The time booking program

Resource

Version 4.1

- Resource is the program for booking resources in Windows
- Resource can be used by many persons simultaneously in a network
- Resource keeps track of your resources, and helps you to plan and analyse them
- Resource is very easy to use and claims short start period
- Resource supports working with both mouse and keyboard
- Resource has a multitude of options to simplify your work, personal or for all users
- Resource has three different permission levels with limitations for each user
- Resource can copy and move bookings easily with the mouse
- Resource has different status for each booking
- Resource can rapidly and easily find first free time for a resource, a group or for a location
- Resource can be used for reminding with alarm bookings

Thank you for choosing the booking program Resource! We are convinced that the program will satisfy your expectations and assist you in your work. Below is a complete instruction guide that will take you to a quick start of the program and all its functions.

Resource is a professional tool but at the same time easy to use, thanks to its logical design. The purpose with the program was to create an easy to use, foreseeable and effective program to handle bookings of resources such as personal, machines etc.

Resource is developed by DataPartner in close dialog with many different users, with the intent to adapt the program functions and layout for the user's real needs in different branches. We have started from the traditional paper version of a time book and then added a variety of functions that uses the computers power to make the booking work simpler, foreseeable and effective.

This version of Resource (version 4.1) is much improved and very faster with many new functions. Take part of all the new functions by reading this manual.

Date: 01/03/2011

Table of contents

Installation

Resource is developed for Windows, i.e. it runs in 32-bits operating systems. Minimum Windows 95 or Windows NT version 4.0 with latest service pack is required.

NOTE! Before installation is started, please remove any previous versions of Resource! See removal below. This is required to avoid conflicts due to different versions of files. Do not forget to **save your database** so you preserve your information.

To install Resource run the installation program (Resource.exe). This can for example be done by selecting the *Start- button* and then *Run*. Type '*C:\Temp\Resource.exe*' (*C:\Temp* is the folder that contains the installations program) in the textbox and select *OK*.

The installations program for Resource will take you through the installation. You only answer a few questions, such as where Resource shall be installed. You also select which parts and modules that shall be installed in each computer. The default folder is 'C:\Program Files\DataPartner\Resource" but can be changed. You can abort the installation before you click on '*Install*".

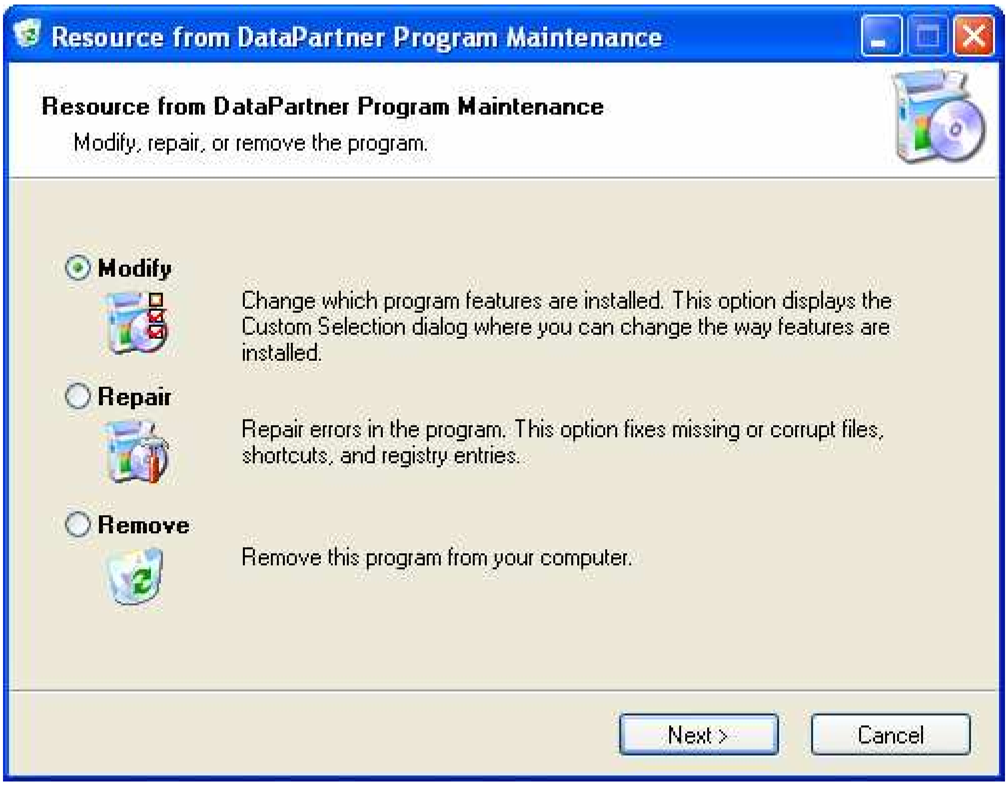
There are several programs that can be installed in your computer, Resource (a must) and an administration program (optional) and two additional modules for Statistics and an Outlook Link (optional). A more detailed description of the management programs and modules are found later in this manual. All installed programs will be found under '*Start button – Program – Resource*". Here is also a shortcut to a text file (ReadMe.txt) that contains any late made changes with Resource after this documentation been written. We recommend you to read it.

