Chapter 38

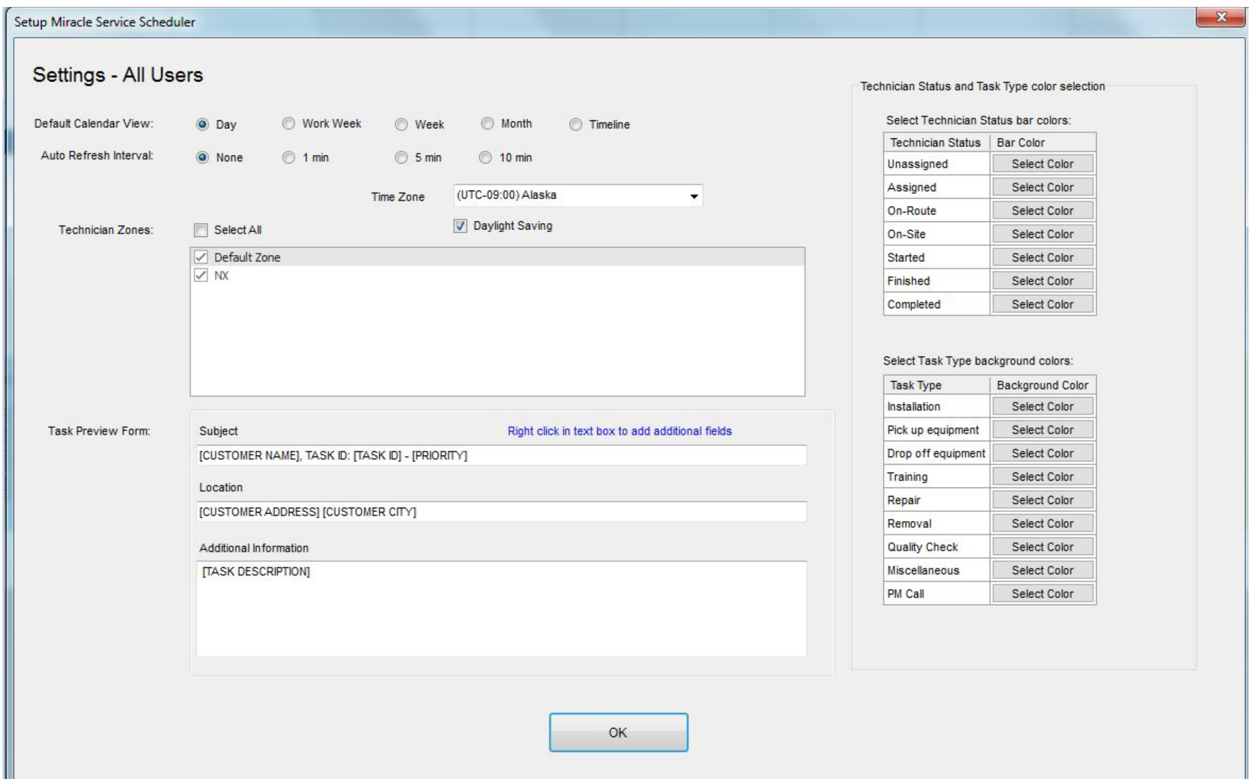
Using the Visual Scheduler

The Miracle Service Visual Schedule is a tool for you to browse and manage the Open Tasks created in Miracle Service. This Visual Schedule is designed to provide a powerful interactive calendar view of your Open Tasks. It allows you to view the jobs and easily assign, re-assign or reschedule jobs directly in the Visual Scheduler. It is designed as a separate companion application to Miracle Service and can be opened while Miracle Service is open, or on its own.

How to Setup the Visual Scheduler

Launch the Visual Scheduler by clicking the Visual Scheduler button found at the bottom of the Open Tasks screen in Miracle Service.

The first time you launch the Visual Scheduler should open the Settings configure your company's preferences. **IMPORTANT:** These are global settings for <u>All Users</u> of your Visual Scheduler.



