



IIG Dispatch Board For Dynamics NAV 6.0

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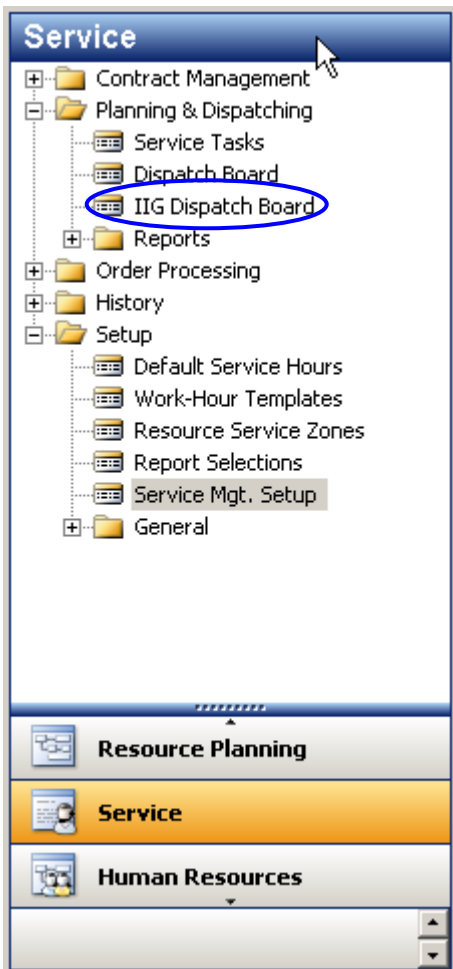
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Introduction

The IIG Dispatch Board for Dynamics NAV add-on provides easy and convenient visual management board added to the Service Management of Dynamics NAV.

Running IIG Dispatch Board from Dynamics NAV

IIG Dispatch Board has been added to the **Planning & Dispatching** menu of the **Service**.



Service Order

The **Resource** fields have been added to the Service Order Header and Line. The Line Resource field is required.

The screenshot shows a software window titled "S0000010 The Cannon Group PLC hhhh - Service Order". It has several tabs: "General", "Invoicing", "Shipping", "Details", and "Foreign Trade". The "General" tab is active, displaying various fields for customer and order information. A "Resource" field is highlighted with a blue box in the header section, containing the value "TIMOTHY". Below the header is a table with columns: "Service I...", "Item No.", "Service I...", "Resource", "Serial No.", "Description", "Repair S...", and "War". Two rows are visible in the table, both with "TIMOTHY" in the "Resource" column. To the right of the main form are two panels: "Customer Information" and "Service Item Information". The "Customer Information" panel shows details for "Customer" and "Avail. Credit". The "Service Item Information" panel shows details for "Service Item...", "Components", "Troubleshoot...", "Skilled Resou...", and "Bar Chart". At the bottom of the window are buttons for "Order", "Line", "Functions", "Posting", "Print...", and "Help".