NOTE! If you have a multi-user license of Resource the database 'Resource.db' have to reside in a shared folder in the network where all user have both read and write rights. See below, under 'First time' further on in this manual.

Removal

If you need to remove Resource from your computer, select the icon '*Add/remove program*" in the Control panel. Select Resource in the list of installed programs and click on the '*Add/remove*" - button. Alternatively, click on "*Change*" in the Control Panel, and then you get the picture below where you can *Modify, Repair* or *Remove* Resource. If you choose to modify or repair you must have the install file in the same folder. When selecting *Modify*, you can add or remove components belonging to the Resource. It may be that any files that Resource needs that have been damaged or are missing. If so you select *Repair* to install all the files again. If other files have been added in the same folder as the program, they will not be removed. These files have to be removed manually.

If the database resides in different folder then where Resource was installed, e.g. on a network disk, the program for removal will not be able to remove it, it has to done manually.



First time

When starting Resource for the first time, the program will ask for the location of the database. This is because the program can run in a network and the database is in a shared folder in the network and not locally as the program. Use the "..." button to find the database, which is called 'Resource.db'. This is only needed to do the first time you start the program. When Resource is terminated normally the first time, the program will automatically remember where the database is located. If you later on need to change the location or change to another database can be done from within the program. More information on this later in this manual.

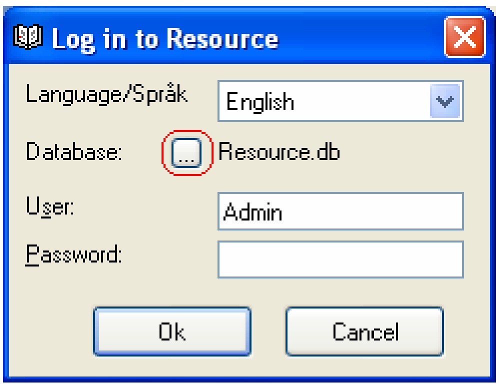


Figure: State database and select language

There is a database in the Resource folder under your "*My Documents*" folder as the program was installed in. You can use that one if only one (1) user shall use the program. If more than one user is required, state the database that resides on the network. The database must be copied manually to the shared folder on the network once. This is normally done after the first installation of the program. Remaining installations of Resource can then connect to the database on the network.

With help of '*Browse*" you can find the folder that contains the database. The window shown is standard in Windows (see Figure below). At the top is a list ("*Look in*"). Here you can select disk (example: C:, D:, etc.) and the folder. In the window you see the existing folders. When the database is localized and selected, click on '*Open*'.

Resource supports both traditional paths (example: C:\Program Files\DataPartner\Resource) and UNC (Universal Naming Convention) path (example: \\computer name\share).