Basic Settings

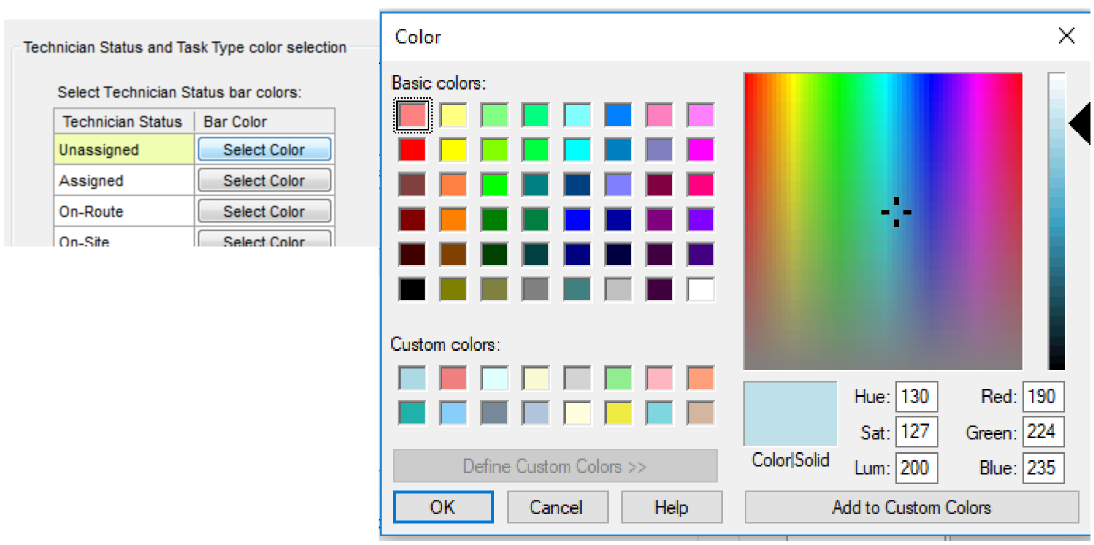
- **Default Calendar View** (optional) - this defines the opening view of the Visual Scheduler - Users can select the default view they prefer to use.
- **Auto Refresh Interval** (optional) - Because the Visual Scheduler retrieves the data from the database to display, changes other users make are not immediately available. You can choose to use the manual ‘Refresh’ button to obtain the most recent data or set the Auto Refresh Interval.
- **Technician Zones** - set the zones to view by default when the Visual Scheduler first opens. It is possible to add and remove zones in the Visual Scheduler once it is open so the setting is intended to set the preference for the initial screen when it is first opened.

Task Preview Form Settings

Using a combination of text and database fields, configure the Subject, Location and Additional Information to appear on the Task Ticket. Right-clicking on a text box will present a list of available fields to choose from. For example, [CUSTOMER NAME] will present the Customer’s Name.

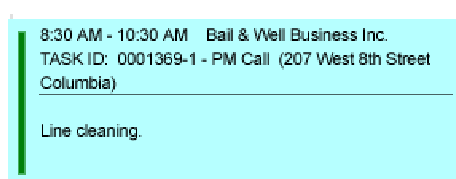
Defining the Colors for Technician Status and Task Type

Clicking on the ‘Select Color’ button will launch a Color Picker to select a basic, custom or personalized color for each individual Technician Status and Task Type.



Technician Status Bar Color: Sets the color of the status bar on the left side of the Task.

