



BEYOND SCHEDULER

User Guide



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About BEYOND Scheduler

About this Extension

BEYOND Service is an extension for Microsoft Dynamics 365 Business Central.

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Beyond Scheduler adds a scheduling overview to your Business Central.

Make your employees' workday easier and increase productivity at the same time. **Beyond Scheduler** consists of a list of unscheduled appointments and a side-by-side view of already scheduled appointments. Assign events to resources based on date and time to create a clear overview for everyone.

The planner has different scales, views and controls depending on how you want to work with it:

Clear view of scheduled service orders assigned to resources by date and time. Quickly and easily drag and drop unscheduled service orders onto the overview, scale them by clicking on the left/right edge and drag them as needed, or move an already scheduled order by clicking and dragging. Click on a scheduled order to get more information about it. Filter unassigned service orders, set the view with different scales or select a date directly from the date picker.

The latest version of this documentation can be found at the following link: [BEYOND Scheduler Documentation](#).

The examples described in this documentation represent only a part of the possibilities that the **BEYOND Scheduler** solution offers you.

If you have a specific case that you would like to map via the solution, please feel free to contact us.

NOTE

No dependencies on or to other apps

No dependent applications are required to use BEYOND Scheduler, i.e. you do not need to install any additional applications.

Documentation Information

Version	Date	Autor	Comment
1.0	24.05.2023	Jannic Weidel	Initial (English) Version of the documentation


Document Access

public

User Interface

This chapter explains the user interface of **Beyond Scheduler**. You can display the view of **Beyond Scheduler** both chronologically and according to individual filter settings (e.g. filtered by user or orders).

To display the interface of **Beyond Scheduler**, proceed as follows:

1. From the role center, open the search function (**ALT+Q**) .
2. Search for **Service Scheduler** and click on the appropriate search result.
3. The interface of **Beyond Scheduler** is displayed.

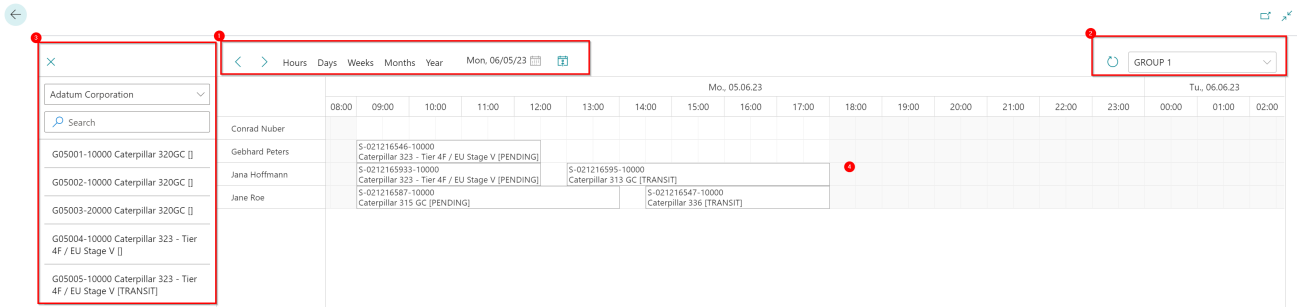


Figure: User Interface

4. The user interface of **Beyond Scheduler** is composed of four areas **Timeline (1)**, **View Filter Area (2)**, **Order Selection Area (3)** and the **Planning Table (4)**.



Figure: Timeline (1)

5. Using the arrow icons on the left edge of the **Timeline (1)**, you can navigate between days, weeks, months or years in the **Planning Table (4)**. To change the temporal unit (days, weeks, months, or years), click the timeline option of the same name. Note that at the bottom of the **Planning Table (4)**, some options display a scroll bar that allows you to view the entire range (e.g. from 00:00 to 23:59).
6. On the right edge of the **Timeline (1)**, you can use the corresponding icons to call up a calendar selection or jump to today's work date.
7. The circular arrow icon to the left of the **View Filter Area (2)** allows you to manually refresh the view. From the dropdown menu, you can apply a filter you have defined to the **Planning Table (4)**. For more information on how to create filters, see the [Create Filter](#) chapter.



Figure: View Filter Area (2)

8. The **Order Selection Area (3)** displays all service orders in the system. The displayed service orders are composed of the following information: Service order number with the corresponding line number + Service item description + Repair status code. Using the dropdown menu, you can apply a filter to filter the service orders. For more information on how to create filters, see the [Create Filter](#) chapter.

✕

Adatum Corporation ▼

🔍 Search

G05001-10000 Caterpillar 320GC []

G05002-10000 Caterpillar 320GC []

G05003-20000 Caterpillar 320GC []

G05004-10000 Caterpillar 323 - Tier 4F / EU Stage V []

G05005-10000 Caterpillar 323 - Tier 4F / EU Stage V [TRANSIT]

Figure: Order Selection Area (3)

9. In the **Planning Table** the timeline and the available resources are displayed. The displayed resources can be narrowed down via filters.

