

Agency Scheduling

Owner of this document is: Scott Wiacek – swiacek@feedingamerica.org

Purpose of this document

The purpose of this document is to describe the process of creating and managing Food Bank shopping, pickup and delivery monthly schedules and Agency appointment times in Ceres and sending them to Agency Express 3.

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Purpose

The purpose of this document is to describe the process of creating and managing Food Bank shopping, pickup and delivery monthly schedules and Agency appointment times in Ceres. The Scheduling functionality may be used just in Ceres, or in conjunction with Agency Express 3.

Ceres Object release 4.00.00 is required for the functionality described in this document.

Creating Schedules and Appointments in Ceres

Scheduling in Ceres is based upon a Schedule Template and Location Code. There are currently three different types of Schedule Templates to work with:

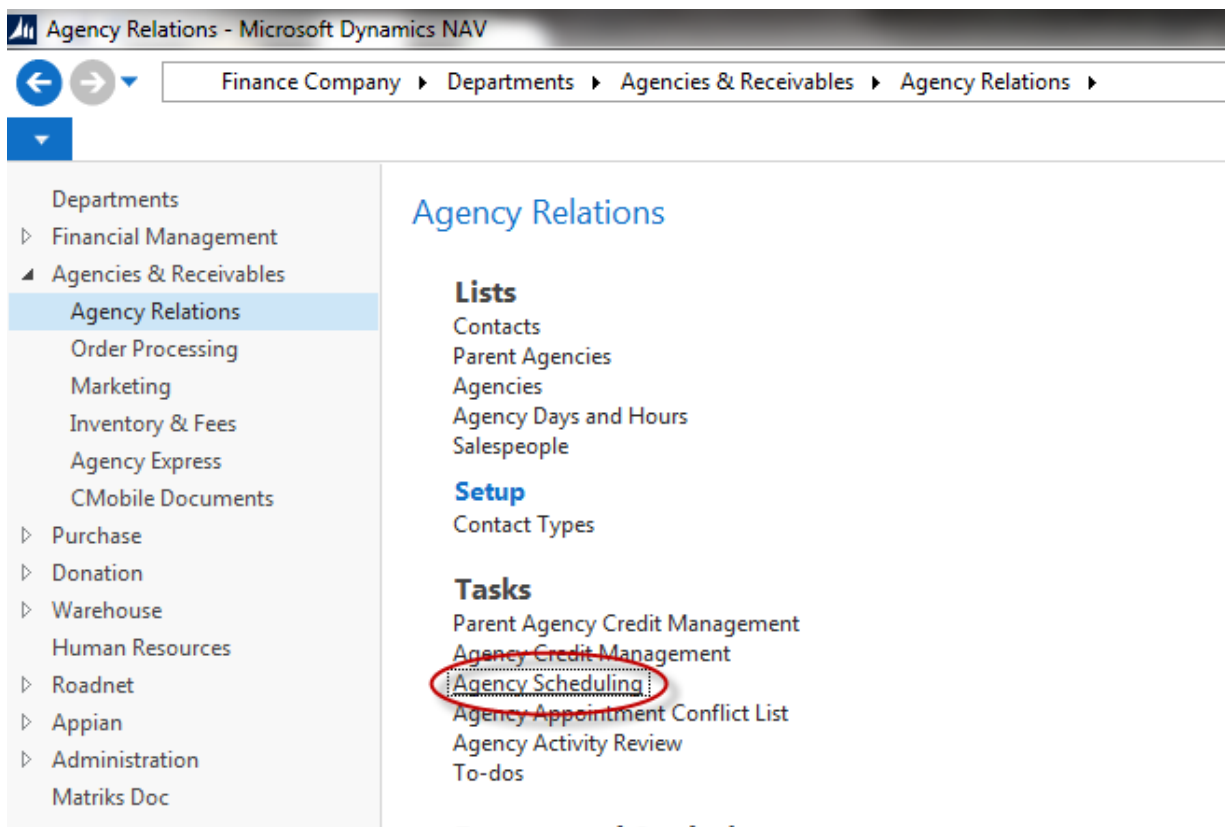
1. Deliver
2. Pickup
3. Shopping

Within each Schedule Template, we can work with one or more locations. For example, under the Deliver Schedule Template, we might want separate calendars for locations MAIN and OFFSITE. In such a scenario, we would need to create appointment lines for Schedule Template = Deliver and Location Code = MAIN, as well as Schedule Template = Deliver and Location Code = OFFSITE. The following sections will describe how best to set this up. Please note – if you use Agency Express the Schedule templates must be named exactly “Deliver”, “Pickup” and “Shopping” in order to function with Agency Express.

Creating Master Schedule Lines

The first step in the scheduling process is to create Master Schedule Lines for the Schedule Template and Location you wish to work with. Master Schedule Lines are essentially a blueprint for a particular calendar; they are not the actual appointment lines but rather appointments slots that appointment lines will eventually be based off of. The following instructions and associated screenshots will add clarity to this concept.

