



PRINTER'S PLAN

POWER TOOLS



Scheduler

POWER TOOL | Scheduler

About Scheduler

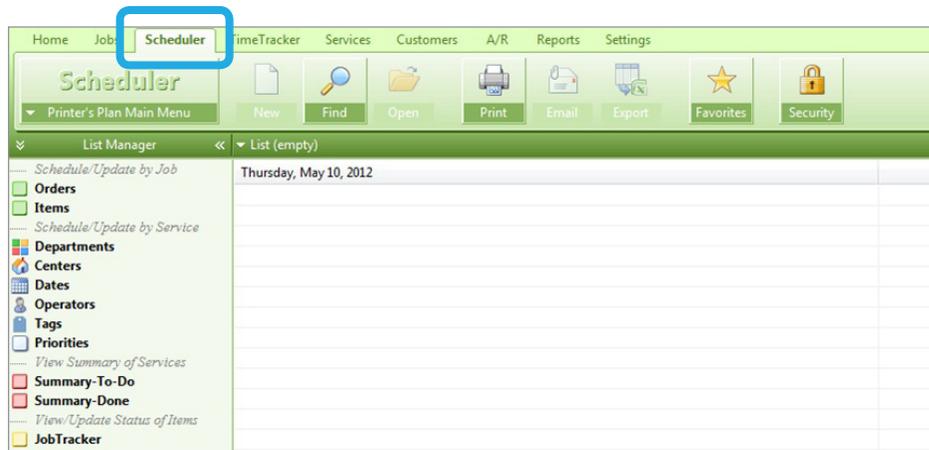
Scheduler is an advanced production tool of Printer's Plan. The major benefits of Scheduler are:

- Reduce production errors
- Meet deadlines
- Improve productivity
- Manage equipment capacity

This guide explains all the features of Scheduler. You can use all of them or just a combination of selected features. After a period of trial, you will discover the best way of using Scheduler for your operation.

Many procedures in Scheduler can be accomplished by scanning barcodes, also. If you would like to incorporate barcode functions into Scheduler, please ask us about our BarcodeSupport tool.

To access Scheduler, click the **"Scheduler"** tab.



Scheduling Services

Opening the "Schedule Job" Window

After entering an Order, open the Schedule Job window to schedule the services and assign operators to them. You can access the Schedule Job window in one of the following three ways:

POWER TOOL | Scheduler

A. In the Job window:

Order 2436 Marketing Brochures In Progress

Bill to Customer No.41: ABC Company, 800 Pike Street Suite #1, Baltimore MD 21202

Ship To: ABC Company, 9645 Saratoga Blvd., Baltimore MD 21207

Ordered By: Sharon Jones, sjones@abc.com, Ph1: 410-539-3466 x 35, Ph2: 443-567-4398, Fax: 410-539-5586

Item	Description	Quantity	Time	Price/Hr	Unit Price	Price
M			1:00	85.00	332.87/M	665.74
					85.0000/Ea	85.00
					89.3923/M	122.11
					17.6000/Ea	35.20
	Small Press: 2 Color Press - Using Paper Properties - Wash: 2 ...	2,732	3:05	125.00	0.1410/Ea	385.43
	Cut: To FinSz 1 Cuts/Sheet	5	0:07	60.00	1.4000/Ea	7.00
	Fold: Auto 2 Folds - See sample attached	2,000	0:31	60.00	0.0155/Ea	31.00

Jobs Section | Job window

B. In the Jobs section:

Jobs

Printer's Plan Main Menu

List Manager << Orders / Received Today (8 listed)

Orders	JobNo	Customer	Title	DateIn	DateProof	DateDue	Net
All	2436	ABC Company	Marketing Brochures	03/23/12	03/23/12	04/11/12	665.74
In Progress	2435	ABC Company	Application Forms	03/23/12	03/23/12	04/11/12	\$4.44
On Hold	2434	Apex Realtors	Brochures	03/23/12	03/23/12	04/11/12	\$0.05
Ready to Ship	2433	ABC Company	Welcome Brochures	03/23/12	03/23/12	04/11/12	\$0.09
Ready to Post	2432	ABC Company	Envelopes	03/23/12	03/23/12	04/11/12	\$2.26
Received Today	2431	Apex Realtors	Brochures	03/23/12	03/23/12	04/11/12	\$0.05
Shipped Today							\$8.83
Late							\$1.61
Due Today							
Due Tomorrow							
Due This Week							
Due Next Week							
Discrepancies							

Jobs Section

C. In the Scheduler section:

Scheduler

Printer's Plan Main Menu

List Manager << Items / Schedule (1 Items of Orders in Progress listed)

Schedule/Update by Job

Group By...	Order-Item No	Customer	Item Description / Service	Date	CSR/Oper	T
04/11/12	2436-1	ABC Company	Marketing Brochures	04/11/12	Lisa	

Scheduler Section

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Using the "Schedule Job" Window

See below for scheduling jobs and other actions you can take in the Schedule Job window.

Item Status	Item and Service Description	Service Date	Operator	Tag	P...	Note	Actual Time	Actual Quantity
	Schedule Marketing Brochures						0:00	2,000
	Design: By Hour	03/27/12	unassignr			Email proof	1:00	0
	Text Coated: 80# Sterilr	03/27/12	unassignr			.11 x 17 . 11	0:00	1,366
	Plate: CTP Plate	03/27/12	unassignr				0:00	2
	Small Press: 2 Color Pre	03/27/12	unassignr				3:05	2,732
	Cut: To FinSz	03/27/12	unassignr				0:07	5
	Fold: Auto 2 Folds	03/27/12	unassignr			See sample i	0:31	2,000
							4:43	

CLICK TO SET THE FIRST DAY COLUMN TO BE THE JOB DATE IN.

CLICK TO SCROLL TO NEXT WEEK.

CLICK TO SET THE LAST CALENDAR COLUMN TO BE THE JOB DUE DATE.

SCHEDULE SERVICES. (EXAMPLE: CLICK THE FRIDAY BOX TO SCHEDULE THE DESIGN SERVICE FOR FRIDAY.)

RIGHT-CLICK TO ASSIGN AN OPERATOR TO A SERVICE.

RIGHT-CLICK TO EDIT ITEM LOCATION.

RIGHT-CLICK TO ASSIGN A PRIORITY NUMBER TO AN ITEM OR A SERVICE.

DOUBLE-CLICK TO ADD OR EDIT ITEM AND SERVICE NOTES.

CLICK TO AUTO-SCHEDULE. **NOTE: THIS FUNCTION IS CURRENTLY NOT CUSTOMIZABLE.**

RIGHT-CLICK TO ASSIGN A TAG TO AN ITEM OR A SERVICE.

CLICK TO EDIT FIELDS OF "WHEN" WINDOW, SUCH AS DUE DATE.

CLICK TO EDIT JOB NOTE/MEMO TO CUSTOMER.

Item Status	Item and Service Description	Service Date	Operator	Tag	P...	Note	Actual Time	Actual Quantity
	Graphic: Marketing Brochures						0:00	2,000
	Design: By Hour	03/30/12	Anna	Check w		Email proof	1:00	0
	Text Coated: 80# Sterilr	04/04/12	Scott			.11 x 17 . 11	0:00	1,366
	Plate: CTP Plate	04/05/12	Devs				0:00	2
	Small Press: 2 Color Pre	04/06/12	Mike	Due noo			3:05	2,732
	Cut: To FinSz	04/09/12	Devs				0:07	5
	Fold: Auto 2 Folds	04/10/12	Lisa			See sample i	0:31	2,000
							4:43	

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Seeing the Big Picture As You Schedule

After scheduling a job or several jobs, refer to the “Summary-To-Do” lists in Scheduler to review the scheduled workload for each day. These lists will help you know how to allocate your resources for maximum efficiency and capacity. For example, to quickly check the amount of time you have scheduled for your Operators, view the Operator list. To review the daily totals for scheduled services, view Department/Service or Center/Service.

Category	Service	Count	TOTAL	Late	03/28	03/29	03/30	04/01	04/02	04/03	04/04
Small Press			36:12		3:43	3:20	6:34		2:09	8:22	
	1 Color Press - Using Paper Pr...	11	11:38			2:29	6:34		2:09		
	2 Color Press - Using Paper Pr...	10	24:34		3:43	0:51				8:22	
Large Press			24:36		7:09	12:01					5:26
	4 Color Press	3	18:20		7:09	5:45					5:26
	5 Color Press	2	6:16			6:16					
Digital Printer			17:19	8:47	2:34	5:58					
	Copier - Blk & Wht	1	1:30			1:30					
	Copier - Color	7	15:49	8:47	2:34	4:28					
Cut			11:12		5:19	0:35	0:11	0:36		2:07	1:27
	To FinSz	11	3:00			0:35	0:11	0:36		0:04	1:27
	Trim 3S (Folded Book)	4	8:12		5:19					2:03	
Fold			5:53		1:38	1:36	1:05				0:45
	Auto 1 Fold - Text wt.	5	2:41		1:38						0:45
	Auto 2 Folds	4	3:12			1:36	1:05				
Collate			17:42		5:15	5:15					5:15
	Hand	6	17:42		5:15	5:15					5:15
Pad			3:15		0:09	0:09	1:09	1:30	0:09	0:09	0:09

Scheduler | Summary-To-Do | Category/Service

Operator	Count	TOTAL	03/28	03/29	03/30	04/01	04/02	04/03	04/04
?	17								
Tim	13	28:24	7:09	8:53	0:37		3:13	2:26	
Mike	24	39:43	6:50	7:45	6:34		1:14	5:56	5:26
Anna	10	16:50	6:30	5:50	4:30				
Dave	34	27:41	7:22	8:22	0:11	0:45		3:24	3:36
Lisa	17	14:57	3:29	3:51	1:14	1:00	1:30	0:46	2:36
Scott	15	3:57						0:52	3:05

Scheduler | Summary-To-Do | Operator

After Scheduling

Viewing To-Do Lists (Orders, Items, and Services)

In Scheduler you will find three types of List Views: Orders List, Items List, Services List. The following pages describe these views.

Orders To-Do

Click "Orders" to expand the list; then, click a filter to list the Orders that satisfy the filter. These filters are identical to the Orders filters in the **Jobs** section.

ORDERS GROUPED BY DUE DATE (SEE "SCHEDULER SETTINGS | LIST OPTIONS" FOR OTHER GROUPING OPTIONS.)

Group By...	Order No	Customer	Job Title / Item / Service	Date	CSR/Oper	Tag
03/29/2012	2433	ABC Company	Welcome Brochures	03/29/2012	Melissa	
	2405	ABC Company	Employee Manuals	03/29/2012	Melissa	
	2375	Attman & Ass...	Form	03/29/2012	Brad	
	2367	Alliance For Th...	Employee Manual	03/29/2012	Brad	
	2364	Abel Laborator	Letterhead	03/29/2012	Paul	
03/30/2012	2432	ABC Company	Envelopes	03/30/2012	Melissa	
	2407	ABC Company	Brochure, Form	03/30/2012	Melissa	
	2374	Allied Building...	Business cards	03/30/2012	Anna	
04/02/2012	2435	ABC Company	Application Forms	04/02/2012	Melissa	
	2434	Apex Realtors	Staff Guides	04/02/2012	Melissa	
	2431	Apex Realtors	Brochures	04/02/2012	Melissa	
	2430	ABC Company	Newsletter	04/02/2012	Melissa	
	2429	Ascot Inc	Letterhead	04/02/2012	Tom	

EACH ROW REPRESENTS AN ORDER.

