Frontage Toxicology Studies Task Scheduler
User Manual

General Guidelines

- ‘New’ button is for inserting a new record into the database and will clear the form fields for input.
- ‘Modify’ button is for altering an existing record in the database and will populate form fields with the record's data. The user must select a record in the data grid view before clicking modify.
- ‘Save’ button will either insert a new record or modify a record in the database with the information entered in the form fields (clicking modify or new determines the mode the form is in and thus the way it saves).
- ‘Undo’ button will clear all fields if form is in ‘New’ mode, or return fields to previous values if form is in ‘Modify’ mode.
- ‘Delete’ button will mark a record as deleted in the database. It will stop showing up in the program, but the actual record is still in the database.
- Most forms have a data grid view. It is the box with rows of records on the left side of the form.
- Clicking a row in the data grid view will select that record and populate the form’s fields with that record’s information.
- Forms have a search function to find records based off keywords
- Forms have filters with drop down menus to show only records that fit parameters
- Forms have a checkbox to toggle between showing all events and hiding past events

Managing technicians

- At least one technician needs to be added before creating studies
- Technician's nickname is the name that will appear on the Excel sheet schedule

1. Navigate to the Technicians Form either through the Main Form or any of the other forms.
2. Be sure to enter the relevant fields for technicians.

Managing studies

1. Enter a **study number**
2. Enter a **sponsor name**
3. Choose a **technician**. Choices are pulled from the database
4. Choose a **study start date** and **end date**.
    a. Remember that tasks/events can't be scheduled past the study end date.
    b. The study end date may always be extended by modifying the record.
5. Choose a **color**.
    a. The color will determine the color of the study tasks in the Excel spreadsheet.
    b. Once a study chooses a color, that color is no longer available to other studies.
    c. Once a study ends, it releases the color to make it available to other studies again.

Managing tasks

- Tasks are jobs performed by technicians. Events are actual instances of a task being performed by a technician at a date and time.
- The tasks form gives users options to schedule tasks on a repeating basis. Meaning, that if users create a task that repeats once a day for 5 days, then 5 events will be created in the database after saving that task.
- Tasks are assigned to the technician that is assigned to the study.

1. Choose a **task start date**. It cannot be after the study end date.
2. Choose a **task type** from the drop down menu.
    a. The types available are from the database, and new types can only be entered in the database manually.
3. The checkbox **'one time event'** is checked by default.
    a. Leaving this checked means the task will only schedule one event. Unchecking it will allow the task to be scheduled on a repeating basis and will add multiple events.
4. **Number of occurrences** is how many days will be scheduled, not necessarily how many events will be scheduled.
    a. For example, if the weekly frequency is 'every day' and the daily frequency is 'once a day', setting the number of occurrences to 7 would schedule 7 days and 7 events. However, consider the same scenario as before except the daily frequency is now 'twice a day'. The number of events

scheduled will now be 14, even though the number of occurrences is still 7.

5. **Weekly frequency** is how the days of the week are to be repeated.
    a. For example, choosing a weekly frequency of ‘once a week’ on Thursday April 25th, with a number of occurrences set at 5, will only create events every Thursday for 5 weeks.
    b. ‘Weekdays’ skips over weekends when creating events, and vice versa for ‘weekends’.
    c. ‘Custom days’ allow for specific days of the week to be chosen. Events will be created only on the days of the week that were selected, except for the first event if the task start date is on a different day of the week (e.g., a user has a custom weekly frequency of Tuesdays and Thursdays, but the task start date is on a Monday. The first event will be created on that Monday, but every event after that will be scheduled on Tuesdays and Thursdays).
6. **Daily frequency** is how many times an event repeats in a day. (Note: you can have a weekly frequency of none and a number of occurrences of one, and then still use daily frequency to schedule multiple events for only a single day).
    a. Up to 5 events can be scheduled in a day. When a daily frequency other than ‘once a day’ is selected, a button becomes visible called **‘Add Daily Events’**. Clicking this will make a new form pop up that allows the user to select start times for each event in the day starting from the second event. The number of events to choose from is determined by the daily frequency selection in the previous form. Once all events have been assigned a start time, click finish to close out the form and return to the tasks form.
7. **Start Time** is the start time for the first event of the day. If daily frequency is once a day this is the only place the user sets the time. Default start time is 9:00 AM
8. **Duration** is where the user sets the length of time to perform the task. Default duration is 30 minutes. Duration can be 15 minutes up to 12 hours.
9. **Specific Timed Event** checkbox determines if the event has to be at a specific time. If checked, the program checks for time conflicts if the technician is performing a different event in the same time period and will drop the event from being added. The program informs the user which events were dropped after saving.
    a. If the Specific timed event checkbox is unchecked the program will **auto-schedule** the event. It will fast forward in 15-minute increments until a time-slot without conflicts is found. When unchecked, the start time will instead be a desired start time, and the program will start the search at that time to auto-schedule.

10. **Comments** are notes about the task that will also be attached to the events, and can be viewed in the Excel spreadsheet. It can be left null.

Managing events

- Events cannot be created in the events form without being attached to a particular task. To create an event within the event form, users must either click on an existing event and hit “New”. That will create a new event within the selected event’s parent task. Or, users can click “Navigate to task events” from the Tasks Form. If a user wants to create individual events, they can also create a one-time event in the Tasks Form.

1. The **Task ID** is the unique identifier of the parent task for the event. It is not editable.
2. The **Event ID** is the unique identifier of the event. It is not editable.
3. **Task Event Count Search** searches for an event by its count. Count is specific to one task.
4. The **Study Number** reiterates the study number for the event. It is not editable in this form.
5. The **Primary Technician** assigns the main technician for the event.
    - In the event that a technician cannot work a given day, the primary technician for events can be changed to assign the events to another technician.
6. The **Task Type** reiterates the type of task for the event. It isn’t editable in this form.
7. The **Event Date** is the date that the event occurs. It can be edited to move individual events to other days.
8. The **Start Time** reiterates when the event starts. It can edited for individual events in this form.
9. The **Duration** reiterates the length of the event. It can be edited for individual events in this form.
10. The **Additional help option** allows users to add as many extra technicians to assist with an event as needed.
    - Check it to reveal a combo box and choose a technician not already assigned to the event at the given time. If a technician is busy at the time of the event, an error message will be displayed.
11. **Comments** reiterate the comments from the task for the event. It can be edited in this form.

Generating a schedule

1. Choose date to get all tasks for that day.
2. Export schedule to an Excel spreadsheet.
3. Navigate to where you saved the file and open it in Excel.

Managing users (for admin only)

1. Navigate to the **Admin Dashboard** from the Main Form.
2. To create a new user:
    a. Click ‘New’.
    b. Specify the user’s **username**, **password**, and check whether you want the user to have admin privileges using the **‘is Admin?’** checkbox. Having admin privileges allows the user to access the admin dashboard.
3. To change the password of an existing user:
    a. Click on a user in the data grid view and click ‘Modify’.
    b. Click the **‘Change Password’** checkbox.
    c. Enter the new password and confirm it. Click ‘Save’ to save the changes.
    d. The user’s admin status can also be changed by modifying the user.