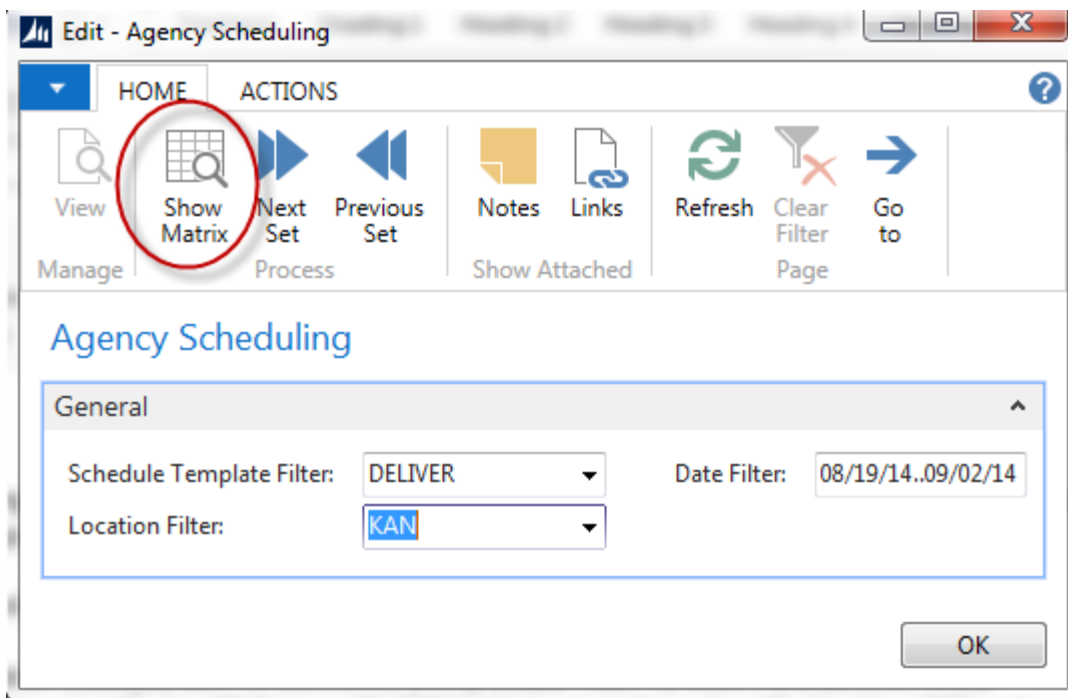
To create Master Schedule Lines, open the Agency Scheduling Matrix. This is accomplished from the Departments Menu by clicking Agencies & Receivables > Agency Relations > Agency Scheduling as illustrated below:



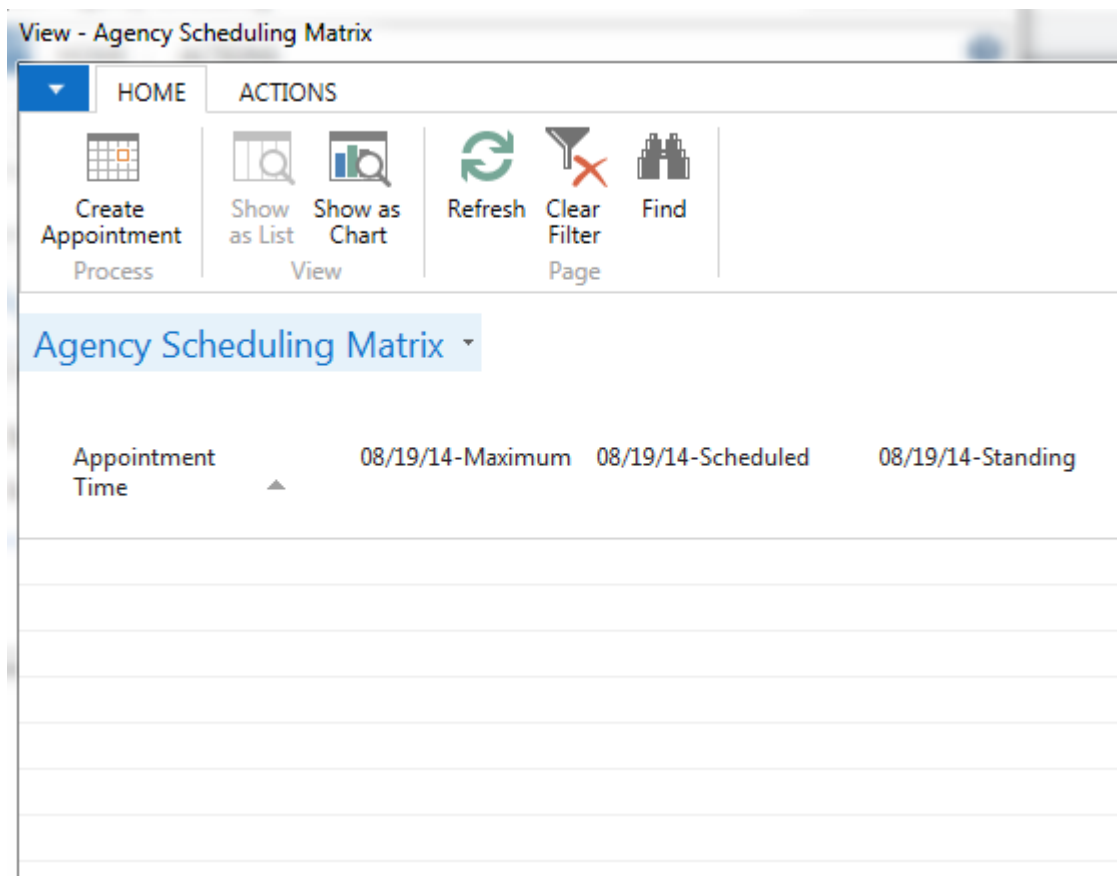
Upon selecting Agency Scheduling, you will be taken into the Agency Scheduling form. From here, you will need to specify

