



Product: ODTView


Subject: Basic Overview of Scheduler Tab

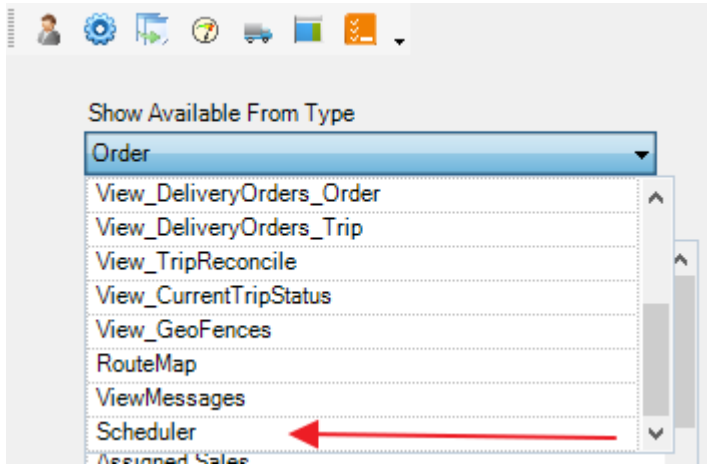
Version:

December 6, 2016

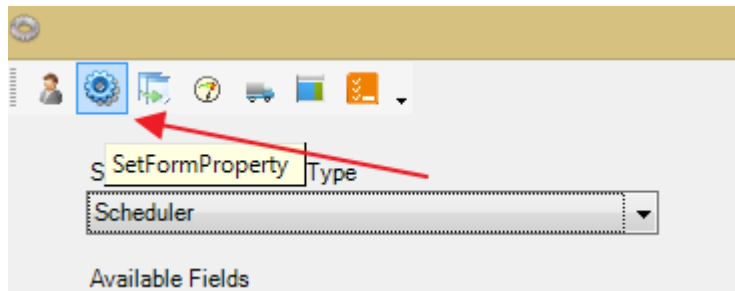
Distribution: Customer

Setting Up Scheduler Tab

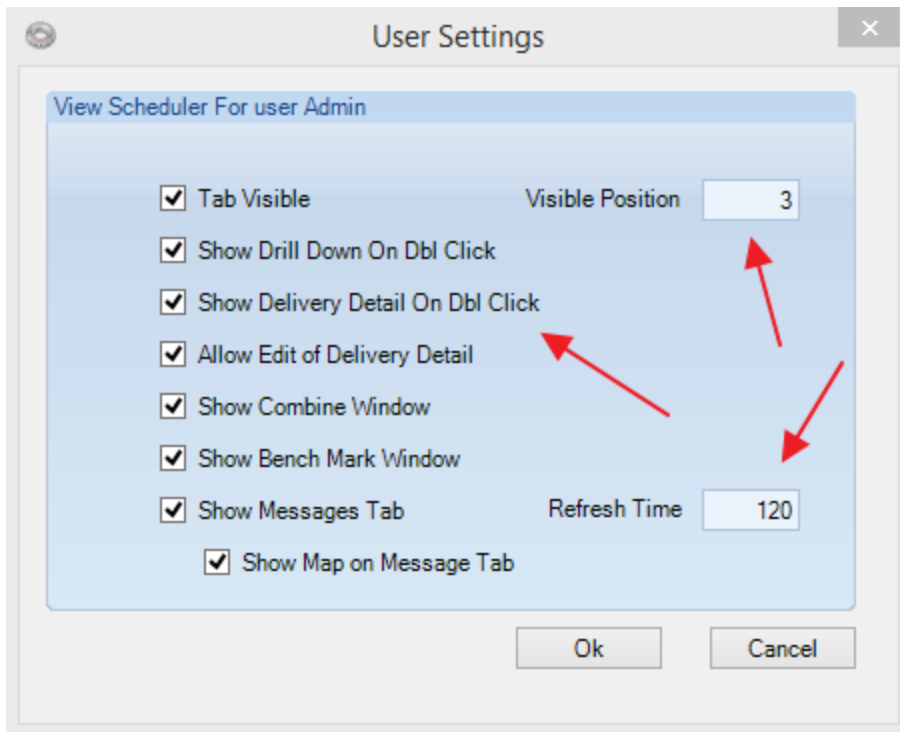
- Log into ODT Viewer with an Admin user
- Navigate to the wrench icon 
- Choose Scheduler from the Show Available Form Type drop down

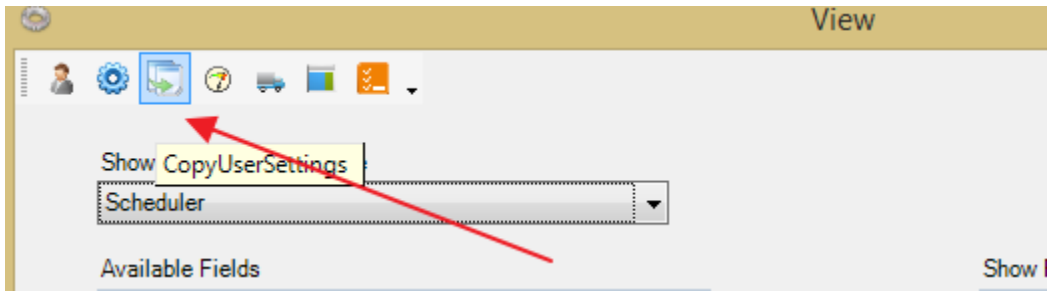


- Choose the Gear Icon from the toolbar (Set Form Property)