ORDER STATUS NAMES AND ICONS

ORDER NUMBER

CUSTOMER NAME

JOB TITLE

ORDER DUE DATE

CSR ASSIGNED TO THE ORDER

		2407	ABC Company	Brochure, Form	03/30/2012	Melissa
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ORDER STATUS ICON

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To view the Items of an Order and the services in each Item, expand the order by clicking the plus (+) sign next to the order number. You can perform the service functions, such as assigning dates and operators and checkmarking services as "Done", in this view, also.

ORDER #2407 EXPANDED TO DISPLAY ITS TWO ITEMS, PRODUCT BROCHURES AND APPLICATION FORMS, AND THEIR SERVICES.

+	2452	ABC Company	Envelopes	03/30/2012	Melissa
+	2431	Apex Realtors	Brochures	03/30/2012	Melissa
+	2407	ABC Company	Brochure, Form	03/30/2012	Melissa
			Product Brochures		
			✓ Design: By Hour	03/28/2012	Anna
			✓ Proof: Proof	03/26/2012	Anna
			✓ Plate: Metal	03/26/2012	Tim
			✓ Text: 70# Beckett Cambric	03/26/2012	Scott
			✓ Cut: To RunSz	03/26/2012	Scott
			✗ Large Press: 4 Color Press	03/28/2012	Mike
			✗ Fold: Auto 1 Fold - Text wt.	03/29/2012	Lisa
			Application Forms		
			✓ Offset: 60# White	03/28/2012	Scott
			✓ Cut: To RunSz	03/28/2012	Lisa
			✗ Digital Printer: Copier - Co...	03/29/2012	Dave
+	2374	Allied Building...	Business cards	03/30/2012	Anna

SERVICE DUE DATES

OPERATOR NAMES

Double-clicking an Order opens its Schedule Job window in fully functioning mode.

03/29/2012	+	2433	ABC Company	Welcome Brochures
	+	2405	ABC Company	Employee Manuals
	+	2375	Attman & Ass...	Form
	+	2367	Alliance For Th...	Employee Manual

Schedule Job

Order 2433 - Welcome Brochures
ABC Company (43)

Item	Item and Service Description	Service Date	<<	W	Th	F	S	Su	M	T	W	Th	F	S	Su	M	T	W	Operator	Tag
Status			M	21	22	23	24	25	26	27	28	29	30	31	01	02	03	04	Apr	
Graphic:	Welcome Brochures																			
✗	Design: Brochure	03/28/12																		Anna
✗	Text Coated: 80# Steris	03/28/12																		Scott
✗	Cut: To RunSz	03/29/12																		Lisa
✗	Digital Printer: Copier	03/29/12																		Dave

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Items To-Do

Click "Items" to expand the list; then, click a filter to list the Items that satisfy the filter.

ITEMS GROUPED BY ORDER DUE DATE (SEE "SCHEDULER SETTINGS | LIST OPTIONS" FOR OTHER GROUPING OPTIONS.)

Group By...	Order-Item No	Customer	Item Description / Service	Date	CSR/Oper	Tag	P	Time	Quantity	Note	Note2
03/28/2012											
Wednesday											
	2415-1	Action Busines...	Application Forms	03/28/2012	Paul			0:00	5,000		
	2414-1	Ascot Inc.	Brochure	03/28/2012	Paul			0:00	1,000		
	2381-1	Alliance For Th...	Newsletter	03/28/2012	Brad			0:00	5,000		
	2372-1	Abel Laborator...	Letterhead	03/28/2012	Paul			0:00	1,000		
	2368-1	Attman & Ass...	Special Window Envelopes	03/28/2012	Melissa			0:00	5,000		
	2365-1	Ascot Inc.	Letterhead	03/28/2012	Melissa			0:00	5,000		
03/29/2012											
Thursday											
	2433-1	ABC Company	Welcome Brochures	03/29/2012	Melissa			0:00	10,000		
	2405-1	ABC Company	Employee Manuals	03/29/2012	Melissa	Deliv...	1	0:00	200		
	2375-1	Attman & Ass...	Form	03/29/2012	Brad			0:00	5,000		
	2367-1	Alliance For Th...	Employee Manual	03/29/2012	Brad			0:00	100		
	2364-1	Abel Laborator...	Letterhead	03/29/2012	Paul			0:00	1,000		
03/30/2012											
	2432-1	ABC Company	Envelopes	03/30/2012	Melissa			0:00	25,000		
	2407-2	ABC Company	Application Forms	03/30/2012	Melissa	Warti...	3	0:00	1,000	**New for...	
	2574-1	Allied Building...	business Cards	03/30/2012	Anna			0:00	1,000		
	2372-2	Allied Building...	Envelope Window	03/30/2012	Anna			0:00	1,000		

EACH ROW REPRESENTS AN ITEM.

2407-2	ABC Company	Application Forms	03/30/2012	Melissa	Waiting for customer call	3	0:00	1,000	**New form**
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Services To-Do

All the views under Departments, Centers, Dates, Operators, Tags, and Priorities are at the Service level. The following example shows all Finishing Services To-Do grouped by service due date.

SERVICES GROUPED BY SERVICE DUE DATE (SEE "SCHEDULER SETTINGS | LIST OPTIONS" FOR OTHER GROUPING OPTIONS.)

"NOTE2" COLUMN IS USED IN THE PRESS SERVICES LIST VIEW AND SHOWS INK COLOR.

Group By...	Item	Customer	I	Category: Service	Date	Operator	Tag	P	Time	Qua...	Note	Note2
05/09/2012												
Fold	2356-1 E...	ABC Comp...		Fold: Auto 1 Fold - ...	05/09/2012	Lisa	Wo...	1	0:10	600		
Package	2380-1 E...					Dave		2	0:15	30		
05/10/2012												
Cut	2374-3 N...	Allied Buildi...		Cut: To FinSz	05/10/2012	Dave		1	0:07	5		
Fold	2362-1 Br...	ABC Comp...		Fold: Auto 2 Folds	05/10/2012	Lisa	Che...	2	0:31	2,000	Attn to p...	
Package	2405-1 E...	ABC Comp...		Package: Wrap in S...	05/10/2012	Dave		2	1:40	200	Save 5 sa...	
05/11/2012												
Friday												
Cut	2434-1 Br...	Apex Realtors		Cut: To FinSz	05/11/2012	Lisa			0:11	8		
Fold	2434-1 Br...	Apex Realtors		Fold: Auto 2 Folds	05/11/2012	Lisa			1:05	5,000		
Number	2435-1 A...	ABC Comp...		Number: Number 1	05/11/2012	Dave			0:37	1,000	See the la...	

EACH ROW REPRESENTS A SERVICE.

ORDER NUMBER - ITEM NUMBER, ITEM DESCRIPTION (EXPAND COLUMN FOR A FULL VIEW OF DESCRIPTION.)

CUSTOMER NAME

SERVICE TAG (EXPAND COLUMN FOR FULL VIEW OF TAG.)

OPERATOR ASSIGNED TO SERVICE

SERVICE TIME AND QUANTITY

Fold	2362-1 Br...	ABC Comp...		Fold: Auto 2 Folds	05/10/2012	Lisa	Che...	2	0:31	2,000	Attn to p...
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SERVICE CATEGORY

ORDER STATUS ICON (GREEN INDICATES ORDER IS "IN PROGRESS")

ITEM STATUS

SERVICE NAME

SERVICE DUE DATE
ORDER DUE DATE (EXPAND COLUMN FOR A FULL VIEW OF DUE DATE. CLICK COLUMN HEADER TO SORT BY JOB DUE DATE.)

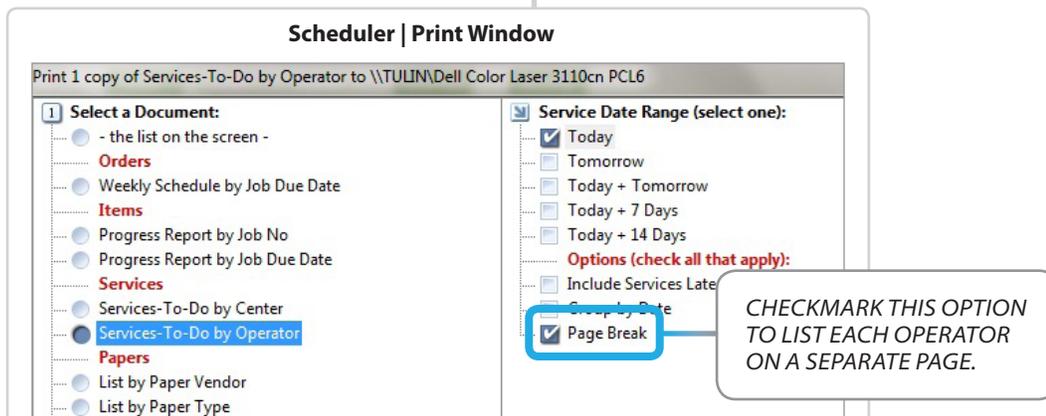
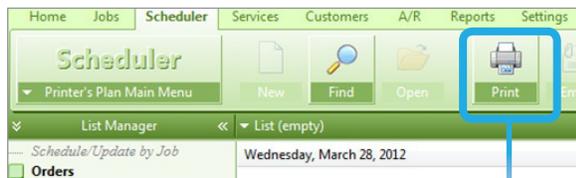
SERVICE PRIORITY NUMBER

SERVICE NOTE (FROM ITEM SPECS WINDOW)

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Printing To-Do Lists for Operators and the Managers

To print To-Do lists for operators and managers for today, click **Print** to open the Print window and make selections as shown below.



Printers Plan 2012 beta (03.29.12 #587)
03/28/12 14:37:57

Printers Plan
Page 3 of 6

Services-To-Do by Operator

Lisa
List Size: 22

The list includes the Services To-Do (not marked as Done) of Orders in Progress and Items in Production

Operator	ServiceDate	Job	Customer	Item	Service	ActTime	ActQty	Tag	Pr	Note
Anna	03/28/2012	2373	ABC Company	1 Application Forms	Design: Form	0:50	1		0	
		2406	ABC Company	1 Cover	Design: By Hour	2:00	0		0	
		2428	Allied Building Supplies	1 Business cards	Prof: Prof- Fedex	0:00	5		0	
		2428	Allied Building Supplies	1 Business cards	Design: Business Card	1:40	5		0	
		2428	Allied Building Supplies	3 Forms	Design: By Hour	1:00	0		0	
		2435	ABC Company	1 Application Forms	Design: By Hour	1:00	0		0	

Printers Plan 2012 beta (03.29.12 #587)
03/28/12 14:39:09

Printers Plan
Page 4 of 6

Services-To-Do by Operator

Dave
List Size: 22

The list includes the Services To-Do (not marked as Done) of Orders in Progress and Items in Production

Operator	ServiceDate	Job	Customer	Item	Service	ActTime	ActQty	Tag	Pr	Note
Dave	03/28/2012	2380	ABC Company	1 Employee Manuals	Package: Wrap in 50s	2:05	250		0	
		2405	ABC Company	1 Employee Manuals	Digital Printer: Copier - C	2:34	7,200		0	
		2406	ABC Company	1 Cover	Cut: Trim 3S (Folded Bo	2:11	96		0	
		2406	ABC Company	1 Cover	Cut: To RunSz	0:32	24		0	
						7:22	7,570			

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To print a list of all operators and their assigned tasks for today (useful for managers), make the following selections in the Print window.