	Mo., 05.06.23											
	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	
Conrad Nuber												
Gebhard Peters		S-021216546-10000 Caterpillar 323 - Tier 4F / EU Stage V [PENDING]										
Jana Hoffmann		S-0212165933-10000 Caterpillar 323 - Tier 4F / EU Stage V [PENDING]				S-021216595-10000 Caterpillar 313 GC [TRANSIT]						
Jane Roe		S-021216587-10000 Caterpillar 315 GC [PENDING]					S-021216547-10000 Caterpillar 336 [TRANSIT]					

Figure: Planning Table (4)

For more information on how to assign a service order to a resource, see the [Schedule Orders](#) chapter.

Create Filter

This chapter describes how to create a filter that is used to narrow down displayed information (such as service orders or resources) in the planning table.

You can define three different types of filters:

- [Create Order Filter](#)
- [Create Resource Filter](#)
- [Create User Filter](#)

Create Order Filter

This section describes how to create a Service Order Filter. This filter is used to narrow down the service orders displayed in the order selection area.

To create an service order filter, proceed as follows:

1. Open the search (ALT+Q) and locate the [Scheduler Unassigned Events Filter Setup](#) page.
2. The **Scheduler Unassigned Events Filter Setup** page is displayed. By default the **DEFAULT** filter is already applied.

Code ↓	Name	Header Filter	Line Filter
→ DEFAULT	⋮ Standardfilter	(Document Type=FILTER(Order), Status=FILTER(Pending In Process), Service Order Type=FILTER(<>))	(Service Item No.=FILTER(<>))

Figure: Scheduler Unassigned Events Filter Setup

3. To create a new filter, click **New** in the menu bar.
4. Under the **Code** column, enter a code for the new filter you want to create.
5. Under the **Description** column, enter a description for the new filter you want to create.
6. To define the filter criteria, click the displayed value under the **Header Filter** column.
7. The **Filter Page** window is displayed.

Filter: Service Header

+ Filter...

Filter totals by:

+ Filter...



Figure: Filter: Service Header

8. Under the **Filter: Service Header** tab, click the plus icon if you want to define a filter criterion based on values from fields in the service header. In the following example, we will create a filter for a customer so that you can filter for service orders of this customer.
9. From the drop-down menu that appears, select the **Customer No.** field.

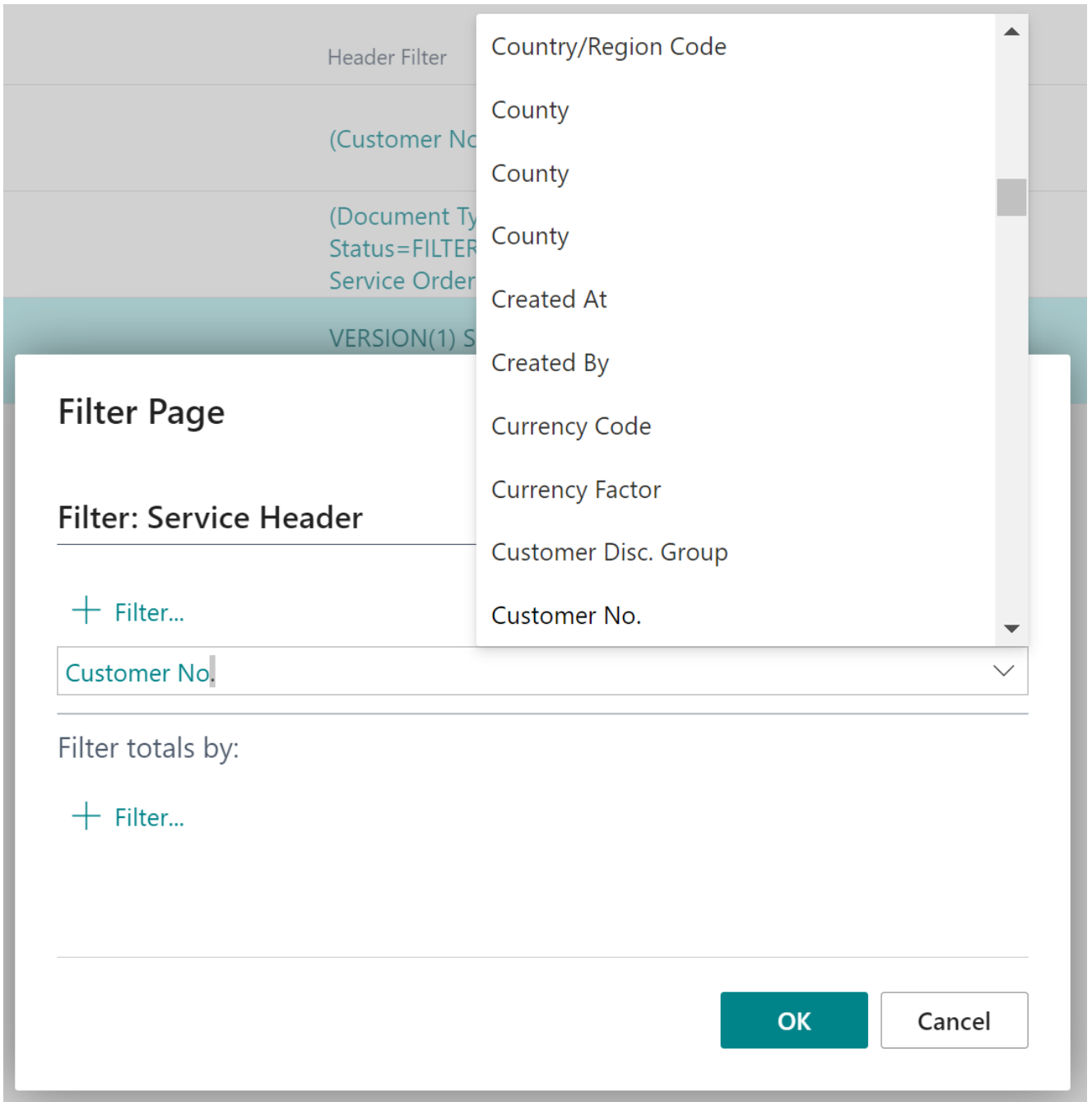


Figure: Customer No.