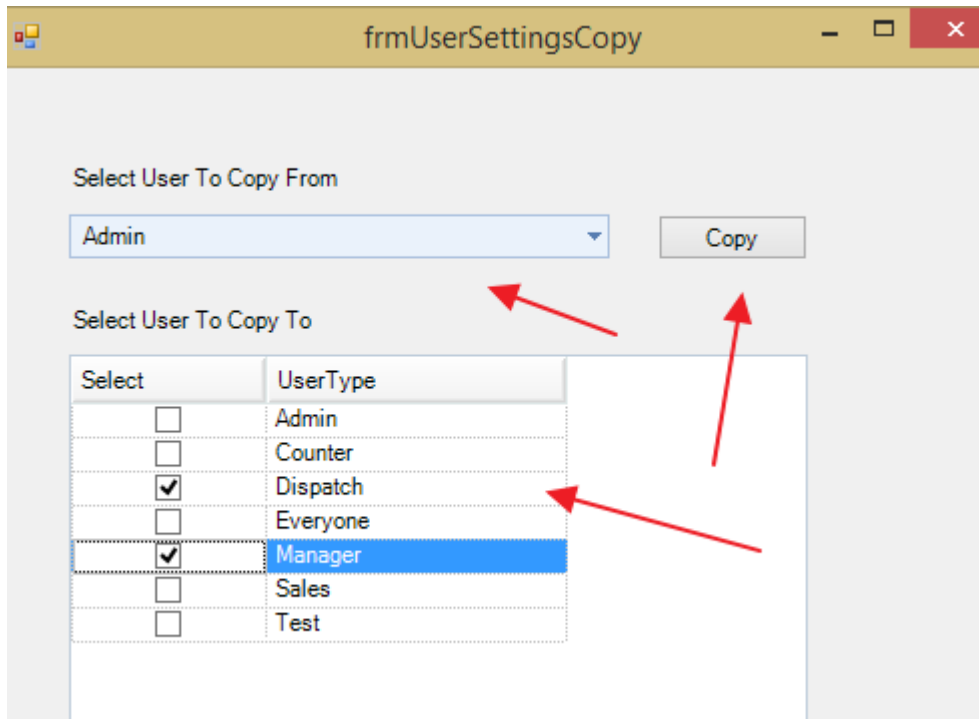


- Choose the following options from the View Scheduler For user Admin
 - Tab Visible
 - Show Drill Down on Dbl Click
 - Show Delivery Edit on Dbl Click
 - Allow Edit of Delivery Detail
 - Show Combine Window
 - Show Bench Mark Window
 - Show Messages Tab – if applicable
 - Enter 3 n the visible position box
 - Refresh Time – recommended between 120-180 seconds
 - Then Choose Ok

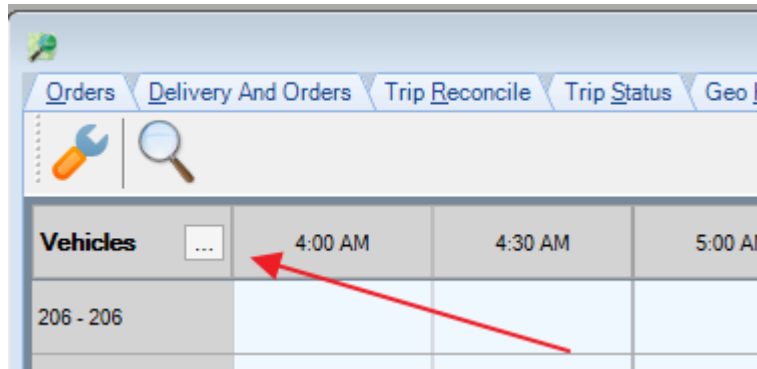




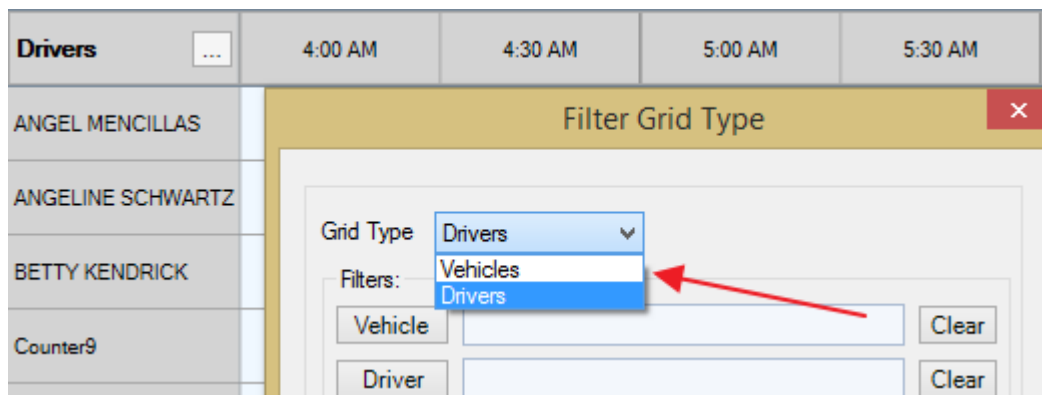
- Select the User Type from the Select User to Copy From drop down
 - Select User Type(s) to copy to
- ***Recommend selecting Dispatch and Manager
- Choose Copy, select OK and then choose Close