Print 1 copy of Services-To-Do by Operator to \\TULIN\Dell Color Laser 3110cn PCL6

1 Select a Document:

- the list on the screen -
- Orders**
- Weekly Schedule by Job Due Date
- Items**
- Progress Report by Job No
- Progress Report by Job Due Date
- Services**
- Services-To-Do by Center
- Services-To-Do by Operator**
- Papers**
- List by Paper Vendor
- List by Paper Type
- List by Job Number

Service Date Range (select one):

- Today
- Tomorrow
- Today + Tomorrow
- Today + 7 Days
- Today + 14 Days
- Options (check all that apply):**
- Include Services Late
- Group by Date
- Page Break**

TO LIST ALL THE OPERATORS ON THE SAME PAGE, DO NOT CHECKMARK THIS OPTION.

Printers Plan 2012 beta (03/29/12 #687) Printer's Plan Page 1 of 1
 03/28/12 10:03:12

Services-To-Do by Operator

List Size: 22
 The list includes the Services To-Do (not marked as Done) of Orders in Progress and Items in Production

Operator	ServiceDate	Job	Customer	Item	Service	ActTime	ActQty	Tag	Pri	Note
Tim	03/28/2012	2362	ABC Company	1 Brochure	Large Press: 4 Color Prt	7:09	4,800		0	
		2426	Ascot Inc.	1 Application Forms	Plate: CTP Plate	0:00	1		0	
						7:09	4,801			
Mike	03/28/2012	2372	Abel Laboratories	1 Letterhead	Small Press: 2 Color Prt	1:52	0		2	
		2374	Allied Building Supplies	1 Business Cards	Small Press: 1 Color Prt	0:30	102		1	Check with Anna.
		2374	Allied Building Supplies	3 Note Pads	Small Press: 1 Color Prt	0:10	281		1	
		2406	ABC Company	1 Cover	Small Press: 2 Color Prt	2:27	2,401		0	
		2427	Abel Laboratories	1 Letterhead	Small Press: 2 Color Prt	1:51	1,237		2	Note change in ink colo
						6:50	4,021			
Anna	03/28/2012	2373	ABC Company	1 Application Forms	Design: Form	0:50	1		0	Proof to salesperson
		2406	ABC Company	1 Cover	Design: By Hour	2:00	0		0	See sample
		2428	Allied Building Supplies	1 Business cards	Proof: Proof- Fedex	0:00	5		0	
		2428	Allied Building Supplies	1 Business cards	Design: Business Card	1:40	5		0	See disk for logo
		2428	Allied Building Supplies	3 Forms	Design: By Hour	1:00	0		0	
		2435	ABC Company	1 Application Forms	Design: By Hour	1:00	0		0	
						6:30	11			
Dave	03/28/2012	2380	ABC Company	1 Employee Manuals	Package: Wrap in 50s	2:05	250		0	Leave 3 books unwrap
		2405	ABC Company	1 Employee Manuals	Digital Printer: Copier - C	2:34	7,200		0	See sample for tab loca
		2406	ABC Company	1 Cover	Cut: Trim 3S (Folded Bo	2:11	96		0	
		2406	ABC Company	1 Cover	Cut: To RunSz	0:32	24		0	
						7:22	7,570			
Lisa	03/28/2012	2356	ABC Company	1 Employee Handbooks	Fold: Auto 1 Fold - Text	0:53	6,000		0	
		2406	ABC Company	1 Cover	Collate: Hand	2:15	2,000		0	
		2406	ABC Company	1 Cover	Fold: Auto 1 Fold - Text	0:21	2,000		0	
						3:29	10,000			
Scott	03/28/2012	2375	Atman & Associates	1 Form	Offset: 60# Color	0:00	5,265		0	Canary
		2428	Allied Building Supplies	1 Business cards	Cover: 65# Carnival Lin	0:00	554		0	White-Bright - 8.5 x 11 -
						0:00	5,819			
						31:20	32,222			

Updating Status

Updating Service Status

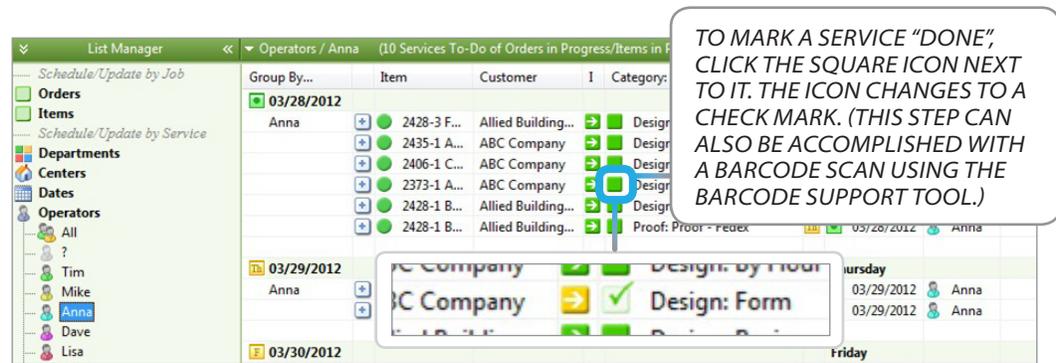
Service statuses can be updated in one of the following ways.

Suggested Procedure 1

(Use this procedure if you have assigned operators to services.)

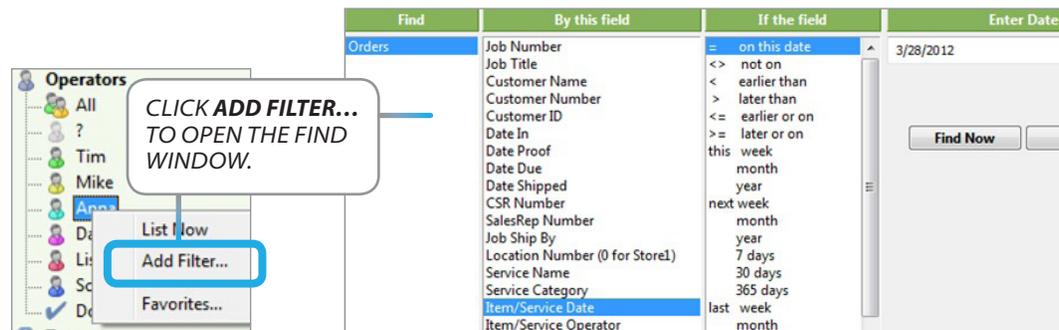
Click the operator's name under "Operators" to list all the services assigned to this operator.

When the operator completes a service, he/she marks it "Done" as shown below.



Scheduler | Services Assigned To Anna

NOTE: To restrict the list to include only the services that are due today, right-click on the operator's name and select **Add Filter...** Then, in the Find window, select **Item/Service Date is equal to today's date.**



Right-click Window for Anna

Find Window

POWER TOOL | Scheduler

Suggested Procedure 2

(Use this procedure if you have assigned “due dates” to services.)

Click Today’s date under “Dates” to list all the services due today. Mark services “Done” as they are completed.

The screenshot shows the 'List Manager' interface with the 'Dates' filter selected for '03/28/2012 Today'. The table lists 16 services with columns for Group By, Item, Customer, I, Category: Service, Date, Operator, and Tag.

Group By...	Item	Customer	I	Category: Service	Date	Operator	Tag
03/28/2012							
Design							
	2428-3 F...	Allied Building...	→	Design: By Hour	03/28/2012	?	
	2435-1 A...	ABC Company	→	Design: By Hour	03/28/2012	?	
	2406-1 C...	ABC Company	→	Design: By Hour	03/28/2012	?	
	2428-1 B...	Allied Building...	→	Design: Business Card	03/28/2012	Anna	
	2428-1 B...	Allied Building...	→	Proof: Proof - Fedex	03/28/2012	Anna	
	2375-1 F...	Attman & Ass...	→	Offset: 60# Color - 8.5 x 11	03/28/2012	?	
	2428-1 B...	Allied Building...	→	Cover: 65# Carnival Linen ...	03/28/2012	?	
	2405-1 E...	ABC Company	→	Digital Printer: Copier - Co...	03/28/2012	Dave	
	2374-1 B...	Allied Building...	→	Small Press: 1 Color Press ...	03/28/2012	?	
	2374-3 N...	Allied Building...	→	Small Press: 1 Color Press ...	03/28/2012	Mike	

Suggested Procedure 3

(Use this procedure if you have not assigned operators or due dates to services.)

Click the corresponding Department under “Departments” or the Center under “Centers” and mark services “Done” as they are completed. (See more information in “Departments” and “Centers” later in this guide.)

The screenshot shows the 'List Manager' interface with the 'Departments' filter selected for 'Graphics'. The table lists 10 services with columns for Group By, Item, Customer, I, Category: Service, Date, and Operator.

Group By...	Item	Customer	I	Category: Service	Date	Operator
Design						
	2406-1 C...	ABC Company	→	Design: By Hour	03/28/2012	?
	2376-1 Di...	ABC Company	→	Design: By Hour	03/28/2012	?
	2436-1 M...	ABC Company	→	Design: By Hour	03/30/2012	?
	2435-1 A...	ABC Company	→	Design: By Hour	03/28/2012	?
	2428-3 F...	Allied Building...	→	Design: By Hour	03/28/2012	?
	2428-1 B...	Allied Building...	→	Design: Business Card	03/28/2012	?
	2429-1 L...	Ascot Inc.	→	Design: Letterhead	03/28/2012	?

Services in the “Graphics” Department

The screenshot shows the 'List Manager' interface with the 'Departments' filter selected for 'Finishing'. The table lists 40 services with columns for Group By, Item, Customer, I, Category: Service, Date, and Operator.

Group By...	Item	Customer	I	Category: Service	Date	Operator
Fold						
	2378-1 Br...	ABC Company	→	Fold: Auto 1 Fold - Text wt.	04/04/2012	?
	2407-1 Pr...	ABC Company	→	Fold: Auto 1 Fold - Text wt.	03/29/2012	?
	2356-1 E...	ABC Company	→	Fold: Auto 1 Fold - Text wt.	03/28/2012	?
	2406-1 C...	ABC Company	→	Fold: Auto 1 Fold - Text wt.	03/29/2012	?
	2379-1 C...	ABC Company	→	Fold: Auto 1 Fold - Text wt.	04/06/2012	?
	2436-1 M...	ABC Company	→	Fold: Auto 2 Folds	03/28/2012	?
	2434-1 Br...	Apex Realtors	→	Fold: Auto 2 Folds	03/30/2012	?
	2362-1 Br...	ABC Company	→	Fold: Auto 2 Folds	03/29/2012	?
Collate						
	2379-3 In...	ABC Company	→	Collate: Hand	04/06/2012	?

Services in the “Finishing” Department

Updating Item Status (Location)

Scheduler helps you track the location of each Item. You will know (with minimum user involvement) where each job is in the production process and which Items are at certain locations in production, such as "In Proof" and "In Finishing".

Click "Items" and then "All" to display the Items of all the current Orders as in the figure below. (If your list is not grouped by "Job Due Date" and you want to list them by Due Date, click the header "Group By..." (Grouping of the Items list can be further customized in Scheduler Settings | List Options and is explained later in this guide.)