1. The Schedule Template you wish to work with
2. The Location Code you wish to work with, and 3) a Date Filter. To view the Matrix, hit Show Matrix. You can only view 15 days of data at any given time. In order to view additional data, you must use the Next Set/Previous

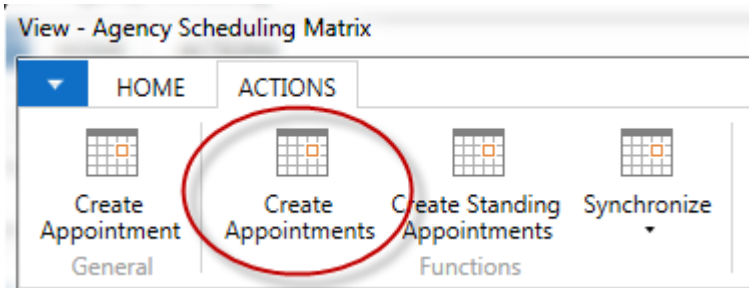
Set buttons located at the top of the form. For this example, we are going to work with Schedule Template **Deliver** and Location Code **KAN**.



Click Home → Show Matrix to view the appointment data for the Template, Location, and Date range. As can be seen, there is no appointment data in this calendar.



To generate our appointments, we must first start by building the Master Schedule Lines. Select Actions > Functions > Create Appointments to open the Create Appointments page. From here we can specify information about the Calendar we want to create.



The specific setup of Master Schedule Lines is pretty flexible. Be certain to include a Start Time and an End Time. If there will be a mid-day break (a lunch break for example) be sure to include a second Start Time and End Time as illustrated in the screenshot. Also, be sure to select the Create Master Schedule Lines checkbox. The Time Interval indicates how much time exists between appointments slots. For example, if you wanted appointments at 8:00am, 8:30am, and 9:00am, you would select a Time Interval of 30 minutes.

Edit - Create Appointments

HOME ACTIONS

View Execute Notes Links Refresh Clear Filter Go to

Manage Process Show Attached Page

Create Appointments

Create Appointment Lines: ☐

Create Master Schedule Lines: ☒

Schedule Template Name: DELIVER

Location Code: KAN

Starting Date: 12/31/9998

Ending Date: 12/31/9998

Starting Time: 8:00:00 AM

Ending Time: 12:00:00 PM

Starting Time (2nd): 1:00:00 PM

Ending Time (2nd): 5:00:00 PM

Time Interval (Minutes): 30

Maximum Weight: 0

Maximum No. of Appointments: 0

Optional: Used if there is a break in the schedule (ex. lunch break)

OK

Note: Do not be concerned with the Starting Date and Ending Date when generating Master Schedule Lines, the 12/31/9998 is used behind the scenes for special processing, it does not concern us here.
When you are finished with your setup, hit the "Execute" button at the top of the page. Clicking OK cancels the task.


Note: In order to synchronize properly with Agency Express, Starting/Ending Times must include minutes that start with :00, :05, :10, :15, :20, through :55. It cannot start or end with any minute in-between five minute intervals. For example: 07:30:00 AM is a valid start time, but 07:32:00 AM is not.


You will notice that the Agency Scheduling Matrix now has a list of times on the right hand side of the page. These are the Master Schedule Lines, they form the general structure of the calendar. As can be seen, without them, we would not have the time slots available to create appointments against. Now that this has been completed, we are ready to create Appointment Lines.