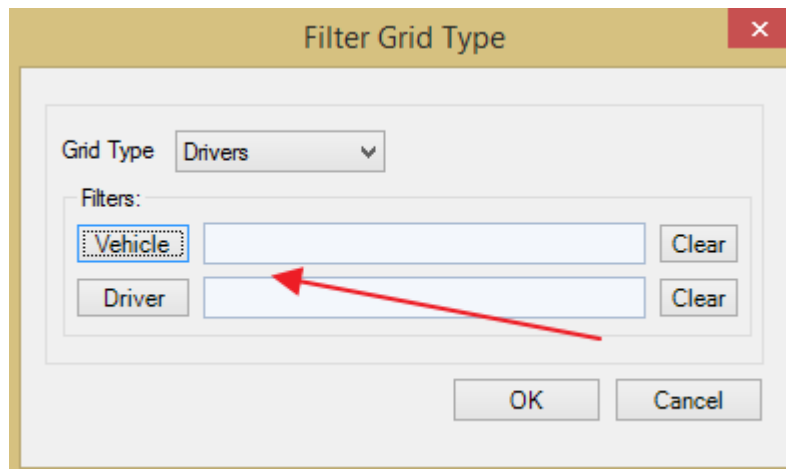
- Schedule Filter
 - Scheduler can be filtered by the driver or the vehicle by choosing the filter option



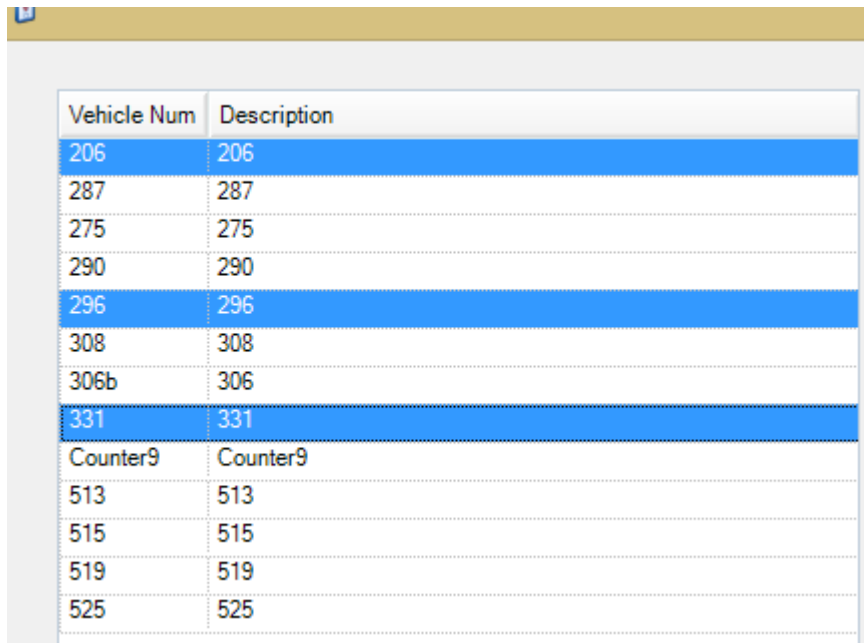
- Choose Vehicle or Driver from Grid Type drop down to filter by driver or vehicle.



- To choose a specific driver or drivers and vehicle or vehicles choose Vehicle or Driver from the filters option

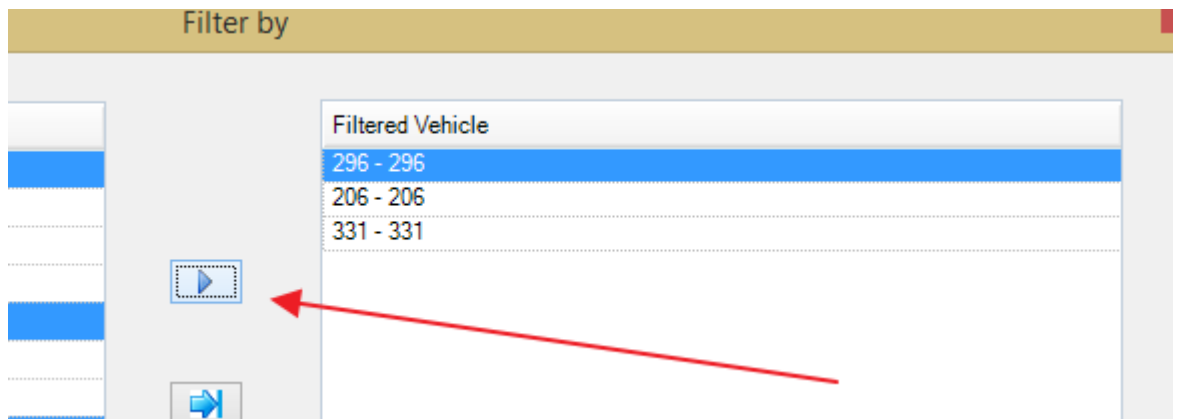


- Select one or more vehicles or drivers by holding the Ctrl key and choosing the driver or vehicle with a left mouse click.

