BEYOND

SCHEDULER

User Guide

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Assign Worksheet to multiple Ressources

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Preface

This documentation contains information on how to install and operate **Beyond Scheduler** in your Business Central environment.

This documentation is intended for experienced users of Business Central. Additional knowledge of third-party software products may be required to set up **Beyond Scheduler**.

Read this documentation in full to set up **Beyond Scheduler** and work with it professionally. Pay particular attention to the tips, information and safety instructions contained in the documentation. Inform your employees about the proper use of **Beyond Scheduler** and keep the documentation in a place that is accessible to your employees.

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Manufacturer

Beyond Scheduler is developed by:

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Version history

Version	Date	Autor	Comment
1.0	24.05.2023	Jannic Weidel	Initial (English) Version of the documentation
1.1	15.01.2025	Jannic Weidel	Description of new Features
1.2	12.06.2025	Jannic Weidel	Added Preface Chapter
Document Access		public	

General Information

This documentation contains important information that you must observe when following the descriptions. The information is highlighted as notes and arranged according to type and importance. The notes are listed below in ascending order of importance:

ℹ TIP

This represents **no risk**. In addition to the classic clicking on options, Business Central also offers the option of using so-called shortcuts. Shortcuts are key combinations with which you can also execute the desired action in the user interface. By using shortcuts, you can work faster and more effectively. Try the key combination and you will be surprised how much faster you can work.

ℹ NOTE

This represents **no risk**. This note contains important information on the correct use, configuration or operation of the software. Follow these instructions to avoid inefficiencies and unnecessary support tickets. For example, this note can show you that an option is hidden and tells you how to proceed if you want to show it again.

☞ IMPORTANT

This represents a **low risk**. This notice refers to non-critical issues that may lead to undesired behavior or configuration problems. May affect user experience or functionality if not considered.

⚠ CAUTION

This represents a **medium risk**. This notice indicates a potential problem that could affect system stability or data integrity. Failure to comply may result in errors, loss of performance or partial service interruptions. The errors caused by non-compliance only affect the app itself and prevent you from working with data within the app.

⚠ WARNING

This represents a **high risk**. This notice indicates an immediate and serious risk to the productive system. Failure to observe this warning may affect the entire system. There is a risk of loss of critical data or total system failure, leading to prolonged downtime. It may not be possible to restore the data and a backup must be imported.

Beyond Scheduler is an extension for Microsoft Dynamics 365 Business Central.

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 events and a view of already scheduled events. 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 events assigned to resources by date and time. Quickly and easily drag and drop unscheduled events onto the overview, scale them by clicking on the left/right edge and drag them as needed, or move an already scheduled event by clicking and dragging. Click on a scheduled event to get more information about it. Filter unassigned events, 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.

We can customize the events you can plan with the planning board according to your needs. 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.

Planning Board

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

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

1. Open the search function from the role center (**ALT+Q**) ☐
2. Search for **Service Scheduler** and click on the corresponding search result.
3. The **Beyond Scheduler** interface is displayed.
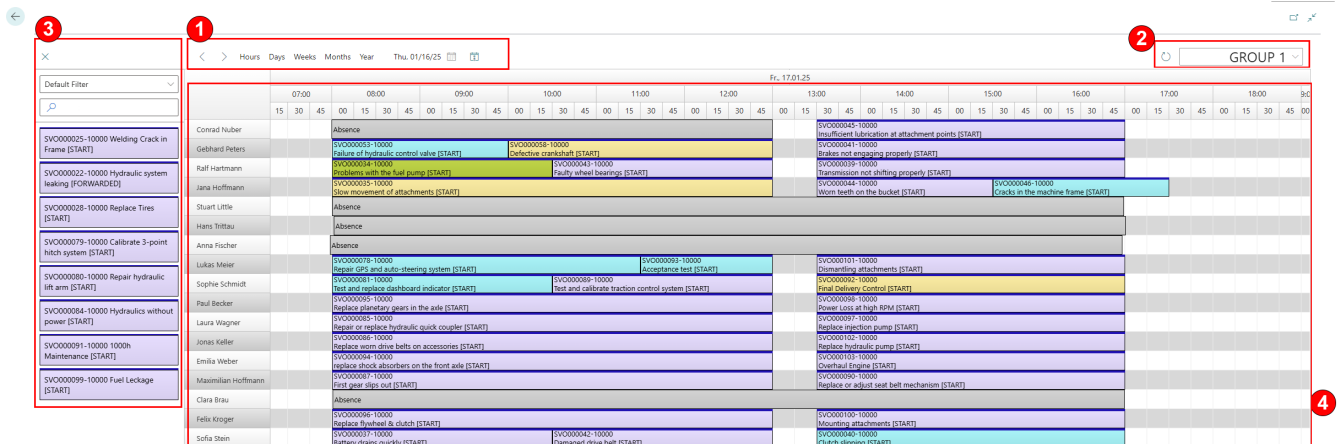
4. The **Beyond Scheduler** user interface consists of the four areas **Timeline** (**1**), **View Filter Area** (**2**), **Worksheet Selection Area** (**3**) and the **Planning Board** (**4**).

