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Infotech Project Scheduler - User Guide

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Introduction

The Infotech Project Scheduler is a powerful tool designed to help you visualize, plan, and manage your projects and resources within Business Central. This interactive scheduler provides a Gantt chart-style interface that allows you to:

- View all your projects and tasks in a timeline view
- Assign resources to tasks
- Adjust task schedules by dragging and dropping
- Monitor resource utilization
- Access project details directly from the scheduler

This guide will walk you through the features and functionality of the Project Scheduler to help you get the most out of this tool.

Getting Started

Accessing the Project Scheduler

1. From the Business Central role center, navigate to **Projects** or search for "Project Scheduler" in the search bar
2. Click on the **Project Scheduler** to open the page

Understanding the Interface

The Project Scheduler interface consists of several key elements:

Project Scheduler Interface

1. **Toolbar** - Contains navigation buttons and actions
2. **Time Scale** - Shows the time periods (days, weeks, months)
3. **Resource Panel** - Lists resources (typically people) on the left side
4. **Schedule Grid** - The main area showing tasks as colored bars
5. **Task Bars** - Represent individual tasks with their duration

Basic Operations

Navigating Time Periods

The toolbar provides several options for navigating through different time periods:

- **Previous Period** - Move to the previous day, week, month, quarter, or year
- **Today** - Jump to the current date
- **Next Period** - Move to the next day, week, month, quarter, or year
- **Jump to Date** - Select a specific date to view

The time scale displayed depends on the configuration set in the General Scheduler Setup.

Horizontal Scrolling:

- Use **Shift + Middle Mouse Button** while hover over the scheduler to control the horizontal scrollbar for easier navigation across time periods

Vertical Scrolling:

- Use **Middle Mouse Button** while hovering over the scheduler for direct vertical scrolling

Viewing Projects and Tasks

Projects and their associated tasks appear as colored bars in the schedule grid. Each bar represents a task with:

- The width indicating the duration of the task
- The position showing the start and end dates
- The row indicating the assigned resource
- The color representing the task status

Understanding Color Codes

Tasks are color-coded to help you quickly identify their status:

- **Blue** (#3498db) - Not Started
- **Green** (#2ecc71) - In Progress
- **Red** (#e74c3c) - Complete

Working with Tasks

Moving Tasks

To change when a task is scheduled or reassign it to a different resource:

1. Click and hold on a task bar
2. Drag the task to a new position (either to a different time or a different resource)
3. Release the mouse button
4. The system will update the task with the new dates and resource assignment

> **Note:** When moving a task, both the start and end dates will be adjusted while maintaining the task duration.

Resizing Tasks

To change the duration of a task:

1. Hover over the right edge of a task bar until the cursor changes to a resize cursor
2. Click and drag to extend or shorten the task duration
3. Release the mouse button
4. The system will update the task with the new end date

> **Note:** When resizing a task, only the end date changes while the start date remains fixed.

Using Context Menus

Right-clicking on a task provides access to additional actions:

1. **Open Project** - Opens the full project card

2. **Comments** - View or add comments related to the project
3. **Project Links** - Access documents linked to the project

Resource Management

Viewing Resource Utilization

The scheduler can display resource utilization information:

- Color-coded cells indicate resource availability
- Green sections represent utilized capacity
- Numbers indicate available resources

This feature helps you identify overallocated or underutilized resources at a glance.

Hiding and Showing Resources

To hide specific resources:

1. Right-click on a resource name in the left panel
2. Select **Hide** from the context menu
3. The resource will be removed from the current view

To show previously hidden resources:

1. Click the **Show Resource** button in the toolbar
2. Select the resources you want to display again
3. Click **OK** to update the view

> **Note:** Hidden resources can also be managed through the Resource List page by checking/unchecking the "Hide Resource" field.