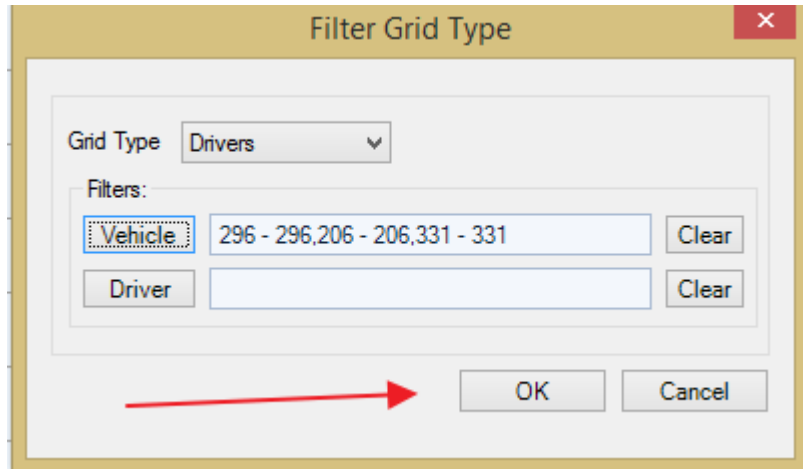


Vehicle Num	Description
206	206
287	287
275	275
290	290
296	296
308	308
306b	306
331	331
Counter9	Counter9
513	513
515	515
519	519
525	525

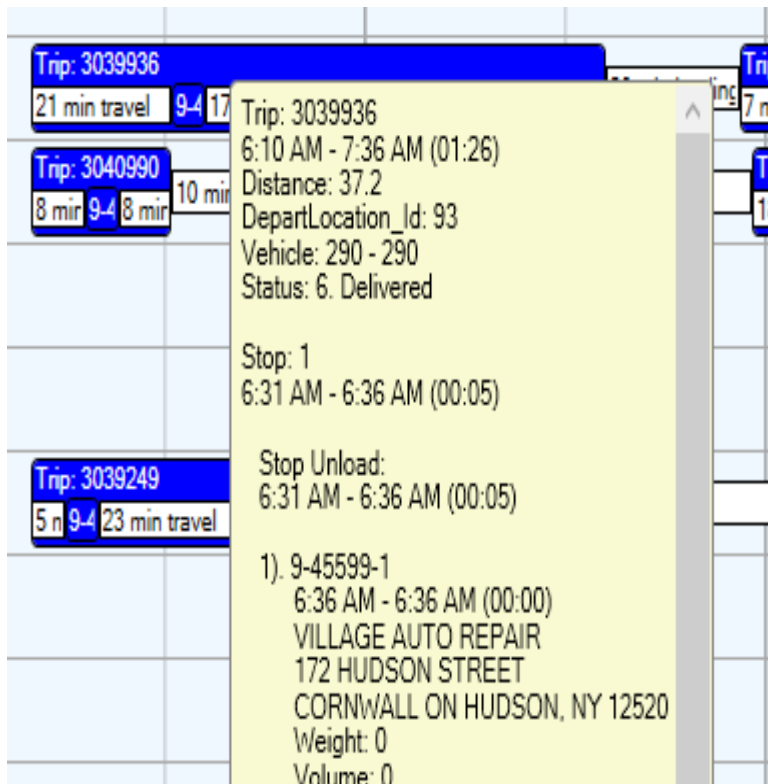
- Once your options are selected choose the right arrow to move your selections to the filtered section of the screen. Then choose Apply and Ok to close the Filter by screen.