5. You can navigate between days, weeks, months or years in the **Planning Board** (**4**) using the arrow icons on the left-hand side of the **Timeline** (**1**). To change the time unit (days, weeks, months or years), click on the timeline option of the same name. Please note that a scroll bar is displayed for some options at the bottom of the **Planning Board** (**4**), which allows you to display the entire time range (e.g. from 00:00 am to 11:59pm).
6. On the right-hand side of the **Timeline** (**1**), you can call up a calendar selection or jump to today's working date using the corresponding symbols.
7. You can update the view manually using the circular arrow symbol to the left of the **View Filter Area** (**2**). From the drop-down menu, you can apply a filter you have defined to the **Planning Board** (**4**). For more information on how to create filters, please refer to the chapter Create filter.

8. The **Worksheet Selection Area** (**3**) displays all service orders in the system. The service orders displayed are made up of the following information: Service order number with the corresponding line number + Service item description + Repair status. You can use the drop-down menu to apply a filter to filter the service orders. For more information on how to create filters, please refer to the chapter Create filter.

SVO000025-10000 Welding Crack in Frame [START]

SVO000022-10000 Hydraulic system leaking [FORWARDED]

SVO000028-10000 Replace Tires [START]

9. The timeline and the available resources are displayed in the **Planning Board**. The resources displayed can be narrowed down using filters.

For more information on how to set up Beyond Scheduler, please refer to the chapter Assign User Permissions.

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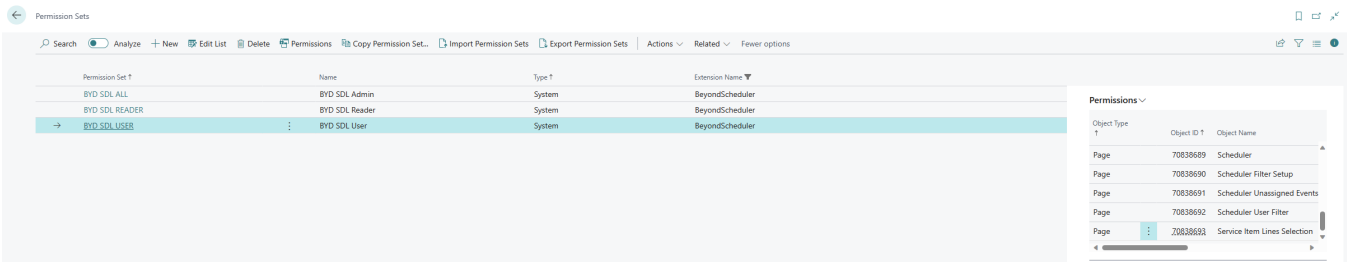
6. The **Permission Set by User** page is displayed.
7. Show the filter area (**SHIFT+F3**) and pick **Extension Name** and the value **BeyondScheduler** as filter criteria.
8. The list is filtered to the permission sets of **BeyondScheduler**.
9. Select the check box on the right side of the page for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

Setup Configuration & Default Behaviour

This chapter describes how to select the configuration and set up the default behavior for scheduling time periods in the planning board.

The contents of this chapter are divided into the following sections:

- Setup Configuration
- Setup Default Behaviour
- Show Dependency Links
- Define Default Service Order Type

Setup Configuration

This section describes how to set up the configuration for **Beyond Scheduler**. The configuration specifies which elements (service orders, rental orders, standby times, etc.) can be scheduled for resources in **Beyond Scheduler**.

BeyondIT can create a customized configuration for you that is adapted to your requirements. For more information about these customizations, please contact us. You can find our contact details in the chapter About BEYOND Scheduler.

To select the configuration for **Beyond Scheduler**, proceed as follows:

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

3. Open the **Config** drop-down list.
4. The available values are displayed. The default value is **Basic Service**. In this configuration, the Service business area is included and you can schedule service orders in the planning board. If you have purchased an individual configuration together with **Beyond Scheduler**, you must enter this as a value in this field in order to be able to use your individual planning elements with the planning board.

You have selected a value in the **Config** field.

Setup Default Behaviour

This section describes how to set up the default behavior within the planning board. The default behavior determines which planning board element (e.g. a note or service order) is created when a period is selected.

To set up the default behavior when selecting a time period in the **Beyond Scheduler** planning board, proceed as follows:

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

3. Open the drop-down list **Standard Entity used for time range click**.
4. The available values are displayed.

5. Select one of the available values:
   - **Nothing**: When selecting a time period, no planning element is created by default.
   - **Service Worksheet**: When a period is selected, a service worksheet is created by default. For more information, please refer to the chapter Create Service Order & Worksheet.
   - **Note**: A note is created by default when a time period is selected. Further information on notes can be found in the chapter Working with Notes.