View - Agency Scheduling Matrix


HOME


ACTIONS


 Create Appointment
Process

 Show as List
View

 Show as Chart
View

 Refresh

 Clear Filter
Page

 Find

Agency Scheduling Matrix ▾

Appointment Time ▴

08/19/14-Maximum

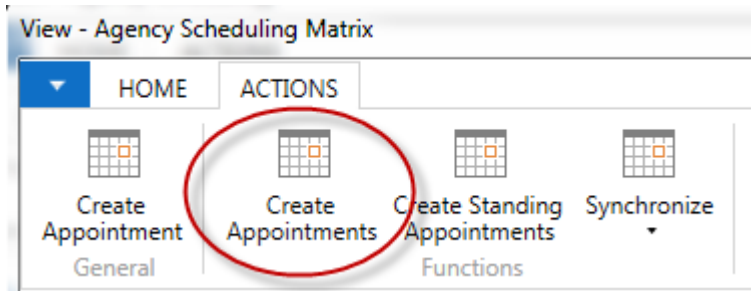
08/19/14-Scheduled

08/19/14-Standing

8:00:00 AM			
8:30:00 AM			
9:00:00 AM			
9:30:00 AM			
10:00:00 AM			
10:30:00 AM			
11:00:00 AM			
11:30:00 AM			
12:00:00 PM			
12:30:00 PM			
1:00:00 PM			
1:30:00 PM			
2:00:00 PM			
2:30:00 PM			
3:00:00 PM			

Creating Appointment Lines

Select Actions > Functions > Create Appointments to open the Create Appointments page.




Once the page has open, begin by selecting the Create Appointment Lines option. Next, select an appropriate Schedule Template Name, Location Code, Starting Date, and Ending Date. Starting Time and Ending Time must be in line what was entered when creating the Master Schedule Lines. For example, if we had created Master Schedule Lines for 8:00am – 5:00pm, we could not turn around and create an Appointment Line for 6:30pm as no placeholder exists for it on the master calendar. The Time Interval will auto-populate based upon the Master Schedule Lines. Max Weight and Max No. of Appointments are set on the basis of user discretion.


Once all fields have been filled in, hit **Execute** to create Appointment Lines. As above, clicking OK cancels the task.


Edit - Create Appointments


HOME


ACTIONS


View


Execute

Notes

Links

Refresh

Clear Filter

Go to

Manage

Process

Show Attached

Page

Create Appointments

Create Appointment Lines:

☒

Create Master Schedule Lines:

☐

Schedule Template Name:

DELIVER

Location Code:

KAN

Starting Date:

8/1/2014

Ending Date:

8/31/2014

Starting Time:

8:00:00 AM

Ending Time:

12:00:00 PM

Starting Time (2nd):

1:00:00 PM

Ending Time (2nd):

4:00:00 PM

Time Interval (Minutes):

30

Maximum Weight:

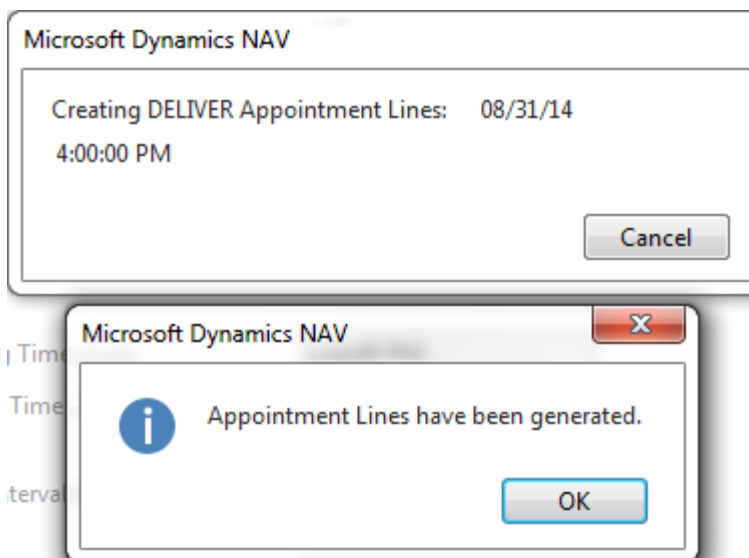
1,500

Maximum No. of Appointments:

5

Optional: Used if there is a break in the schedule (ex. lunch break)

OK



Once appointments have been created, you will notice that the Agency Scheduling Matrix has additional data under the Maximum column. This indicates that Appointment Lines have been successfully generated. No data will appear in the Scheduled and Standing columns until later. At this point our Calendar is complete. Orders may now be scheduled against it.