10. Enter customer number or customer name in the input field.

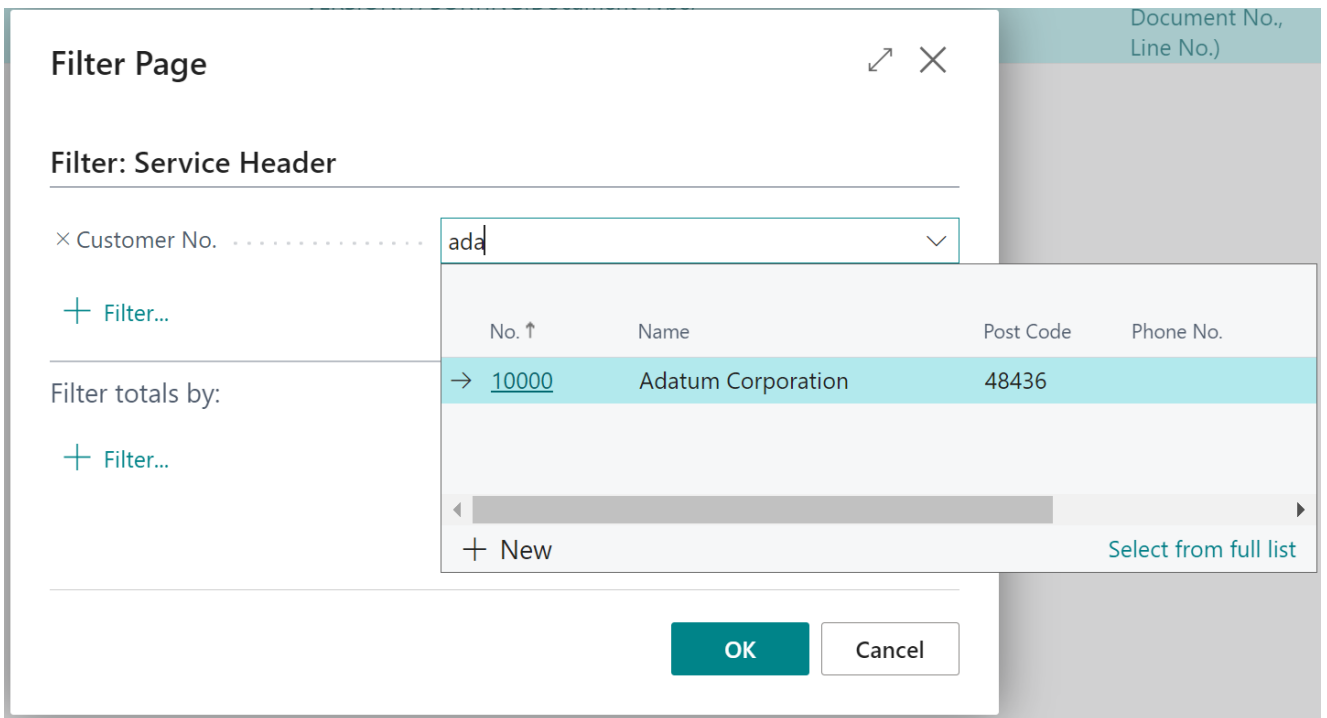


Figure: Create Filter for Customer Orders

11. Click **OK** to create the filter.

You have created a filter. You can select this filter in the order selection area to limit the view of the displayed service orders. You can also assign this filter to a user in the system by default. For more information, see the [Create User Filter](#) section.

Create Resource Filter

This section describes how to create a resource filter. This filter is used to limit the number of resources displayed.

To create a resource filter, proceed as follows:

1. Open the search (**ALT+Q**) and enter **Scheduler Filter Setup**.
2. The **Scheduler Filter Setup** page is displayed. By default, the **DEFAULT** filter is already predefined.