You have set up the default behavior.

Show Dependency Links

This section describes how to show dependency links in the planning board. This function is useful if you are working with several resources on one order in the planning board.

To show the dependency links in the planning board, proceed as follows:

1. Open the search field (ALT+Q) and search for the page **Scheduler setup**.
2. The **Scheduler Setup** page is displayed.
3. Activate the **Show Dependency Links** slider.

Scheduler Setup

General

Config · · · · · · · · · · · · · · · [Basic Service ∨]   Standard Entity used f... · [Nothing ∨]

Dependency Links

Show Dependency Links · · · · · · · · · · · · · (●)

Service

Standard Service Order Type · · · · · · · · · · · · · [∨]

You have activated the dependency links in the planning board. Copied orders in different resource lines are now linked with an arrow.
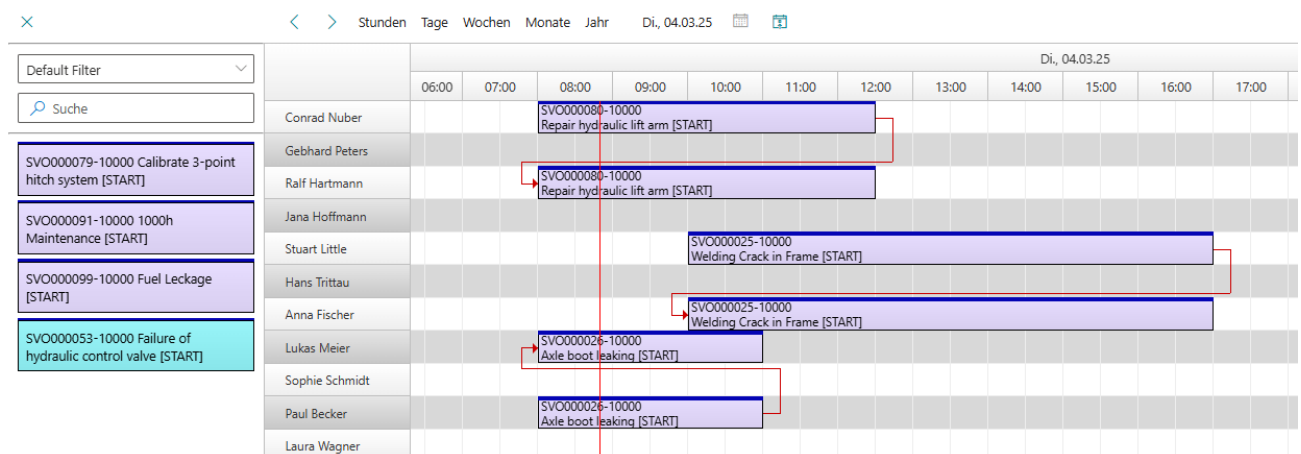
Define Default Service Order Type

This section describes how to define a service order type to be used by default. This setting defines which service order type is used when you create a service order via the planning board.

To define a service order type to be used by default, proceed as follows:

1. Open the search field (ALT+Q) and search for the page **Scheduler Setup**.
2. The **Scheduler Setup** page is displayed.
3. Under the **Standard Service Order Type** field, enter the service order type to be used when you create a service order via the planning board.

Scheduler Setup

General

Config · · · · · · · · · · | Basic Service ∨ | Standard Entity used f... · | Nothing ∨ |

Dependency Links

Show Dependency Links · · · · · · · · · · · · · · ⚪

Service

Standard Service Order Type · · · · · · · · · · · · · · · · · · | ∨ |

For more information on how to create a service order via the planning board, please refer to the chapter Create Service Order & Worksheet.

Next Chapter

Add colors for repair status

This chapter describes how you can define a color to graphically represent the repair status in the Beyond Scheduler planning board. You can use the color to read the repair status of the corresponding service order (or worksheet).

To define a color for the repair status, proceed as follows:

1. Open the search (ALT+Q) and search for the page **Repair Status Setup**.
2. The **Repair Status Setup** page is displayed.

	Code ↑		Description		Hex Color	Service Order Status	Priority
	DONE		Service done			Finished	Low
	FORWARDED		Forwarded			Pending	Medium High
	INPROCESS		Service in Process			In Process	High
	QUOTECREA		Quote created			On Hold	Medium Low
	SP ORDERED		Spare part ordered			On Hold	Medium Low
	SP RCVD		Spare part received			Pending	Medium High
	START		Start			Pending	Medium High
	UNFPROC		Unfinished process			Pending	Medium High
→	WAITCUST	⋮	Wait for customer			On Hold	Medium Low

3. You can enter a color value under the **Hex Color** column. Below you will find some examples that you can use:
   #FF0000
   #FF8000
   #FFFF00
   #40FF00
   #1DFD70
   #0404B4
   #B404AE

