Release Notes: Visual Service Scheduler for Microsoft Dynamics NAV

Product	Visual Service Scheduler
Version	1.3
Build	1.3.0
Date	5 March 2019

List of Enhancements

- Available for Microsoft Dynamics 365 BC.
- Additional NAV data fields (Variant Code, Service Order Type, Serial No., Contract No. etc.) available for tooltip and in part also for bar label.
- The first day of the overload can be directly scrolled to by pressing the CTRL key and at the same time clicking the overload symbol in the table,
- When "Save changes immediately" is used, new and changed allocations appear with a green frame until reloading.
- The performance of loading and changing views was significantly improved.

List of Fixed Bugs

- Changes of capacity utilization were not always shown in the resource calendar.
- Using "Save changes immediately" sometimes lead to writing back defective allocation records to NAV.
- Restoring width and heighth of the single charts now happens in a more stable way.
- The histogram utilization wasn't shown when a reload was done in the "Two Gantt charts" view.
- Filter settings for the order backlog in the lower Gantt chart weren't taken into account properly.
- The allocation status didn't change when a canceled Service Item Line had been reallocated by dragging the bar.
- The deadline sometimes vanished behind the capacity curve.
- Deselecting nodes in the order backlog sometimes didn't lead to hiding the resource qualification symbol ("doctoral caps").
- Sometimes symbol layers in the lower Gantt chart were shifted in the "Read only" mode.

Product	Visual Service Scheduler
Version	1.2
Build	1.2.0
Date	30 April 2018

List of Enhancements

- Additional NAV data fields (country codes, addresses, etc.) available for tooltip and bar label
- Searching for a Service Order Line in the order backlog and planning board by Service Order No., Customer and Place is possible.
- New context menu item "Create Worktime" enables creating additional working time thus being able to place bars in work free times. This will neither appear in the calandar nor will it cause a capacity increase.
- Collapsing and expanding in the order backlog is now possible. The "Setup" dialog was enhanced by an option to preset a collapsing level.
- A warning symbol in the table area indicates a capacity overload (only, if the overload lies behind the work date).
- A histogram view was added.
- There's a new mode "Viewer Only" that doesn't allow saving changes.
- A new context menu item allows to show detailed information on allocations by the Project and Assembly Module. By modifications of the CA/L code, these settings can be customized.
- Different data filters for order backlog and planning table can be created, named and applied.
- The new "Use start time" option in the "Setup" dialog allows to hide planning data the Response Date of which lies after the planning horizon (only available for the order backlog).
- Significant performance improvement.

List of Fixed Bugs

- "Hide planned service orders" didn't work in the "Two Gantt Charts" view.
- Error on taking over times from the Service Item Line: When a Service Item Line was allocated to a resource, the default duration was used ignoring a duration possibly having been specified before. Now this duration is only used if no times are specified.

Product	Visual Service Scheduler
Version	1.1.3
Build	1.1.3.4
Date	31 January 2018

List of Enhancements

- Available for Microsoft Dynamics NAV 2018.
- Multiple selection and moving of Service Orders and Service Item Lines by CTRL key is now possible for
    - moving from order backlog onto Gantt
    - moving from lower Gantt to upper Gantt
    - moving within the upper Gantt

List of Fixed Bugs

- Different backlogs in the views "Two Gantt Charts" and "Tree & Gantt Chart".
- Incorrect changing of the allocation duration when allocations merged and **Save Immediately** was activated.
- The color text constant for the resource absence was not processed in the add-in.
- The second chart in the "Two Gantt Charts" view wasn't updated.
- Data weren't saved to NAV when **MultiMove** was used.
- When allocations were deleted, the resource fields had to be deleted as well on transferring to the order backlog.
- Splitting and immediate shortening caused errors when "Save Immediately" was activated.

Product	Visual Service Scheduler
Version	1.1.2
Build	1.1.2.12
Date	23 October 2016

List of Enhancements

- The following enhancements were implemented in the **Setup** dialog:
  - **Hide Response Date** with the following options:
    - **Not activated** (= former default):
      - **Resources** can be collapsed and expanded
      - In **expanded** groups, the response date gets visualized either by a **red** (if the allocation bar starts after this date) or **grey** triangle
      - The triangle will be **linked** with the bar by a (red or black) line
      - While **dragging an allocation**, the date will be highlighted by a red deadline.
    - **Activated**: The highlightings described above are dropped.
  - **Use Service Hour Starting Time**
    Specifies whether **the beginning of working hours** will be based on the data fields **Day**, **Starting Time** and, if necessary, **Starting Date** (for a possible range of validity) of the table **Service Hour** (T5910).
    If this option is **not activated**, based upon the daily capacity, the working time will be centered around noon (e.g. 8 hours capacity will result in specifying the working time from 8:00 to 16:00).
  - **Movement Grid** (hours)
    Specifies how many time units are equivalent to one step when a node is modified interactively. Possible values: 0.25, 0.5 and 1 hour.
  - **Initially Allocated Hours**
    Specifies how long a bar will get when a service operation is dragged from the workload into the planning board at the left. A drop-down list offers the values 1, 2, 3, 4, 6, 8, 12, or 24 hours.

