# Chapter 1 - Setting up

## *First-time use*

### *Security key and registration*

The software constituting the Prestige Scheduler suite is normally installed for you by your local dealer. If you are installing the software yourself, please refer to separate installation instructions.

As with many software packages these days, Prestige Scheduler needs some special attention before attempting to use it for the first time. PS is commercial software and is licensed to the end user. Terms of use are covered in the end-user license agreement (EULA), which is installed as a text file when PS software is installed.

In particular, Prestige Scheduler needs to be activated with a unique license key. This key is generated by Scheduling Technologies (STL), the owner and world-wide distributor of Prestige Scheduler, and is based on the maximum required number of concurrent clients accessing PS services at any one time. The license key is issued subject to the EULA and is confidential and non-transferable. By installing and applying this key, the end-user is agreeing to be bound by the terms of the EULA.

In order to install the license key, which is required before you can begin using PS, you need to run the PS set-up program (schsetup.exe) from the installation directory. Here is the screen you will see:
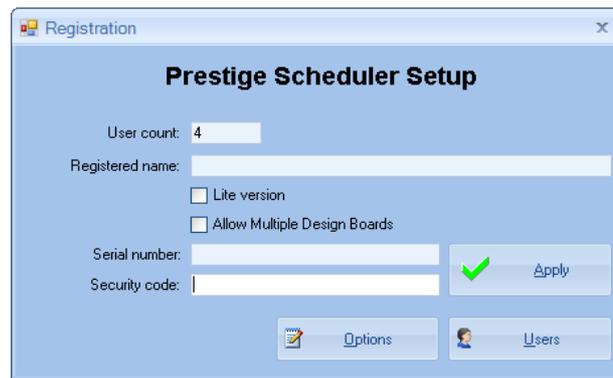


Registration information will include a serial number, as well as the unique key. Enter the information you are supplied into the relevant textboxes and press the [Apply] button. You will need to re-visit this screen if any of this information changes; for example, if you increase the user count or include support for multiple boards. In these sorts of cases, you will be issued with a new key based on the changes you have made. Here is an example of a registration screen that has been filled in:
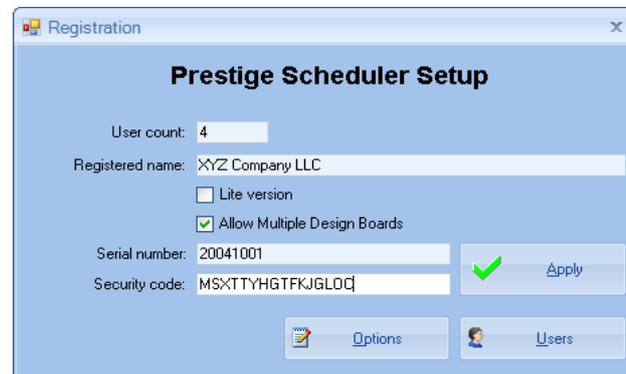


Points to note:

- The serial number will always by a six-digit number.

- The security key will always be a 16-character string consisting of upper-case letters.
- The security code in the above example is not a valid key and is shown for example only.

Once you have filled in these details as supplied and pressed the [Apply] button, a dialogue will appear informing you of success (or failure). If you get a failure, make sure you have entered all the details correctly, particularly the Registered name and Security code, both of which are case sensitive.

Once you have successfully applied the license key, you can begin to set up some options.

## Users

Each user that needs to run a PS client on their PC must be registered in the PS database. You add users by selecting [Users] from the set-up front screen. Here is the screen you use to add users to the PS database:
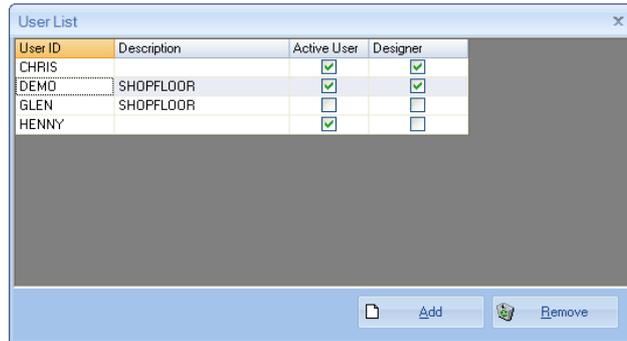


Chris and Demo have both been given design rights. Henny has been given active-user rights but has not been enabled as a designer. Glen has been given neither design nor active rights. Glen is, in effect, a read-only user.