	Code ↑		Description		Hex Color	Service Order Status	Priority
	DONE		Service done		1DFD70	Finished	Low
	FORWARDED		Forwarded		0404B4	Pending	Medium High
	INPROCESS		Service in Process		FFFF00	In Process	High
	QUOTECREA		Quote created		0404B4	On Hold	Medium Low
	SP ORDERED		Spare part ordered		FF0000	On Hold	Medium Low
→	SP RCVD	⋮	Spare part received		FF8000	Pending	Medium High
	START		Start		0404B4	Pending	Medium High
	UNFPROC		Unfinished process		FF0000	Pending	Medium High
	WAITCUST		Wait for customer		FF0000	On Hold	Medium Low

You have set up colors for repair statuses. The repair status and the color are displayed in the planning board. The color you have set for the repair status is displayed as a band (1) above the tile on the planning board. The repair status code is displayed in brackets after the service line description (2). For more information on how to store a color for service order types (3), see the chapter Add colors to service order types.

① Color ribbon for repair status

SVO000028-10000 Replace Tires
[START]

② Repair status code   ③ Color for service order type

←

✕   〈 〉 Stunden Tage Wochen Monate Jahr Fr., 17.01.25 ▦ ▦   Fr., 17.01.25

Default Filter ▾		07:00				08:00				09:00				10:00				11:00				12:00			
🔍		00	15	30	45	00	15	30	45	00	15	30	45	00	15	30	45	00	15	30	45	00	15	30	45	00

SVO000022-10000 Hydraulic system leaking [FORWARDED]

Conrad Nuber — Customer Visit at Adatum

SVO000028-10000 Replace Tires [START]

Gebhard Peters — Customer Visit at Adatum

Ralf Hartmann — SVO000034-10000 Problems with the fuel pump [START] / SVO000043-10000 Faulty wheel bearings [START]

SVO000058-10000 Defective

Jana Hoffmann — SVO000035-10000 Slow movement of attachments [START]

Stuart Little — Absence

Next Chapter

Add Colors to Service Order Types

This chapter describes how you can assign colors to service order types so that you can see which service order type is involved in the planning board.

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

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

#FF0000
#FF8000
#FFFF00
#40FF00
#1DFD70
#0404B4
#B404AE

You have assigned a color code to the service order types. The corresponding service orders are displayed in color in the **Beyond Scheduler** planning board.

Next Chapter

Add Holidays to Beyond Scheduler

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

To define a public holiday that is displayed in **Beyond Scheduler**, proceed as follows :

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

7. The base calendar card is displayed.
8. To define a day as a public holiday in the planning board 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	☐	
	31.12.2023		Sunday	☐	
→	01.01.2024	⋮	Monday	☑	New Year's Day
	02.01.2024		Tuesday	☐	
	03.01.2024		Wednesday	☐	

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

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

←

	Hours Days Weeks Months Year	Mon, 01/01/24 📅 🗓

Default Filter ∨		Mo., 01.01.24	Tu., 02.01.24	We., 03.01.24
🔍 Search		New Year		
SVO000022-10000 Hydraulic system leaking [FORWARDED]	Conrad Nuber			
	Gebhard Peters			
SVO000028-10000 Replace Tires [START]	Ralf Hartmann			
	Jana Hoffmann			
SVO000079-10000 Calibrate 3-point hitch system [START]	Stuart Little			
	Hans Trittau			

Next Chapter

Add Special Day to Beyond Scheduler

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

To define a special day that is displayed in **Beyond Scheduler**, proceed as follows:

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

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

Base Calendar Card

BASIS · BASIS

✓ Saved

Actions ⌄   Related ⌄   Automate ⌄

General

Code	BASIS
Name	BASIS

Customized Changes ...   No

Lines

Date ↑	Day ↑	Nonworking	Description
01.01.2024	Monday	☐	
02.01.2024	Tuesday	☐	Company Anniversary

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   Wed, 01/01/25 📅 📆

Default Filter

🔍 Search

		December 24				
		Mo., 30.12.24	Tu., 31.12.24	We., 01.01.25	Th., 02.01.25	Fr., 03.01.25
					Company anniversary	
	Conrad Nuber					
SVO000022-10000 Hydraulic system leaking [FORWARDED]	Gebhard Peters					
	Ralf Hartmann					
SVO000028-10000 Replace Tires [START]	Jana Hoffmann					
	Stuart Little					
SVO000079-10000 Calibrate 3-point hitch system [START]	Hans Trittau					

[Next Chapter](#)

Create Filter

This chapter describes how you can create a filter that is used to limit the information displayed (such as service orders or resources) in the planning board.

You can define three different filter types:

- Create Order Filter
- Create Resource Filter
- Create User Filter

Create Order Filter

This section describes how to create an order filter. This filter is used to limit the service orders displayed in the order selection area.