- Then choose ok to filter your selections on the scheduler grid

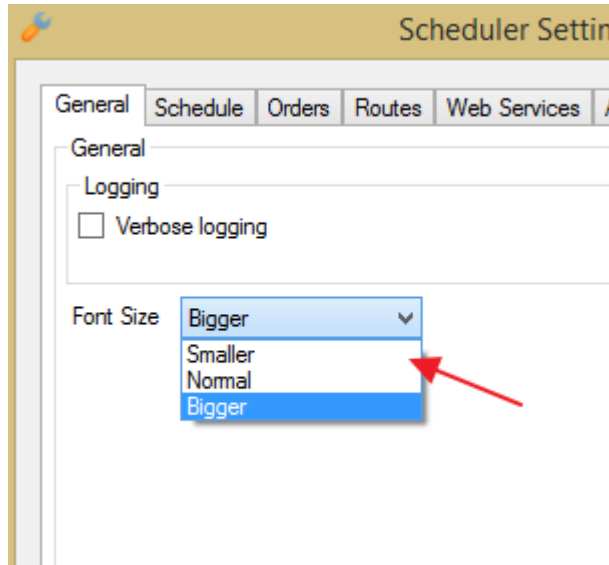


- Mouse over trips show all orders and details of that trip

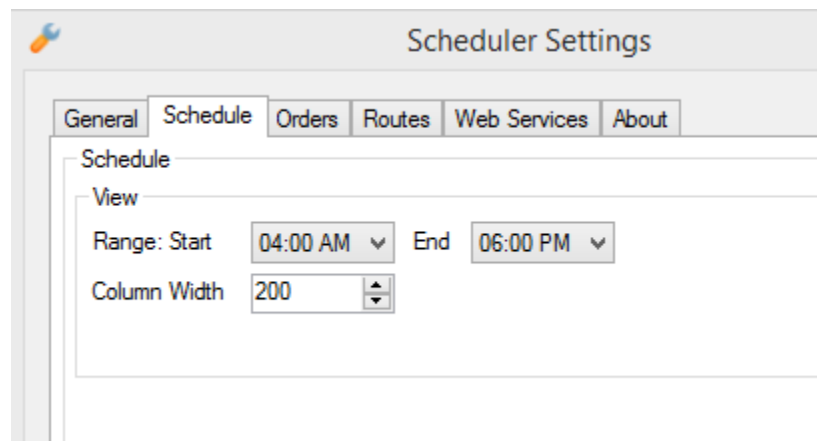


- Choose wrench icon on the  Schedule tab to modify Scheduler Settings

- Choose the General Tab and choose the down arrow to select a larger or smaller font size and choose Ok to save the selection



- To change the time range available in the scheduler grid, choose the Schedule Tab to modify the start and end time choose ok to confirm changes.

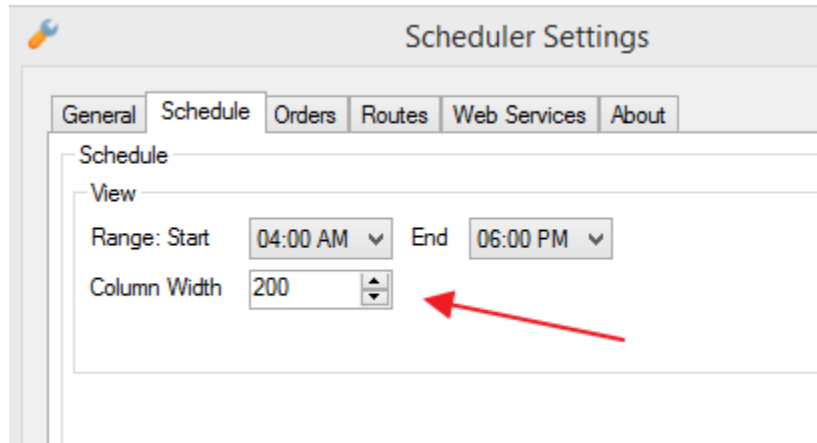


note

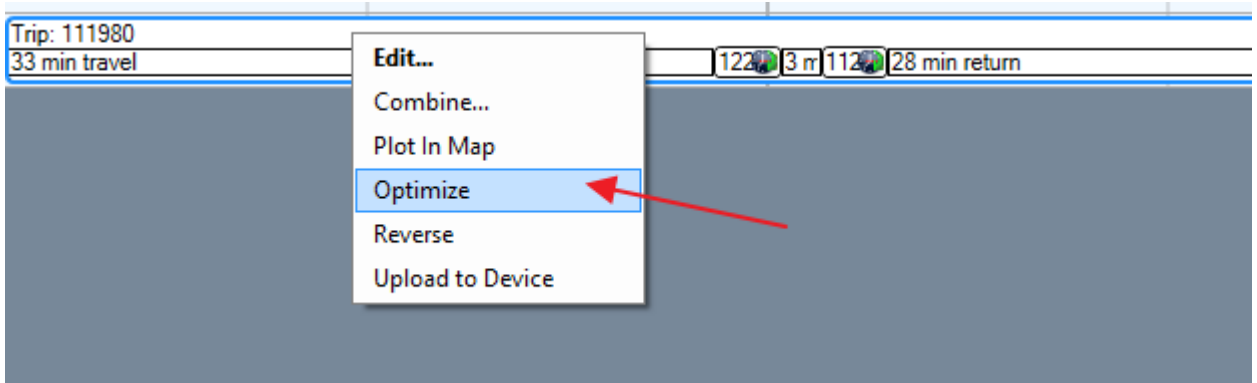
The default start and end time is from 04:00 am to 06:00 PM. This time range controls the time range available to schedule trips in the Scheduler grid

Vehicles	6:00 AM	6:30 AM	7:00 AM	7:30 AM	8:00 AM	8:30 AM	9:00 AM	9:30 AM	10:00 AM	10:30 AM	11:00 AM
Aaron - Ford Fusion											

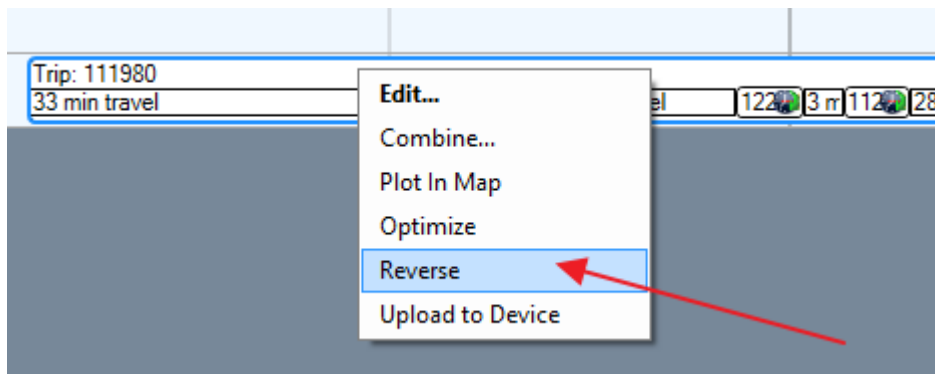
- To change the column width of each 30-minute block increase or decrease the column width by using the up or down arrows choose ok to confirm changes



