SedonaOffice®

The #1 Financial Software for Security Companies

# Job Planner

*Note: this information is an extraction from Online Help.*

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# Job Planner Overview

The Job Planner is a management tool designed to aid in the planning and scheduling of jobs, from the 50,000 ft. long view, to the project that begins tomorrow.

Functionality of this tool includes:

**Plan -** View upcoming jobs in a Gantt Chart format and adjust their schedule times.

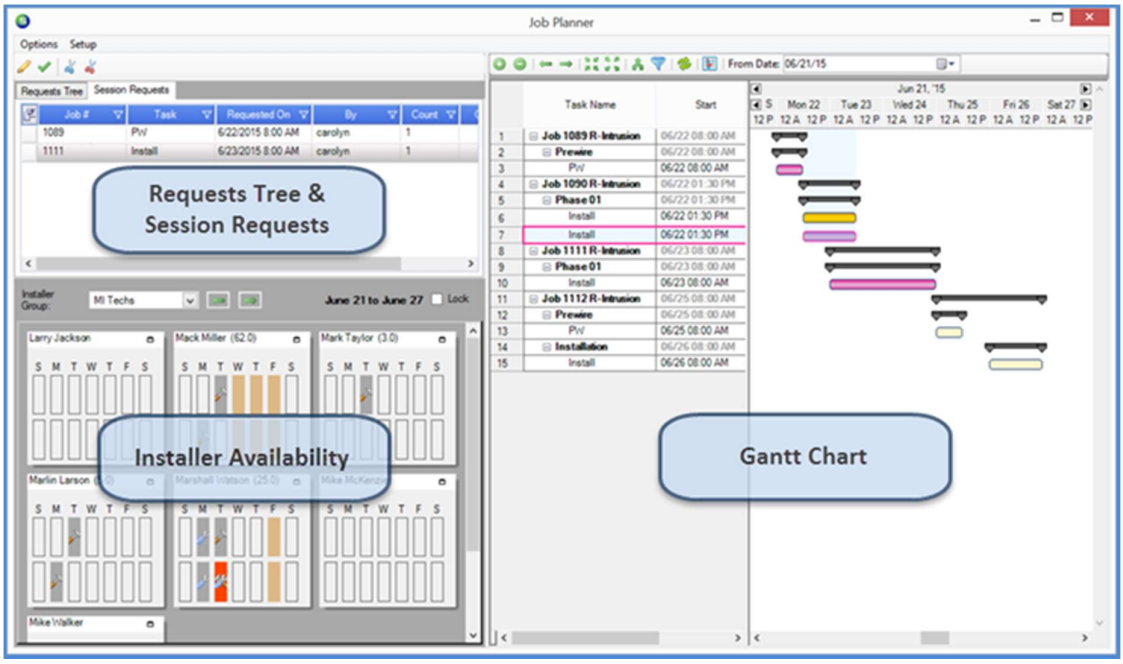
**Schedule** - Create and schedule Job appointments flexibly and easily.

**Collaborate** - Use the Requests mechanism to split the work between a Project Manager and Scheduling Manager.

If your company would like to use this feature, contact support@sedonaoffice.com to have the Job Planner activated.

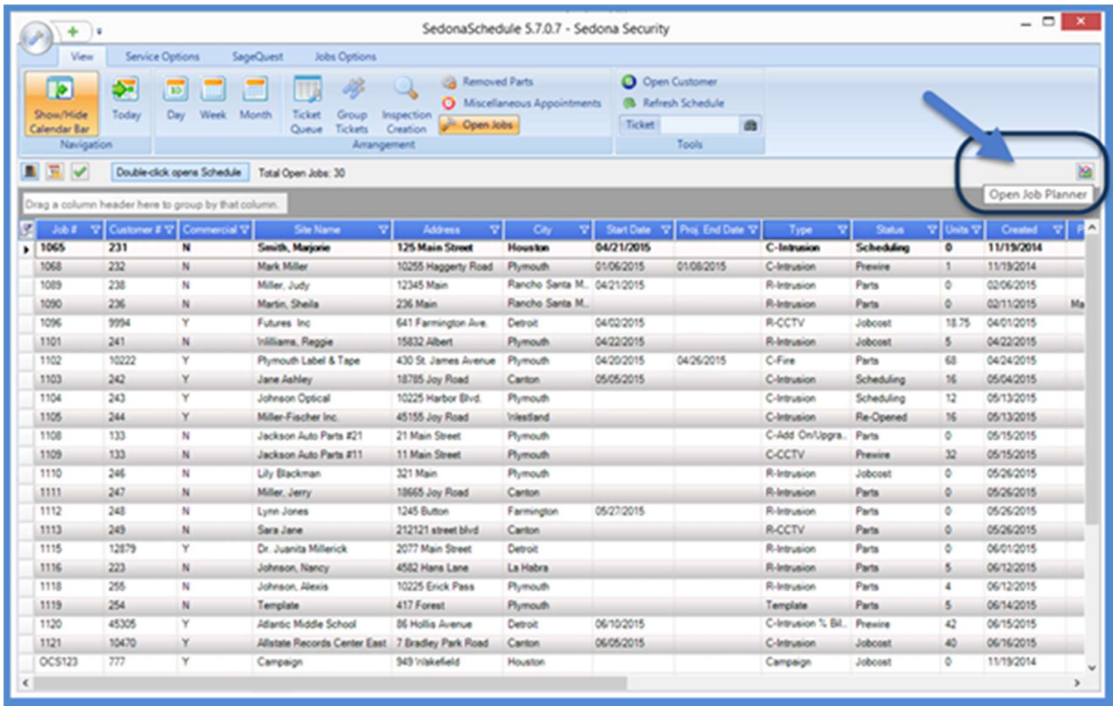
This document will cover the following Job Planner Topics:

- **Job Planner Elements & Definitions**
- **Job Planner Setup**
- **Job Planner Functionality**



**Job Planner Overview (continued)**

The Job Planner is accessed from the *Open Jobs* list in SedonaSchedule. Clicking on a button located at the far right of the *Open Jobs* header will launch the Job Planner tool.



## Basic Concepts

The Job Planner was designed to be used by Installation Mangers, Job Planners/Schedulers, Project Managers, or any staff member involved in the planning of labor resources for Jobs. Usage of various elements of the Job Planner may done by one individual or shared responsibility between a planning person and a scheduling person.

This tool is designed to review upcoming Jobs (and their Tasks to be scheduled), submit requests for Tasks to be scheduled, and finally schedule appointments for the Jobs.

Upcoming Jobs are reviewed within a Gantt Chart; only Jobs where a User has input a Projected Start Date within the Job Work Order form will appear in the Gantt Chart. The Projected Start Date becomes the baseline for when Job Tasks need to be scheduled. Job Tasks may be moved within the Gantt Chart based upon available labor resources (Installers).

Once Job Tasks are placed on the desired dates within the Gantt Chart, the User selects individual Job Tasks and submits a *Session Request*. A Session Request is basically a request for a Job Appointment to be scheduled. Session Requests are not saved to the database; these are basically pending or "what-if" requests until they are actually Submitted for scheduling.

After all Session Requests have been made, the User reviews the Session Request List, then *Submits* the Session Requests (for scheduling). Prior to Submitting the Session Requests, the User may remove one or multiple Jobs from the list to be scheduled at a later time. If the User logs out of the SedonaSchedule prior to Submitting the Session Requests, all Session Requests will be cleared from the list.

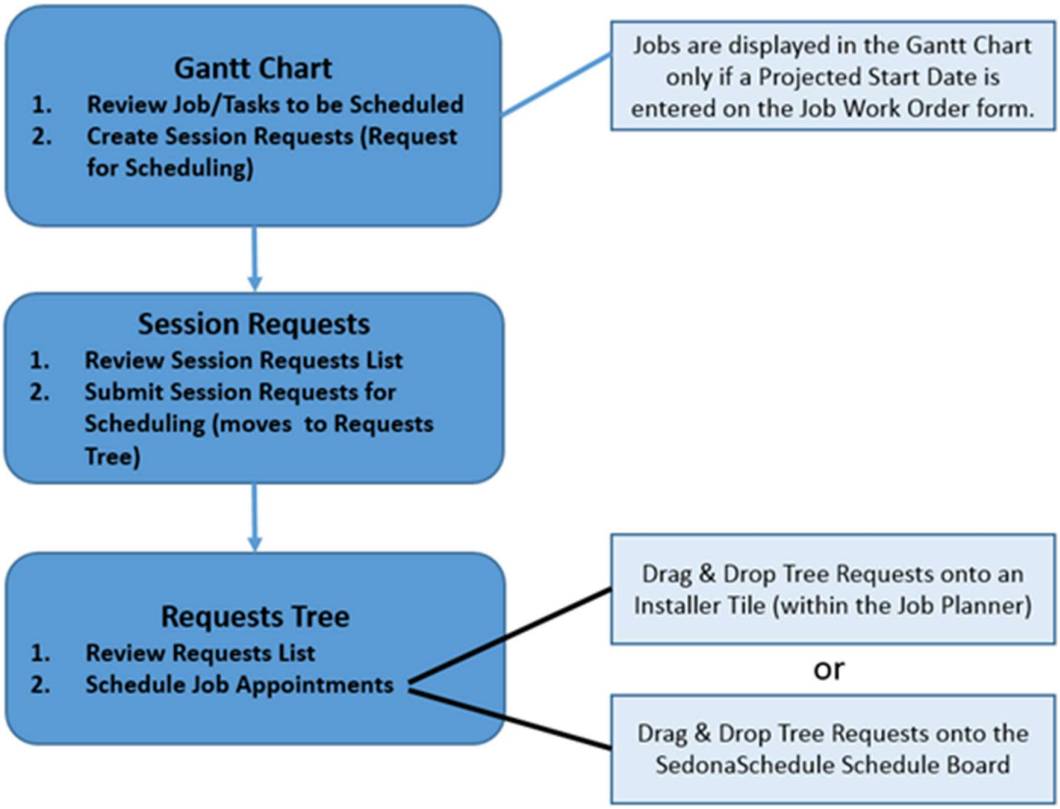
Submitting the Session Requests moves all Job Tasks in the Session Request List to the *Request Tree*.