To create an order filter, proceed as follows:

1. Open the search field (ALT+Q) and search for the page **Scheduler Unassigned Events Filter Setup**.
2. The page **Scheduler Unassigned Events Filter Setup** is displayed. The **DEFAULT** filter is already predefined by default.

3. To create a new filter, click on **New** in the menu bar.
4. Enter a code for the new filter to be created in the **Code** column.
5. Enter a name for the new filter to be created in the **Name** column.
6. To define the filter criteria, click on the displayed value under the **Header Filter** column.
7. The **Filter Page** window is displayed.

Filter Page

↗ ✕

Filter: Service Header

\+ Filter...

Filter totals by:

\+ Filter...

<div align="right">

OK   Cancel

</div>

8. Click on the plus symbol under the **Filter: Service Header** tab if you want to define a filter criterion based on values from fields in the service header. In the following example, we create a filter for a customer so that you can filter for service orders from this customer.

9. From the drop-down menu that is displayed, select the **Customer No.** field.

Header Filter

(Customer No

(Document Ty
Status=FILTER
Service Order

VERSION(1) S

| Country/Region Code |
| County |
| County |
| County |
| Created At |
| Created By |
| Currency Code |
| Currency Factor |
| Customer Disc. Group |
| Customer No. |

Filter Page

Filter: Service Header

+ Filter...

Customer No.

Filter totals by:

+ Filter...

OK   Cancel

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

Filter Page

Filter: Service Header

✕ Customer No. · · · · · · · · · · · · · · · ·   ada

No. ↑	Name	Post Code	Phone No.
→ 10000	Adatum Corporation	48436	

+ Filter…

Filter totals by:

+ Filter…

＋ New   Select from full list

OK   Cancel

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

You have created a filter. You can select this filter in the order selection area and thus restrict the view of the displayed service orders/worksheet. You can also assign this filter to a user in the system by default. For more information, see the section Create user filter.

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 field (ALT+Q) and search for the page **Service Scheduler Filter Setup**.
2. The **Service Scheduler Filter Setup** page is displayed. The **DEFAULT** filter is already predefined by default.

Code ↑		Name	Resource Filter	Header Filter	Line F
→ DEFAULT	⋮	Default Filter	(Type=FILTER(Person), Blocked=FILTER(false))	(Document Type=FILTER(Order), Status=FILTER(Pending|In Process), Service Order Type=FILTER(<>''))	(Serv

3. To create a new filter, click on **New** in the menu bar.
4. Enter a code for the new filter to be created in the **Code** column.
5. Enter a name for the new filter to be created in the **Name** column.
6. To define the filter criteria, click on the displayed value under the **Resource Filter** column.
7. The **Filter Page** window is displayed.

Filter Page

↗ ✕

Filter: Resource

+ Filter...

Filter totals by:

+ Filter...

<div align="right">

OK   Cancel

</div>

8. Click on the plus symbol under the **Filter: Resource** tab if you want to define a filter criterion based on values from fields on the resource card. In the following example, we create a filter for a number of resources so that only these resources are displayed in the planning board after selecting this filter.

9. Select the **No.** field from the drop-down menu that appears.

Name	Resource Filter	
	VERSION(1) SC	ING(
⋮ ▓▓▓		
Default Filter	(Type=FILTER(F	FILTE nding

IC Partner Purch. G/L Acc. No.

In Customer Zone

Indirect Cost %

Job Title

Last Date Modified

Modified At

Modified By

Name

Name 2

No.

Filter Page

Filter: Resource

╋ Filter...

No| ∨

Filter totals by:

╋ Filter...

OK   Cancel

10. Enter the resources (here: **CONRAD|JANA|JANE|GEBHARD**). Further information on filters and the available filter expressions can be found in the chapter Filter criteria and operators.

Filter Page

⤢ ✕

Filter: Resource
_____

✕ No. · | CONRAD|JANA|JANE|GEBHARD   ⌄ |

╋ Filter...
_____

Filter totals by:

╋ Filter...

_____

| **OK** | | Cancel |

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

You have created a filter. You can select this filter in the view filter area and thus restrict the view of the displayed service orders/worksheets. You can also assign this filter to a user in the system by default. For more information, see the section Create user filter.

Create User Filter

This section describes how to assign one or more filter combinations to a user in the system by default so that this user is already shown a filtered view when they call up the **Beyond Scheduler** planning board.

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

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

← Scheduler User Filter   🔖 ⤢ ↗

🔍 ⬚ | ╋ New 📝 Edit List 🗑 Delete   ↗ ▽ ☰

User ID ↑	Scheduler Filter Code	Unassigned Events Filter Code
→		

3. Under the **User ID** column, enter the user for whom you want to store a filter combination by default.
4. Under the **Scheduler Filter Code** column, enter the resource filter to be used for the user. For more information on resource filters, see the section Create Resource Filter.
5. Under the **Unassigned Events Filter Code** column, enter an order filter to be used for the user. For more information on resource filters, see the section Create Order Filter.