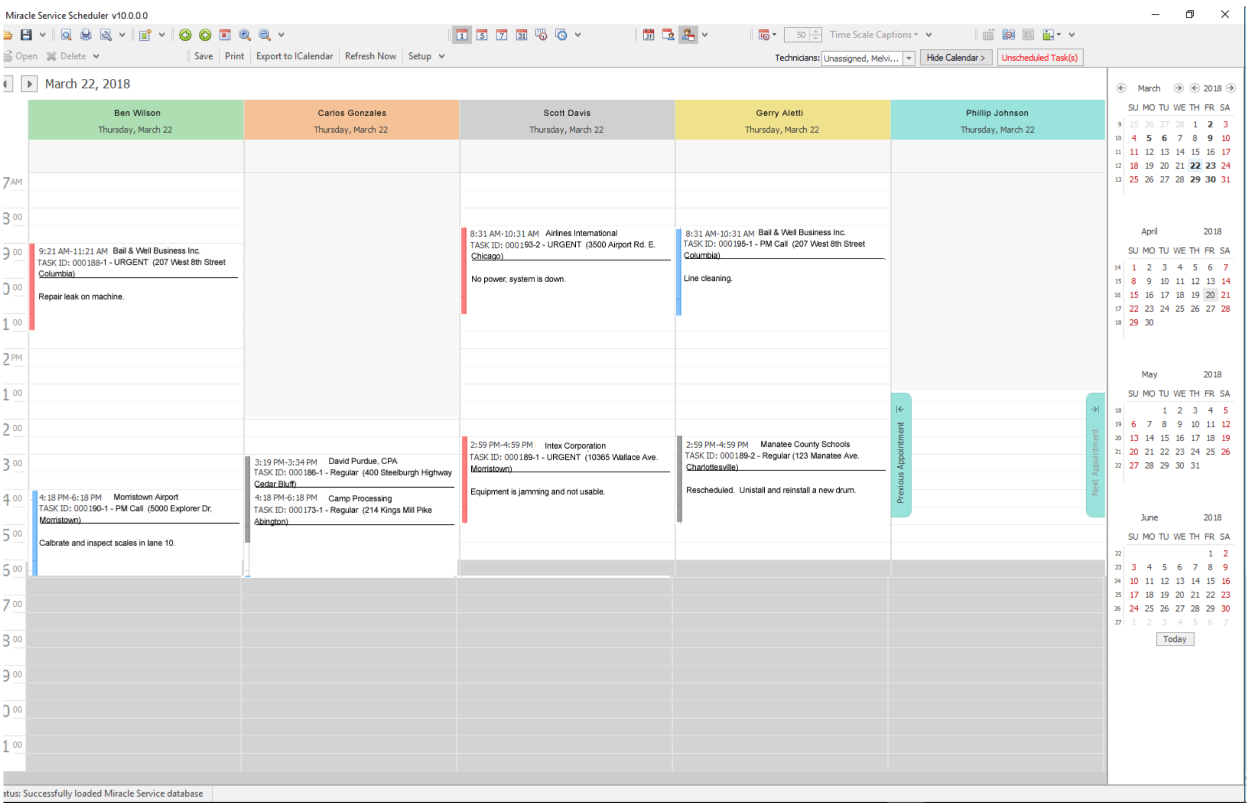
Task Type Background Color: Sets the background color of the Tasks on the calendar.



Visual Scheduler Overview

When the Visual Scheduler is open there are two main areas of the application. The main viewing area and the monthly calendar overview on the right side of the screen.

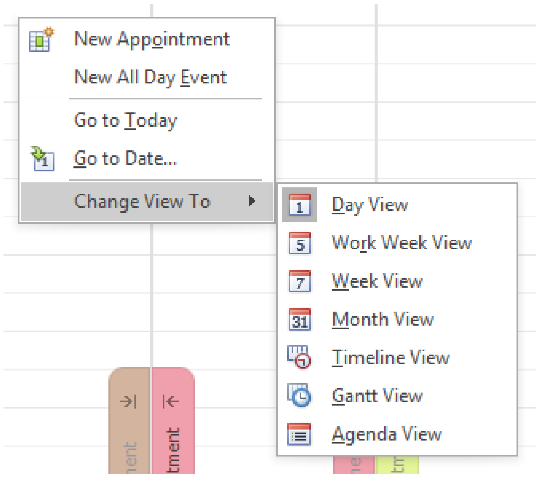
The monthly calendar side bar is a quick way to see a high level overview of your schedule and which days have calls assigned. Days where a call is assigned shows the date number in **bold**. If the date number is not bold, then no calls are scheduled for that date.



Changing Visual Scheduler Views

To change the Visual Scheduler view user can select the buttons across the top of the screen. Then you can select 'Day', 'Work Week', 'Week', 'Month', 'Timeline', or 'Gantt View".

Alternatively, users can right click their mouse and select the view from this pop-up menu.