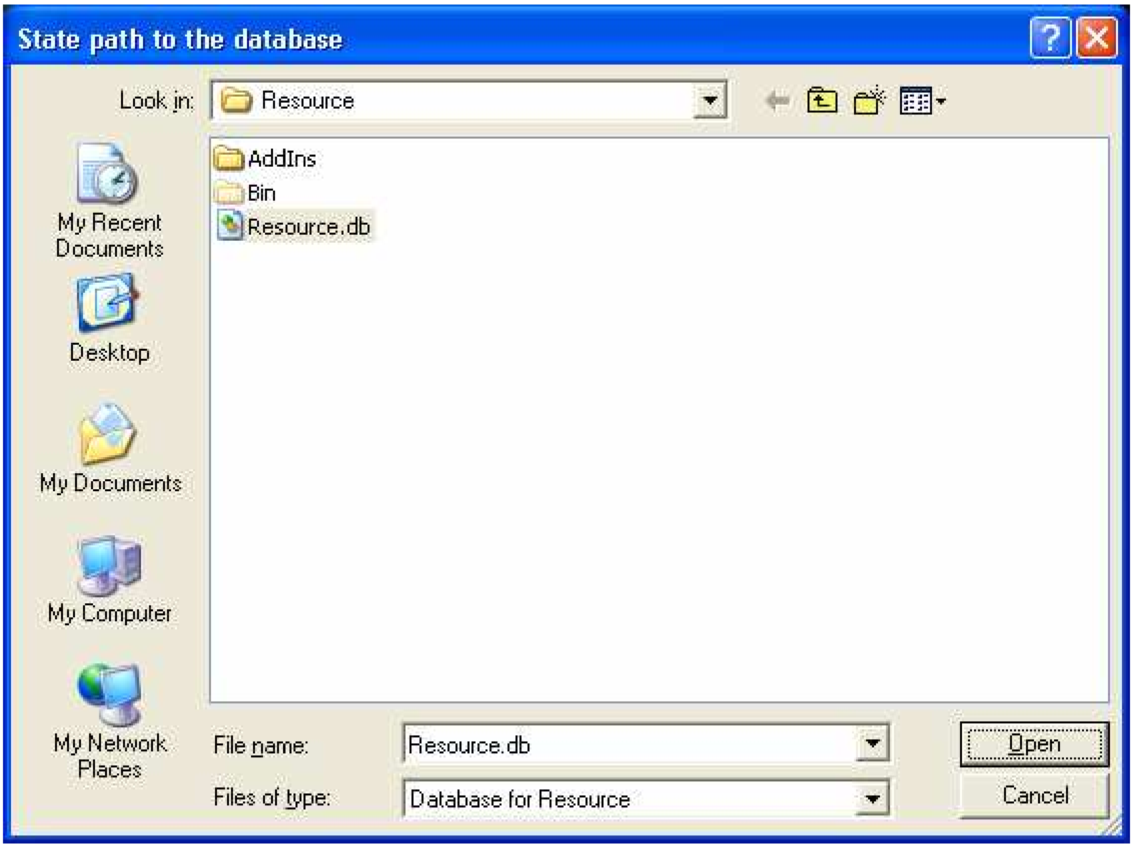


Figure: Browse for database

NOTE! If you have a multi user version, all user of the system must have read and write rights in the shared folder that contain the database.

Users

When contact has been established with the database (see above), you have to log in to the system each time the program is started. The system allows users to access the information with different rights. Three users are defined in the system: *Admin*, *Book* and *Guest*. Each user in the system have; *Name* (mandatory) and *Password* (optional).

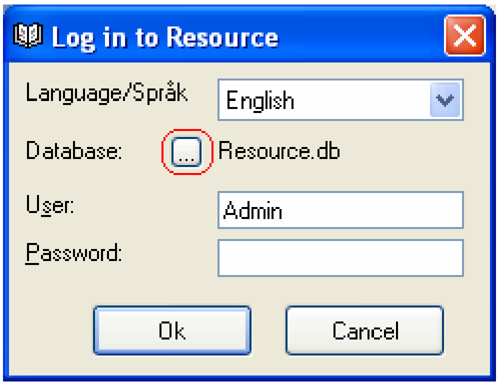


Figure: Log in

At the first log in state 'Admin" (no quotations), '*Book*" or '*Guest*" without any password. To see who is logged in look at the top of the main window, e.g. it can say: *User: Lena, Book)*. This means that the user *Lena* is logged on to the system and has *Book* as basic rights. Only 'Admin" have all rights initially and is the user that can add user, resources, customers, etc.