You have defined a filter combination for the user. When the user opens the **Service Scheduler** page and wants to schedule service orders/worksheets, the view of the planning board is already filtered.

Work with Notes

This chapter describes how to work with notes in Beyond Scheduler. The contents of this chapter are divided into the following sections:

- Create Note
- Copy & Paste Note
- Edit Note Time
- Assign Note to another Resource
- Delete Note from Planning Board
- Convert Note to Service Order

Create Note

This section describes how to create a note.

To create a note, proceed as follows:

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

3. Right-click in the planning board.
4. A context menu is displayed.

5. Select the **Create Note** option from the context menu.
6. A dialog window is displayed.

Note - 1004

Title *****

Description

Background Color

OK   Cancel

7. Enter a title. The title is displayed on the planning board.
8. Enter a description in the input field.
9. You can enter a hexadecimal color value in the **Background color** field to define the background color for the note tile in the planning board. Below you will find some examples that you can use:

#FF0000
#FF8000
#FFFF00
#40FF00
#1DFD70
#0404B4
#B404AE

You have created a note. You can convert notes into a service order. For more information, see the section Convert Note to Service Order.

Copy & Paste Note

This section describes how to copy a note.
To copy a note, proceed as follows:

1. Open the search field (ALT+Q) and search for the page **Service Scheduler**.
2. The **Service Scheduler** page is displayed.
3. In the planning board, right-click on the note you want to copy.
4. A context menu is displayed.
   ![context-menu-in planning-table](../media/context-menu-in planning-table.png)
5. To copy the selected note to the clipboard, select the **Copy** option from the context menu.
6. Right-click on an unplanned period in the planning board to open the context menu.

7. Select the **Paste** option from the context menu.

8. The note copied in the clipboard is pasted into the planning board.

You have copied a note. You can move the note on the planning board using drag and drop (left-click and drag).

Edit Note Time

This section describes how you can edit the time period of a note in the planning board.
To edit the time period of a note in the planning board, proceed as follows:

1. Open the search field (ALT+Q) and search for the page **Service Scheduler**.
2. The **Service Scheduler** page is displayed.
3. In the planning board, move the mouse pointer to the left or right edge of the note.
4. The mouse cursor for horizontal resizing (⟺) is displayed.
5. Click with the left mouse button and keep it pressed. Move the mouse cursor to the corresponding new time in the planning board and release the left mouse button.

You have changed the time period for a note. This function can also be used for service orders in the planning board.

Assign Note to another Resource

This section describes how you can assign a note to another resource.

To assign a note to another resource, proceed as follows:

1. Open the search field (ALT+Q) and search for the page **Service Scheduler**.
2. The **Service Scheduler** page is displayed.
3. Move the mouse cursor over the note in the planning board that you want to assign to another resource.
4. Click on the note with the left mouse button and keep the mouse button pressed.
5. Drag the note to another resource line.

You have assigned the note to another resource.

Delete Note from Planning Board

This section describes how to remove a note from the planning table. Please note that you must remove the note completely; this cannot be undone.

To remove a note from the planning table, proceed as follows:

1. Open the search field (ALT+Q) and search for the page **Service Scheduler**.
2. The **Service Scheduler** page is displayed.
3. In the planning board, right-click on the note you want to remove.
4. A context menu is displayed.
   ![context-menu-in planning-table](../media/context-menu-in planning-table.png)
5. To delete the selected note, select the **Unassign** option from the context menu.

The note is removed from the planning board and deleted.

Convert Note to Service Order

This section describes how to convert a note into a worksheet. The following description assumes that both the customer and the service item of the corresponding customer are already saved in the system.

When a note is converted into a service order, the description of the note is transferred to the service order line as a description. The description can be changed either before the conversion or later in the converted service order.

To convert a note into a service order with a worksheet, proceed as follows:

1. Open the search field (ALT+Q) and search for the page **Service Scheduler**.
2. The **Service Scheduler** page is displayed.
3. In the planning board, right-click on the note that you want to convert into a worksheet.
4. A context menu is displayed.
   ![context-menu-in planning-table](../media/context-menu-in planning-table.png)
5. To convert the selected note into a worksheet, select the option **Convert to Worksheet** from the context menu.
6. The **Worksheet Wizard** dialog box is displayed.

7. Select a customer for the worksheet from the **Customer** drop-down list.
8. To create a new service order for a service item, enter the service item of the corresponding customer using the **Service Item** drop-down list and click **New** in the wizard.

Worksheet Wizard

Create a new service item line by selecting the service order type. By clicking 'create' a new service order will be created with a new service item line and planned on the scheduler.

Service Order Type ·········· ***** [⌄]

Create   Back

9. Use the **Service Order Type** drop-down list to select a service order type for the service order to be created.
10. Click on **Create** to create the service order.

You have converted a note into a service order.