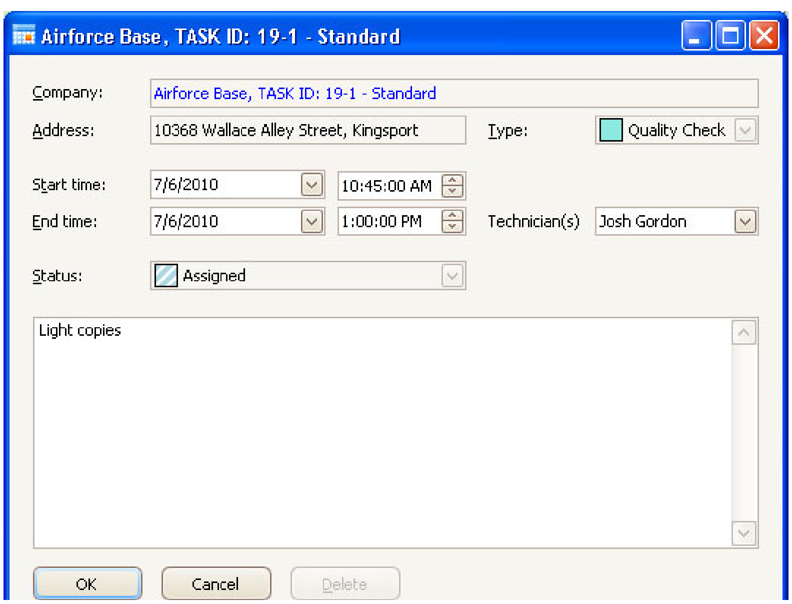


This pop-up menu also allows the user to select the day they are interested in viewing. They can select 'Go to Today' or 'Go to Date'. Users can also click on the monthly calendar on the right side of the screen to select any day quickly.

Scheduling Tasks in the Visual Scheduler

Drag and Drop - Scheduling tasks in the Visual Scheduler is very easy as it is a 'drag and drop' application. Users can select a task that is being displayed and the click and hold their left mouse button to grab the task. They can then drag the job to a new time or technician while holding down their left mouse button. The user can also drag and drop the task in to the Monthly Calendar on the right side to schedule or reschedule the task for a new date. This makes it easy for the dispatcher to schedule the job days or even months ahead.

Task Ticket - Users can also schedule the task by opening the task ticket. Open any task by double-clicking the task.



With the task ticket open, the user can modify a number of fields:

Start Time: Use the pull down or enter a new date and / or time.

End Time: Use the control button of the right of the field is change the hours, minutes, seconds or AM/PM. Select the area you wish to modify and then click with up or down arrow to increase or decrease the values.

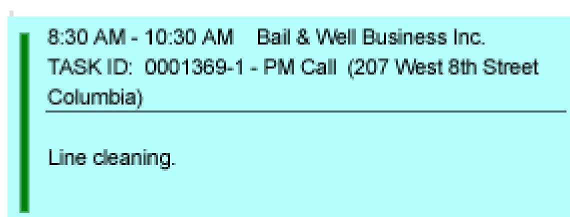
Technician(s) - Click the pull down arrow beside the technician to assign the task to one or more technicians. Click the box beside the technician to assign then to the task.

Work Description area - Users can update and edit the Work Description be typing in the text box.

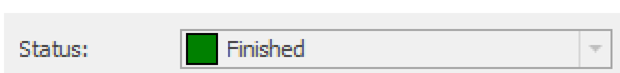
Visual Scheduler Task Information

The following information is available in the Visual Scheduler:

Task Type: The task type is represented by the color of the task in the scheduler. In the task window, you can view the task color and the task type definition if it is not know.



Task Status: The status of the task is represented by the color bar on the left side of the task. In the task window you can view the status color and the definition if it is not known.



Task Company: The Company field includes the Company Name, Task ID and Task Priority.

Task Number (ID): The Task ID is displayed in the Company Field. The Task ID in the above example is ‘19-1’.