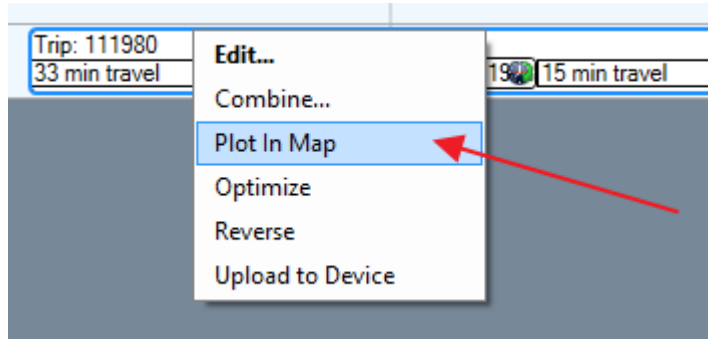
- Route Optimization
 - To optimize a route right click on the trip and choose Optimize.



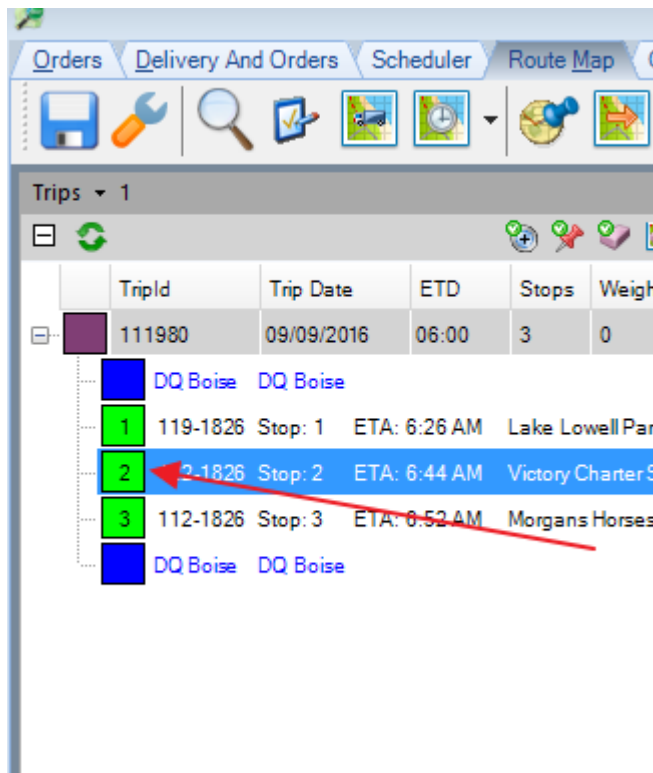
- To reverse the route right click on the trip and choose Reverse



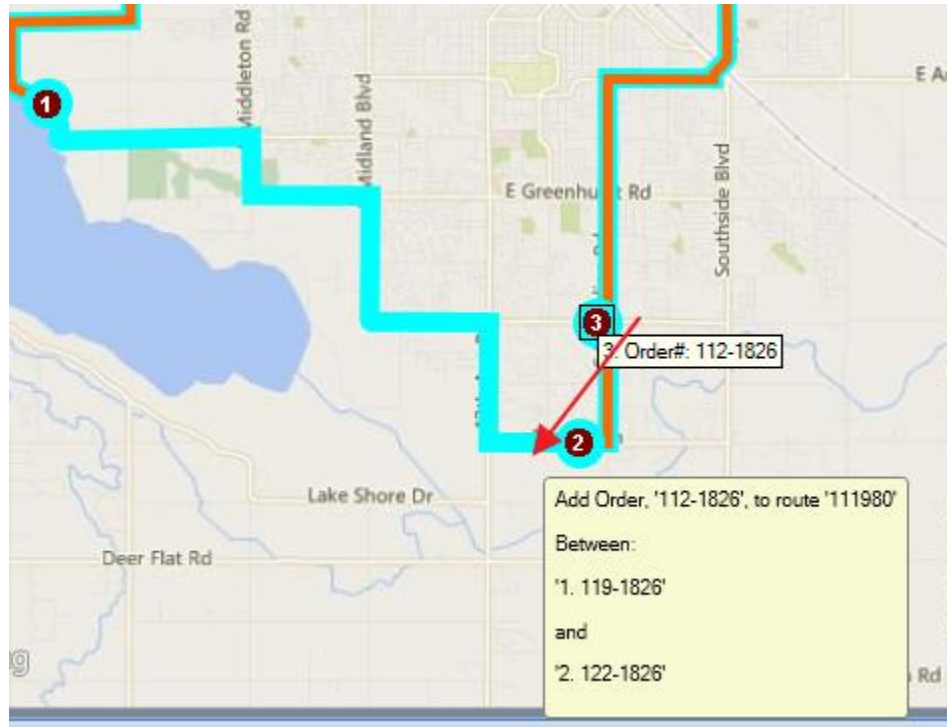
- To plot the trip right click and choose Plot in Map