The *Request Tree* is a list of Jobs for which appointments need to be created. The User creating Job Appointments may drag and drop from the Request Tree onto the Installer Availability area of the Job Planner, or drag and drop directly onto the SedonaSchedule Scheduling Board. As Jobs Job Appointments are created, those Jobs drop off of the List in the Request Tree.

Please refer to the flow chart on next page for a visual representation of the Job Planner Basic Functionality.

**Job Planner Overview (continued)**

Below is a flow chart of the designed basic functionality of the Job Planner.



## Job Planner Elements & Definitions

The Job Planner consists of three main sectional controls; each of these controls will be defined on the following pages.

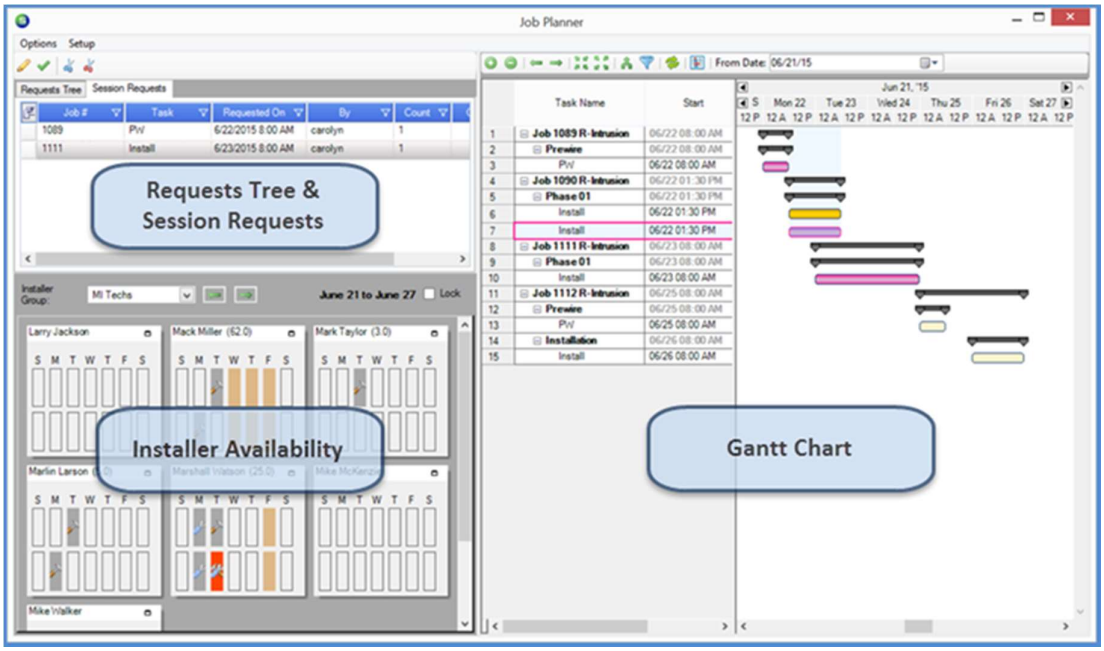
- **Gantt Chart**
- **Request Tree and Session Request Grid**
- **Installer Availability Control**

These controls and the SedonaSchedule Scheduling Board all work together so users can plan and schedule Jobs with ease and accuracy. The Job Planner form works best on its own large monitor, with the SedonaSchedule Board on an adjacent monitor. (This is because there are drag-and-drop operations from the Job Planner to the Schedule Board; although, the same results can be achieved from within the Job Planner, alone.)

**Requirement:** The Job Planner only works with jobs that have a Projected Start Date (this date is set on the Job Work Order form), and an open status (i.e. not “Closed”, “Reversed”, or “Job Complete”).

**Requirement:** All job tasks (except non-labor tasks) must be, at minimum, one hour in duration. Tasks can increase in length in hour increments. These task lengths can be set from the Job Task List within the Job record, or within the Job Planner **(**See Task Setup**).**

Follow the links below for definitions of each of the three main Job Planner Controls.

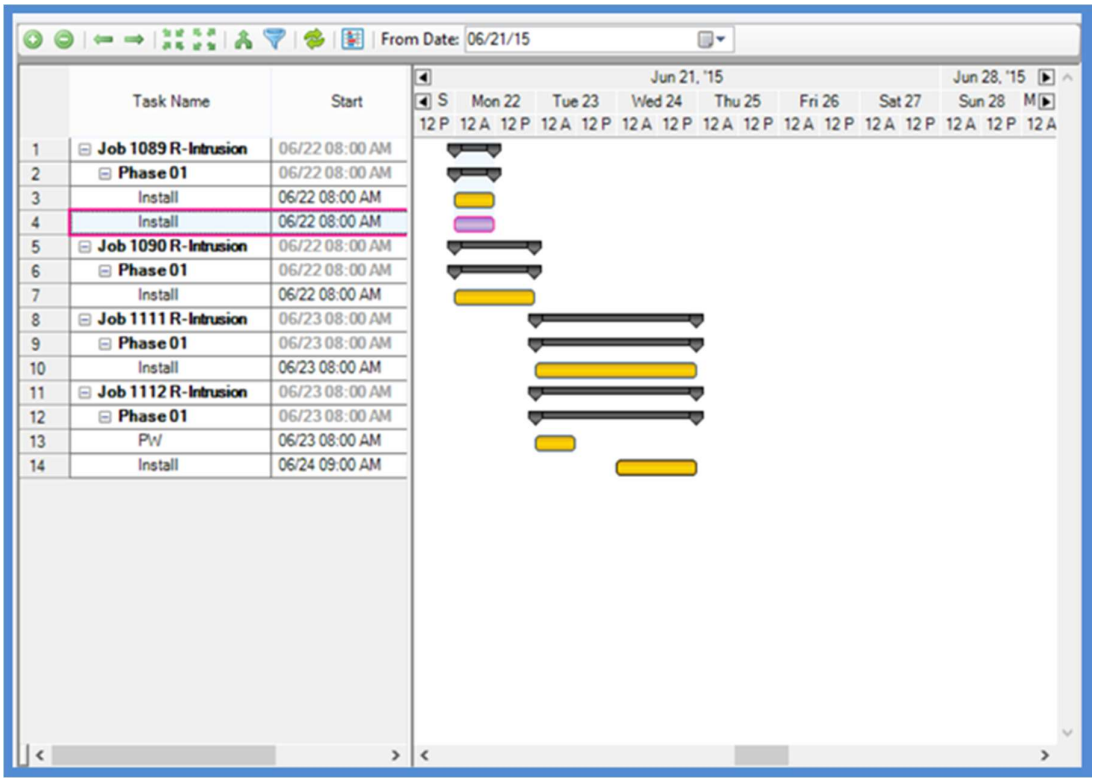


## Gantt Chart Definitions

The Gantt Chart is comprised of a grid section, a chart section, and a taskbar. The grid and chart sections are aligned horizontally, and each row represents a **Job** or a **Job Task**. (Note: the Job Planner deals exclusively with *Job Tasks*, not *Labor Tasks*. For this reason, the term **Task** will be used for the remainder of this document to indicate a Job Task.)

The Jobs displayed in the Gantt chart appear in chronological order from top to bottom based upon the Job's start date. The date increases moving from left to right on the horizontal axis. When the Job Planner opens, it selects the job that starts nearest to today's date.

The colored blocks in the chart section, referred to as **Task Blocks**, are the graphical representations of the Tasks. As will be seen, the user can perform a number of actions on these Tasks, but the primary action involves dragging (mouse left-click, hold and drag) Tasks left and right to modify their schedule date.