Implicitly, then, a user can have one of three levels: read-only, active non-designer or designer. A user who is nominated as a designer also inherits all the rights of an active user. An active user can enter design mode and manipulate and save a design but cannot publish a design to replace the active board. An active user can also edit much of the job information available in the Job Browser. Importantly, an active user can start, stop and complete process tasks.

To add a user to the database, press the [Add] button. A new empty line is added to the Grid. Give the new user a unique name (up to 10 characters), an optional description and set his/her rights as appropriate to the user. Information you type is saved automatically as you leave the cell. There is no need to take any explicit action to save the information in the database.

If you need to remove a user, select the row containing the user and press [Remove].

## Setup Options

Setup options allow you to customise several options at the application level (as opposed to user's individual customization options). To bring up the options screen, press the [Options] button on the Registration screen.
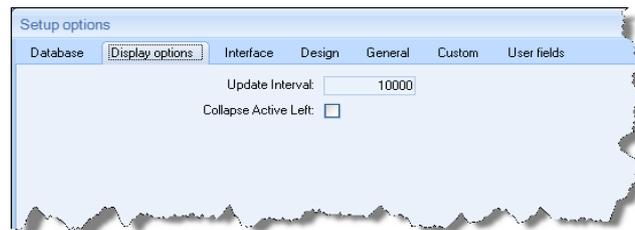
Each tab can be pressed to bring up the tabbed-page of options implied by the tab's caption.

### Database



The only option in the database tab page is the "Program Directory". This tells PS where to go look for files associated with the application, and is normally the directory where the applications themselves reside. This must be a full (rather than relative) path and should be a UNC path rather than making any reference to a shared drive letter. As you can see in our screen shot, we have referenced the server name (\\sch01 in our case), then the logical drive (cdrive) and finally the directory on that logical drive (scheduler in our case).

### Display options

Setup options

Database | Display options | Interface | Design | General | Custom | User fields

Update Interval:        10000
Collapse Active Left: ☐

*Update Interval:* This is a base interval in milliseconds that will be used to calculate idle time between update cycles by the PS Task Manager (TM). At each cycle, PS TM will attend to any shop floor transactions that have arrived for attention since the last cycle and recalculate the active board.

*Collapse Left:* This is an option that applies to the calculation of the active board. If this option is checked, TM, at each calculation, will endeavour to recover any white space that develops between bars on a row by moving bars as left as possible. Recoverable white space can exist, for example, to the left of a process that is backward scheduled and would thus normally occupy its JIT position. Having this option on will force such processes to be moved left as far as possible (whilst still preserving remaining constraints such as predecessors and any milestone dates).

### Interface

Setup options

Database | Display options | Interface | Design | General | Custom | User fields

Shop Floor Online:        ☐
Allow Buffering:           ☑
Allocate Stock On Import:  ☐
Separate Passes:           ☐
Offset for Date Required (Hrs):        -8
Cleanup Code: 9999

The interface tab page contains options that you can set relating to the import of jobs and the interaction with shop floor systems:

*Shop Floor ...:* Check this flag if you have an interactive on-line shop floor data collection system that will send transactions to PS.

*Allow Buffering:* Check this option if you want to support the buffering of loadings as they are imported from your disparate software system (MIS ERP etc.). This option exposes a buffer field in the resource maintenance screen that allows you to nominate a buffer percentage (positive or negative), which will be applied to loadings that are imported against that resource. See the resource maintenance topic for more details.

*Allocate Stock:* Allocate stock on import is an option you can check as an indication to the Importer program (the program that controls the import of job information from your disparate software to PS) that any stock (material milestones) should be flagged as allocated as they are imported. This, in essence, would result in a "completed" material milestone. This is useful if you want to be able to discover the materials involved without there being any actual material constraints.