View - Agency Scheduling Matrix

HOME

ACTIONS

Create Appointment

General

Create Appointments

Create Standing Appointments

Functions

Synchronize

Agency Scheduling Matrix

Type to filter

Appointment Time

08/19/14-Maximum

08/19/14-Scheduled

08/19/14-Standing

08/20/14-Maximum

08/20/14-Scheduled

8:00:00 AM

5

5

8:30:00 AM

5

5

9:00:00 AM

5

5

9:30:00 AM

5

5

10:00:00 AM

5

5

10:30:00 AM

5

5

11:00:00 AM

5

5

11:30:00 AM

5

5

12:00:00 PM

5

5

12:30:00 PM

1:00:00 PM

5

5

Marking Days Off



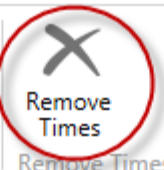
If we anticipate being closed for a holiday, or will be operating on a revised schedule, we need to mark days/times off of the calendar. In doing so, we are preventing appointments from being scheduled during a time when we are not open. In this example we have create appointments for the month of January. Since Jan. 18th is the holiday Martin Luther King Jr. day, we anticipate being close.

That being the case, we need to mark this day off. To do so, right click the column with the date you wish to mark off (it doesn't matter if you use the Max, Scheduled, or Standing column, they will all work) and select Lookup to go to enter the Appointment Detail Schedule. From here, select Actions → Functions → Check Remove Time on All. This will cause all times to be marked for removal from our calendar. If you do not want to mark the entire day for deletion, can selectively check which times you wish to remove by manually checking the Remove Time checkboxes as appropriate.

Once you have selected times to remove, hit Actions → Remove Time. Confirm that you wish to delete the lines by pressing "Yes". All appointment lines for August 19th are now deleted and cannot be scheduled against.

Edit - Appointment Detail Schedule - DELIVER · KAN · 8/19/2014 · 8:00:00 AM

HOME ACTIONS

Check Remove Time on All Uncheck Remove Time on All Remove Times
 Functions Remove Times


DELIVER · KAN · 8/19/2014 · 8:00:00 AM

Filters

Schedule Template Name: **DELIVER** Appointment Date: **8/19/2014**
 Location Code: **KAN**

Rem... Time	Appoin... Time ▲	No. of Sched. Appts.	No. of Standing Appts.	Max. No. of Appointme...	Scheduled Weight
<input checked="" type="checkbox"/>	8:00:00 AM			5	
<input checked="" type="checkbox"/>	8:30:00 AM			5	
<input checked="" type="checkbox"/>	9:00:00 AM			5	
<input checked="" type="checkbox"/>	9:30:00 AM			5	

Microsoft Dynamics NAV

 You are about to permanently delete 16 Appointment Lines. Lines with booked appointments or that have been sent to the web will not be deleted. Continue?

Yes No

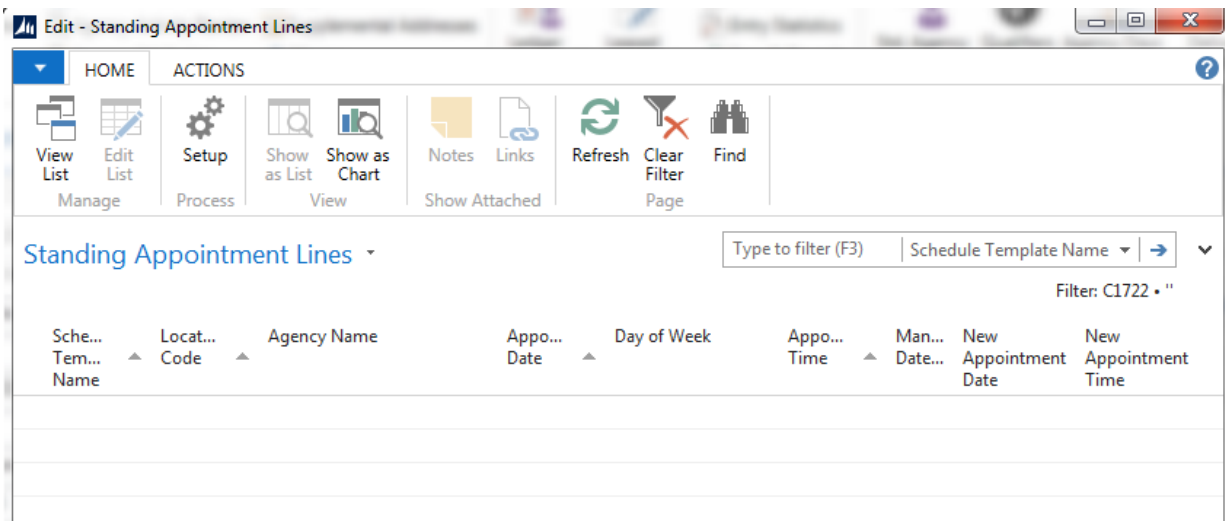
Creating Standing Appointments

Standing Appointments are default appointment days/ times that can be established for Agencies. There are two ways to create standing appointments in Ceres:

1. Automatically via the Create Standing Appointment batch routine
2. Create standing appointments manually (usually single appointments)

Automatic Standing Appointments

To automatically create standing appointments, you must first complete Standing Appointment Setup for the agencies in question. From any Agency card, select Navigate → Distributions → Standing Appointments to open the Standing Appointment Lines for that Agency. You will notice that no standing appointments initially exist. That is because we have not created them yet.