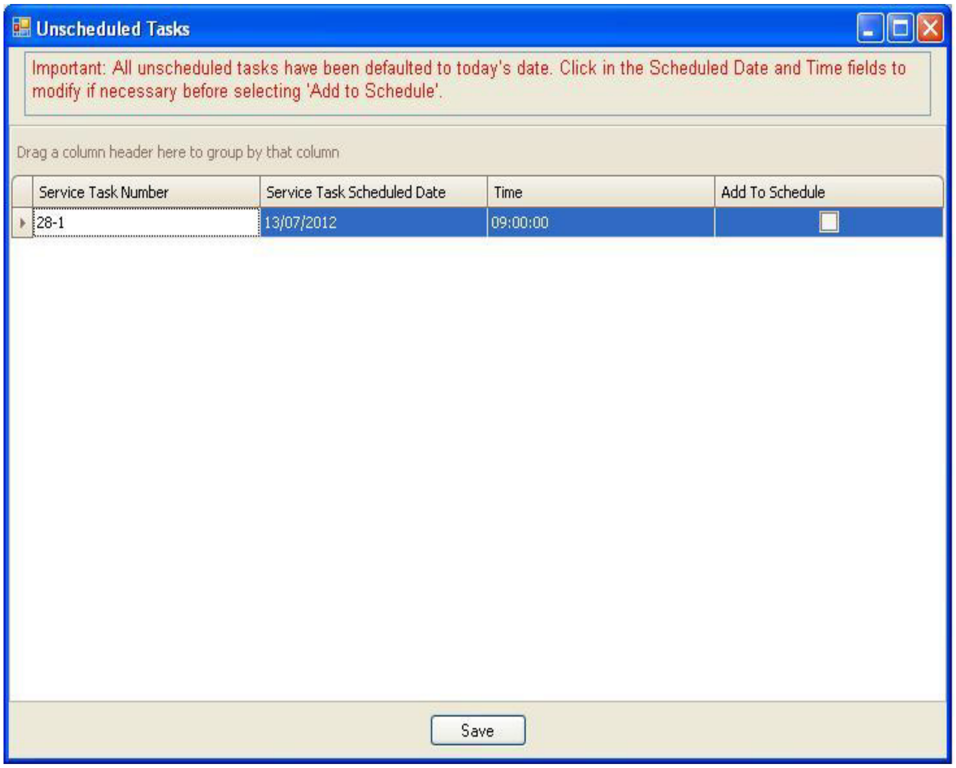
Task Priority: The Task Priority in the above example is ‘Standard’.

Task Location (Address): The address of the service task is displayed in the Address Field. This includes the Address and City/Town of the service task location.

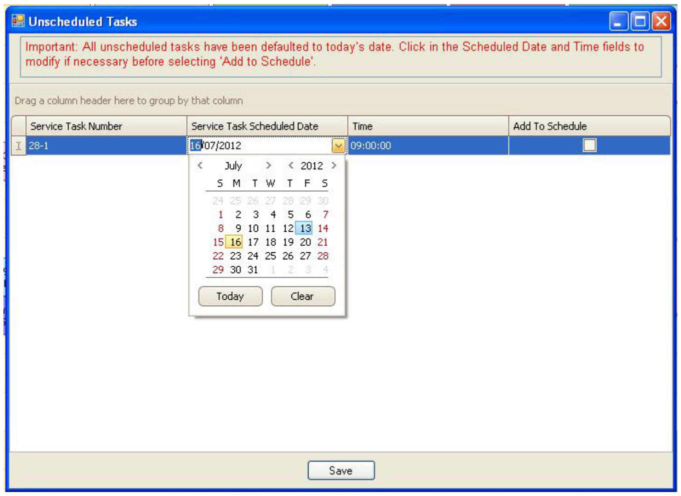
Unscheduled Task(s)

When tasks do not have a Scheduled Date assigned they cannot be displayed in the Calendar so a Button is activated on the menu bar to indicate there are Unscheduled Tasks.

Click the ‘Unscheduled Task(s)’ button to open the Unscheduled Task Window.



This screen is a list of all unscheduled tasks. By default the planned scheduled date and time is set to the start of the current business day. Click on the drop down arrow beside the date to select the date. Click on the time field to enter a preferred time to schedule the call. Check the ‘Add To Schedule’ box and then click save to schedule the selected call(s). Multiple calls can be managed in this screen at the same time.


Unscheduled Tasks
Important: All unscheduled tasks have been defaulted to today's date. Click in the Scheduled Date and Time fields to modify if necessary before selecting 'Add to Schedule'.
Drag a column header here to group by that column
Service Task Number
Service Task Scheduled Date
Time
Add To Schedule
28-1
16/07/2012
09:00:00
July
2012
Today
Clear
Save