THE ICONS IN THE COLUMN NAMED "I" (FOR "ITEM") INDICATE THE LOCATIONS OF THE ITEMS. SEE THE LEFT PANE TO FIND OUT THE LOCATION THAT EACH ICON SYMBOLIZES, OR JUST EXPAND THE "I" COLUMN AS SHOWN BELOW:

Group By...	Order-Item No	Customer	I	Item Desc
03/28/2012	2415-1	Action Business	→	Application Letterhead
03/28/2012	2372-1	Abel Laborator...	→	
03/29/2012	2407-1	ABC Company	→	Product B...
03/29/2012	2407-2	ABC Company	→	Application
03/29/2012	2405-1	ABC Company	→	Employee
03/29/2012	2375-1	Attman & Ass...	→	Form
03/29/2012	2374-1	Allied Building...	→	Business Card
03/29/2012	2374-2	Allied Building...	→	Envelopes Window
03/29/2012	2374-3	Allied Building...	→	Note Pads
03/30/2012	2435-1	ABC Company	→	Application Forms
03/30/2012	2434-1	Apex Realtors	→	Brochure 4 color
03/30/2012	2432-1	ABC Company	→	Envelopes

ITEM LOCATION COLUMN EXPANDED

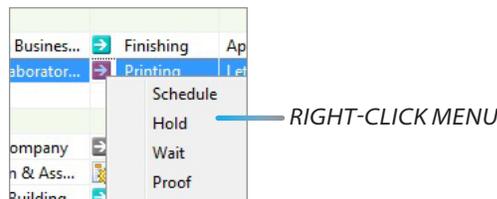
Item locations are divided into three groups: 1) Not in Production, 2) Items in Production, and 3) End Production.

1) "Not in Production" Locations (Schedule, Hold, Wait, Proof)

A job in one of these locations is not in production yet or has been pulled out of production.

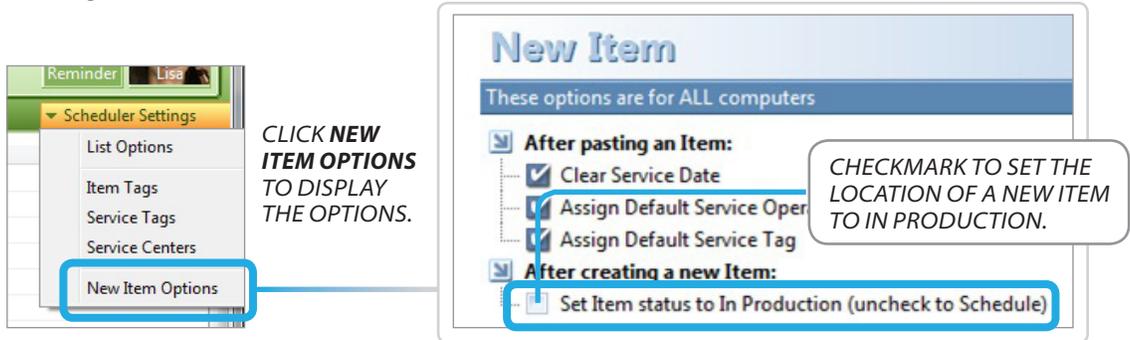
These location names are pre-defined and cannot be edited.

To place an Item in one of these locations, drag the Item to that location or right-click in the "I" column of the Item to select the location.



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NOTE: Depending on the option setting, a new Item will automatically appear either in "Schedule" or "In Production". You can set this option in **Scheduler Settings | New Item Options** as shown below. (Scheduler Settings is covered in more detail later in this guide.)



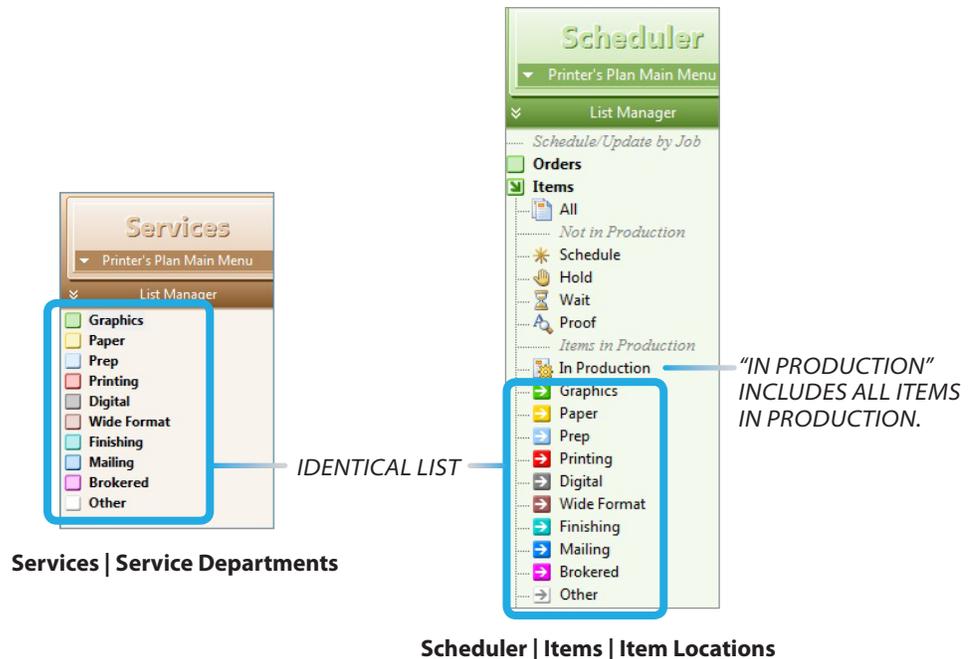
Scheduler | Scheduler Settings Menu

Scheduler | Scheduler Settings | New Item Options

Setting the new Item status to "Schedule" (box not checked) allows the production manager to review the Item and assign dates and operators to its services before the job goes into the In Production status.

2) "Items In Production" Locations

The "Items In Production" locations, except for "In Production", match the Service Departments created in the Services section. See below:



Services | Service Departments

Scheduler | Items | Item Locations

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When you mark a service of an Item "Done", the Item automatically moves to the location that corresponds to the Department of the service next in line. See below:

EXAMPLE:

Item is in Graphics location (circled in blue) because the first service in the Item is a Graphics service and it is not completed yet.

Graphics service is completed (checkmarked). Now Item is in Paper location (circled in blue) because the next service after the Graphics service is paper which belongs to the Paper department.

2433-1	ABC Company	Marketing Brochures
		Design: Brochure
		Text Coated: 80# Steri
		Digital Printer: Copier
		Fold: Auto 2 Folds

2433-1	ABC Company	Marketing Brochures
		Design: Brochure
		Text Coated: 80# Steri
		Digital Printer: Copier
		Fold: Auto 2 Folds

NOTE: To benefit fully from this automatic moving of an Item from one location to the next, in the Services section, organize the Service Departments in the order of production.

ARRANGE THE ORDER SO THE DEPARTMENTS ARE LISTED IN THE ORDER OF PRODUCTION.

CLICK TO ASSIGN COLORS TO DEPARTMENTS

Services | Service Settings | Service Departments and Categories Table

NOTE: The colors assigned to Service Departments are also assigned to the corresponding Item locations. This color-coding helps the user easily identify the Item locations (see the "I" column).

Order-Item No	Customer	I	Item Description / Service
2407-1	ABC Company	Product Brochures	Product Brochures
2407-2	ABC Company	Application Forms	Application Forms
2405-1	ABC Company	Employee Manuals	Employee Manuals
2375-1	Attman & Ass...	Form	Form

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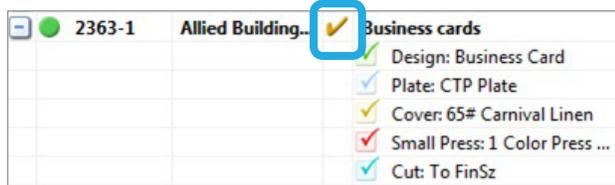
“In Production” location: When a job is in this location, it is in production but not at a specific location, such as Graphics, yet. This may mean that the job has been scheduled but has to go through one last review before it goes to the first production location. Use it in the way that fits your operation best. You may want to ignore this location completely.

As mentioned earlier in this section, you can select an option so that a newly created Item automatically goes to the “In Production” location, bypassing the “Schedule” location. This option is usually selected under one or more of the following conditions:

- CSRs schedule jobs from the Job window as soon as they create the Items,
- You are not using the “scheduling services” and “assigning operators” features, or
- You want Items to appear in production as soon as they are created.

3) “End Production” Location

When all the services of an Item are check marked, the Item automatically moves to the “Done” location. The icon for this location is a yellow checkmark. See below:



NOTE: Even if you have not checkmarked all or any of the services, just dragging the Item to the “Done” location checkmarks all the services.

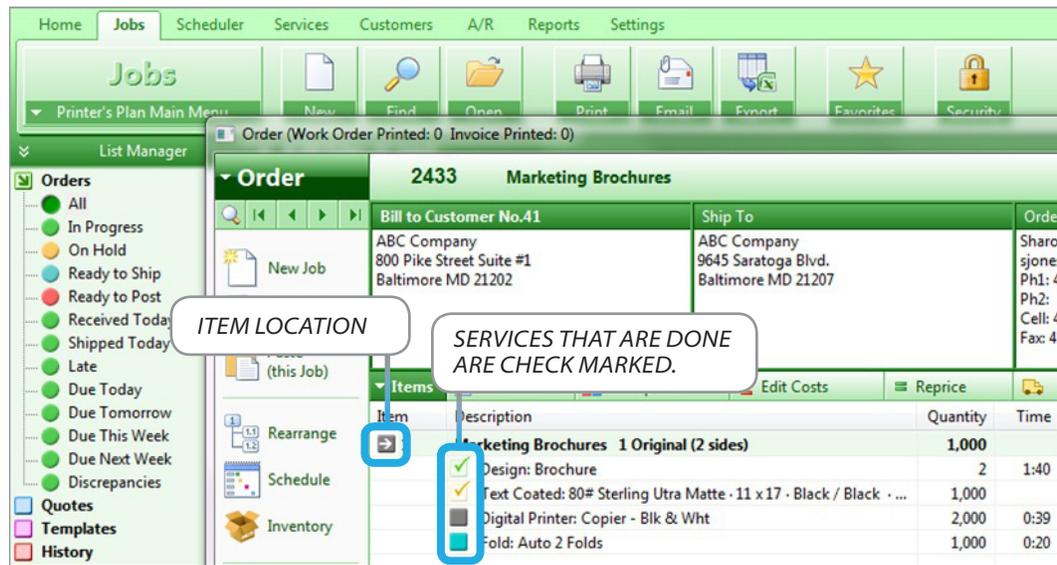
Viewing Items at a Specific Location

To view Items that are currently at a specific location, click the location. The following figure shows the Items currently at the Finishing location. Click the plus (+) sign next to the Item to view the services of the Item (see Item 2407-2 in the figure).

Group By...	Order-Item No	Customer	Item Description / Service	Date	CSR/Oper
03/28/2012	2415-1	Action Busines...	Registration forms	Wednesday 03/28/2012	Paul
03/29/2012	2407-2	ABC Company	Application Forms Plate: CTP Plate Carbonless: 3 Part Small Press: 1 Color Press ... Pad: NCR Padding Number: Number 1	Thursday 03/29/2012	Lisa Lisa Scott Tim Lisa Lisa
04/06/2012	2379-2	ABC Company	Inside pages	Friday 04/06/2012	Lisa
	2362-1	ABC Company	Brochure	04/06/2012	Lisa

Viewing Item Location and Service Status in the Job Window

You and your staff can view the location of an Item and statuses of its services from the Job window in the **Jobs** section.