List of Fixed Bugs

The following areas were affected by bug fixes

- **Save Immediately** in the Set**u**p dialog
- **Restriction of the allocations** to the selected time slot
- Better recognition of **finished orders**
- Occasional problems when **moving bars** in expanded groups
- Significant **improvement of performance** upon loading

Product	Visual Service Scheduler
Version	1.1
Build	1.1.2.1
Date	15 June 2016

List of Fixed Bugs

- In the "Tree & Gantt Chart" view now only ServiceItemLines can be dragged from the Order Backlog into the Gantt chart.

Product	Visual Service Scheduler
Version	1.1
Build	1.1.2
Date	2 June 2016

List of Enhancements

- The **Setup** dialog now allows to specify whether allocations should stay in the same resource group when being shifted or not.
- Allocations that are located **after** their ResponseDate are highlighted by a triangle symbol.
- While allocations are being moved, orientation aid is offered by the ResponseDate being visualized as **date line**.
- When bars are marked, all corresponding allocations get marked as well.
- **Look & Feel** of visualization and interactions were improved.

List of Fixed Bugs

The following areas were affected by bug fixes
- Filtering
- Handling of allocations
- Handling of linked operations
- Writing back directly

Product	Visual Service Scheduler
Version	1.0
Build	1.0.1
Date	16 July 2015

List of Enhancements

- The filtering options by **ResourceGroups** and by **ServiceOrders** were added to the **Setup** dialog. The strings that are entered here will be used as NAV filter criteria, e.g. „PLUMBERS|CARPENTERS", „SO00006" etc.

- New **General Options**:
    - **Save immediately**: Each data modification will be stored in NAV immediately; an automatic reloading will not be invoked, however.
    - **Show Finished Orders**: By default Service Orders with repair status „finished"are ignored; this behavior can be changed here.

- **Highlight preferred resource (linked to service item)**
  If a preferred resource has been connected to a service item, this resource will be marked with an asterisk, when the service item line is clicked.

- **Fixate tasks (ServiceOrderAllocations)**
  In the node context menu, tasks can now be fixated, this being indicated by a yellow pin. Fixated tasks cannot be modified until the fixation will be reversed.
  The data object **ServiceOrderAllocation** now has a new attribute **IsFixed**, that can be set, if needed, in the function **LoadServiceDBToGantt()** of the Codeunit **5416200 (NETRONIC VSS Manager)**
  As this fixation can be set and reset in the node context menu, the appropriate storage of this attribute has to be added in the functions **CreateSOARecord** and **ModifySOARecord** of the code unit mentioned.

- **Visualize resource absences via negative resource capacities**
  Absences (new nonworking times) now can be identified and visualized explicitly. For this purpose, the new text attribute **Comment** was added to the data object **ResourceCapacity**, that can be set, if needed, in the function **LoadServiceDBToGantt()** of the Codeunit 5416200 (NETRONIC VSS Manager).
  At the moment, only the key phrases „Holiday" (orange), „Illness" (green) und „Business trip" (yellow) get colored.
  These key words can be customized by changing the text constants **TEXT7235, TEXT7236** and T**EXT7235** in the function **LoadLanguageDependentOptions** of the Codeunit 5416200 (NETRONIC VSS Manager).

Product	Visual Service Scheduler
Version	1.0
Build	1.0.0
Date	18 November 2014

Key Features

- The main diagram of the VSS is the Gantt chart "allocations" in the top left area. It shows an overview of the service tasks to the respective resource, the priority being indicated by color.
- In the **Two Gantt Charts** view, the unfilled orders, i.e. not yet allocated service orders/ service item lines are shown in a second Gantt chart, being sorted in alphabetical order within their priority level.
- In the **Tree and Gantt Chart** view, the unfilled orders are displayed as indented list, being sorted by priority and response date.
- By clicking a resource or resource group the corresponding capacity load will be displayed in a histogram below the Gantt chart.
- Planning of service orders by **Drag & Drop:** Service item lines can be moved interactively either from the lower to the upper Gantt chart or from the Tree chart on the right side to the Gantt chart. Allocations to resources can be changed by moving them vertically to another resource. The duration of service orders can also be modified interactively.
- Allocations can be canceled, split and deleted.
- **Fully integrated** in the Standard Service Module and the Resource Planning of Microsoft Dynamics NAV.
- Real-time **visual decision-making support**.

Technical Details

- For Microsoft Dynamics NAV 2015, 2013 R2, and 2013
- Based entirely on the .NET framework
- Designed for data from the Service & Resource Planning Module (service orders, service item lines, resource allocations)
- Real-time integration as Dynamics NAV page
- Based on VARCHART Gantt 5.0