**Gantt Chart Definitions (continued)**

## Task Block Types

- **Normal Task (Blue)**: Tasks which have no special status. These Tasks can be dragged and requested.
- **Billable Task (Green)**: These Tasks are Normal Tasks which are billable, and can be dragged and requested.
- **Non-Labor Task (Gray)**: When a user sets a Task length to zero, it's considered a non-labor Task. These signify Tasks in a Job which would not normally be scheduled to an installer, for example administrative Tasks. Nevertheless, they can be dragged and requested. They can also be excluded from the Gantt Chart (See **General Settings**).
- **Session Request Task (Pink)**: Any Task for which the user has made a session request. These Tasks are locked (or frozen), and cannot be dragged, but the user can make a second request on them. Session Requests appear in the **Session Request Grid** area of the Job Planner. Session Requests *do not exist in the database; they are part of the "session", i.e. what the user is currently working on*. The user can remove Session Requests. Exiting SedonaSchedule, or clicking **Reload** on the Gantt Chart Taskbar will remove all Session Requests. Finally, Session Requests can be "submitted" [for Scheduling] by clicking the Submit Sessions Request button on Session Request Taskbar, which causes them to become "real" requests.

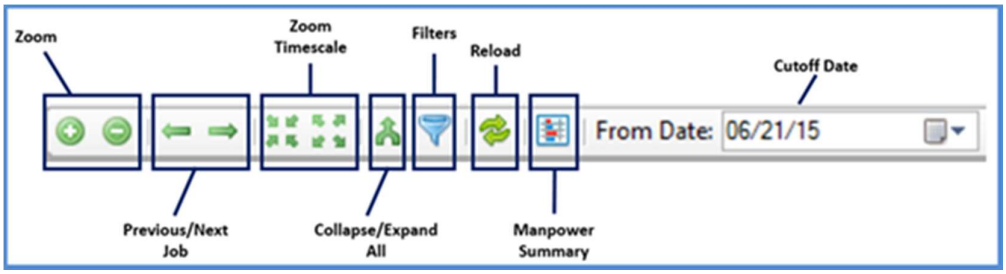
## Task Block Types (continued)

- **Requested Task (Red)**: Any Task for which the User has submitted a Session Request. These Tasks are locked and cannot be dragged, but the User can make a second request on them. Requested Tasks, or **Requests**, appear in the **Request Tree**. Requests are stored in the database, and will reappear after restarting the SedonaSchedule application, or clicking Reload. **Requested Tasks can be scheduled**.
- **Scheduled Task (Gold)**: A Task that was previously a Requested Task, and has been scheduled by the User (at least once). *Scheduled Tasks always appear on the chart at the date on which they were actually scheduled*. They cannot be dragged, but the User can request them again.
- **Sign-Off Task (White)**: A Task which has been signed-off by a User. These Tasks have been "signed-off" from within SedonaOffice. While the intention is that these Tasks are "complete", they can still be dragged and requested.
- **Session Task (Purple)**: When Tasks which are locked and cannot be dragged by the User are requested, a Session Task is created. These Tasks share all of the information of the Task which "spawned" them in common, but they *can be dragged and requested*. Session Tasks indicate a desire by the User to reschedule—to schedule a second (or third, etc.) time—a previously scheduled Task. (Note: While this can be done with any frozen Task, the intention is for use on Scheduled Tasks which *were not finished, for whatever reason, after the first appointment(s) were completed*.)

**Gantt Chart Definitions (continued)**

## Gantt Chart Taskbar

The Taskbar located above the Gantt Chart affects the spacing in the chart, scrolling from Job to Job, and which Jobs are loaded for planning. The image below shows the Gantt Chart Taskbar.



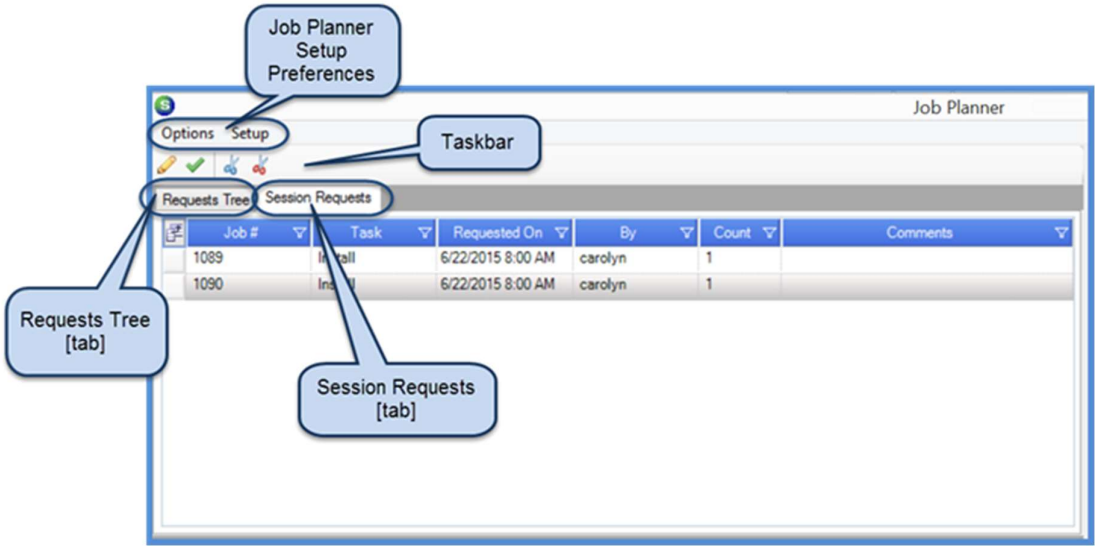

The Gantt Chart Taskbar items, from left to right:

- **Zoom**: Clicking the zoom buttons increases or decreases the distance per unit on the horizontal axis (time) on the chart.
- **Previous/Next Job**: Clicking the left/right arrows "scrolls" through the Jobs in the chart. Clicking the right arrow will move to the next Job; clicking left moves to the previous Job.
- **Zoom Timescale**: These buttons change the timescale per unit of the horizontal axis. The default timescale is a half-day. (Others are: four hour, day, week, and two week.)
- **Collapse/Expand All**: This feature controls whether or not Job Tasks are shown in the Gantt grid and chart. Clicking "Collapse All" will cause the Jobs to "roll up", hiding the Tasks.
- **Filters**: Clicking this button opens a form allowing the User to apply filters to which Jobs are loaded onto the Gantt chart. The filter categories are: Job status, Job type, install company, project manager, and branch. (*Note that an absence of selections on a particular filter is the same as the selection of all items on that filter, i.e.* ***all items which fit are shown in both cases***.)
- **Reload**: This button causes the Job Planner to reload all of its data from the database. This means that the Jobs are reloaded, their initial positions on the Gantt chart are reset, and all Session Requests and Session Tasks are removed. Session Requests that were submitted are retained, as are any Requests which were scheduled.
- **Manpower Summary**: Clicking the Manpower Summary button in the Gantt Chart Taskbar opens a read-only form that looks at all of the Jobs that the Job Planner is considering, giving totals for requested days, scheduled days, and total days by the Task code. Users can toggle between showing the output in days or hours.
- **Cutoff Date**: Normally, the Job Planner will show *every open Job (i.e. Jobs with a status other than "Closed", "Reversed", or "Job Complete") that started up to one month prior to today's date*. This drop-down allows the User to specify a date which the Job Planner uses to eliminate Jobs with prior start dates.

## Requests Tree & Session Requests Grid Definitions

The top-left section of the Job Planner form consists of two Tabs; *Session Requests* and *Request Tree*, and a Taskbar located above the two tabs. The Session Requests are entirely hypothetical and do not exist in the database. As the User plans Jobs and makes Session Requests, the requests populate the Session Requests Grid.

The buttons on the Requests Taskbar will be described on the following page.

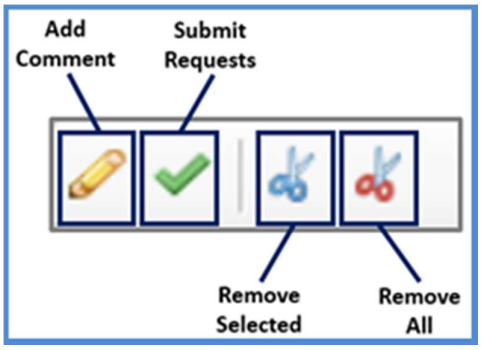


**Requests Tree & Session Requests Grid Definitions (continued)**

## Requests Taskbar

The Requests Taskbar is only displayed when you are currently click on the Session Requests tab. There are four buttons on the Requests Taskbar that perform various actions within the grid of Sessions Request tab. Two of these buttons; *Add Comment* and *Remove Selected*, allow for selection of multiple rows in the grid. To select multiple rows within the grid area of the Session Request, hold the **Ctrl** key down while selecting rows (left-clicking) in the grid. In the button descriptions, below, this is referred to as multiple selection.

- **Add Comment:** Selecting a single Session Request and clicking this button allows the User to enter a comment for the Task. Clicking this button after a multiple selection will add the comment to all of the selected requests.
- **Submit Requests:** This button turns every Session Request in the grid into a Request [for Scheduling]. When clicking this button the application will perform the following action: Requests are saved to the database, the Session Requests are cleared, and the Requests Tree is populated with the Jobs that were listed in the Session Request list.
- **Remove Selected:** Removes the selection (or multiple selection) of row(s) from the grid area of the Session Requests.
- **Remove All:** Removes all of the Session Requests from the grid.