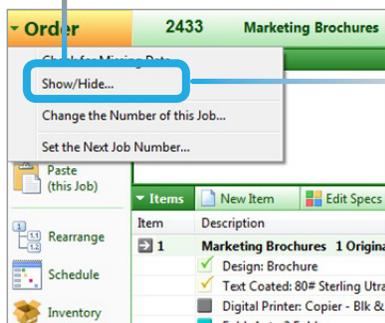
Jobs section | Job window

Ability to view service and Item statuses is a feature that can be enabled/disabled as follows:

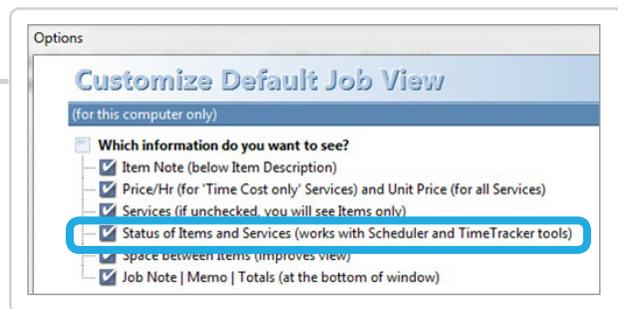
- 1) Click **Order** to display the Order menu.
- 2) Select **Show/Hide...**
- 3) Check the **Status of Items and Services** option. (Uncheck to disable the feature.)

See the figure below:

CLICK TO DISPLAY THE MENU SHOWN.



Jobs section | Job window

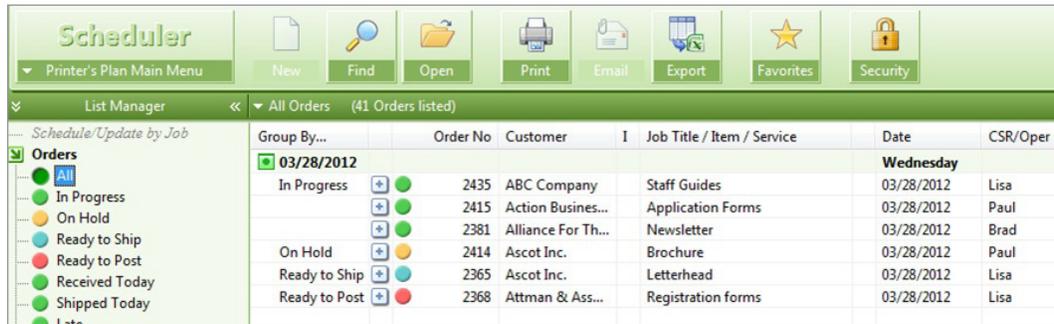


Show/Hide... Options window

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Updating Order Status

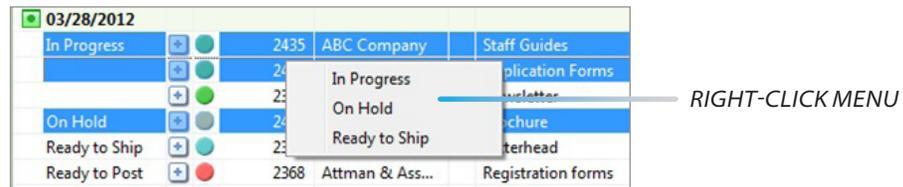
Order statuses in Scheduler and their icon colors are identical to the Orders in the **Jobs** section: "In Progress", "On Hold", "Ready to Ship", and "Ready to Post".



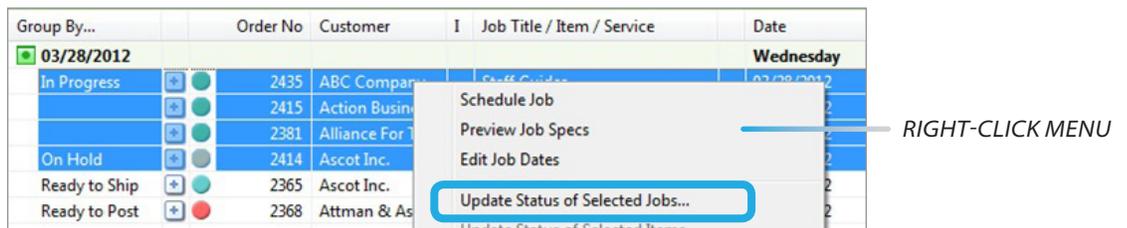
When all the services of an Order are checked as "Done", the Order status will automatically change to "Ready to Ship".

Ready to Ship	2365	Ascot Inc.	Letterhead	03/28/2012	Lisa
			<input checked="" type="checkbox"/> Letterhead <input checked="" type="checkbox"/> Design: Letterhead <input checked="" type="checkbox"/> Writing: 24# Classic Linen <input checked="" type="checkbox"/> Digital Printer: Copier - Co...	<input checked="" type="checkbox"/> 03/28/2012 <input checked="" type="checkbox"/> 03/25/2012 <input checked="" type="checkbox"/> 03/28/2012	Anna Scott Lisa

To manually change the status of Order(s), select the Order(s) and right-click in the Order number column.



To automatically update the status of Order(s), select the Order(s), and right-click in the Job Title column.



More Scheduler Functions

Departments

The Departments in Scheduler are the same as the Service Departments created in the **Services** section.

When you click a Department, the right pane displays the services that belong to that Service Department and are assigned to current Orders.

EXAMPLE: In the figure below, on the left pane, the Finishing department is selected. On the right, all the Finishing services assigned to current Orders are listed.

GROUPING IS DETERMINED BY THE OPTION(S) SELECTED IN **SCHEDULER SETTINGS | LIST OPTIONS. TO GROUP BY ANOTHER CRITERION, SUCH AS BY DATE, CLICK **GROUP BY...****

Group By...	Item	Customer	I	Category: Service	Date	Operator
Cut	2366-1 B...	Apex Realtors		Cut: To FinSz	04/04/2012	Dave
	2363-3 F...	Allied Building...		Cut: To FinSz	04/04/2012	Dave
	2431-1 Br...	Apex Realtors		Cut: To FinSz	03/29/2012	Dave
	2434-1 Br...	Apex Realtors		Cut: To FinSz	03/30/2012	Dave
	2374-1 B...	Allied Building...		Cut: To FinSz	03/29/2012	Dave
	2436-1 M...	ABC Company		Cut: To FinSz	04/09/2012	Dave
	2430-1 N...	ABC Company		Cut: To FinSz	04/04/2012	Dave
	2374-3 N...	Allied Building...		Cut: To FinSz	03/29/2012	Dave
	2363-1 B...	Allied Building...		Cut: To FinSz	04/04/2012	Dave
	2428-1 B...	Allied Building...		Cut: To FinSz	04/01/2012	Dave
Fold	2407-1 Pr...	ABC Company		Fold: Auto 1 Fold - Text wt.	03/29/2012	Lisa
	2406-1 C...	Annapolis Gen...		Fold: Auto 1 Fold - Text wt.	03/29/2012	Lisa
	2356-1 E...	ABC Company		Fold: Auto 1 Fold - Text wt.	03/28/2012	Dave
	2379-1 C...	Albright Assoc...		Fold: Auto 1 Fold - Text wt.	04/06/2012	Dave
	2378-1 Br...	ABC Company		Fold: Auto 1 Fold - Text wt.	04/04/2012	Lisa

ALL: DISPLAYS ALL SERVICES OF ALL ORDERS.

DONE: DISPLAYS ALL THE SERVICES THAT HAVE BEEN COMPLETED.

LIST OF FINISHING SERVICES TO-DO. COMPLETED SERVICES CAN BE CHECKMARKED IN THIS VIEW, ALSO.

CUSTOMER TO WHICH THE ITEM BELONGS

SERVICE NAME

+ ● 2378-1 Brochure ABC Company → ■ Fold: Auto 1 Fold - Text wt. F W 04/04/2012 👤 Lisa

JOB NO - ITEM NO AND DESCRIPTION OF THE ITEM TO WHICH THE SERVICE BELONGS (ITEM COLUMN EXPANDED TO SHOW ITEM DESCRIPTION)

CURRENT LOCATION OF THE ITEM

SERVICE DUE DATE

OPERATOR ASSIGNED TO SERVICE

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Other actions that can be accomplished in the "Departments" view:

- When you click the plus (+) sign next to an Item, the Item expands and the other services in the Item are displayed for your view.

EXPANDED ITEM

Item	Service	Date	Operator	Actual Time	Actual Quantity
2378-1 Br...	ABC Company	04/04/2012	Lisa		
2406-1 C...	Annapolis Gen...	03/29/2012	Lisa		
2356-1 E...	ABC Company	03/30/2...	Dave		
Employee Handbooks					
	Bond: 20# White	03/28/2...	Scott	0:00	1,000
	Index: 110# Color	03/28/2...	Scott	0:00	2,000
	Tabs: Tabs CusStock	03/28/2...	Scott	0:00	2,000
	Digital Printer: Copier - ...	03/29/2...	Dave	1:13	4,000
	Fold: Auto 1 Fold - Text ...	03/30/2...	Dave	0:45	5,000
2379-1 C...	Albright Assoc...	04/06/2012	Dave		
2407-1 Pr...	ABC Company	03/29/2012	Lisa		

- Double-clicking a service opens the Schedule window of its Order where you can view the Order details.

Item Status	Item and Service Description	Service Date	Operator	Actual Time	Actual Quantity
Digital	Employee Handbooks			0:00	1,000
	Bond: 20# White - 8.5 x	03/28/12	Scott	0:00	1,000
	Index: 110# Color - 8.5 x	03/28/12	Scott	0:00	2,000
	Tabs: Tabs CusStock - 8	03/28/12	Scott	0:00	2,000
	Digital Printer: Copier -	03/29/12	Dave	1:13	4,000
	Fold: Auto 1 Fold - Text	03/30/12	Dave	0:45	5,000
				1:58	

Auto...	When	Ordered By	Job Note	Memo to Customer
Help	In Proof 3/26/2012	Sarah Littleton	Deliver to the back door by 2 pm.	
	Due 4/2/2012 11 am	sllittleton@abc.com		
	Ship'd	Ph1: 410-539-3466 x 35		
	CSR Lisa	Cell:		
Close	Status In Progress	Fax: 410-539-5586		

Service Centers

Centers provide an alternative way to grouping Services in production as compared to service Departments. They are user-defined in Scheduler and then assigned to services.

For example, in the **Services** section, you may have set up all your digital printers in one department, such as Digital Department. Therefore, in Scheduler, when you click the “Digital” department under “Departments”, you see all the digital printers that are assigned to current Items. However, you may also want to view some specific printers in separate lists. Creating Centers allows you to accomplish this.