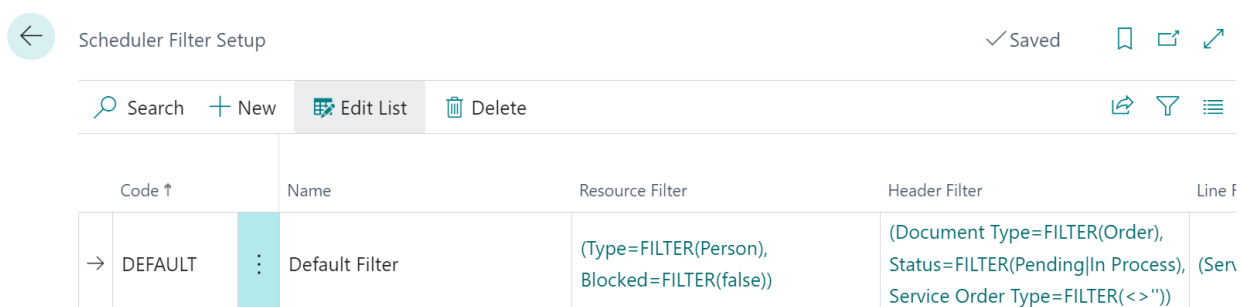


Figure: Create Resource Filter

3. To create a new filter, click **New** in the menu bar.
4. Under the **Code** column, enter a code for the new filter you want to create.
5. Under the **Description** column, enter a description for the new filter you want to create.
6. To define the filter criteria, click the displayed value under the **Resource Filter** column.
7. The **Filter Page** window is displayed.

Filter: Resource

+ Filter...

Filter totals by:

+ Filter...



Figure: Filter: Resource

8. Under the **Filter: Resource** tab, click the plus icon if you want to define a filter criterion based on values from fields in the resource map. In the following example, we will create a filter for a set of resources, so that after selecting this filter in the planning table, only these resources will be displayed.
9. Select the **No.** field from the dropdown menu that is displayed.

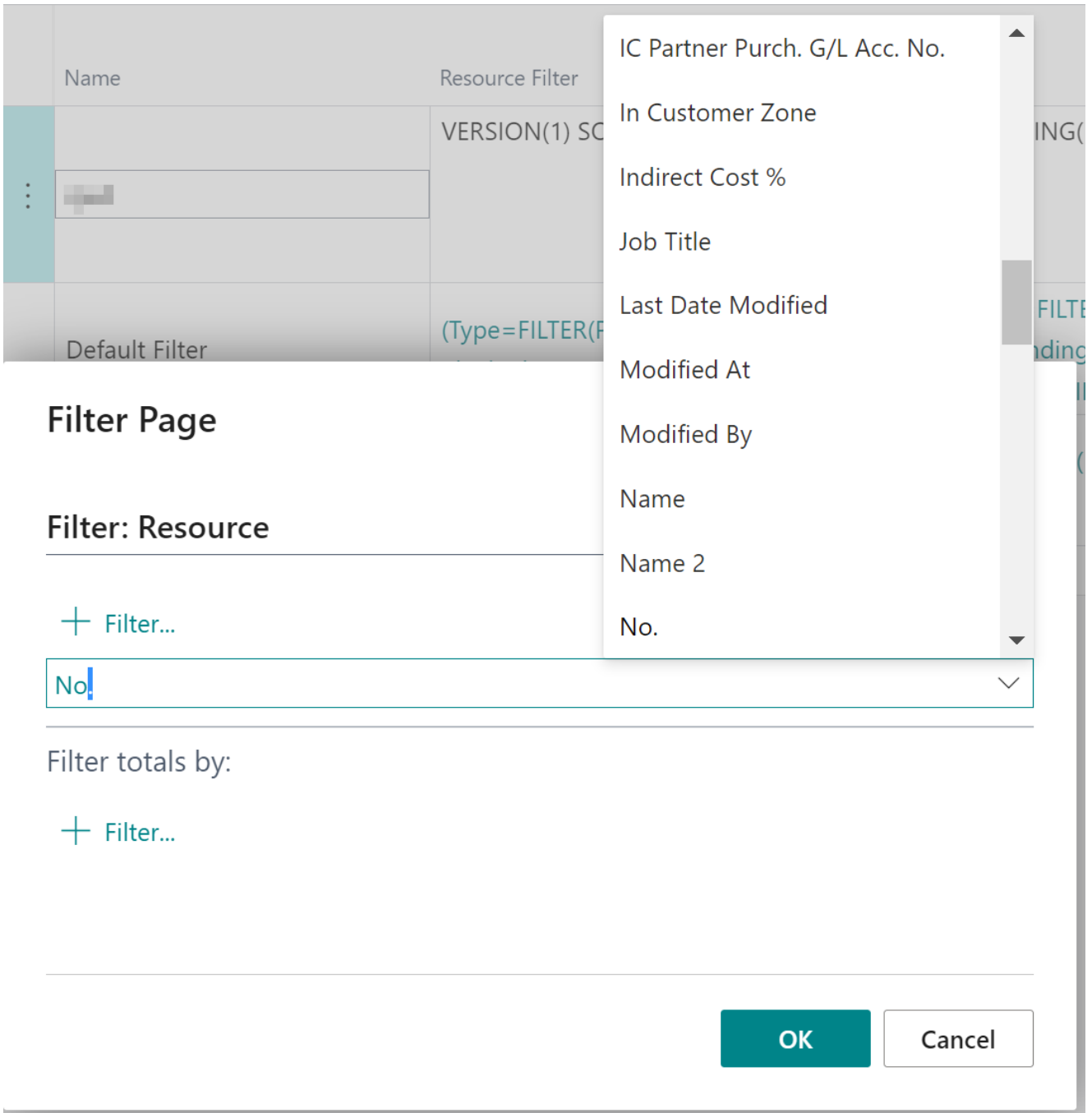


Figure: Resource No.

10. Enter the resources (e.g. **CONRAD|JANA|JANE|GEBHARD**). For more information on filters and the available filter expressions, see the [Filter Criteria and Symbols](#) chapter.