*Separate Passes:* Several processes on a single resource (very often a printing press) may have multiple passes. This is often just indicated by a number rather than physical steps in the imported information. This option indicates to the importer whether or not such passes should be split into physically separate processes when imported into PS.

*Offset for Date:* Often the "Date Required" field in an MIS or ERP system is just a date and does not include a time. By default, such dates are given a time component of 12:00am. This option allows you to set an offset (positive or negative) from that default, in hours, which will get applied

to such dates as they are imported. In our example above this has been entered as "-8". Thus if the imported date were say July-10-2007 (at 12:00am by default), this offset would result in an imported Date Required of 4pm on July-9-2007 (midnight - 8 hours).

*Cleanup Code:*    This is a resource code defined (or about to be defined) in your resources. If you nominate such a cleanup code, the following will occur:

When a completion is received for a process that is queued on this resource by the Task Manager, any preceding processes that would normally be required to be complete at that point are also completed. Useful, for example if you do not have shop floor interaction on all stations.

### Design
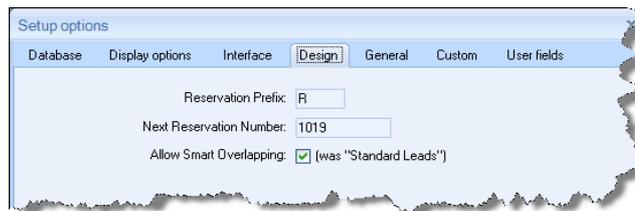


Most design customization is done at the user level. So only a couple of options at the global level. Reservations are commonly used by designers to reserve space for anticipated jobs either based on a Salesperson's request or because of regularly repeating work and you want to do some capacity analysis. Either way, the resultant reservations may end up on the active board, so you need to ensure that reservation numbers are not duplicated amongst design boards (the reservation number is equivalent to a job number, which must be unique). So in this tab page you nominate a common numbering scheme that all designers should use when creating reservations.

*Prefix:*    This is a single character code that will be prepended to the reservation number. This allows for easy distinction from real job numbers, which are normally pure numeric. If your job numbering system includes non-numeric prefixes, make sure you nominate a prefix here that will not conflict.

*Next ..*    This is an incrementing pure numeric. When you first set up, you choose here the seed or starting value. Then, as reservations are generated by designers, this number is incremented for each reservation. You can re-seed the starting value by returning here.

*Allow smart ..*    Allow smart overlapping is now a defunct item. PS in essence ALWAYS implements this feature.

### General
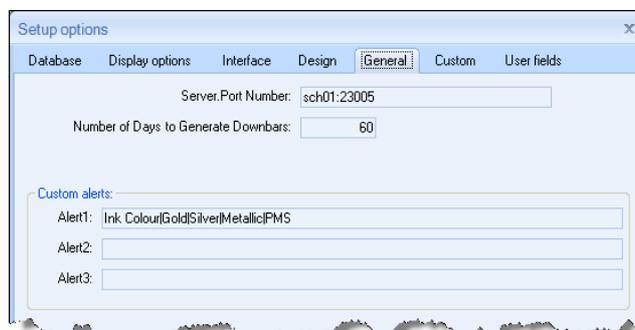


The first two options in the General tab are important and should always be set with care. Alerts are optional.

*Server:Port ..*    This value is used by both the Task Manager and PS client applications to establish communications between them. It establishes the server name within your intranet that will host the Task Manager listening service; and nominates the port number that should be used. The server name and port number must be delimited (separated) by a colon (:).

The Task Manager uses the Server name to make sure that you are starting the Task Manager listener on the correct server; otherwise the Task Manager will refuse to start (with the error message that it is the wrong host).

Each client uses this information to establish a connection to the Task Manager server.

*Number of ..*   PS clients use down bars to block out non-productive time along resource rows. Downbars are generated from proformas and this value establishes how many days into the future these bars should be generated. Each time a client starts in design mode, PS takes the opportunity to generate downbars up to this nominated limit. Bearing in mind that there are performance penalties involved with making this value overly large, you should not make this value larger than necessary. You can come back here and tweak this value if you find that your processes are extending beyond existing down bars.