To open Standing Appointment Setup, click the Setup button in the upper left hand portion of the page.

Agency No.	Schedule Template Name	Location Code	Description	Week No. in Month	Day of Week	Date in Month	Appointment Time
C1722	DELIVER	KAN		1	Monday	0	9:00:00 AM
C1722	DELIVER	KAN		0		15	10:00:00 AM
C1722	DELIVER	KAN		0		21	11:00:00 AM

There are a couple of different ways that standing appointments can be setup. In the screenshot on the previous page we utilized two methods. Line number one indicates we want to schedule standing appointments for agency **C1722** every **first Monday** of the month at **9:00am**. Line number two indicates that we would like to schedule a standing appointment for the same agency on the **15th** day of every month at **10:00am**. Similarly, line number three states that we would like to create a standing appointment on the **21st** of every month at **11:00am**. Once satisfied, hit OK to go back to the Standing Appointments page.

Note: Standing Appointment Setup is relatively static. In other words, we wouldn't anticipate having to change this very often once completed unless an agency, or even the food bank, deems it necessary. You will need to complete this for any agency that you wish to automatically create standing appointments for, but once done, you will rarely need to come back.

Now that we have completed setup, we can automatically create appointments for this agency. This is done by selecting Actions→ Functions → Create Standing Appointments. You will notice that the Create Standing Appointments routine is pre-filtered for the agency you are working with. We will run the routine globally in the next section, but for now, leave the agency filter in place. You will need to enter a date filter. Typically we enter a date filter that matches the date range for the calendar we just created. Because we just created appointment for the month of January, we will create standing appointment for the month of January as well. Once the filter has been entered, hit Preview to create standing appointments for your agency.

Edit - Create Standing Appointments

ACTIONS

Clear Filter
Page

Standing Appt. Setup Line

Show results:

Where Agency No. is C1722

And Schedule Template Name is Enter a value.

And Location Code is Enter a value.

+ Add Filter

Limit totals to:

Where Date Filter is 08/01/14..08/31/14

+ Add Filter

Print... Preview Cancel

If any errors occurred during this process and a standing appointment cannot be created, an exception report will print indicating this fact. In this case, no errors occurred so the exception report would not show any data. You will now notice that standing appointments have been created for this particular agency.

Edit - Standing Appointment Lines

HOME ACTIONS

View List Edit List Setup Show as List Show as Chart Notes Links Refresh Clear Filter Find

Manage Process View Show Attached Page

Standing Appointment Lines

Type to filter (F3) Schedule Template Name → Filter: C1722 • KAN

Schedule Template Name	Location Code	Agency Name	Appoint... Date	Day of Week	Appointment Time	Man... Date...	New Appointment Date
DELIVER	KAN	The Salvation Army	8/4/2014	Monday	9:00:00 AM		
DELIVER	KAN	The Salvation Army	8/15/2014	Friday	10:00:00 AM		
DELIVER	KAN	The Salvation Army	8/21/2014	Thursday	11:00:00 AM		

We can also create standing appointments for multiple agencies. This is done through the Agency Scheduling Matrix. From the Agency Scheduling Matrix, select Actions → Functions → Create Standing Appointments. This will open the same request form as before. In this case, an Agency No. filter should not be entered as we are creating standing appointments for everybody. Schedule Template Name and Location Code will default based upon the calendar we are scheduling from. We must still input a date filter though, the report cannot run without it. Once satisfied, hit preview to create standing appointments for all agencies.

The first screenshot shows the 'View - Agency Scheduling Matrix' interface. It has a navigation bar with 'HOME' and 'ACTIONS' tabs. Under 'ACTIONS', there are four icons: 'Create Appointment General', 'Create Appointments', 'Create Standing Appointments' (circled in red), and 'Synchronize'. Below the icons is a link 'Agency Scheduling Matrix'.

The second screenshot shows the 'Edit - Create Standing Appointments' form. It has a 'ACTIONS' tab and a 'Clear Filter' button. The main area is titled 'Standing Appt. Setup Line' and contains the following filters:

- Show results:**
 - Where Schedule Template Name is DELIVER
 - And Location Code is KAN
 - And Agency No. is Enter a value.
 - + Add Filter
- Limit totals to:**
 - Where Date Filter is 08/01/14..08/31/14
 - + Add Filter

At the bottom of the form are buttons for 'Print...', 'Preview', and 'Cancel'.

Standing appointments are now reflected on our calendar. In this example, we have a standing appointment on the 21st at 11:00am which can be seen below. Once this standing appointment is used

on an order, it will be deleted and replaced by a scheduled appointment (this process is explained in greater detail in the *AE3 Managing Web Orders* document).