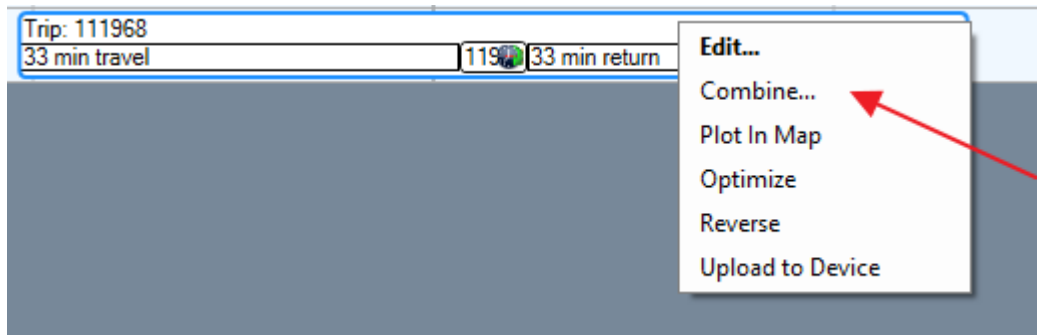
- To change the stop sequence on the route map, highlight the stop and drag and drop the order to the correct stop



- To change the stop sequence on the map, click and hold the stop you want to move and drag it in front of the stop that comes before it.



- To add or remove orders to an existing trip right click and choose combine.



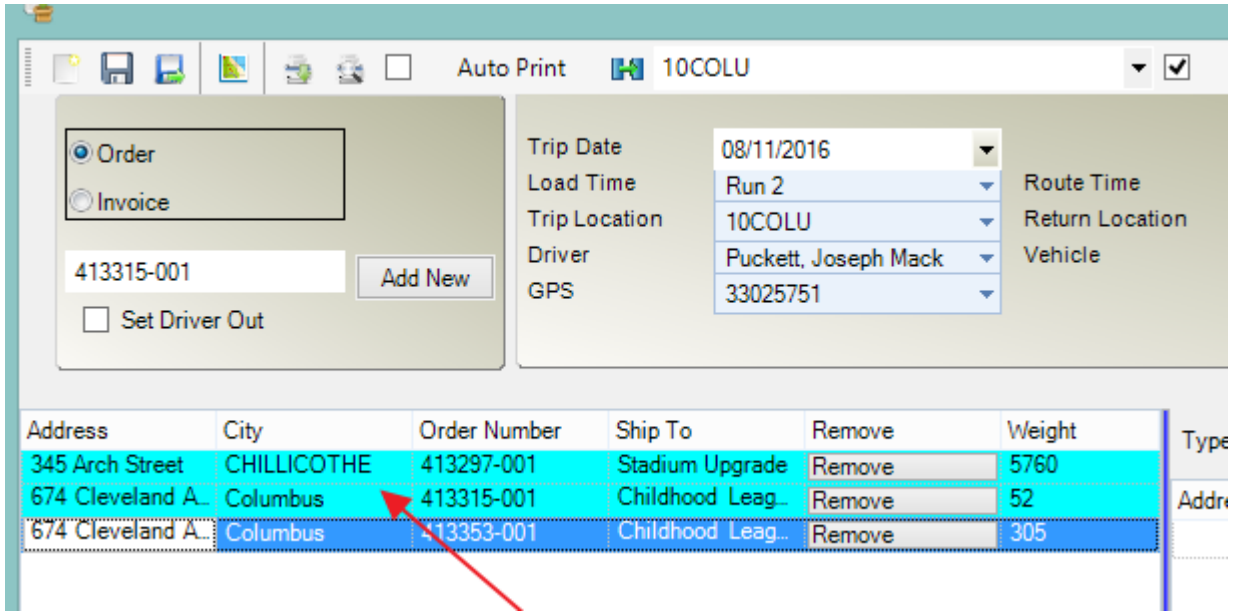
- To add an order to the trip from the combine screen enter or scan the order/invoice number and choose add new.

City	Order Number	Ship To	Remove
Meridian	115-1977	Catnap Quarters	Remove
Meridian	117-1977	Murf's Appliance...	Remove

- To save the changes choose the save icon
- To save and close the combine screen choose the save and close icon
- To save and upload the trip choose the upload to gps icon



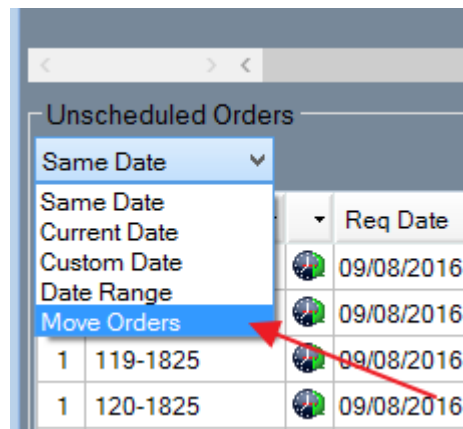
- To change the stop sequence in the combine screen, select the order you wish to move (a + sign will show by the mouse pointer) and drag and drop the order to the new stop sequence. In this example, I move the order for Stadium Upgrade to come before the two orders for Childhood League