*Custom Alerts*   Alerts are optional attributes that you can set for processes on your board. As you can see, you can set up-to three sets of alerts. An alert has a visual attribute as well as a value. The value is selected from a drop-down list, which you create here.

To set up an alert, you supply a series of text values delimited (separated) by a vertical bar (|). The first text value represents the name you want to give to the alert. All other values in the sequence represent the values you want to appear in the drop-down when the alert is being set in design mode. Designers set an alert on a process via the Process tab page in the Job Browser:
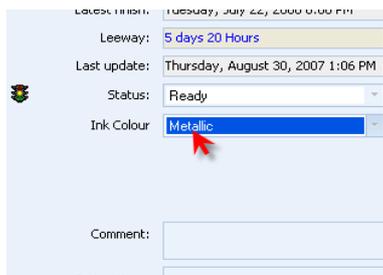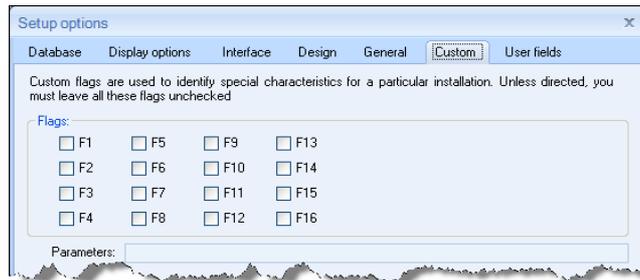


The alert is shown visually in the EPB:
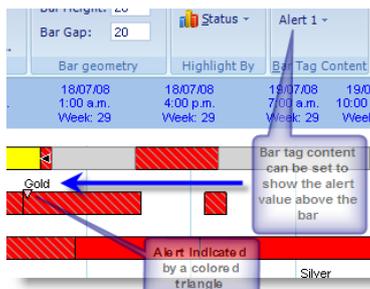


 Each alert type (1 2 or 3) is represented by a different coloured triangle. Only alerts you set up here, with a name and at least one drop-down value, will be available for use in the PS client application.
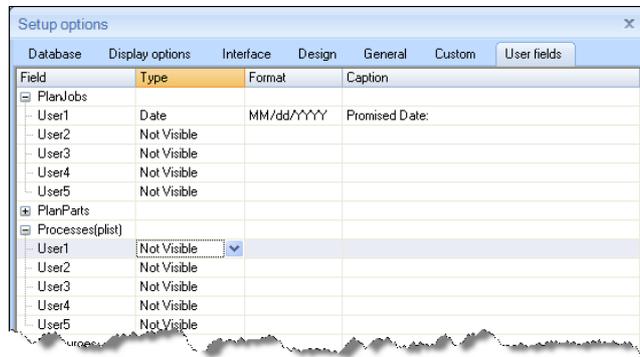
### Custom Tab



As you can see from the text instructions on this tab page, unless instructed by your dealer, you should leave all items on this page blank.

The flags can be used to distinguish some special experimental feature that is not yet available for general use; or a flag may be set if you have some customization within your specific version of PS.
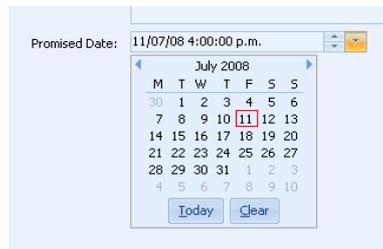
### User Fields



User fields are available to set up additional fields in the database specific to your requirements. Generally, values for these fields will be imported from your MIS or ERP. You can define up-to five fields at each of the three hierarchical levels (job, part, process). Such defined fields will be visible in the Job Browser within the respective level's tab page.

In the screen shot above, we have defined only one visible field, being a date field at the Job level called "Promised Date".

Here we show this user field at work in the Job Browser:



Note:          Date formatting is no longer dictated by the format supplied in the User Fields setup. The date format is taken from the locale of the individual user, as set up in the Windows "Regional and Language Options". Other user applications and reporting could still make use of the format string you supply here.