Accessing Resource Details

To view detailed information about a resource:

1. Right-click on a resource name in the left panel
2. Select **Open Resource Card** from the context menu
3. The Resource Card page will open with complete details

Project Scheduler Views

The Project Scheduler supports multiple custom views, allowing you to save different filter and display configurations for various purposes.

Creating Custom Views

1. **Access View Management:**
    - Click **Switch View** in the toolbar
    - Select **New** to create a new view

2. **Configure View Settings:**
   - **Code:** Enter a unique identifier for the view
   - **Description:** Provide a meaningful description
   - **Time Headers:** Choose from multiple time display options:
     - Years/Months/Days
     - Months/Days
     - Weeks/Days
     - Days/Hours (with 15min, 30min options)
   - **Range:** Set the default time range (Day, Week, Month, Quarter, Year)
   - **Display Options:** Configure weekends, links, and dark mode
3. **Set Filters:**
   - **Resource Filters:** Choose which resources to display
   - **Project Filters:** Filter by specific projects
   - **Project Planning Step Filters:** Filter by planning steps

Managing Multiple Views

- **Default View:** Mark one view as default for automatic loading
- **Copy Views:** Use **Copy Filter Set** to duplicate and modify existing views
- **Set as Default:** Change which view loads automatically

Switching Between Views

1. Click **Switch View** in the toolbar
2. Select the desired view from the list
3. The scheduler will reload with the new configuration

Scenario Mode

Scenario Mode allows you to make temporary changes to your schedule without affecting the actual data, perfect for "what-if" planning.

Starting a Scenario

1. Click **Start Scenario** in the toolbar
2. The scheduler will display "Scenario Mode" in the corner
3. All changes made will be temporary until saved or discarded

Working in Scenario Mode

- Move and resize tasks as normal
- Changes are highlighted and tracked separately
- The original data remains unchanged
- You can continue working with full scheduler functionality

Saving or Discarding Changes

To save scenario changes:

1. Click **Save Scenario** to save changes immediately, or
2. Click **Stop Scenario** and choose "Yes" when prompted to save

To discard scenario changes:

1. Click **Stop Scenario** and choose "No" when prompted
2. All scenario changes will be discarded and original data restored

Advanced Features

Filtering and Grouping

The Project Scheduler supports comprehensive filtering:

- **Resource Grouping:** Resources are automatically grouped by Resource Group
- **Custom Filters:** Use the **Filter** button to create temporary resource filters
- **View-Based Filtering:** Save permanent filter combinations in custom views
- **Hierarchical Display:** Resources display in a tree structure for better organization

Printing Options

The scheduler offers multiple printing options:

- **Print Viewport:** Print only what's currently visible
- **Print Range:** Print a specific date range
- **Print Full:** Print the entire scheduler view

Customizing the Setup

Access **Project Scheduler Setup** to configure global defaults:

- **Locale:** Set date and time formatting
- **Default Range:** Choose the default time period
- **Time Headers:** Set the default time display format
- **Show Weekends:** Default weekend display setting
- **Default Resource Filter:** Set which resources appear by default
- **Scenario Mode Color:** Choose the color for scenario mode indicator

Troubleshooting

Common Issues

Issue: Task doesn't move or resize correctly

- Ensure you have appropriate permissions for the project
- Check if the task has dependencies that prevent movement
- Verify that the date range is visible in the current view

Issue: Resource doesn't appear in the scheduler

- Check if the resource is marked as "Hide Resource" in the Resource Card
- Verify that the resource is of type "Person" and not blocked
- Ensure the resource is included in your current view's resource filter
- Check if the resource has an assigned Resource Group
- Use **Show Resource** button to restore hidden resources

Issue: Double scrollbars appear

- This is a known issue that can occur in certain browser configurations
- Try refreshing the page or adjusting your browser zoom level

Support Contact

For additional assistance with the Project Scheduler, please contact:

- **Email:** support@infotech-inc.com
- **Phone:** (608) 783-1110