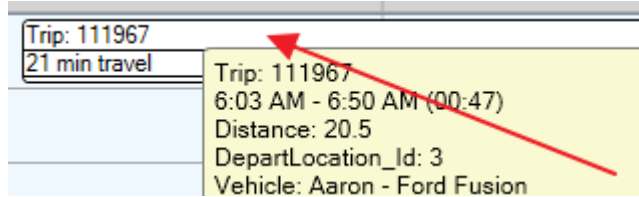
- To save the changes choose the save icon
- To save and close the combine screen choose the save and close icon
- To save and upload the trip choose the upload to gps icon



- To Move a scheduled order or trip choose Move Orders from the drop down menu in the Unscheduled Orders grid



- To move a Trip, click in the trip area and drag the trip to the Unscheduled Orders grid



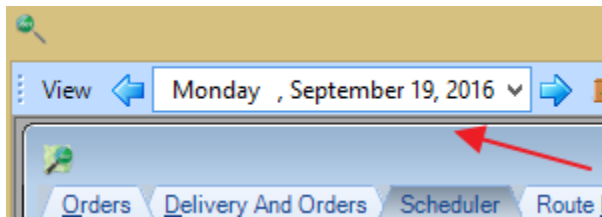
- To move a Trip, click in the trip area and drag the trip to the Unscheduled Orders grid. Once the trip is moved each order will show in the grid with the stop number indicated

Unscheduled Orders

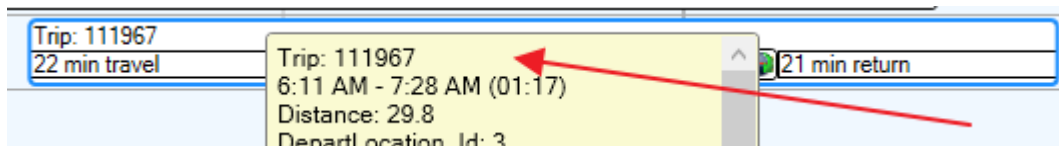
Move Orders ▾

# ▾	Order # ▾	Req Date ▾	Customer ▾	Ship To
1	118-1828	09/09/2016	Boise Test Account	Greenhurst I
2	122-1825	09/08/2016	Boise Test Account	Victory Char
3	120-1825	09/08/2016	Boise Test Account	Copper Can

- To move the trip, choose the date you wish to move the trip to from the date option



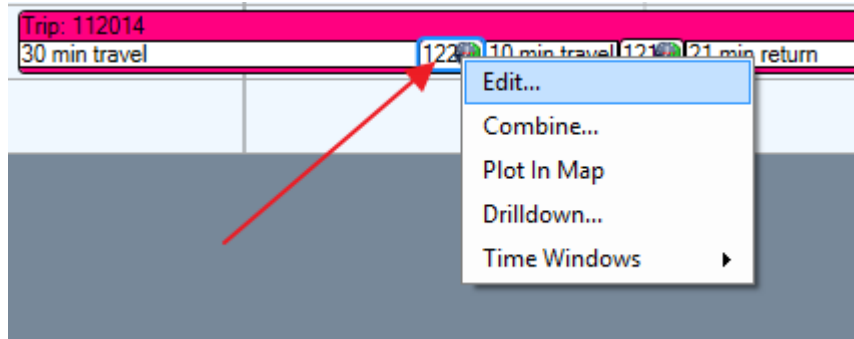
- Then drag each order to the vehicle\driver and time slot preferred. The trip will now be scheduled on the date chosen with the existing trip id.



- This same functionality can be used to move an order or orders individually. Choose the order from the trip and drag the order to the Unscheduled orders grid. Then follow the instructions above on how to move a Trip

- Viewing Line Item Detail

- To view the line item detail of an unscheduled order, select the order you want to view and right click and choose drilldown



- Sorting Unscheduled Orders

- Click the column header to sort by that column. To sort by additional columns, hold down the shift key and select another header column.

Unscheduled Orders (2170)				
Date Range		Friday	July	15, 2016
#	Order #	Req Date	Customer	
1	408857-001	07/29/2016	POELKING C	
1	404420-001	07/22/2016	GIBSON, JA	
1	408695-001	07/28/2016	ST. ELIZABE	
1	411321-001	08/05/2016	UNITED COI	

- For example, to sort by City and then by Order # you would click the City header first and then holding the shift key click the Order # header. Keep holding the shift key and selecting additional column headers to sort by even more columns.

- A transparent triangle indicates which columns are being sorted

Unscheduled Orders (3)				
Move Orders				
#	Order #	Req Date	Customer	Sh
3	413336-001	08/12/2016	DOTSON COMPANY INC.	RI
2	413540-001	08/12/2016	KETTERING HEALTH NETWO...	KE
1	412485-001	08/12/2016	WITTENBERG UNIVERSITY	WI

- The triangle points up for ascending and down for descending sort.
 - Clicking the header again toggles the sort direction
 - Column sorts will be remembered between screen refreshes

- Searching for an Order\Invoice



- To search for an Order # select the Find Order\Invoice icon
- To find the most current order\invoice check the Find Most Current option in the find order screen. To find like orders\invoices check the Find Like option in the find order screen

- Order Edit in Unscheduled Orders grid

- To edit Stop Duration, Load Type and Status fields on an unscheduled order right click and choose edit. The Delivery Edit Window opens and changes can be made by selecting the drop down from each field. Choose save and close icon to exit the Delivery Edit Window.