In the log in window you can select what language Resource shall use. At present there are two languages, English and Swedish to choose from. During the installation of Resource you selected the language for the installation and this decides the language, which is default in Resource.

NOTE! The database differs between the languages and your database is determined when you selected language at the installation. If you installed with Swedish text you have to log in with Admin, Book or Guest and the holidays are in Swedish (can be changed manually).

Add

More users can be added to the system. Users logged in with admin rights can only do this. Select '*Maintenance*" – '*Users*" from the menu. The maintenance menu is only visible to users with admin rights. The system has no limitations to the number of defined users. This is dependent of numbers of concurrent users of Resource.

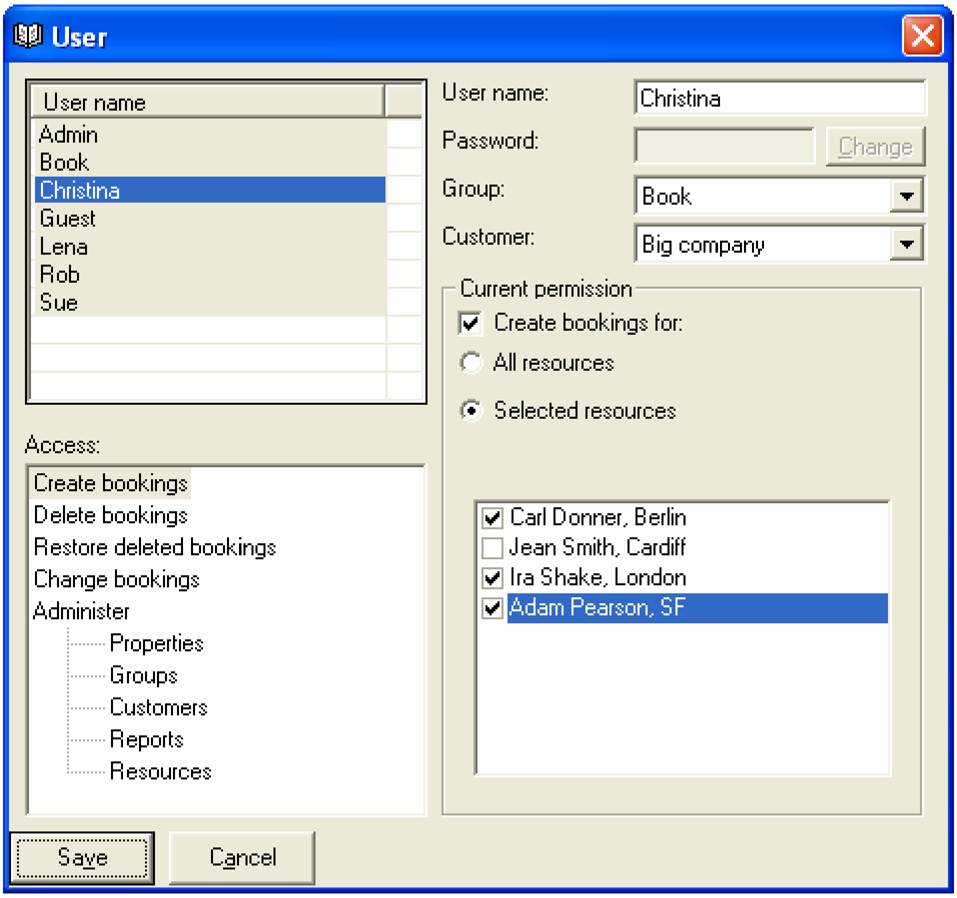


Figure: Users

NOTE! You must be logged in with admin rights to work with user of the program.

In the window you will see all users in the system in a list on the left side. To add a new user, click on the '*Add*" button. State the users name up to the right (mandatory) for the new user and select rights in the list (default for new users is Book).