Filter Page



Filter: Resource

× No.

CONRAD|JANA|JANE|GEBHARD



+ Filter...

Filter totals by:

+ Filter...



Figure: Create Filter for Ressources

11. Click **OK** to create the filter.

You have created a filter. You can select this filter in the view filter area and thus limit the view of the displayed resources. You can also assign this filter to a user in the system by default. For more information, see the [Create User Filter](#) section.

Create User Filter

This section describes how to assign one or more filter combinations to a user in the system by default, that this user is already shown a filtered view when he calls the planning table of **Beyond Scheduler**.

To set a user to see one or more filter combinations for the planning table by default, proceed as follows:

1. Open the search (**ALT+Q**) and locate the [Scheduler User Filter](#) page.
2. The **Scheduler User Filter** page is displayed.

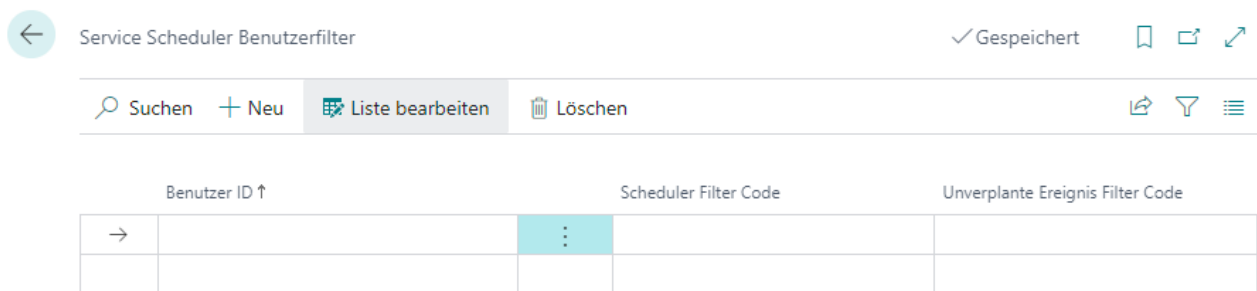


Figure: Setup User Filter

3. Under the **User ID** column, specify the user for whom you want to store a filter combination by default.
4. Under the **Scheduler Filter Code** column, specify the resource filter to be used for the user. For more information about resource filters, see the [Create Resource Filter](#) section.

5. Under the **Unassigned Events Filter Code** column, specify an order filter to use for the user. For more information on resource filters, see the [Create Order Filter](#) section.

You have stored a filter combination for the user. When the user accesses the **Service Scheduler** page and wants to schedule service orders, the planning table view is already filtered.

Assign User Permissions

The following description shows how to assign user permissions for the **BEYOND Scheduler** extension. The permission sets provided are:

Permission Set	Description
BYD SDL Reader	This permission set enables the reading of data from the Beyond Scheduler extension.
BYD SDL User	This permission set enables the use of the Beyond Scheduler extension at user level. In this permission set, the setup is excluded, i.e. the user has access to the functions but not to the setup of the app.
BYD SDL All	This permission set gives the assigned user administrative access to the Beyond Scheduler extension and the associated setup.

To assign the permission set for **BEYOND Scheduler** to a user, proceed as follows:

1. Open the search function from the role center (**ALT+Q**).
2. Search for **Permission Sets** and click on the appropriate search result.
3. The **Permission Sets** page is displayed.
4. Select one of the above permission sets from the list.
5. Click **Related > Permissions > Permission Set by User** in the menu bar.

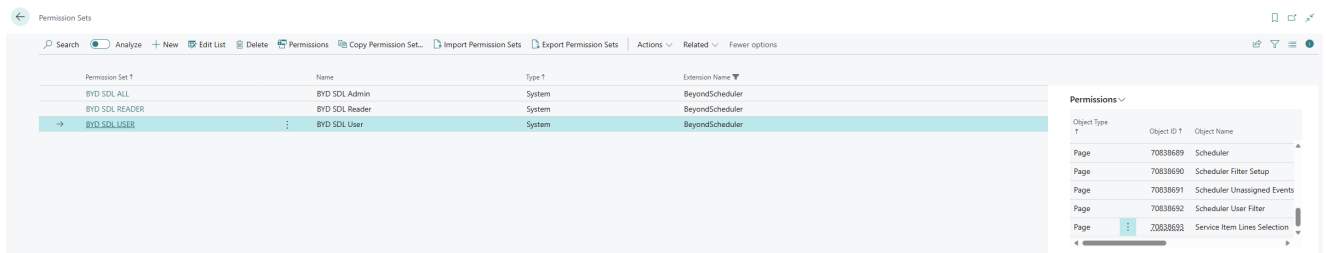


Figure: Permission Sets for BEYOND Scheduler

6. The **Permission Set by User** page is displayed.
7. Show the filter area (**SHIFT+F3**) and pick **Extension Name** and the value **BeyondScheduler** as filter criteria.
8. The list is filtered to the permission sets of **BeyondScheduler**.
9. Select the check box on the right side of the page for the user or users to whom you want to assign the permission set.

You have assigned a permission set for **BEYOND Scheduler** to a user. Note that users with the **SUPER** permission set have all rights, i.e. you do not need to give this user any additional rights.