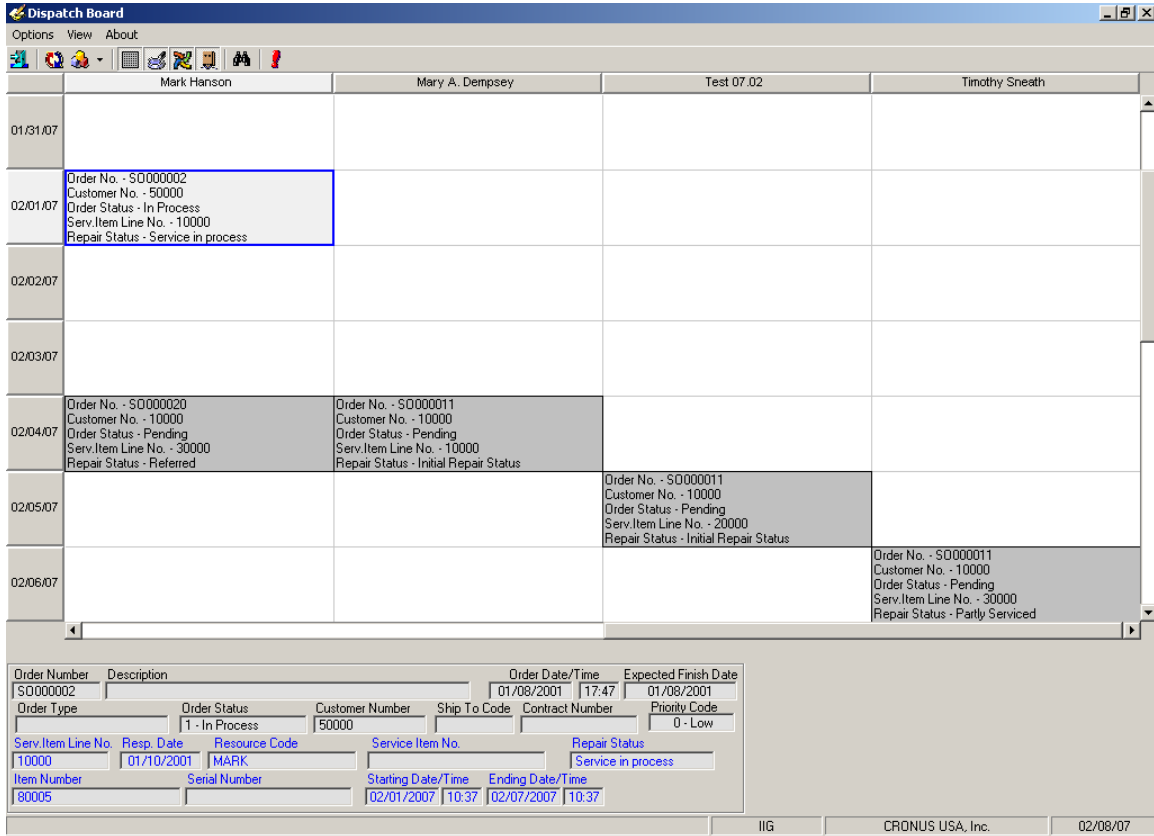
Service I...	Item No.	Service I...	Resource	Serial No.	Description	Repair S...	War
4	80002	DESKTOP	TIMOTHY		Computer III 600 MHz	INITIAL	
2	80002	DESKTOP	TIMOTHY		Computer III 600 MHz	INITIAL	

IIG Dispatch Board

The **IIG Dispatch Board** displays active service orders and service item lines determined by dates and resources.

User specified information for each service order/service item line is displayed in a cell. Each type of data in the cell (e.g., Customer, Service Order Number, Contract Number) can be color-coded for easier visibility. Also, display names of data fields can be changed (for example, shortened). The user can also filter the service orders by requesting only those service orders with data falling in certain ranges.

Dispatch Board displays only the Service Orders and Service Order lines with start date.



All the columns have equal width, but you can adjust it in a couple ways. Click anywhere between the names of Resources at the top of the board, and drag the mouse to the right to increase the width or to the left to decrease it. During dragging, a vertical bar displays the new position of the dragged grid line, and the status bar displays the new

column count.

All the columns will have equal widths when you release the mouse. The number of columns will remain unchanged when you resize the window, so you can also adjust cell width by resizing the entire window. Rows will only have whole cells.