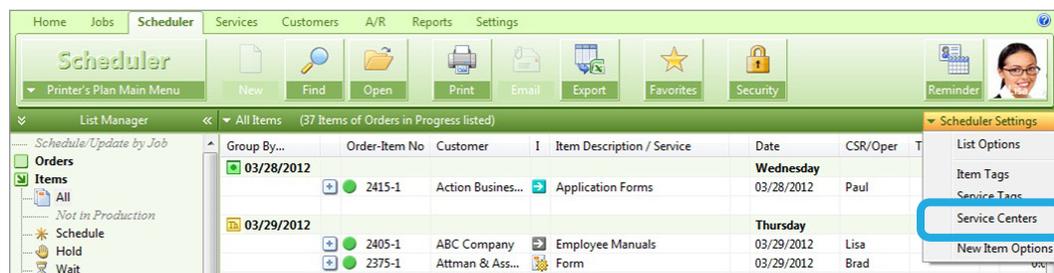
Group By...	Item	Customer	I	Category: Service	Date	Operator	Tag	P	Time	Quantity
03/28/2012										
Digital Color	2406-1 C...	ABC Company		Digital Printer: Copier - Color	03/28/2012	Dave			4:18	5,000
Digital Color	2405-1 E...	ABC Company		Digital Printer: Copier - Color	03/28/2012	Dave			2:34	7,200
03/29/2012										
Digital Color	2380-1 E...	ABC Company		Digital Printer: Copier - Color	03/29/2012	Dave			4:28	13,000
03/30/2012										
Digital Color	2406-3 In...	ABC Company		Digital Printer: Copier - Color	03/30/2012	Dave			3:39	
	2374-1 B...	Allied Building...		Digital Printer: Copier - Color	03/30/2012	Dave			3:24	10,000
	2374-3 N...	Allied Building...		Digital Printer: Copier - Color	03/30/2012	Dave			0:06	84
									0:09	250
04/05/2012										
Digital Color	2406-2 In...	ABC Company		Digital Printer: Copier - Color	04/05/2012	Dave			3:24	10,000

Color Copiers Listed Under “Digital Color” Center

Setting up Service Centers

You can define up to 24 Service Centers. To modify the existing Centers and to add new Centers:

In Scheduler, click **Scheduler Settings** and select **Service Centers**.



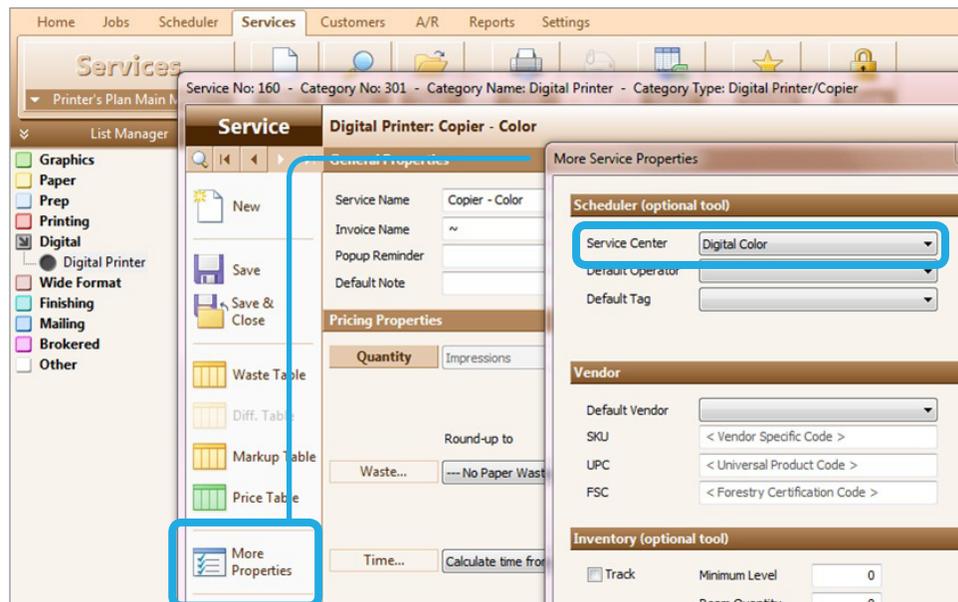
The Service Centers window appears.

Assigning Centers to Services

After you set up the Service Centers, assign Centers to services using one of the following two methods:

Method 1:

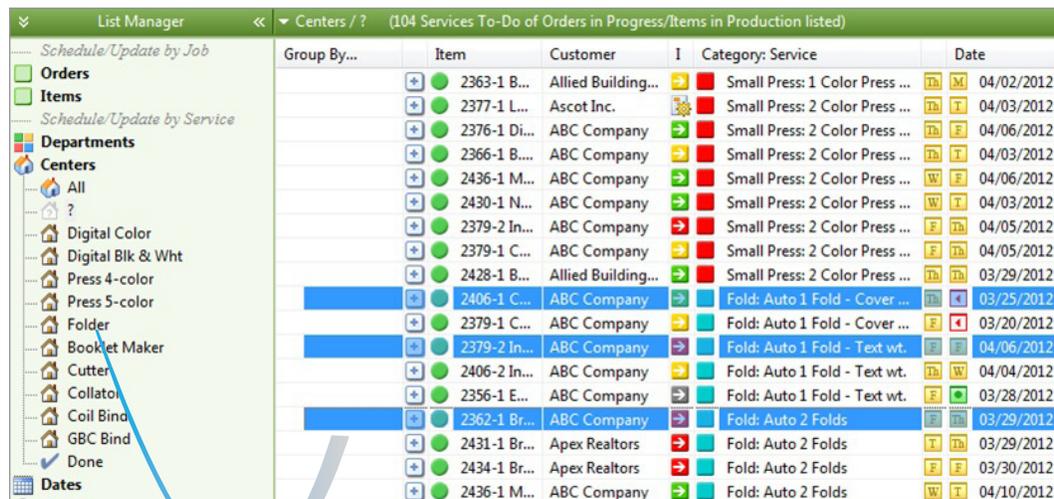
- 1) In the **Services** section, open a service.
- 2) Click **More Properties...** to open the More Service Properties window.
- 3) Click the arrow in the **Center** field and select the center.



Method 2 (This is the most efficient way if you want to assign one center to multiple services.)

- 1) In Scheduler, expand **Centers**.
- 2) Click the center indicated with a question mark (?). All the services without center assignments are listed.
- 3) Select (highlight) the services to which you want to assign one specific center. If you have the same service, such as "Auto 2 Folds", listed more than once, you need to highlight it only once. (See the figure below.)
- 4) Drag the selected services to that center.

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Group By...	Item	Customer	I	Category: Service	Date
	2363-1 B...	Allied Building...		Small Press: 1 Color Press ...	04/02/2012
	2377-1 L...	Ascot Inc.		Small Press: 2 Color Press ...	04/03/2012
	2376-1 Di...	ABC Company		Small Press: 2 Color Press ...	04/06/2012
	2366-1 B...	ABC Company		Small Press: 2 Color Press ...	04/03/2012
	2436-1 M...	ABC Company		Small Press: 2 Color Press ...	04/06/2012
	2430-1 N...	ABC Company		Small Press: 2 Color Press ...	04/03/2012
	2379-2 In...	ABC Company		Small Press: 2 Color Press ...	04/05/2012
	2379-1 C...	ABC Company		Small Press: 2 Color Press ...	04/05/2012
	2428-1 B...	Allied Building...		Small Press: 2 Color Press ...	03/29/2012
	2406-1 C...	ABC Company		Fold: Auto 1 Fold - Cover ...	03/25/2012
	2379-1 C...	ABC Company		Fold: Auto 1 Fold - Cover ...	03/20/2012
	2379-2 In...	ABC Company		Fold: Auto 1 Fold - Text wt.	04/06/2012
	2406-2 In...	ABC Company		Fold: Auto 1 Fold - Text wt.	04/04/2012
	2356-1 E...	ABC Company		Fold: Auto 1 Fold - Text wt.	03/28/2012
	2362-1 Br...	ABC Company		Fold: Auto 2 Folds	03/29/2012
	2431-1 Br...	Apex Realtors		Fold: Auto 2 Folds	03/29/2012
	2434-1 Br...	Apex Realtors		Fold: Auto 2 Folds	03/30/2012
	2436-1 M...	ABC Company		Fold: Auto 2 Folds	04/10/2012

DRAG SELECTED SERVICES TO THEIR CENTER.

Checking if All Services Have Center Assignments

When you click the center indicated with the question mark, the services listed are the ones assigned to current Orders only. Therefore, not all services without center assignments may be included in this list. After completing the steps in Method 2, do the following to assign centers to services that were not listed:

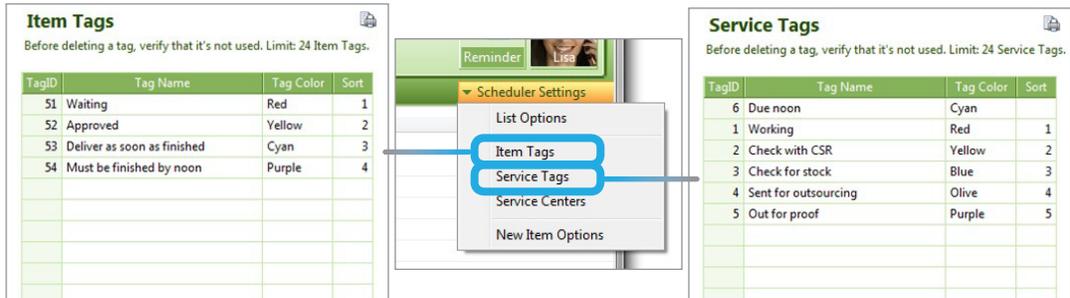
- 1) In the **Services** section, list the services of one Service Category.
- 2) Scroll to the right until you see the column named "Center". The question marks (?) indicate the services without center assignments.
- 3) Follow the steps in Method 1 to if you want to assign centers to these services.

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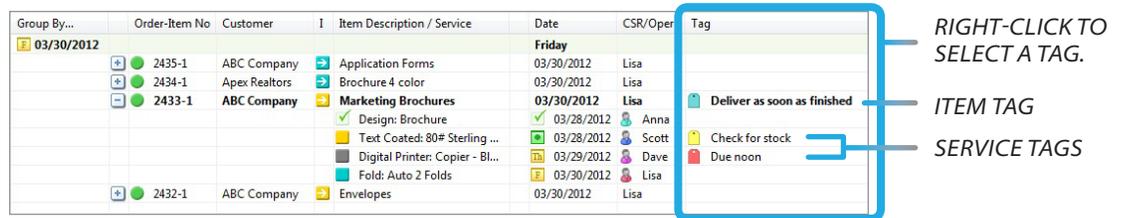
Tags

You can assign pre-defined tags to services and Items as communication tools.

Service and Item tags are defined in Scheduler Settings | Item Tags/Service Tags. You can also assign colors to tags for easy identification.

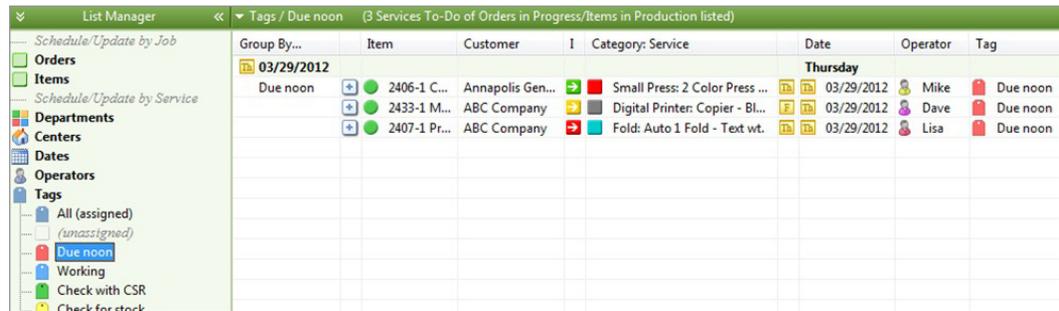


Assigning a Tag to a Service or an Item



Viewing Tag Lists

Clicking a tag under "Tags" displays all the services to which that specific tag is assigned.