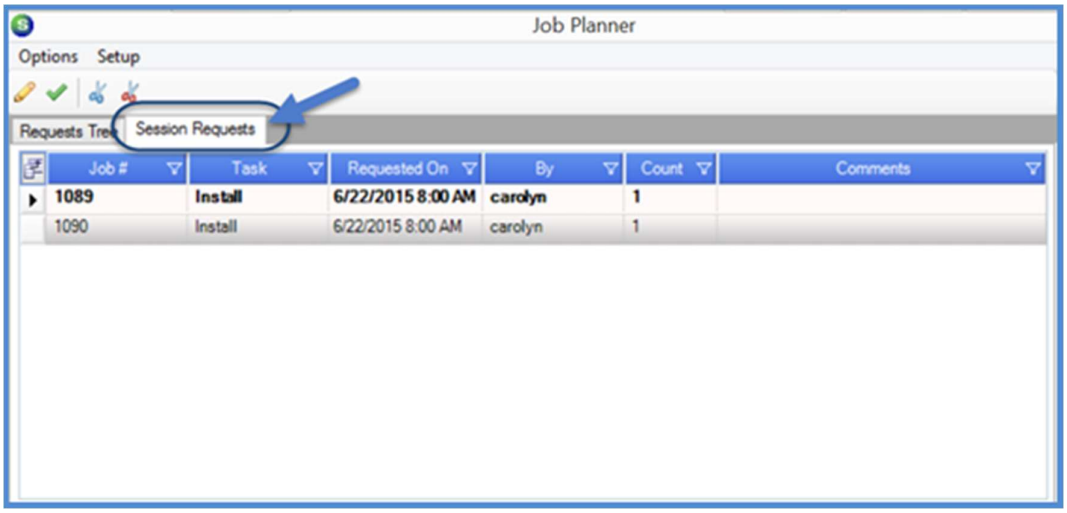


**Requests Tree & Session Requests Grid Definitions (continued)**

## Session Requests

Session Requests are added to the Grid in the order in which they are made; however, they can be sorted by clicking on the blue column headers. Session Requests are added to the Grid by right-clicking on a Job Task displayed within the Gantt Chart. The Session Requests grid columns are described as follows:

- **Job Number** - SedonaOffice Job Number
- **Task Code** - Job Task to be scheduled [from the Job's Task List]
- **Requested On** - This *is not* the date the request was made, but the date the Task is requested to be scheduled on. This date should match the date where the Task starts on the Gantt Chart.
- **By** - The User code of the User who made the request.
- **Count** - When multiple requests have been made for the same Job, Task, and requested schedule date, this count will increment.
- **Comment** - A comment entered by the requester [from the Request Taskbar button].



**Requests Tree & Session Requests Grid Definitions (continued)**

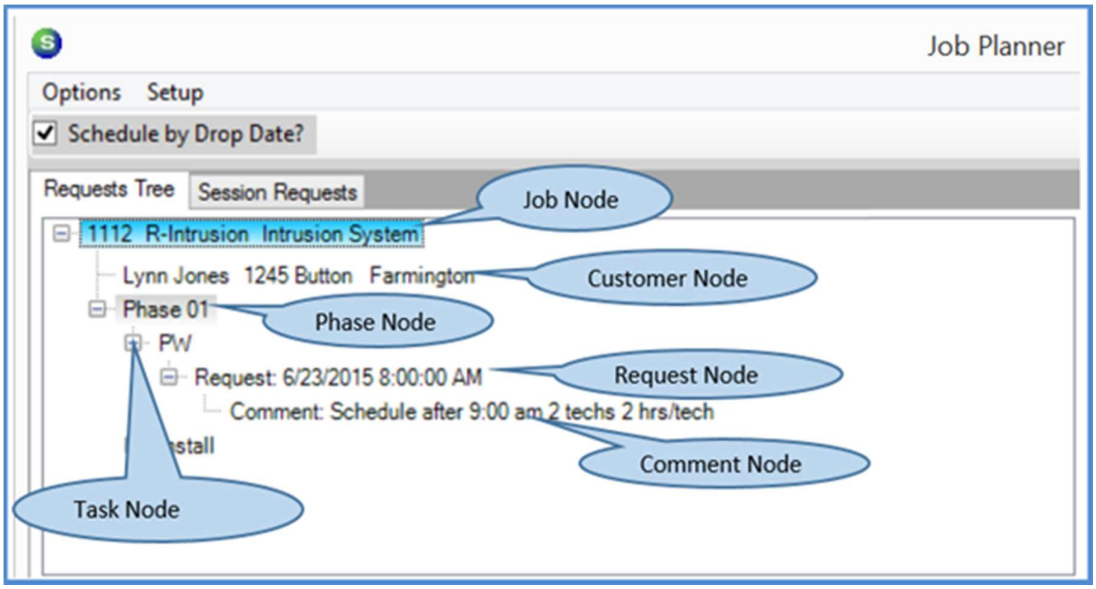
## Requests Tree

The Requests Tree contains the actual Requests previously submitted from the Session Requests List that need to be scheduled. These requests are stored in the database, and are loaded into the tree when the Job Planner opens (or on reload). It's called a tree because it's made up of nodes that operate similarly to the folder structure in Windows Explorer.

When expanding the tree of a particular Job, the various Nodes display lower levels of detail about the Job.

A Job Appointment may be scheduled by dragging a Job from the Request Node and dropping onto the *Installer Availability* control within the Job Planner, or drag and drop onto the SedonaSchedule Schedule Board.

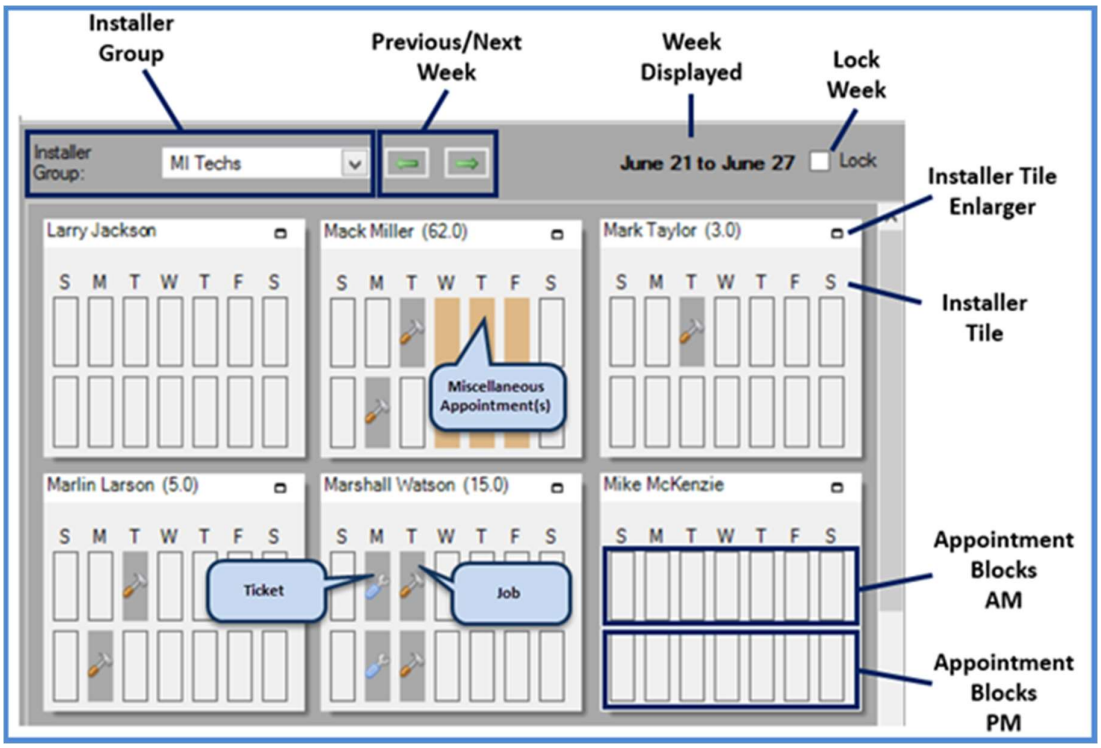
The Requests Tree node structure is shown below.



## Installer Availability

The Installer Availability area of the Job Planner is comprised of four components; Installer Tiles, Appointment Blocks, Installer Group selector, Previous/Next Week arrows, and the Lock Week checkbox. This component is used to view currently scheduled appointments (including Jobs, Tickets and Miscellaneous appointments), schedule new Job Appointments, and view statistical information relative to Installers.

Each of these components will be described on the following pages.