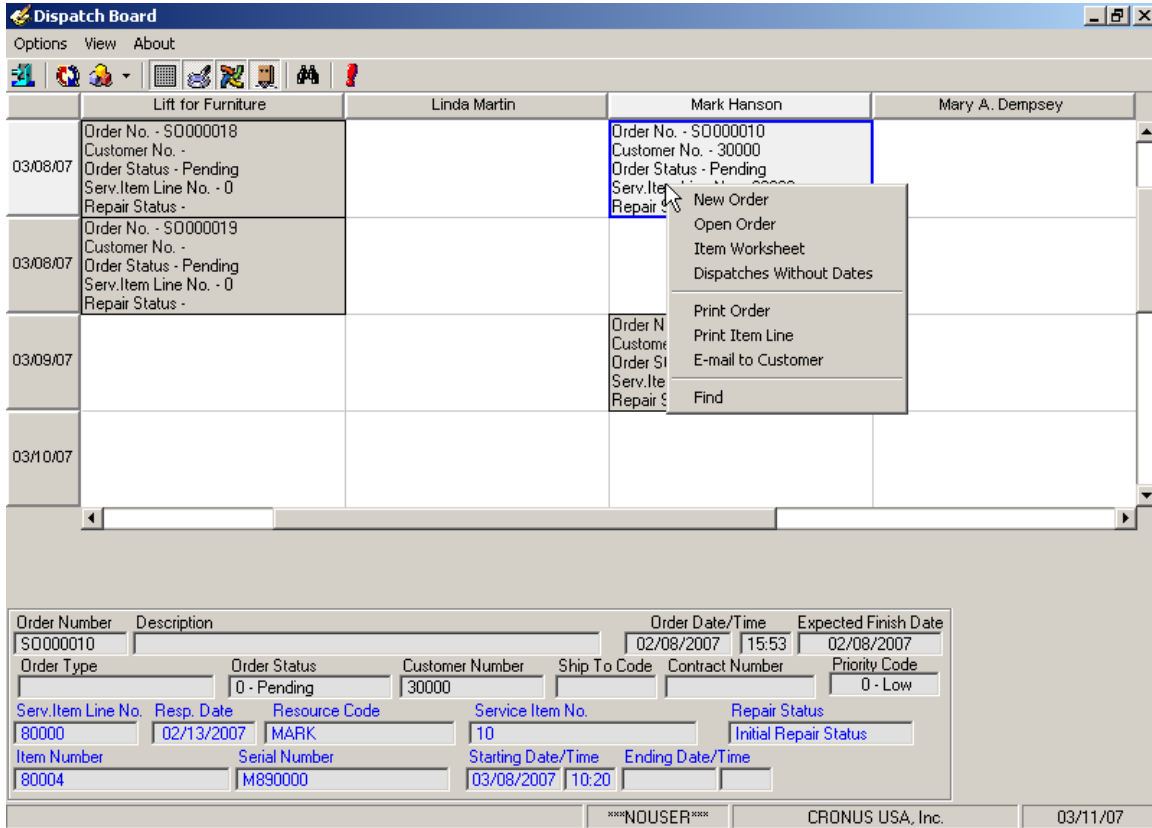
A cell can be dragged to another resource or response date, and the system will update the corresponding service order. A tooltip displays the destination date and resource while dragging.

The cursor is changed to the “not allowed” sign, if the move of a cell is not allowed (moving without resource or date change).

Cells can be selected using keyboard Arrows, Page Up, Page Down keys.

Right-clicking on a cell (or using the Windows Application key on the keyboard) displays pop-up menu, from which you can quickly run some programs for the service order.

To pass focus to the cells part of the screen (for example, after using Refresh), press Ctrl+G. The left upper cell of the displayed cells will be selected.



The following options are available from the pop-up menu for the current service order.

New Order displays the quick **Service order** window ready for new service order entry.

50000013 - Service Order

General

No. 50000013 Document Date 09/28/09

Description Starting Date

Customer No.

Name

Service Order Type

Contract No.

Contact No.

Resource LINDA

Service I...	Item No.	Resource	Serial No.	Description	Fault Ar...	Sympto...	Fault
*▶							

Order Line Help

Open order displays the **Services order** window for the current service order.

Item Worksheet displays the **Service item Worksheet** window for the current service order.

Print Order prints the **Service Order** information to the default system Printer.

Print Item Line prints the **Service Item Line** information to the default system Printer.

E-mail to Customer e-mails the Order information to the Customer.

Dispatches Without Dates opens a list of Service Orders and Service Order Lines without start dates. Clicking the **Select** button changes its start date to the date from which the cell had been selected.