View - Agency Scheduling Matrix

HOME ACTIONS

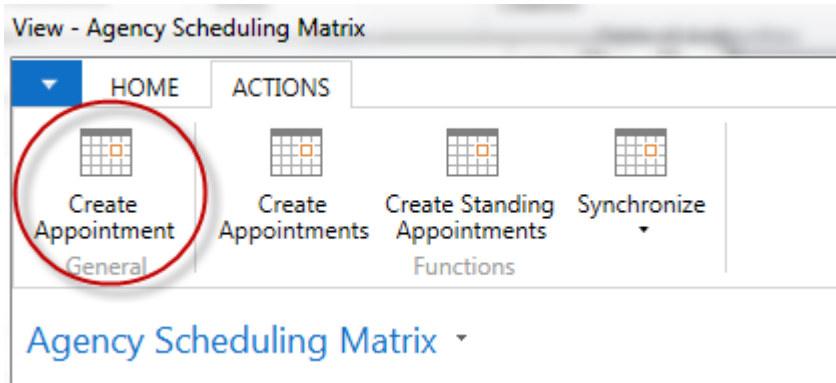
Create Appointment Process Show as List View Show as Chart Refresh Clear Filter Page Find

Agency Scheduling Matrix Type

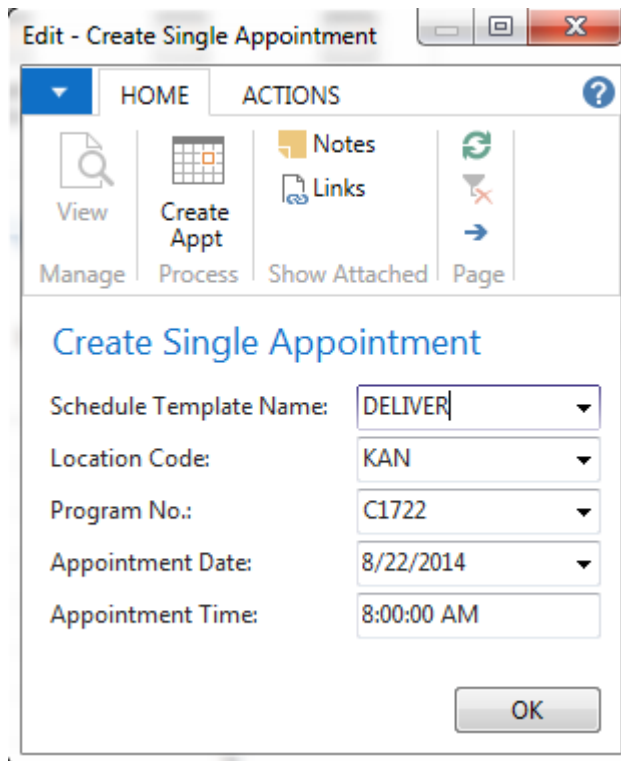
Appointment Time	08/21/14-Maximum	08/21/14-Scheduled	08/21/14-Standing	08/22/14-Ma...	08/22/14-
8:00:00 AM	5			5	
8:30:00 AM	5			5	
9:00:00 AM	5			5	
9:30:00 AM	5			5	
10:00:00 AM	5			5	
10:30:00 AM	5			5	
11:00:00 AM	5		1	5	
11:30:00 AM	5			5	
12:00:00 PM	5			5	
12:30:00 PM					
1:00:00 PM	5			5	
1:30:00 PM	5			5	
2:00:00 PM	5			5	
- - - - -	-			-	

Manually Creating (SINGLE) Standing Appointments

You can manually create a single standing appointment (an appointment without an Order yet) from the Agency Scheduling Matrix by selecting Actions → General → Create Appointment.



Most of the fields will default based upon the calendar. You will however need to specify an Appointment Date and an Agency. Once you are satisfied, hit Create Appt. to create the standing appointment.

The screenshot shows the 'Edit - Create Single Appointment' dialog box. It has a ribbon with 'HOME' and 'ACTIONS' tabs. Under the 'ACTIONS' tab, there are four buttons: 'View', 'Create Appt', 'Notes', and 'Links'. Below the ribbon, the 'Create Single Appointment' section contains the following fields: 'Schedule Template Name' (dropdown menu with 'DELIVER' selected), 'Location Code' (dropdown menu with 'KAN' selected), 'Program No.' (dropdown menu with 'C1722' selected), 'Appointment Date' (dropdown menu with '8/22/2014' selected), and 'Appointment Time' (text box with '8:00:00 AM' entered). An 'OK' button is located at the bottom right.

Note: You can also create a single appointment from the Agency Card (or by highlighting the Agency in the LIST view) by going to Navigate → Distributions → Standing Appointments → Actions → Functions → Create Single Appointment (or you can add the function to your Action Pane).