Schedule Service Orders

This chapter describes how to use the **Beyond Scheduler** planning table to schedule service orders and assign them to resources.

To schedule service orders, proceed as follows:

1. Open the search (ALT+Q) and search for the **Service Scheduler** page.
2. The **Service Scheduler** page is displayed.



		Mo., 05.06.23										
		08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	
Adatum Corporation	Conrad Nuber											
G05001-10000 Caterpillar 320GC []	Gebhard Peters		S-021216546-10000 Caterpillar 323 - Tier 4F / EU Stage V [PENDING]					S-021216515-10000 Caterpillar 317GC [TRANSIT]				
G05002-10000 Caterpillar 320GC []	Jana Hoffmann		S-0212165933-10000 Caterpillar 323 - Tier 4F / EU Stage V [PENDING]				S-021216595-10000 Caterpillar 313 GC [TRANSIT]					
G05003-20000 Caterpillar 320GC []	Jane Roe		S-021216587-10000 Caterpillar 315 GC [PENDING]					S-021216547-10000 Caterpillar 336 [TRANSIT]				
G05004-10000 Caterpillar 323 - Tier 4F / EU Stage V []	John Doe											
G05005-10000 Caterpillar 323 - Tier 4F / EU Stage V [TRANSIT]	Max Mustermann											
	SOFIA STEIN											

Figure: Service Scheduler

3. To schedule a service order and assign it to a resource, left-click on a service order. Keep the left mouse button pressed and drag the service order into the planning table into the corresponding row of the resource.

You have assigned a service order to a resource. Further functions for the planning table can be found in the following sections:

- [Edit Duration of the Service Order](#)
- [Delete Service Order from Planning Table](#)

Edit Duration of the Service Order

This section describes how to adjust the duration of a service order in the planning table.

To adjust the duration of a service order in the planning table that is already assigned to a resource, proceed as follows:

1. Open the search (ALT+Q) and search for the **Service Scheduler** page.
2. The **Service Scheduler** page is displayed.



		Mo., 05.06.23										
		08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	
Adatum Corporation	Conrad Nuber											
G05001-10000 Caterpillar 320GC []	Gebhard Peters		S-021216546-10000 Caterpillar 323 - Tier 4F / EU Stage V [PENDING]					S-021216515-10000 Caterpillar 317GC [TRANSIT]				
G05002-10000 Caterpillar 320GC []	Jana Hoffmann		S-0212165933-10000 Caterpillar 323 - Tier 4F / EU Stage V [PENDING]				S-021216595-10000 Caterpillar 313 GC [TRANSIT]					
G05003-20000 Caterpillar 320GC []	Jane Roe		S-021216587-10000 Caterpillar 315 GC [PENDING]					S-021216547-10000 Caterpillar 336 [TRANSIT]				
G05004-10000 Caterpillar 323 - Tier 4F / EU Stage V []	John Doe											
G05005-10000 Caterpillar 323 - Tier 4F / EU Stage V [TRANSIT]	Max Mustermann											
	SOFIA STEIN											

Figure: Service Scheduler

3. To adjust the duration of the service order for the resource, move the mouse cursor to the edge of the service order in the planning table until an arrow icon is displayed.



		Mon, 06/05/23										
		08:00	09:00	10:00	11:00	12:00	13:00	14:00				
Adatum Corporation	Conrad Nuber		S-021216546-10000 Caterpillar 323 - Tier 4F / EU Stage V [PENDING]									
G05001-10000 Caterpillar 320GC []	Gebhard Peters		S-021216546-10000 Caterpillar 323 - Tier 4F / EU Stage V [PENDING]									
G05002-10000 Caterpillar 320GC []	Jana Hoffmann		S-0212165933-10000 Caterpillar 323 - Tier 4F / EU Stage V [PENDING]				S-021216595-10000 Caterpillar 313 GC [TRAN					
G05003-20000 Caterpillar 320GC []	Jane Roe		S-021216587-10000 Caterpillar 315 GC [PENDING]									S-02 Cate
G05004-10000 Caterpillar 323 - Tier 4F / EU Stage V []	John Doe											
	Max Mustermann											

Figure: Schedule and Assign Service Order

4. Click the left mouse button, hold it down and drag the service order field to the desired size (duration).

You have changed the duration of a service order. The changed start and end time is transferred to the **Resource Allocations** page of the corresponding service item.

Delete Service Order from Planning Table

This section describes how to remove a service order from a resource planning row.

To delete a service order from the planning table, proceed as follows:

1. Open the search (ALT+Q) and search for the **Service Scheduler** page.
2. The **Service Scheduler** page is displayed.



×		< > Hours Days Weeks Months Year							Mon, 06/05/23	
Adatum Corporation		7:00	08:00	09:00	10:00	11:00	12:00	13:00		
Search		Conrad Nuber								
G05001-10000 Caterpillar 320GC []	Gebhard Peters			S-021216546-10000 Caterpillar 323 - Tier 4F / EU Star [PENDING]						
G05002-10000 Caterpillar 320GC []	Jana Hoffmann			S-0212165933-10000 Caterpillar 323 - Tier 4F / EU Stage V [PENDING]			S-0212165933-10000 Caterpillar 323 - Tier 4F / EU Stage V [PENDING]			
G05003-20000 Caterpillar 320GC []	Jane Roe			S-021216587-10000 Caterpillar 315 GC [PENDING]						
G05004-10000 Caterpillar 323 - Tier 4F / EU Stage V []	John Doe									
G05005-10000 Caterpillar 323 - Tier 4F / EU Stage V [TRANSIT]	Max Mustermann									
	SOFIA STEIN									

Figure: Service Scheduler



- To remove service orders from the planning table, right-click the corresponding service order in the planning table and select **Delete** from the context menu.