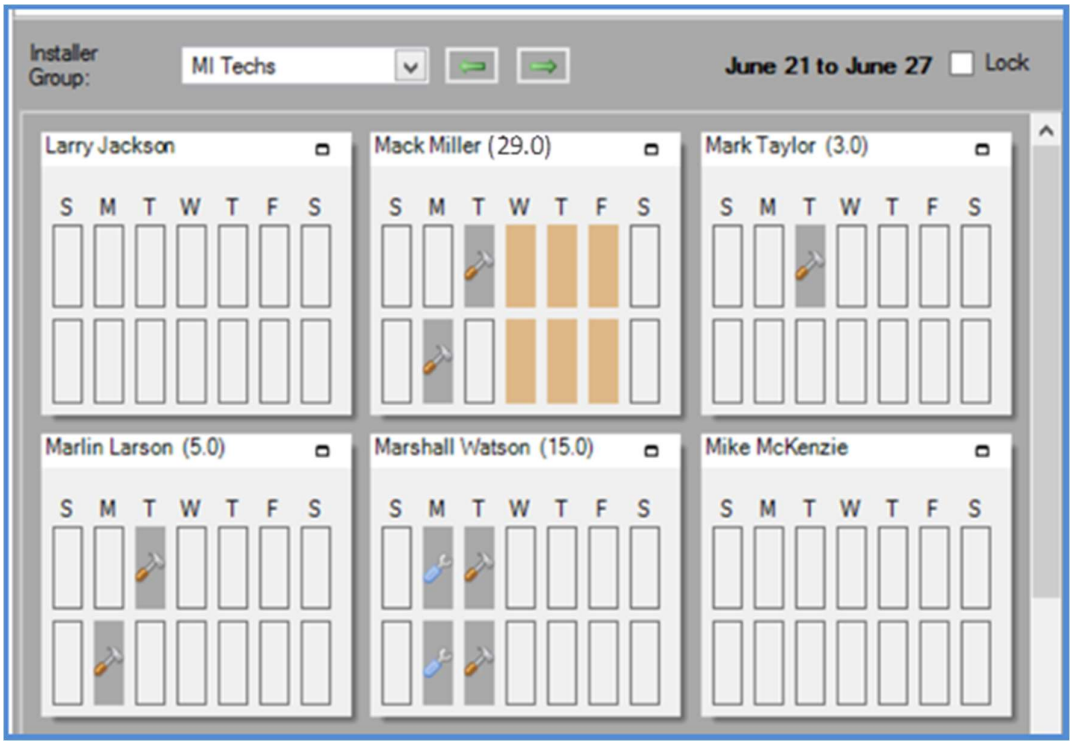
**Installer Availability (continued)**

## Installer Tiles

Each installer in the Installer Display Group has an Installer Tile. (Note that the employee must be set as an Installer in SedonaSetup to appear).

Each tile contains two rows (representing AM on top, and PM on bottom) and seven columns (representing the days of the week, from Sunday to Saturday) of Appointment Blocks.

If a number is shown in parenthesis to the right of an Installer's name, this indicates the estimated hours the installer has been scheduled for the week.

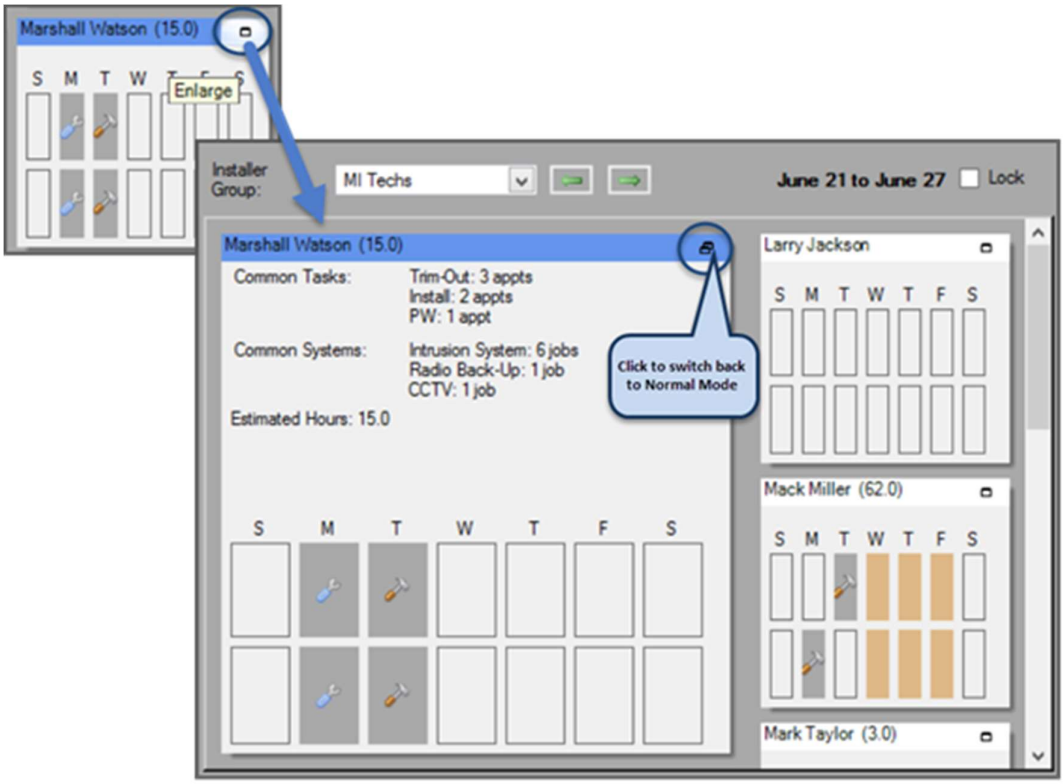


**Installer Availability (continued)**

## Installer Tile Enlarger

In the upper right corner of each Installer Tile, you will see a small box; clicking this box will enlarge the particular Installer. There are two additional pieces of data in the enlarged tile:

- **Common Tasks:** Gives the top three Tasks that the installer has the most experience working on in the last year, by their number of appointments.
- **Common Systems:** Gives the top three systems Tasks that the installer has the most experience working on in the last year, by their number of appointments.



**Installer Availability (continued)**

## Appointment Blocks

Each block within an *Installer Tile* represents one half day in time. If an Installer has a scheduled appointment, one of four possible images will be displayed in the Installer Tile:

Ticket Appointment

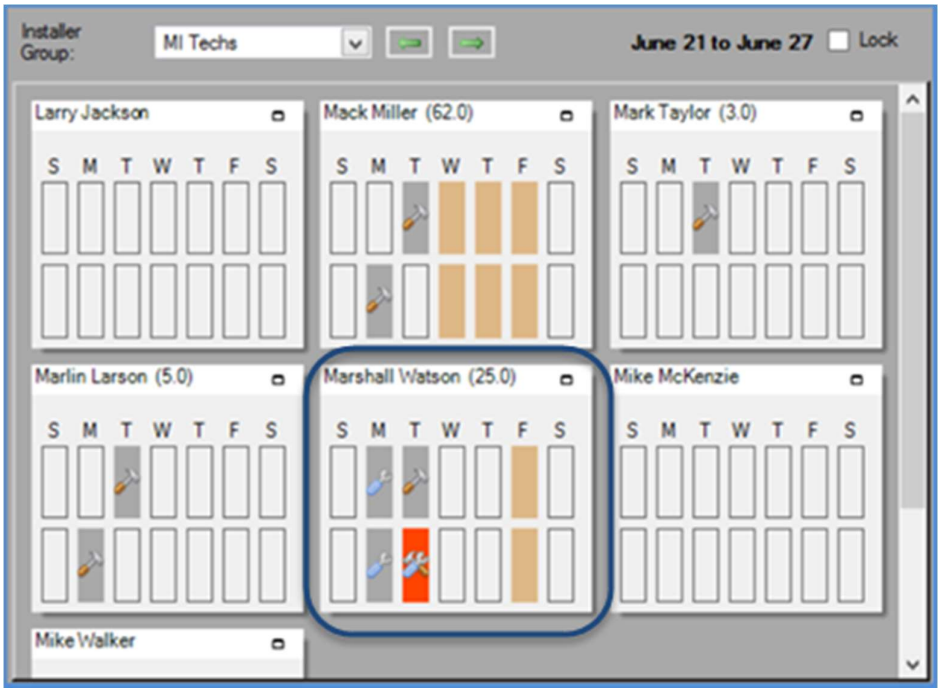
Job Appointment

Both Job & Ticket Appointments

Miscellaneous Appointment

Hovering over an Appointment Block with a displayed image, lists brief details of the scheduled appointments in a Tool-tip.

Double-clicking on any Appointment Block will move the calendar on the SedonaSchedule Schedule Board's Day View to the clicked date.