NOTE: The "Tags" lists include only the Service Tags. Item Tag lists are not available.

Priority Numbers

You can assign priority numbers to services to indicate the order in which services due on a certain day should be completed. Assigning priority numbers helps manage the production efficiently.

Group By...	Item	Customer	I	Category: Service	Date	Operator	Tag	P
03/29/2012	Thursday							
Lisa	2407-1 Pr...	ABC Company		Fold: Auto 1 Fold - Text wt.	03/29/2012	Lisa	Due noon	1
	2406-2 In...	ABC Company		Fold: Auto 1 Fold - Text wt.	03/29/2012	Lisa		4
	2434-1 Br...	Apex Realtors		Fold: Auto 2 Folds	03/29/2012	Lisa		3
	2362-1 Br...	ABC Company		Fold: Auto 2 Folds	03/29/2012	Lisa		5
	2415-1 A...	Action Busines...		Pad: NCR Padding	03/29/2012	Lisa		2

Lisa's Tasks (Due Today) Prioritized

You can also assign priority numbers to Items to help the production manager(s) identify the order of urgency of jobs that are due on the same day.

RIGHT-CLICK TO ASSIGN A PRIORITY NUMBER (1-9).

Group By...	Order-Item No	Customer	I	Item Description / Service	Date	CSR/Oper	Tag	P
	2434-1	Apex Realtors		Product Brochures	03/29/2012	Lisa		5
	2415-1	Action Busines...		Registration forms	03/29/2012	Paul		2
	2405-1	ABC Company		Employee Manuals	03/29/2012	Lisa		4
	2375-1	Attman & Ass...		Form	03/29/2012	Brad		3
	2374-1	Allied Building...		Business Cards	03/29/2012	Anna		1
	2374-2	Allied Building...		Envelopes Window	03/29/2012	Anna		1
	2374-3	Allied Building...		Note Pads	03/29/2012	Anna		1

Items of Orders (Due Today) Prioritized

Viewing Prioritized Services:

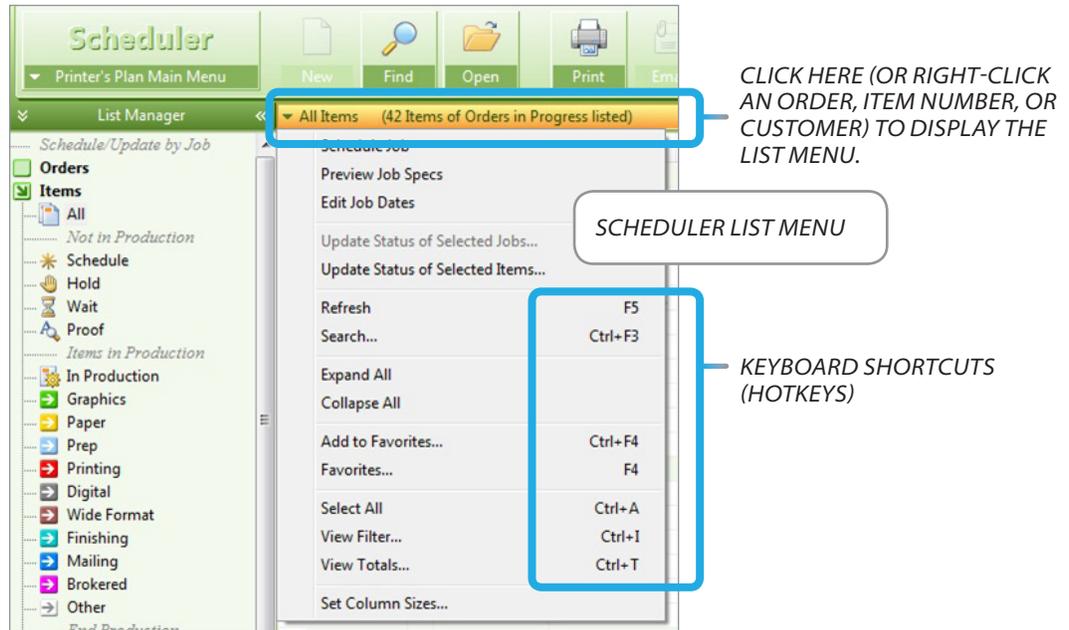
To see all the services to which a specific priority number is assigned, click that number under "Priorities".

Group By...	Item	Customer	I	Category: Service	Date	Operator	Tag	P
03/28/2012	Wednesday							
2	2372-1 Letterhead	Abel Laborator...		Small Press: 2 Color Press ...	03/28/2012	Mike		2
	2427-1 Letterhead	Abel Laborator...		Small Press: 2 Color Press ...	03/28/2012	Mike		2
	2407-1 Product Brochures	ABC Company		Fold: Auto 1 Fold - Text wt.	03/28/2012	Lisa	Due noon	2

NOTE: The "Priorities" lists include only the service Priorities. These lists are not available for Item priorities.

Scheduler List Menu

Click the top **List Menu** bar above the right pane to display the Scheduler List Menu.



Descriptions of the Functions on the List Menu

Schedule Job

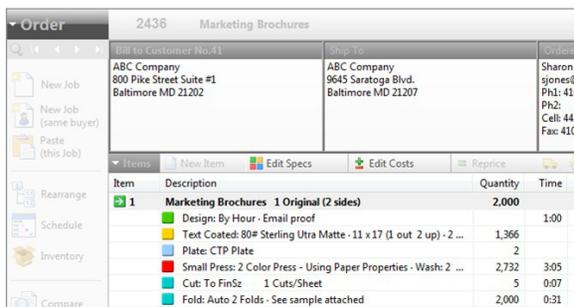
Opens the "Schedule Job" window.



Preview Job Specs

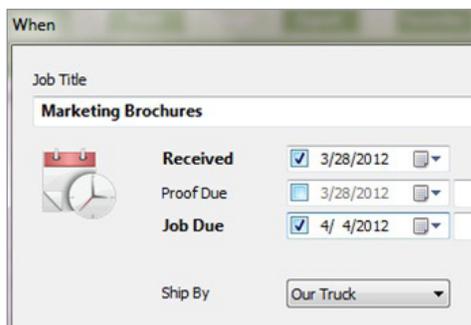
Opens the "Job" window for preview.

Editing is not allowed in this job view.



Edit Job Dates

Opens the "When" window for editing.

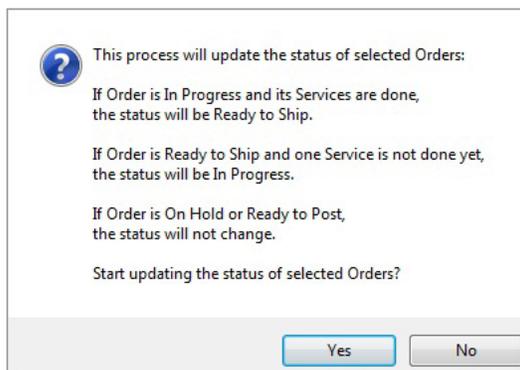


Update Status of Selected Jobs...

(available only for Orders views)

Updates the statuses of the highlighted Orders. The window shown appears when this selection is made.

Click **Yes** to update the status(es).

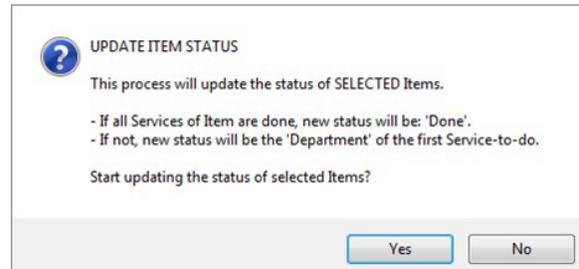


Update Status of Selected Items...

(available only for Items views)

Updates the statuses of the highlighted Items. The window shown appears when this selection is made.

Click **Yes** to update the status(es).



Refresh

When you make a modification to an Item in the **Jobs** section, such as adding a service, or when someone updates Scheduler data from another computer, you need to refresh your screen to view the updated data on your computer. Use the "Refresh" command or press the [F5] key for this function.

Search...

Opens the following window which allows you to search the list for a specific item.



Expand All

Expands all the selected Items (Orders if you are in an Order list view) to display their services.

Collapse All

Collapses all the selected Items (Orders) to hide their services (their Items).

POWER TOOL | Scheduler

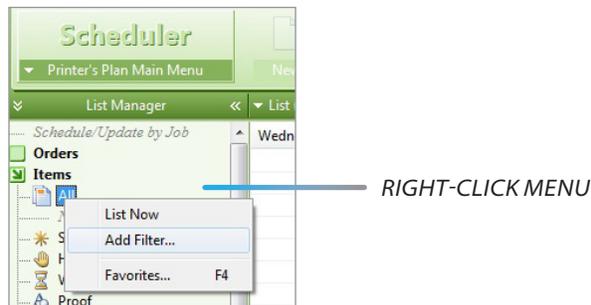
Add to Favorites...

Allows you to save a custom list as a favorite report.

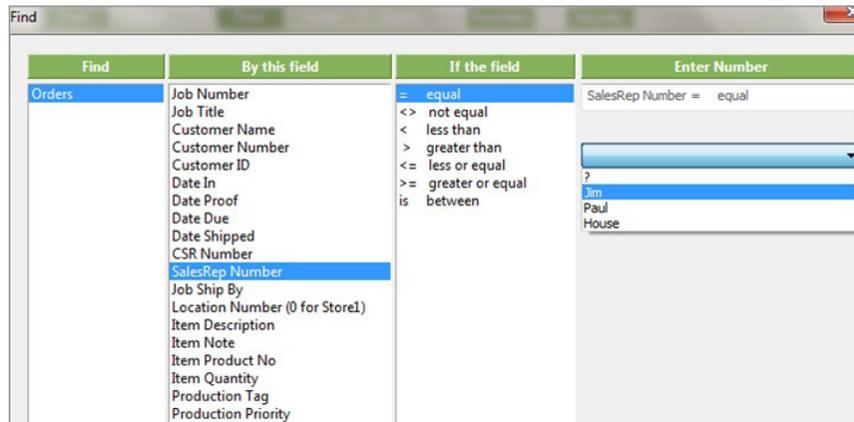
EXAMPLE:

Jim, the salesperson, occasionally wants to see the locations of the jobs of his customers. To create such a list, he does the following:

- 1) Open the "Items" folder and right-click "All". A menu appears.



- 2) Select "Add Filter..." The Find window appears.
- 3) Make the selections as below.



POWER TOOL | Scheduler

4) A list of the Items of his customers' Orders appears.