To change a user, click on '*Edit*". Here you can change the name and rights for the user. To change passwords see below.

The right is altered by selecting the rights in the list down to the left in the window. Then you will see the options for that right. In the Figure above the '*Create bookings*" right is shown and after you selected '*Create bookings for:*" you can select if the user shall be able to create bookings for all resources or only for selected resources. If you only want to allow selected resources you select them in the list at the lower right in the window.

Here you also can select if a user shall be able to administer *properties, groups, customers, reports* and/or *resources*. Default for these is that the user may NOT administer them.

To remove a user click button '*Remove*". As default (see options below) you get a question to confirm removal of the user. The button '*Update*" will reread the information again from the database (only applicable for multi user environment of Resource).

To change the password click on the '*Change password*" button, where you state the new password and once again for verification.

NOTE! A user must be selected in the list to be able to change the password.

If you are logged in as Admin or Book, you can change your own password via the menu '*Tools – Change password*". The current password must be stated and then the new password to times (for verification). As Guest you cannot change the password for anybody.

The left list with all users can be sorted via mouse click on the column headers. For each click the list is sorted in ascending or descending order depending on the previous sort order (alternating function).

NOTE! You cannot change anything for user *Admin*, only change the password. The *Admin* user cannot be removed and always have all rights.

Tip! It is recommended to set the password for Admin for security reasons, since this user have all rights in the system. At installation there is no password for any of the three defined users.

Rights

The user's rights decide determine what he or she can do in the system. You can select between three different user right levels *Admin*, *Book* or *Read*. Those with *Admin* right can do anything in the system. With *Book* rights you can add, change and delete bookings, but may not change some options, such as overlapping bookings, database location, etc.

If you have *Read* rights you may only look at bookings and cannot make any searching or any changes.

You set the rights for each user can with help of the checkboxes in the frame rights. If the checkbox '*Create new bookings*" is selected the user can create bookings, otherwise not. The checkbox '*Change bookings*" state if the user should be able to change bookings. If selected, you can limit changes to only apply to the users own bookings by selecting '*Only own bookings*". Same rules can be applied for removal of bookings by selecting '*Remove bookings*" and '*Only own bookings*".

Users of Resource can see their rights by selecting the menu '*Tools – My rights*". A window is shown with the logged in user can do. Only with admin rights you can see other user's rights.

A user may also be a customer, which means that the user is connected to a customer in the internal customer table within Resource. You select a customer to list in the window if the user is to be a customer. When a user is a customer logs into Resource the user will only be able to create bookings (if user has the permission) directly linked to them self, the customer. If you do not want users to be connected to any customer please choose "<No customer selected>" which is listed first (default).

Resources

General

To create bookings there must be at least one resource. A resource can be a person, machine, room, etc. depending on what industry Resource is used in. Besides these resources the system can also show alarms (more about alarm later on). Below we walk you through on how to add, remove and change resources in the system. This can be done manually or can be imported from another resource register. Read more under Data administration.

No.	Resource name	Resource Location
1	Room Blue Heaven	1:st floor
2	Room Hawk	2:nd floor
3	Room White room	2:nd floor
4	Lorry CBA 321	Liverpool
5	Lorry ABC 123	London
6	Lorry BCA 231	Lubboc
7	Laundry room One	Main street
8	Laundry room Two	Main Street
9	Laundry room One	New Street
10	Anders Svensson	New York
11	John Smith	New York
12	Eva Larsson	San Francisco

Figure: Resources

Resources are shown to left in the main window, under the yellow headers. Here you see three columns, from left: *Number*, *Resource name* and *Resource location*. Number and location columns can be hidden. You do that by clicking with the right mouse button in the yellow part over the resources and selecting '*Number*" or '*Location*" in the context menu. If there is a checkmark to the left of the menu it indicates that the column is visible. Too see more of the location column you use the scrollbar under the resources at the bottom the window.

You can change the width of name- and location columns by placing the mouse pointer over the right black vertical line for the column within the yellow area. The mouse pointer will become a double arrow and by holding down left mouse button and pull, to the left (decrease) or to the right (increase), to desired size.