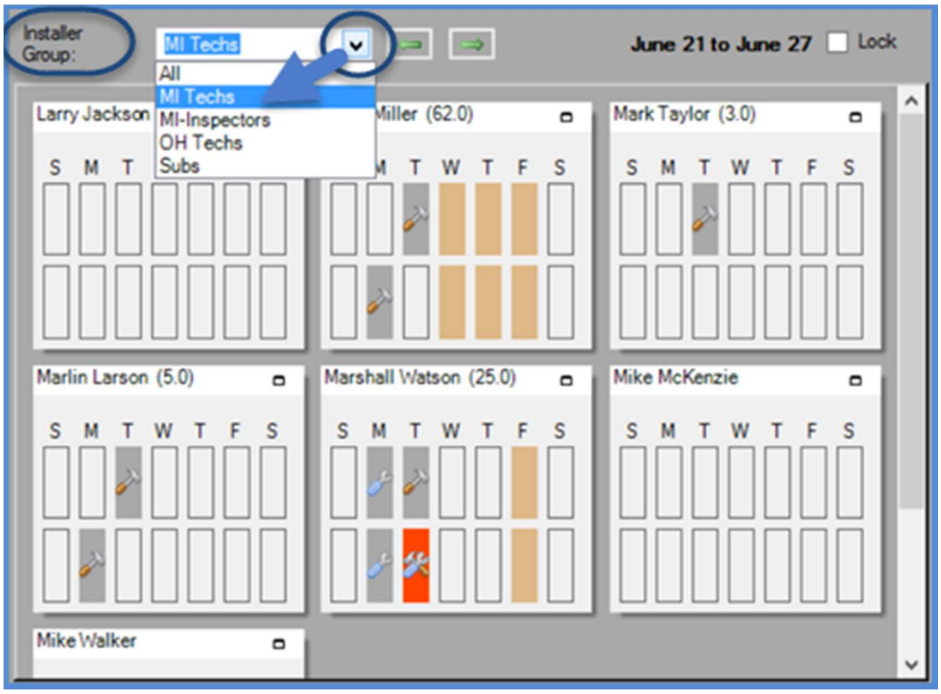


**Installer Availability (continued)**

## Installer Group

Choosing a group from the drop-down will re-populate the Installer Availability with the Installer Tiles of the Installers assigned to the Installer Display Group.

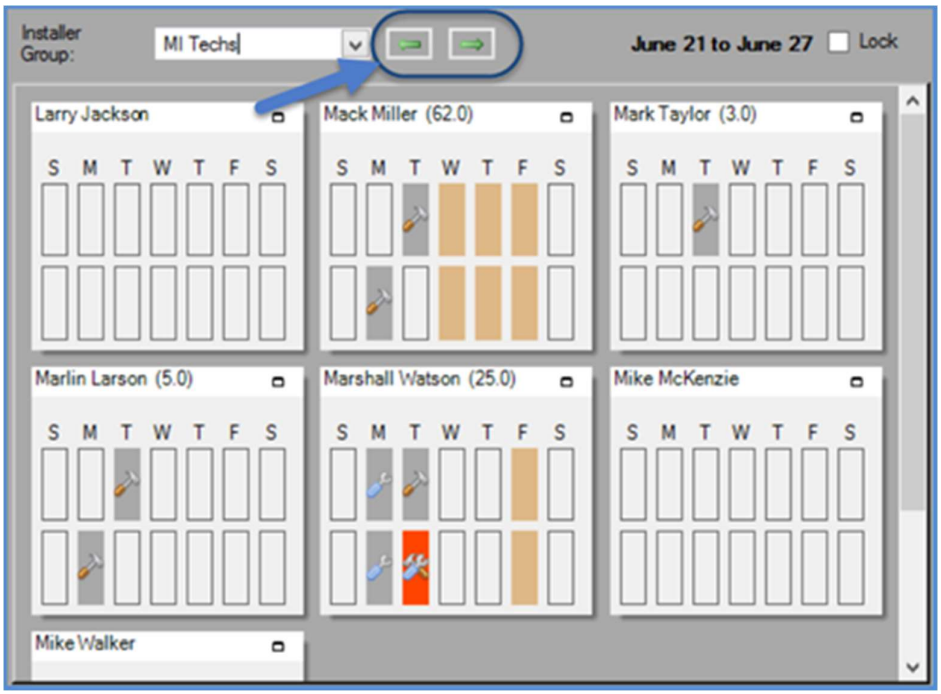
These Installer Groups are the same Display Groups that are setup and maintained in SedonaSchedule.



**Installer Availability (continued)**

## Previous/Next Week

Clicking on the arrows will change the week being viewed to the Next or Previous week; the left arrow goes back to the previous week and the right arrow advances to the next week.

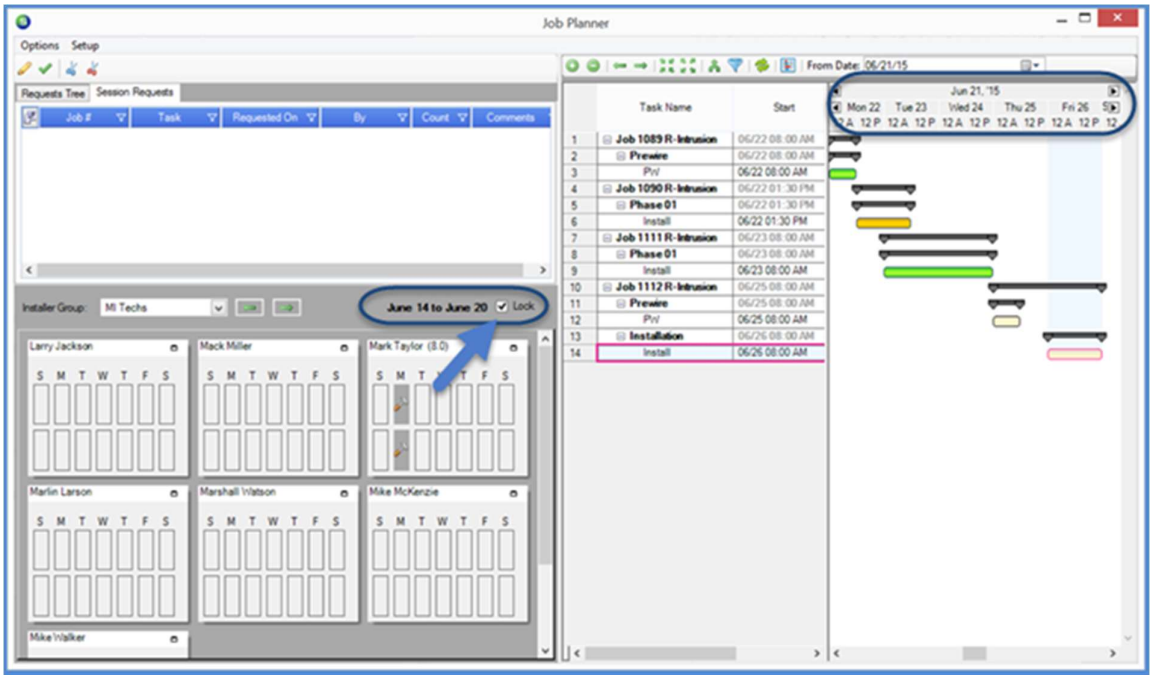


**Installer Availability (continued)**

## Lock Week

Selecting this checkbox prevents the currently displayed week from changing. While the *Lock Week* checkbox is selected, if you click on a Task for a Job within the Gantt Chart area where the date in the Gantt Chart is not in the currently displayed week and try to drag the Task into the Installer Availability area, the displayed week will not change to the week of the Gantt Chart Job Task.

In the example below, the current week in the Installer Availability area is the week of June 14 and we have the Lock Week checkbox selected. In the Gantt Chart area, we are viewing the week of June 21. Since the Lock Week is selected, we are not able to drag a Job Task from the Gantt Chart into the Installer Availability area since the two Job Planner controls are not in the same week.

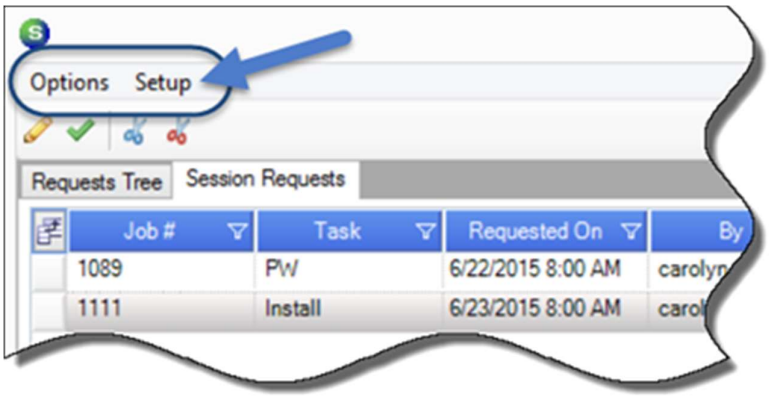


## Options & Setup

There are two menus for specifying preferences on how various areas of the Job Planner will function; *Options* and *Setup*. These two menus are located at the upper left of the Job Planner form. Once setups are established, the choices will affect all Users working with the Job Planner. Currently there is no User Group security controlling access to these setups, so if any one individual makes changes to the Options and Setup, it will affect all Users.

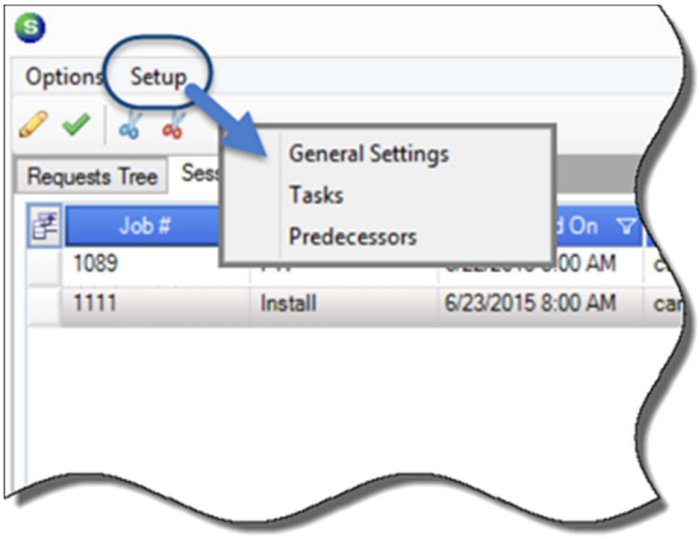
Below are the topics that will be covered in this section.