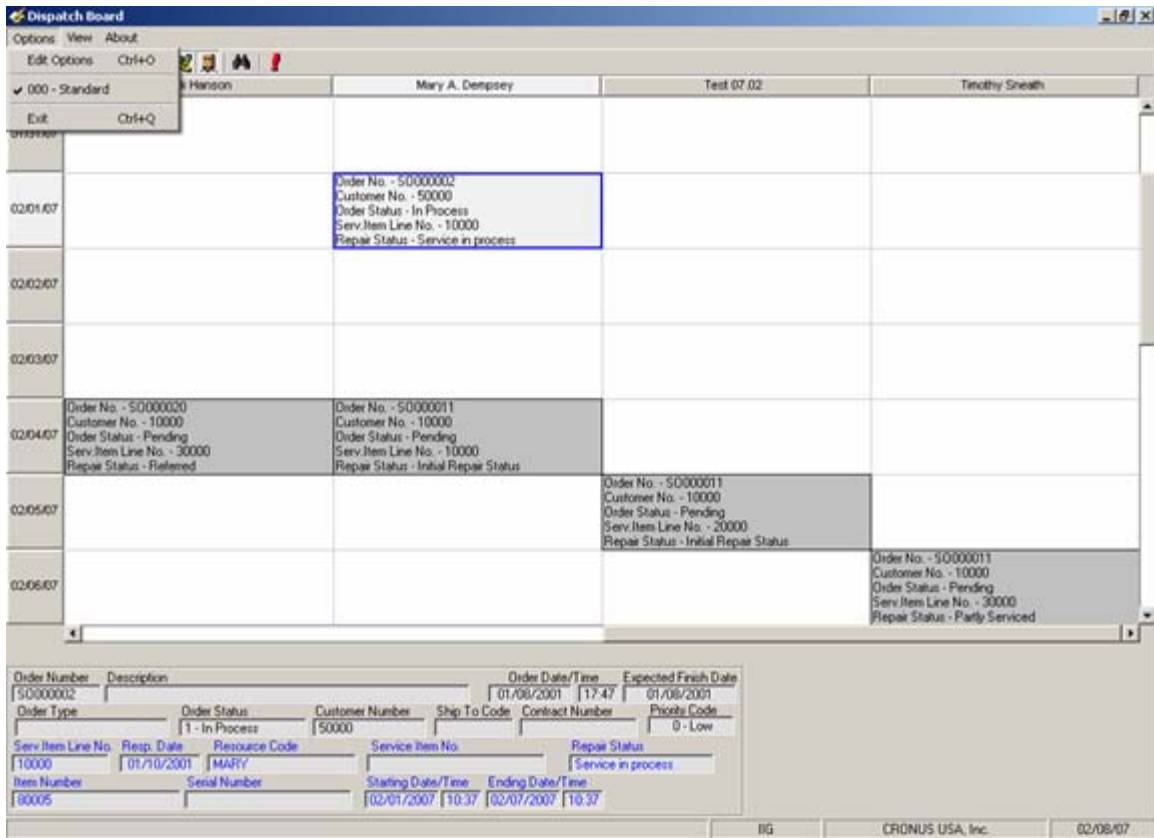
The screenshot shows a window titled "Dispatches Without Dates List" with a table of data. The table has six columns: Order No., Serv. Item Li..., Resource ..., Resource Name, Repair Status, and Order Date. The first row is highlighted in blue. Below the table, there is a "Show All" checkbox, "Select" and "Cancel" buttons, and a status bar with fields for "5 Rows.", "****NOUSER****", "CRONUS USA, Inc.", and "03/11/07".

Order No.	Serv. Item Li...	Resource ...	Resource Name	Repair Status	Order Date
SO000001	50000			INITIAL	1/5/2001
SO000001	60000	MARK	Mark Hanson	INITIAL	1/5/2001
SO000010	10000	MARK	Mark Hanson	INITIAL	2/8/2007
SO000013	30000	MARK	Mark Hanson	INITIAL	2/26/2007
SO000015	0	MARK	Mark Hanson		2/26/2007

Show All

5 Rows. ****NOUSER**** CRONUS USA, Inc. 03/11/07

The **main menu** located in the upper left corner of the **Dispatch Board** screen, contains the following submenus.



In the **Options** menu, you can select an existing **Option Type**, and **Edit Options** in the **Options for User** dialog box (described later). Currently active Option Type is indicated with a checkmark.