You have deleted the service order from the planning table. The service order is displayed again in the order selection view after refreshing the table. To do this, click the refresh icon (🔄) on the right edge of the screen.

[Next Chapter](#)

Add Color to Service Order Types

This chapter describes how to assign a color to service order types so that you can identify the service order type of a service order in the planning table.

< > Hours Days Weeks Months Year Mon, 06/05/23  

	Mo., 05.06.23											
	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00		
Conrad Nuber												
Gebhard Peters		S-021216546-10000 Caterpillar 323 - Tier 4F / EU Stage V [PENDING]						S-021216515-10000 Caterpillar 317GC [TRANSIT]				
Jana Hoffmann		S-0212165933-10000 Caterpillar 323 - Tier 4F / EU Stage V [PENDING]					S-021216595-10000 Caterpillar 313 GC [TRANSIT]					
Jane Roe		S-021216587-10000 Caterpillar 315 GC [PENDING]						S-021216547-10000 Caterpillar 336 [TRANSIT]				
John Doe												
Max Mustermann												
SOFIA STEIN												

Figure: Color differentiation of service order types

To assign a color to a service order type, proceed as follows:

1. Open the search (**ALT+Q**) and search for the **Service Order Types** page.
2. The **Service Order Types** page is displayed.
3. Under the column **Hex Color** you can store a color value. Below you will find some examples that can be used:

#FF0000

#FF8000

#FFFF00

#40FF00

#1DFD70

#0404B4

#B404AE

You have added a color code to one or more service order types. In the planning table of **Beyond Scheduler** the corresponding service orders are displayed in color.

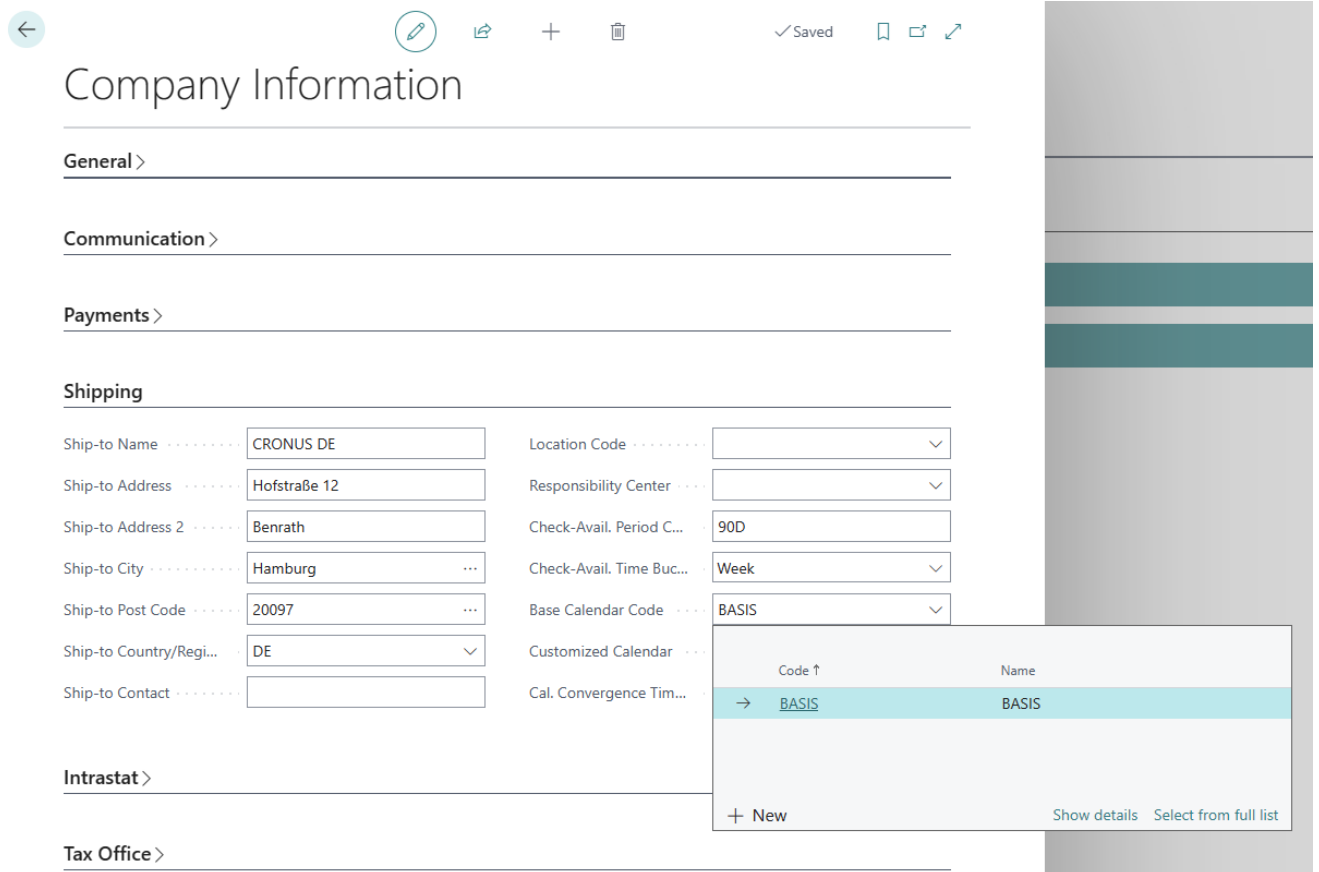
[Next Chapter](#)