- **Setup**
- **User Preferences**
- **Options**



## Job Planner Setup

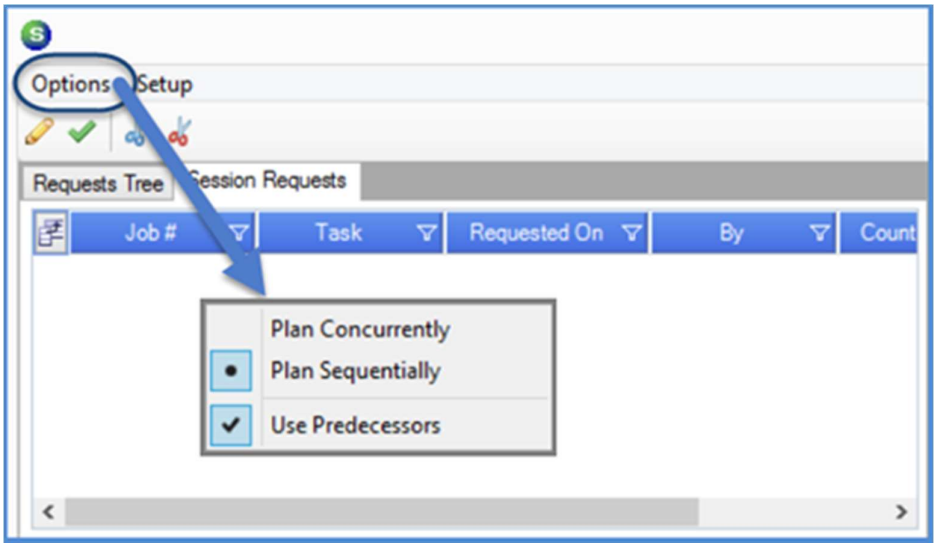
The *Setup* Menu contains three options; General Settings, Tasks, and Predecessors. Each of these options will be described on the following pages.



## Job Planner Options

The *Options* Menu contains three items; the first two Items, Plan Concurrently and Plan Sequentially are either/or choices. Once your option has been saved, you may change this setting at any time to view the Gantt Chart with the other option.

The third item, Use Predecessors, is a matter of preference for your company. Each of these options are described on the following pages.



## User Preferences

User Preferences consist of a set of options and filters that are saved when SedonaSchedule closes and loaded when the Job Planner opens, and are unique to each User.

Several Filters available from which to choose from the **Gantt Chart Taskbar**. The filter selections are saved for each User.

**Regarding Filters:** It is important to know that Filters are remembered when logging back into the Job Planner; a User may open the Job Planner and not see a Job they're expecting to see if a Filter is being used.

Following is a list of preferences that are saved when logging out and logging back into SedonaSchedule [to access the Job Planner]:

- Whether the form is maximized
- The position of the form on the screen
- The size of the form on the screen
- Whether Plan Concurrently or Sequentially is selected
- Whether Use Predecessors is selected
- Whether Schedule By Drop Date is selected
- Whether Exclude Non-Labor Tasks is selected
- The zoom and timescale zoom settings
- The Start Date Cutoff Date
- The splitter positions

## Job Planner Functionality

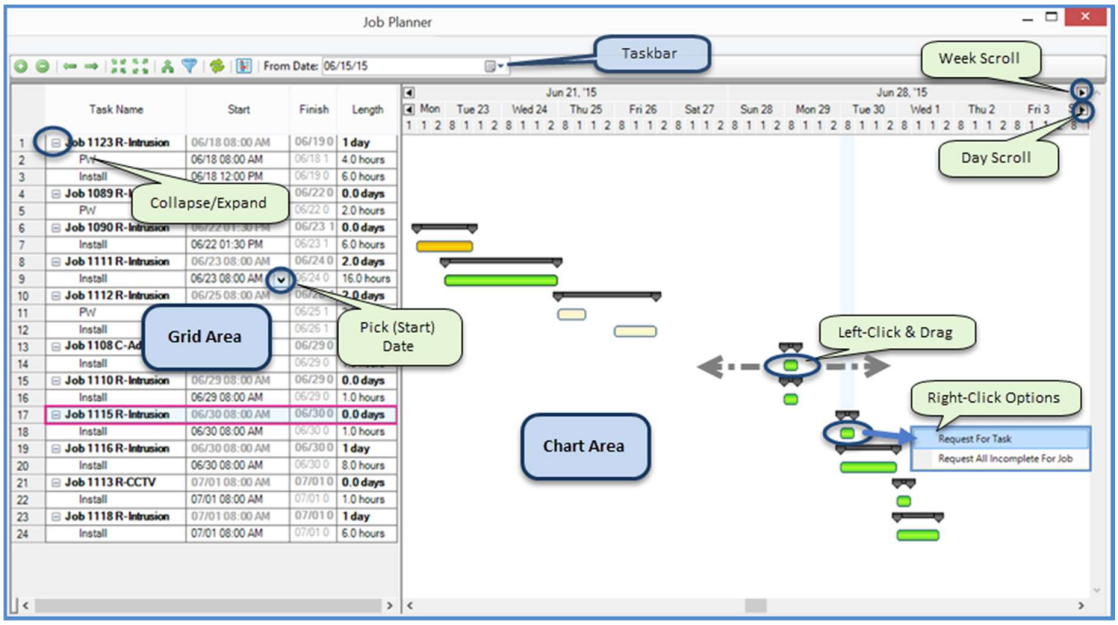
There are several topics related to the functionality of the Job Planner. Below are a list of the topics that will be covered in this section.

- Gantt Chart Definitions and Actions
- Task Block Types
- Initial Placement of Tasks
- Dragging Tasks
- Scheduling Process
- Making & Submitting (Scheduling) Requests
- Scheduling Requested Tasks
- Installer Availability Scheduling

## Gantt Chart Definitions & Actions

For the most part, the User will perform actions within the chart portion of the Gantt Chart. The grid portion is designed mostly for informational purposes, with the following exceptions:

- Clicking the minus sign to the left of a Job number will collapse the Job and its Tasks.
- If a Task is far from the date on which the User wishes to schedule it, the User can access a date picker in the specific Start column cell. Picking the date and un-selecting the cell will move the Task.
- Clicking on any row in the grid will select the Job or Task, place the Task block in view in the chart, and can cause the week displayed in the Installer Availability Control to change. The selected Job or Task is boxed in pink on the grid, and the Task block is encircled in pink.

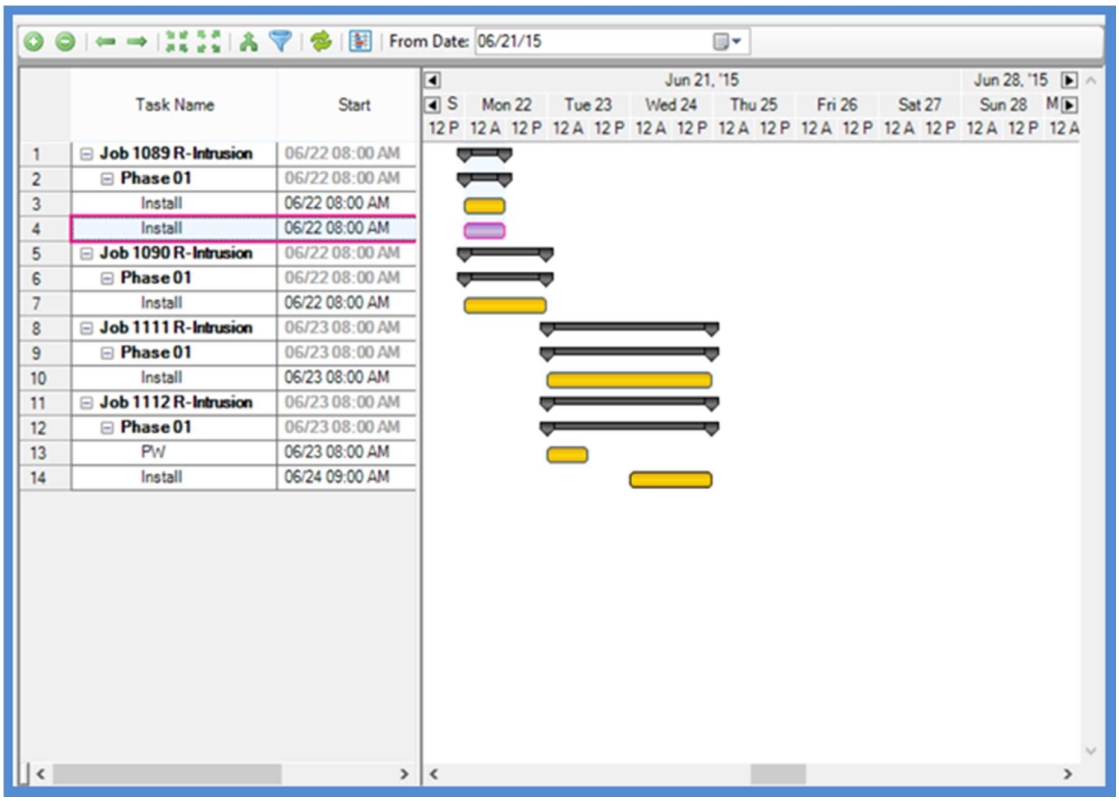


**The Gantt Chart (continued)**

The Gantt Chart is comprised of a grid section, a chart section, and a taskbar. The grid and chart sections are aligned horizontally, and each row represents a **Job** or a **Job Task**. (Note: the Job Planner deals exclusively with *Job Tasks*, not *Labor Tasks*. For this reason, the term **Task** will be used for the remainder of this document to indicate a Job Task.)