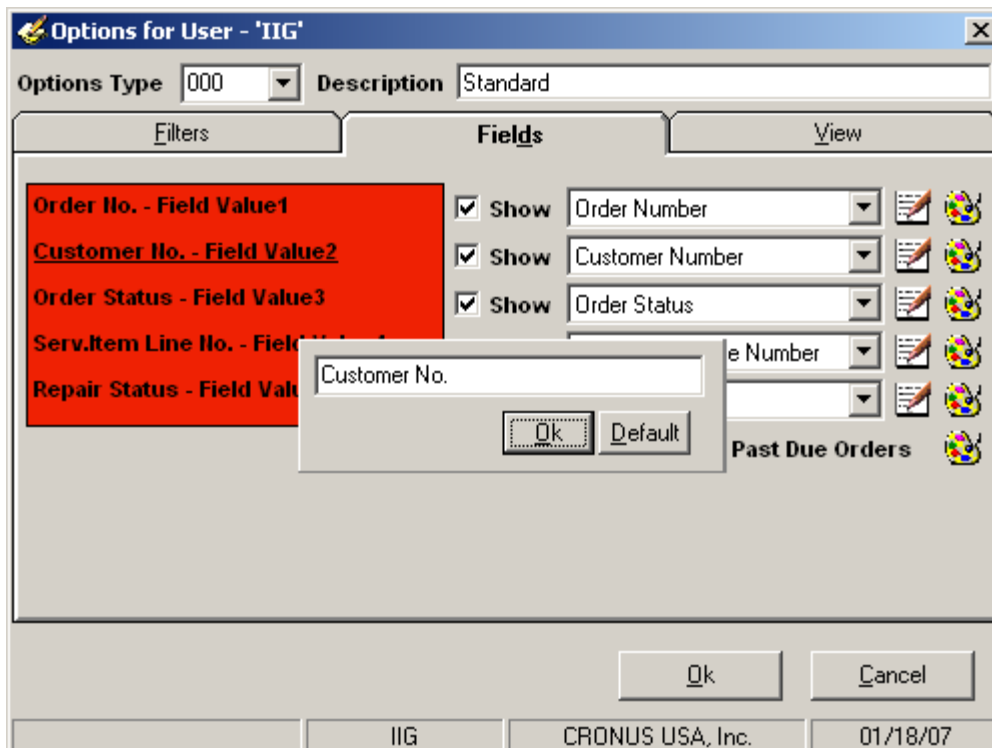
In the **View** menu, you can select to Show/Hide **Toolbar**, **Grid Lines**, **Fields**, **Blanks** (blank rows and columns), **Blocked Resources**, **Refresh** the Dispatch Board view, and **Find** a specific Service order/Service item line on the Board.

The **Toolbar** enables you to quickly **Exit** the Dispatch Board, **Refresh** the view, **Edit Options**, select **Option Type**, **Show/Hide Grid Lines**, **Fields**, **Blanks**, **Blocked Resources**, **Find** Service order/Service item line. Current Option Type is unavailable (already selected).

The Dispatch Board is automatically refreshed when Accepting changes in the **Service order** screen, deleting service orders/service item lines, creating new service orders/service item lines.

To control which data fields appear in the cells (and their colors), select the **Edit Options** submenu from the **Options** menu of the **Dispatch Board** main window.

Click the **Fields** tab in the displayed **Options for User** dialog box.



You can choose up to five data fields to be displayed in the cells of the board. Select fields from the drop-down lists, and see preview on the left.

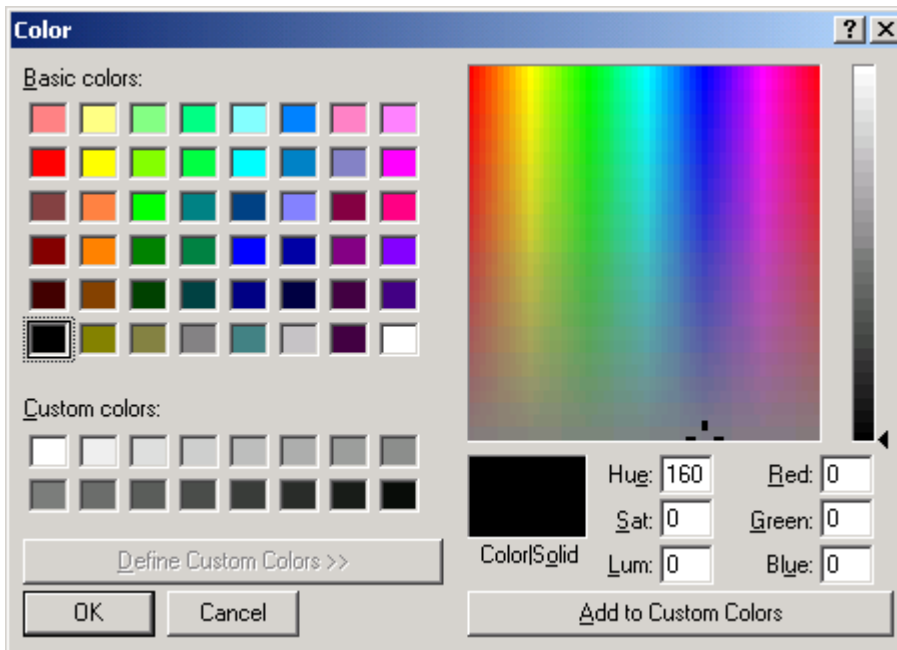
You can hide fields if you do not need all five fields displayed. Uncheck the boxes next to fields that you do not want to be displayed.