Add Holiday to Beyond Scheduler

This chapter describes how you can define a public holiday for display in **Beyond Scheduler**.

Proceed as follows to define a public holiday that is displayed in **Beyond Scheduler**:

1. Open the search (ALT+Q) and search for the page **Company Information**.
2. The **Company Information** page is displayed.
3. Navigate to the **Shipping** tab.
4. Expand the dropdown list for the **Base Calendar Code** field.
5. Select the base calendar currently in use from the dropdown list.
6. Click on **Show details** in the dropdown list menu.



The screenshot shows the 'Company Information' page with the 'Shipping' tab selected. The 'Base Calendar Code' dropdown is expanded, showing a list with 'BASIS' selected. The 'Show details' button is visible at the bottom of the dropdown.

Code ↑	Name
→ BASIS	BASIS

+ New Show details Select from full list

Figure: Show Details

7. The basic calendar card is displayed.
8. To define a day as a public holiday in the planning overview of **Beyond Scheduler**, activate the checkbox for the corresponding day under the **Nonworking** column in the **Lines** tab of the basic calendar card.



BASIS · BASIS

Actions ▾ Related ▾ Automate ▾

General

Code BASIS

Customized Changes ... No

Name BASIS

Lines



Date ↑	Day ↑	Nonworking	Description
30.12.2023	Saturday	<input type="checkbox"/>	
31.12.2023	Sunday	<input type="checkbox"/>	
→ 01.01.2024	Monday	<input checked="" type="checkbox"/>	New Year's Day
02.01.2024	Tuesday	<input type="checkbox"/>	
03.01.2024	Wednesday	<input type="checkbox"/>	

Figure: Mark day as Holiday

9. Enter a description for the public holiday in the **Description** column. This is also displayed in the planning overview.

You have entered the day as a public holiday. The public holiday is highlighted in red and the description is displayed.



		Mon, 01/01/24								
		December 23				January 24				
		Su., 31.12.23	Mo., 01.01.24	Tu., 02.01.24	We., 03.01.24	Th., 04.01.24	Fr., 05.01.24	Sa., 06.01.24	Su., 07.01.24	Mo., 08.01.24
Search			New Year's Day							
Conrad Nuber										
Gebhard Peters										
Jana Hoffmann										
Jannic Weidel										

Figure: Holiday in the planning overview of Beyond Scheduler

[Next Chapter](#)

Add Special Days to Beyond Scheduler

This chapter describes how you can define a special tag for display in **Beyond Scheduler**.

Proceed as follows to define a special day that is displayed in **Beyond Scheduler**:

1. Open the search (ALT+Q) and search for the page **Company Information**.
2. The **Company Information** page is displayed.
3. Navigate to the **Shipping** tab.
4. Expand the dropdown list for the **Base Calendar Code** field.
5. Select the base calendar currently in use from the dropdown list.
6. Click on **Show details** in the dropdown list menu.

The screenshot shows the 'Company Information' page in SAP. The 'Shipping' section is active, displaying various fields for shipping information. The 'Base Calendar Code' field is expanded, showing a dropdown menu with a table of options. The table has two columns: 'Code' and 'Name'. The 'BASIS' option is selected and highlighted in blue. Below the table are buttons for '+ New', 'Show details', and 'Select from full list'.

Code	Name
→ BASIS	BASIS

Figure: Show Details

7. The basic calendar card is displayed.
8. To define a special day in the planning overview of **Beyond Scheduler**, enter a text in the **Description** column in the **Lines** tab of the basic calendar card.



BASIS · BASIS

Actions ▾ Related ▾ Automate ▾

General

Code BASIS

Customized Changes ... No

Name BASIS

Lines



Date ↑	Day ↑	Nonworking	Description
01.01.2024	Monday	<input type="checkbox"/>	
02.01.2024	Tuesday	<input type="checkbox"/>	Company Anniversary

Figure: Add Special Day to the Planning Overview

You have entered the day as a special day. The day is highlighted in red and the description is displayed.



× < > Hours Days Weeks Months Year Tue, 01/02/24 📅 🗓️

	December 23			January 24				
	Su., 31.12.23	Mo., 01.01.24	Tu., 02.01.24	We., 03.01.24	Th., 04.01.24	Fr., 05.01.24	Sa., 06.01.24	Su., 07.01.24
			Company Anniversary					
Conrad Nuber								
Gebhard Peters								
Jana Hoffmann								
Jannic Weidel								

Figure: Special Day in the Planning Overview

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