Group By...	Order-Item No	Customer	I	Item Description / Service	Date	CSR/Oper
03/28/2012 Wednesday						
	2372-1	Abel Laborator...		Letterhead	03/28/2012	Paul
03/29/2012 Thursday						
	2434-1	Apex Realtors		Marketing Brochures	03/29/2012	Lisa
	2415-1	Action Busines...		Registration forms	03/29/2012	Paul
	2375-1	Attman & Ass...		Form	03/29/2012	Brad
04/03/2012 Tuesday						
	2431-1	Apex Realtors		Brochure 4 color	04/03/2012	Lisa
04/04/2012 Wednesday						
	2429-1	Ascot Inc.		Letterhead 2 Color	04/04/2012	Tom
04/05/2012 Thursday						
	2406-1	Action Busines...		Cover	04/05/2012	Lisa
	2406-2	Action Busines...		Inside pages	04/05/2012	Lisa
	2406-3	Action Busines...		Inserts	04/05/2012	Lisa
	2377-1	Ascot Inc.		Letterhead 2 Color	04/05/2012	Tom
	2370-1	Attman & Ass...		Special Window Envelopes	04/05/2012	Lisa

5) To save this list as a favorite, right-click the list and select "Add to Favorites..." A window appears.

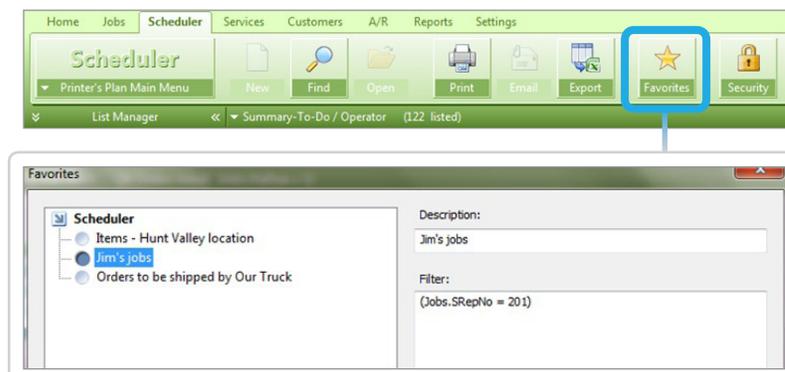
Add to Favorites

Name:

Printer's Plan will create a short-cut to this report/list.

6) Name the list, such as "Jim's jobs" and click **OK**.

In the future, any time Jim wants to see his customers' jobs and their locations, he clicks the **Favorites** button at the top of the **Scheduler** section and selects "Jim's jobs".



POWER TOOL | Scheduler

Favorites...

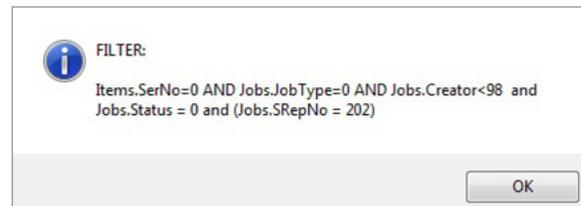
Opens the Favorites window shown in the figure above. Making this selection is the same as clicking the **Favorites** button.

Select All

Selects (highlights) all the items on the list.

View Filter...

Opens a window that shows the criteria Printer's Plan used to create the displayed list.



View Totals...

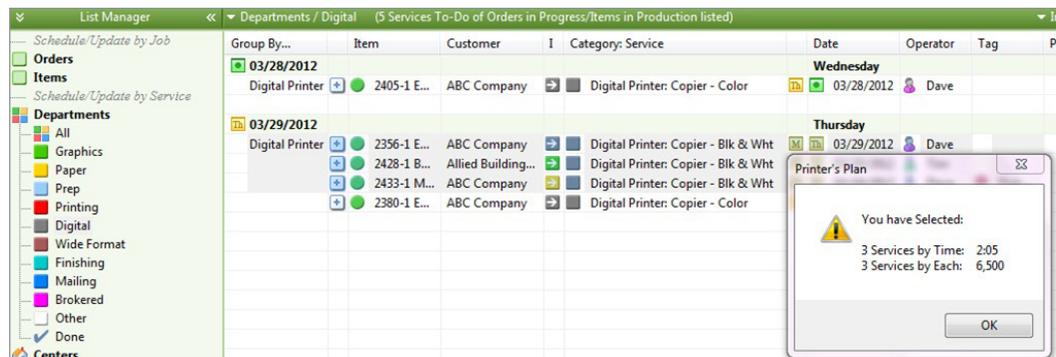
Opens the Totals window. In services views, this window shows the total quantity/time for the selected services.

EXAMPLE:

To see the total time and number of clicks for your Black & White copier on a certain date:

- 1) Select "**Digital**" under "Departments".
- 2) Highlight the Black & White copier services assigned to that date.
- 3) Open the right-click menu and select "**View Totals...**"

(See the figure below.)



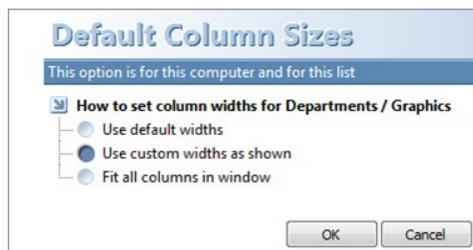
POWER TOOL | Scheduler

Set Column Sizes...

In any view of Scheduler, you can change any column width or hide a column by clicking the right end of the column header and dragging it to the right or the left as shown below.



If you want to keep the adjusted column widths for this view, click “**Set Column Sizes...**” on the right-click menu. The “Default Column Sizes” window appears.



Select “**Use custom widths as shown**” to save the changes you made to the column widths. Later, if you want to return to the default widths, select “**Use default widths**” from the same window.

Use the “**Fit all columns in window**” selection when you want to see all the columns but your computer screen is not wide enough and you need to scroll sideways to see the other columns.

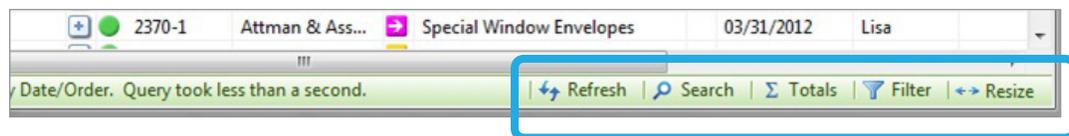
NOTES:

The options in the “Default Column Sizes” window are computer-specific and also list-specific. If you want to see the same column widths also in other list views, you must go to each list view and repeat the procedure.

These options apply to only the changes made to the column widths. Changes made to the order of the columns will not be saved.

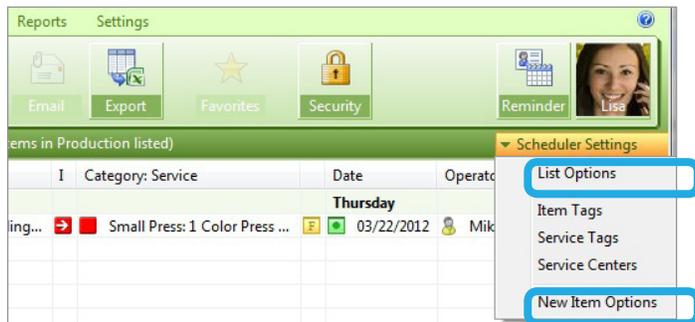
List Menu Bar at the Bottom

NOTE: The “Refresh”, “Search...”, “View Filter...”, “View Totals...”, and “Set Column Sizes...” commands are also available as buttons on the lower right corner of every view of Scheduler.



Setting Scheduler Options and Defaults

Click **Scheduler Settings** to set the options and defaults in Scheduler.



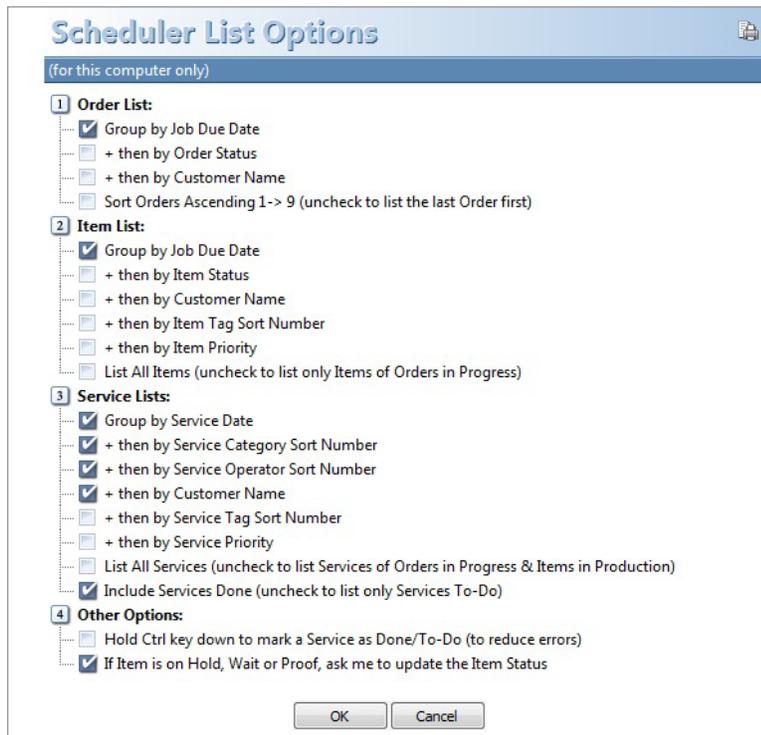
ITEM TAGS, SERVICE TAGS, AND SERVICE CENTERS ARE EXPLAINED IN THE PREVIOUS PAGES OF THIS GUIDE.

List Options

These options are computer-specific.

The options in 1 through 3 apply to list views of Orders, Items, and Services respectively.

The explanations of the “Other Options” in 4 follow the figure below.



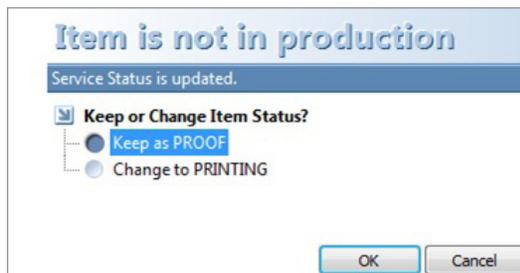
#4 – Other Options

“Hold Ctrl key down to mark a Service as Done/To-Do”

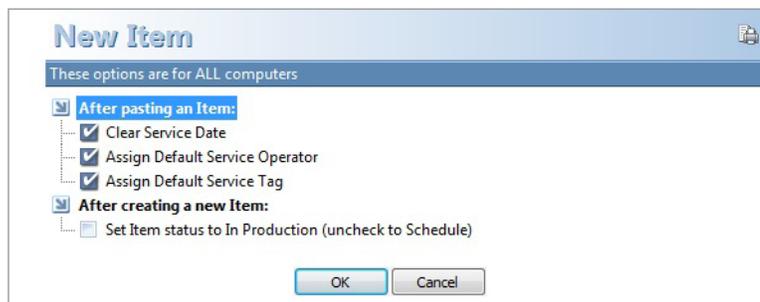
Sometimes to checkmark a service as “Done”, you may accidentally click the box next to another service. Holding the [Ctrl] key down while clicking the box requires more attention to the task, thus eliminating the error mentioned.

“If Item is on Hold, Wait or Proof, ask me to update the Item Status”

If this option is checked: When an Item is in one of the Hold, Wait, and Proof statuses, any modification in one of its services, such as a change of service due date, will cause a window to pop up asking if you want to keep or change the Item status as shown in the figure below.



New Item Options



“After pasting an Item” options

If these options are checked, the assignments (dates, operators, and tags respectively) will be cleared when an Item is copied and pasted from a History job. Otherwise, the same assignments will carry forward to the new Item.

“After creating a new Item” option

This option is explained in the “Tracking Items” section.