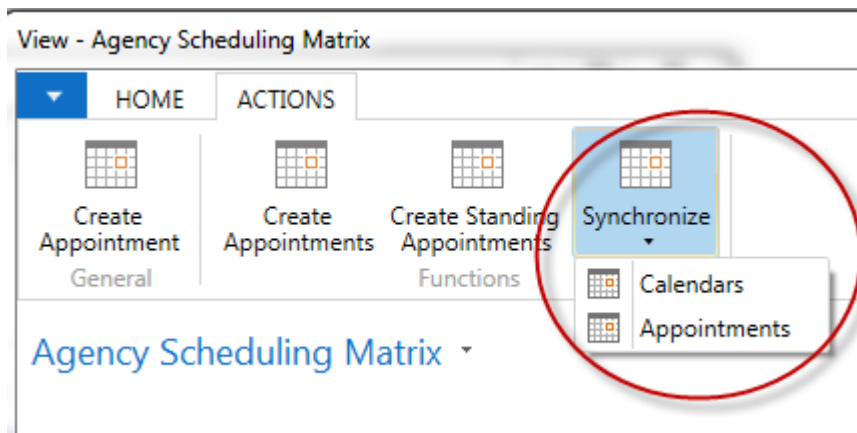
Synchronizing Appointments

The final step in the scheduling process is to synchronize appointments with the web. There are two pieces of scheduling data we can synchronize: calendar data and appointment data.

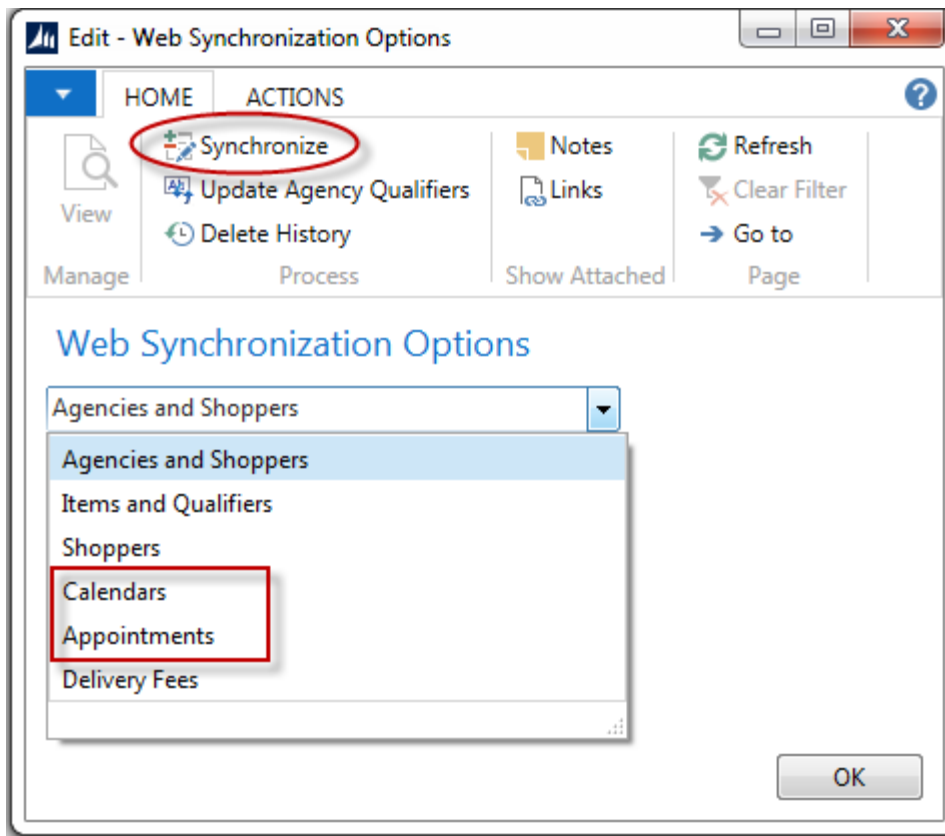
To synchronize a calendar, from the Agency Scheduling Matrix, select Actions → Functions → Synchronize → Calendars.

Note: Once you synchronize a calendar with the web you cannot make additional changes to it. For example, if you synchronize a calendar and realize later that you forgot to mark off a holiday, you are stuck as you cannot go back and mark that day off. It is extremely important to make sure you are satisfied your calendar is correct before you send it to the web.

To synchronize appointments, from the Agency Scheduling Matrix, select Actions → Functions → Synchronize → Appointments.



Note: You can also synchronize from the Web Synchronization Options menu at Departments → Agencies & Receivables → Agency Express → Web Synchronization Options.



Select Calendars (or Appointments) from the drop down, then click Synchronize.

Related Topics:

1. Agency Express Managing Web Orders
2. Agency Order Overview
3. Agency Overview
4. Agency Express Overview of File Structure and Data Synching
5. Agency Express 3 Agencies, Shoppers and Items