Tip! If you made one or more columns to small or to big, you can restore the size to standard size easily with a double click in the yellow area (at the top) in one of the columns.

As default the location column sorts resources. You can sort in name or location order by clicking in the yellow area (for each column). Every other click in the yellow area for a column, the resources are sorted ascending (A→Z) and next click descending (Z→A) by the selected column.

Add

To add resources log in into Resource with Admin rights. Select '*Maintenance*" – '*Resources*". Only users with Admin rights or rights to administrate resources can make changes in the register for resources.

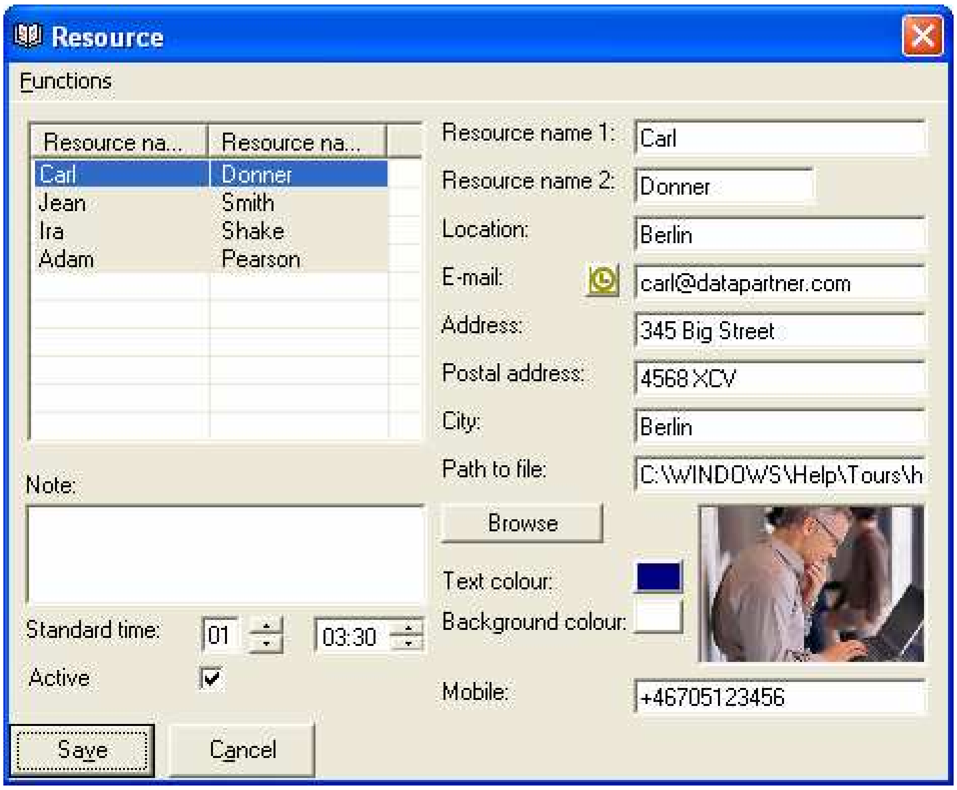


Figure: Resource (person)

In the resource window you will see the resources currently available in the system in a list on the left side, with two columns *Resource name 1* and *Resource name 2*. The list of resources can be sorted by *Resource name 1* or *Resource name 2* by clicking with the left mouse button on each column name (the grey area at top of the column). For each click on the column name the list is sorted in ascending or descending order, i.e. if the list is sorted in descending order it will be sorted in ascending order after a mouse click.

To add a resource, click on '*Add*" and fill out the fields to the right. You must state *Resource name 1, Resource name 2* and *Location*, since they are shown in the main window. Other fields are optional.

Each resource can be identified in the main window with colours (se Figure above). You can set both *Text colour* and *Background colour* for each resource. The selected colours are shown in the buttons to the right of the texts *Text colour* and *Background colour*. By clicking on these buttons you can select each colour.

Tip! Select colours that contrast with each other. Example: If you select white as text colour and white as background colour you won't be able to read the resource name or location. If you select a bight text colour you should select a dark background colour and vice versa.