You can also change the display name of selected fields. Click the **Edit** button next to the field drop-down. An edit box is displayed, where you can type a shorter or more convenient name for the field. (You can even delete the entire name. If you have highlighted the field with color, you can identify it that way or, simply remember which one it is.)

Click the **Default** button to reset the name to the default. Click **OK** to save the new display name.

The **Past Due Orders** shows the technicians whose due dates are expired but the status is not set on Close.

To change the color of a field, click its **Color** button. Select color in the standard Windows **Color** dialog box.



Go to the **View** tab in the **Options for User** screen.

Options for User - 'IIG'

Options Type: 000 Description: Standard

View

Show on Startup

Toolbar Fields
 Grid Lines Blanks
 Blocked Resources

Show as Column: Technician Duplicate
Show as Row: Date Duplicate

View Date Range

Number Of Days Before Current Date: 0
Number Of Days After Current Date: 0

Use color for Tasks in Color Bars
Use color for Dispatches in Color Bars
Show Color Bars Over Text
Date/Time Range

Time

Open Time: 9:00:00 AM Close Time: 7:00:00 PM Interval: 1 hour

Ok Cancel

IIG CRONUS USA, Inc. 01/18/07

Check the corresponding boxes in the **Show on Startup** section to show **Toolbar, Grid Lines, Fields, Blanks, Blocked Resources** each time the Dispatch Board starts.

You can set the **Numbers Of Days Before and After Current Date**. This can be useful to locate service orders more easily and also to shorten refresh time of the Board. If both are set to 0, all the Dates are displayed.

The **Show as Column** and **Show as Row** combo boxes have been added to the **Options for Users** form. The position of the Technician is determined by those options, whether to show in a column or in a row.

The **Use Color for Tasks in Color Bars, Use Color for Dispatches in Color Bars, Show Color Bars Over Text, Date/Time Range** check boxes have been added to the **Options for Users** form. If the **Date/Time Range** option is checked, the whole time (from Start Time to End Time) is specified on the Dispatch Board. If no End Date is specified for the technician, then the line will last till the end of the Dispatch.

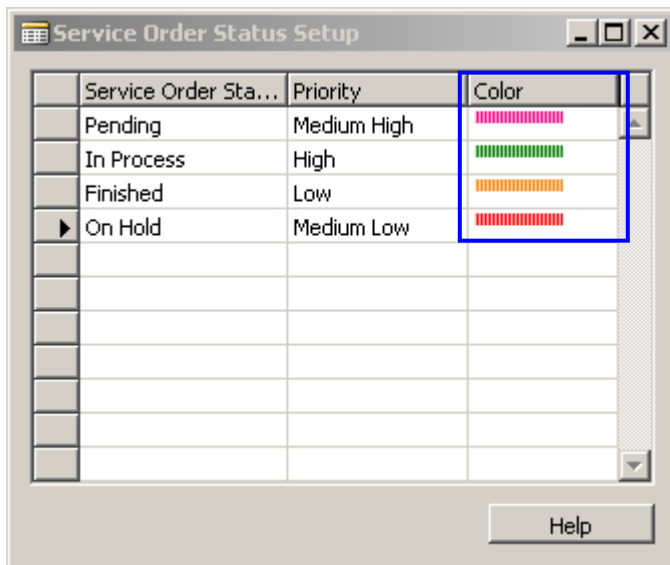
The **Time group (Open Time, Close Time, Interval)** has been added to the **Options for Users** form. This option is intended for displaying the day with hours.

