If no designation is at the beginning of the file press F1 for "none".

For WINDOWS network users

The drive letter entered here will be the drive that the ASCII export file resides on.

(C) Create New Data File Or (A) Add Records To existing Data File

When the restoration of the file or files is complete the 'Restore from an export file' menu will be displayed.

You may select another file to restore. You may continue to restore files or press TAB to print the restore log and then return to the File Utilities sub-menu. A window will appear for you to select where to print the restore log. A restore log shows the file(s) restored, the number of records per file, the date and time.

Rebuilding Data Files

Rebuilding data files can be used for one of two reasons:

A data file has become corrupted and needs to be recovered.

To recover disk space and clean out deleted or purged records.

The Rebuild a File function essentially takes the good records out of a file, removes the old file, and creates a new file with the good records.

To begin, select Rebuild a file from the File Utilities menu. Please select the file you wish to rebuild. Enter the number of the file you wish to rebuild, or use the option:

Option: F1   To rebuild "All" of the data files.

A new screen will appear showing the status of each file as it is being rebuilt. Once completed, you are returned to the Rebuild a file screen.