The Jobs displayed in the Gantt chart appear in chronological order from top to bottom based upon the Job's start date. The date increases moving from left to right on the horizontal axis. When the Job Planner opens, it selects the job that starts nearest to today's date.

The colored blocks in the chart section, referred to as **Task Blocks**, are the graphical representations of the Tasks. As will be seen, the User can perform a number of actions on these Tasks, but the primary action involves dragging (mouse left-click, hold and drag) Tasks left and right to modify their schedule date.



## Task Block Types

- **Normal Task (Blue)**: Tasks which have no special status. These Tasks can be dragged and requested.
- **Billable Task (Green)**: These Tasks are Normal Tasks which are billable, and can be dragged and requested.
- **Non-Labor Task (Gray)**: When a User sets a Task length to zero, it's considered a non-labor Task. These signify Tasks in a Job which would not normally be scheduled to an installer, for example administrative Tasks. Nevertheless, they can be dragged and requested. They can also be excluded from the Gantt Chart (See **General Settings**).
- **Session Request Task (Pink)**: Any Task for which the User has made a session request. These Tasks are locked (or frozen), and cannot be dragged, but the User can make a second request on them. Session Requests appear in the **Session Request Grid** area of the Job Planner. Session Requests *do not exist in the database; they are part of the "session", i.e. what the User is currently working on*. The User can remove Session Requests. Exiting SedonaSchedule, or clicking **Reload** on the Gantt Chart Taskbar will remove all Session Requests. Finally, Session Requests can be "submitted" [for Scheduling] by clicking the Submit Sessions Request button on Session Request Taskbar, which causes them to become "real" requests.

## Initial Placement of Tasks on the Gantt Chart

When the Job Planner opens, the placement of the Tasks on the Gantt Chart depends on several criteria. Generally, the Job Planner uses explicitly set dates when they are available, and only implies schedule dates when necessary. The following are the explicitly set dates, in their order of precedence:

1. **Scheduled Date** - When the User schedules a Task within the Gantt Chart of the Job Planner, the date on which the Task was scheduled is used.
2. **Requested Date** - If the User has submitted a request for the Task, the requested date is used to place the Task.
3. **Task Schedule Date** - When the Job is created in SedonaOffice, in the Job Task list, the User can enter a Schedule Date. If this date is present it is used.
4. **Job Projected Start Date & Previous Task** - Described below.

The first Task in a Job is the key to placement of the Tasks on the chart. (Also important is the selection of Concurrent or Sequential Planning, and whether Predecessors are being used. See Planning Options.) If this Task lacks one of the first three criteria, above, the projected start date of the Job is used to place it. Subsequent Tasks are subject to the criteria also, but lacking an explicitly set date they are placed according to the Task that precedes (as well as the planning options used).

The objective of Task placement is not to provide a perfect schedule for the User, but to place Tasks in the vicinity of the date they might be scheduled.

## Dragging Tasks on the Gantt Chart

Dragging Tasks on the Gantt Chart updates the tentative start date for the dragged Task. As was previously stated (See Task Block Types) some Tasks are locked, or frozen, on the Gantt Chart and their schedule dates cannot be changed. When ending a drag action on a Task, there are two important things to notice.

First, the schedule date of a Task will adjust (forward in time) if the User attempts to schedule it on a forbidden weekend day. Each Job is associated with an Install Company; Install Companies are created and maintained in SedonaSetup. Within an Install Company setup record, the User can check boxes which indicate whether Saturdays and Sundays are allowed days.

Likewise, the width of the Task block will adjust to span forbidden weekend days. A Task's length will not change, but its finish date will.

Finally, Tasks which have predecessors will automatically be moved forward with their predecessors, and will be restricted from moving to a schedule time before their predecessors.

## Scheduling Process

Scheduling Tasks is the main purpose of the Job Planner, regardless of the User's role. In the illustration below, the general process flow is shown. The User plans Tasks within the Gantt Chart by dragging them to the desired schedule dates/times, makes requests for Tasks using the right-click context menu, submits requests when they're satisfied with their plan, and schedules requests to complete the process.

As will be seen in the following pages, there are a number of ways that the User can schedule Tasks, but you cannot schedule a Task until it becomes a Request.

## Making and Submitting Requests

The Job Planner deals with two types of requests: Session Requests and (actual) Requests. Session Requests do not exist in the database—only in the memory of the User's computer. Clicking the Reload button (or restarting SedonaSchedule) will remove all Session Requests.

The User creates Session Requests by right-clicking on a Task within the Gantt Chart and selecting "Request For Task" or "Request All Incomplete For Job" from the right-click menu options. Selecting the right-click option Request All Incomplete For Job, creates a Session Request for all Tasks in the Job Task List (Job record) that have not been approved. The Task block color will change to pink, and the Task's information will appear in a row in the Session Requests Grid (See Session Requests Grid). You may remove any Request by right-clicking on a Request or Session Request Task block within the Gantt Chart and selecting the Remove Request option or you may highlight the Request within the Sessions Request Grid then click the Remove Selected Session button on the Session Request Taskbar.

Important: When a Task has been requested or scheduled, it becomes frozen; the User can no longer drag its schedule time on the Gantt Chart. If the User requests the Task again, a Session Task is created, which appears as a purple Task block on the Gantt Chart. Session Tasks can be dragged and requested, and are volatile like Session Requests.

In the Job Planner, Requests (not Session Requests) are actually scheduled by the User. Session Requests become Requests when the User submits them by clicking the Submit button on the Session Request Taskbar. Upon doing this, each Session Request in the Session Requests Grid moves to the Session Requests Tree (See Session Requests Grid and Requests Tree). The red Task blocks on the Gantt Chart represent Requests, and these are the Tasks from which we create Job appointments.

## Scheduling Requested Tasks

Once we have genuine Requests displayed in the Requests Tree, there are a number of ways we can schedule them.

**Important:** The "Schedule By Drop Date" option affects all drag-and-drop operations. This option means precisely what it says: When the box is checked, the "dropped" Task will be scheduled beginning on the date it was dropped, and when it is not checked, it gets scheduled on the "Request Date".

The request scheduling methods are given below:

- Dragging the Request Task Block from the Gantt Chart to the SedonaSchedule Schedule Board.
- Double-clicking the Request Task Block (Note that this requires that an installer be selected in the Installer Availability Control.)
- Dragging the Request from the Requests Tree to the SedonaSchedule Schedule Board.
- Dragging the Request from the Requests Tree to the Installer Availability area of the Job Planner.
- Double-clicking the Request in the Requests Tree (Note that this requires that an installer be selected in the Installer Availability area).

**The Job appointments created by the Job Planner are based on the Task length of the scheduled Task, as well as the Install Company of the Job. (Whether the Install Company works Saturdays and/or Sundays, as well as their daily start and end times determine the appointments created by the Job Planner.)**

When scheduling Tasks in the Job Planner, you are not able to split a multi-appointment Task amongst multiple Installers. All appointments for a Task will be assigned to a single Installer. If this is not desired, simply drag-and-drop the appointments on the SedonaSchedule Schedule Board.

After the request has been scheduled, the request is removed from the Requests Tree, the Task block on the Gantt Chart turns to yellow and moves to the slot on which it was scheduled, and the Installer Availability Control is refreshed.

**Important:** Once a scheduling action is committed by the user, the Job Planner no longer "tracks" the appointments it created. This means that moving appointment dates or changing installers or deleting appointments will not be "known" to the Job Planner.

## Installer Availability Control Scheduling

As stated on the previous page, there are four ways to schedule appointments using the Installer Availability area of the Job Planner:

- Drag Request Node from the Requests Tree to the Appointment Block (or Installer Tile if “Schedule By Drop Date” is not checked)
- Select the desired Installer Tile, then double-click the Requested Task Block in the Gantt Chart.
- Select the desired Installer Tile, then double-click the Requested Node in the Requests Tree.

Note: The Job Planner does not stop the User from scheduling multiple appointments in the same Appointment Block of an Installer Tile.