By default, the displayed fields, names, ranges and colors are saved for each user and each company separately under Option Type 000 Standard.

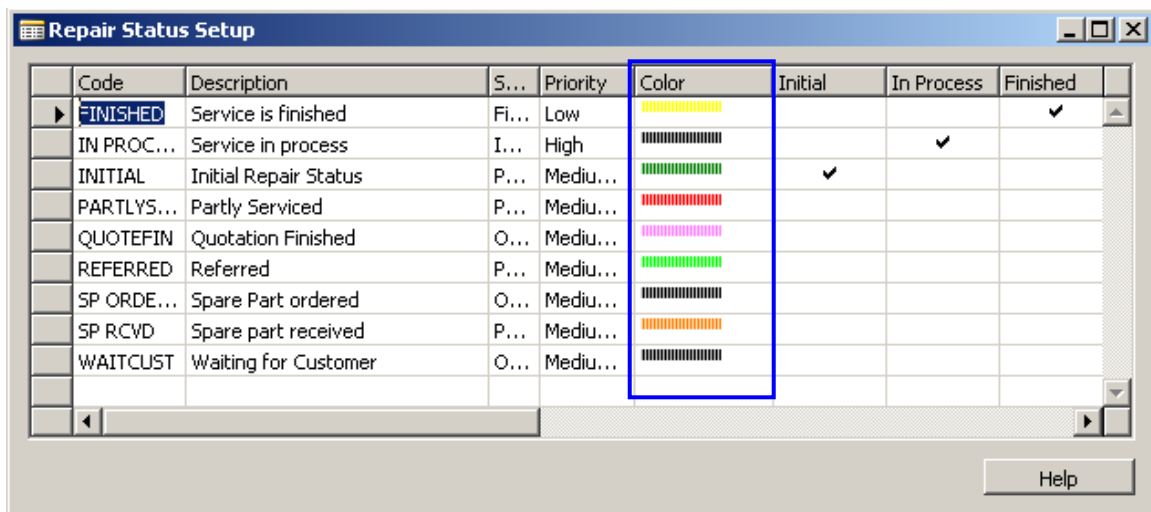
You can create different views by entering a new **Option Type** and corresponding **Description**. The settings are reset to defaults in the program. Make your changes, and click **OK** to save the Option Type. When you open the Options dialog box again, the new Option Type is added to the drop-down list and can be selected for editing.

Status Setup

The **Color** column has been added to the **Order Status Setup** menu item of the **Order Processing Setup** menu.



The **Color** column has been added to the **Repair Status Setup** menu item of the **Order Processing Setup** menu.



Set colors in the fields in order to distinguish the statuses of technicians in the Dispatch Board.

The Board will look like this after setting colors:

The screenshot shows the IIG Dispatch Board application window. The main area is a grid with columns for Linda Martin, Mark Hanson, Mary A. Dempsey, and Test 07.02. The rows represent dates from 01/31/07 to 02/06/07. Data is entered into the grid cells, with some cells highlighted in green and others in blue. A detailed view at the bottom shows fields for Order Number, Description, Order Date/Time, Expected Finish Date, Order Type, Order Status, Customer Number, Ship To Code, Contract Number, Priority Code, Serv Item Line No., Resp. Date, Resource Code, Service Item No., Repair Status, Item Number, Serial Number, Starting Date/Time, and Ending Date/Time.

Order Number	Description	Order Date/Time	Expected Finish Date
5000002		01/08/2001 17:47	01/08/2001
Order Type	Order Status	Customer Number	Ship To Code
	1 - In Process	50000	
Contract Number	Priority Code		
	0 - Low		
Serv Item Line No.	Resp. Date	Resource Code	Service Item No.
10000	01/10/2001	MARY	
Repair Status	Service in process		
Item Number	Serial Number	Starting Date/Time	Ending Date/Time
80005		02/01/2007 10:37	02/07/2007 10:37

IIG CRONUS USA, Inc. 02/08/07