Next Chapter

Create Service Order & Worksheet

This section describes how to create a new service order with a new worksheet.

To create a new service order with a new worksheet, proceed as follows:

1. Open the search field (ALT+Q) and search for the page **Service Scheduler**.
2. The **Service Scheduler** page is displayed.
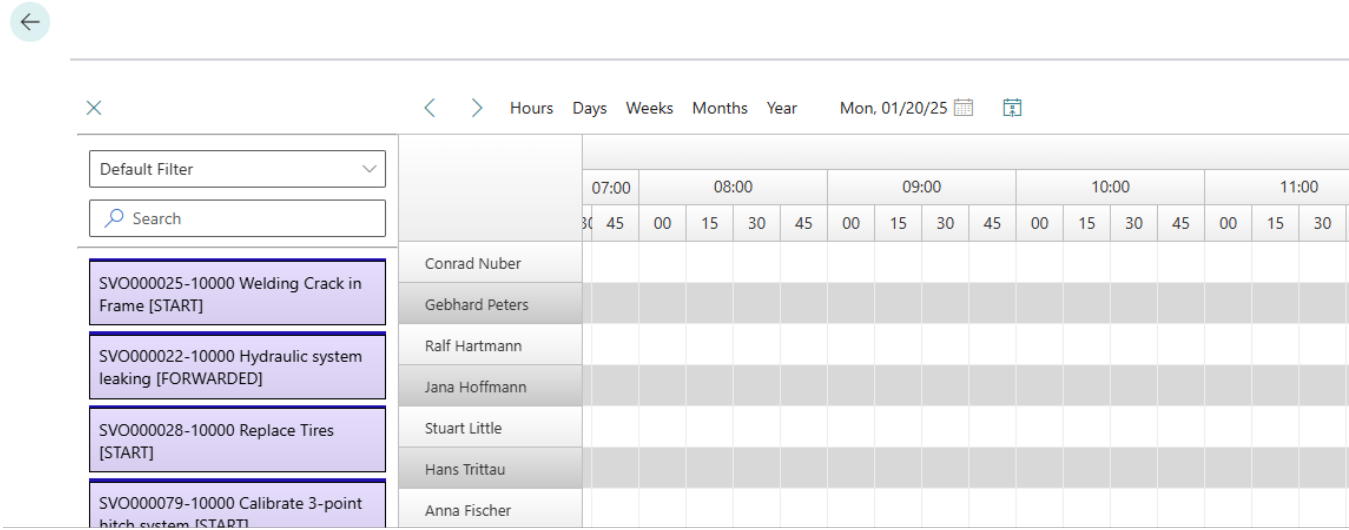
3. Right-click in the planning board.
4. A context menu is displayed.
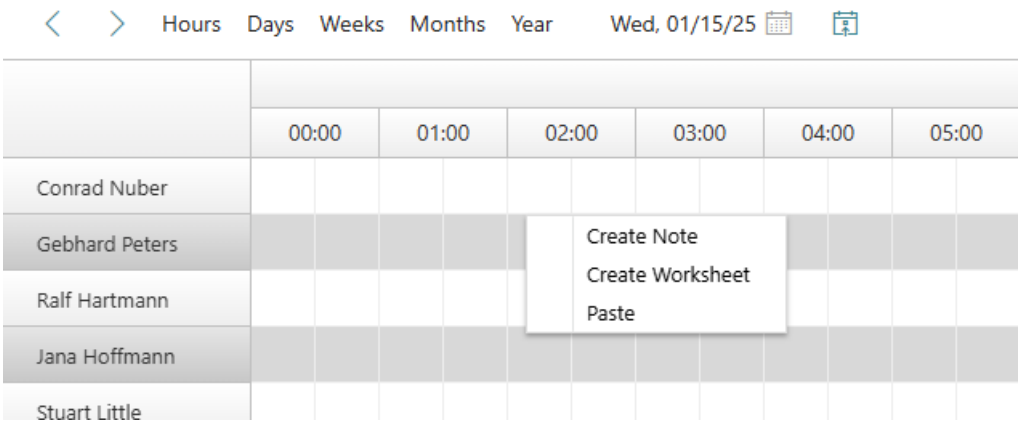
5. Select the **Create Worksheet** option from the context menu.
6. A dialog window is displayed.

Worksheet Wizard

Select a customer and a service item (optional) for which you want to schedule an event.

Customer ⋯⋯⋯⋯⋯⋯ **✱** [▽]

Service Item ⋯⋯⋯⋯⋯⋯ [▽]

[New] [**Next**]

7. Select a customer for the worksheet from the **Customer** drop-down list.
8. To create a new service order with a worksheet for a service item, enter the service item of the corresponding customer using the **Service Item** drop-down list and click **New** in the wizard.
9. The next step in the Worksheet Wizard is displayed.

Worksheet Wizard

Create a new service item line by selecting the service order type. By clicking 'create' a new service order will be created with a new service item line and planned on the scheduler.

Service Order Type ⋯⋯⋯⋯ **✱** [▽]

[Create] [Back]

10. Select a service order type.
11. Click **Create**.
12. The service order with worksheet is created and automatically inserted into the planning board with a period of 2 hours.

You have created a new service order with a worksheet. For more information on how you can change the time period of the

service order or how to assign a service order to several resources, please refer to the chapter Schedule Service Order.

Schedule Service Order

This chapter describes how you can assign service orders and the associated worksheets to resources using the planning board.

To better distinguish between worksheets, you can assign a color to service order types and repair statuses. For more information on this setup, see the chapters Add colors to service order types and Add colors for repair status.

To plan service orders and schedule resources with worksheets, proceed as follows:

1. Open the search field (ALT+Q) and search for the page **Service Scheduler**.
2. The **Service Scheduler** page is displayed.
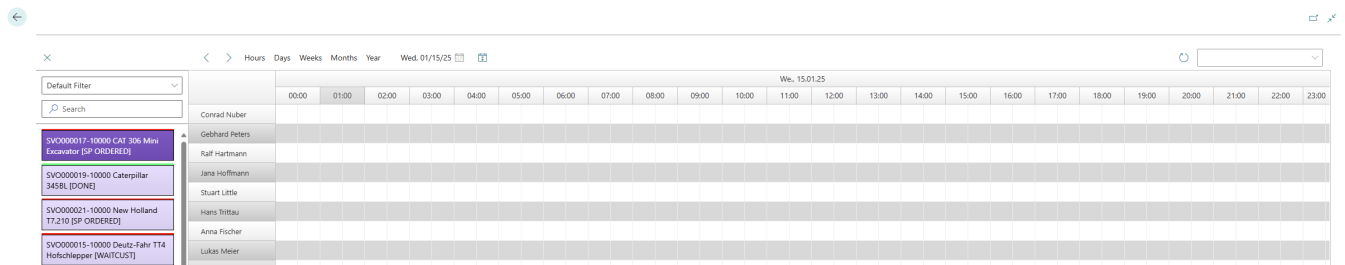
3. Left-click on a worksheet, hold down the mouse button and drag the worksheet to the corresponding resource line in the planning board.

You have assigned a worksheet to a resource.

After assigning a worksheet to a resource, you can use the following functions for planning:

- Edit Times for Service Worksheet
- Assign Worksheet to another Resource
- Assign Worksheet to multiple Ressources
- Remove Worksheet from Planning Board

Edit Times for Service Worksheet

This section describes how you can change the period for the worksheet.

To change the period for a worksheet, proceed as follows:

1. Open the search field (ALT+Q) and search for the page **Service Scheduler**.
2. The **Service Scheduler** page is displayed.
3. In the planning board, move the mouse cursor to the left or right edge of the worksheet.
4. The mouse cursor for horizontal resizing (⟺) is displayed.
5. Click with the left mouse button and keep it pressed. Move the mouse cursor to the corresponding new time in the planning board and release the left mouse button.

You have changed the period for the work slip.

Assign Worksheet to another Resource

This section describes how you can assign a worksheet to another resource.

To assign a worksheet to another resource, proceed as follows:

1. Open the search field (ALT+Q) and search for the page **Service Scheduler**.
2. The **Service Scheduler** page is displayed.
3. Move the mouse cursor over the worksheet in the planning board that you want to assign to another resource.
4. Click on the worksheet with the left mouse button and keep the mouse button pressed.
5. Drag the worksheet to another resource line.

You have assigned the worksheet to another resource.

Assign Worksheet to multiple Ressources

This section describes how you can assign a worksheet to several resources at the same time.

To assign a worksheet to several resources, proceed as follows:

1. Open the search field (ALT+Q) and search for the page **Service Scheduler**.
2. The **Service Scheduler** page is displayed.
3. In the planning board, right-click on the worksheet that you want to assign to several resources.
4. A context menu is displayed.

5. To assign the worksheet to several resources, you must copy the worksheet and assign it to the corresponding resources. Select the **Copy** option from the context menu.
6. Right-click on an unplanned period of another resource in the planning board to open the context menu.

7. Select the **Paste** option from the context menu.
8. The worksheet copied in the clipboard is pasted into the planning board.

In this way, you assign the same worksheet to two resources.

Remove Worksheet from Planning Board

This section describes how to remove a worksheet from the planning board.

To remove a worksheet from the planning board, proceed as follows:

1. Open the search field (ALT+Q) and search for the page **Service Scheduler**.
2. The **Service Scheduler** page is displayed.
3. In the planning board, right-click on the worksheet that you want to remove.
4. A context menu is displayed.

5. To remove the selected worksheet from the planning board, select the **Unassign** option from the context menu.

The worksheet is removed from the planning board and moved back to the unplanned service orders on the left-hand side of the screen.