You can also add a picture of the resource by clicking on the button '*Browse*". You will see a dialog where you can select a picture file in J-PEG-, GIF- or BMP-format. The picture will be shown in the frame at lower right of the window.

NOTE! The picture file should reside in a folder that all users of Resource can access otherwise it will not be shown! The path to the picture file is shown in the field '*Path to file*".

You can define '*Standard time*" for resources. There are two different standard times per resource, one for day view and one for other views. You will find them below *Notes*. The textbox to the right states hours and minutes in day view and the left states number of days for a new booking in all other views.

Under '*Standard time*" is a checkbox with the name '*Active*" and with it selected the resource will be available in the program. In this way you can add resources, which shall not be active under a period. When it's time to activate the resource just check this box **NOTE!** At import of resources (see later in this manual) the imported resources are not marked as active. You have to do this manually for each resource here.

Other fields are for resources in form of persons, but can also be used for other types of resources where you can state optional information. The field "Email" is for you to be able to send e-mail to the resources. The same feature is available to customers in the system and both can be used for the sending of SMS on your SMS provider has that option. There is also a field for a mobile number.

To change properties for a resource you select the resource in the left list box. Then information about the selected resource and you can click on '*Edit*" button. When changes are done select '*Save*" to save changes or '*Cancel*" if you want to discard the changes

"*Update*" will reread the information from the database (only applicable for multi user environment). If you want to remove a resource, click on the '*Delete*" button.

NOTE! When you remove a resource all bookings, all connections for the resource, such as group belongings and connections to properties for that resource are removed too.

You can go to the resource window direct from the main window if you want to change, or just get more information about a specific resource. Place the mouse pointer over the resource and right click on that row. You will see a context menu with two options. If you select the lower one '*Change*", you will come to the resource window and with the selected resource pre selected.

Groups

In Resource is finesse to group your resources. If you are logged in the rights to administer groups, you can with the menu choice ‘*Maintenance – Groups*” add, edit, etc. groups in the system. These groups can for example be based on categories, belongings, personal etc. Which resources that should be in the group, can all who have *book* or *admin* rights decide. More information below.

Add

When you select the ‘*Add*’ button you can state a group name at max 30 characters in the textbox to the right. Resource will not accept a name that not is unique (two groups cannot have the same name). To save the new group, click on button ‘*Save*”. If you don’t want to save changes click on the ‘*Cancel*” button.

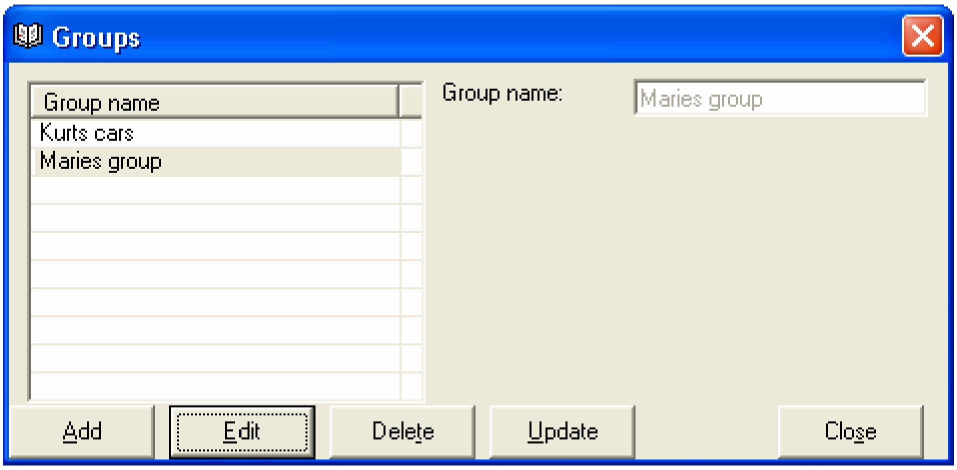


Figure: Groups

To change the name on a group click on the ‘*Edit*” button and make change in the textbox. Save changes in the same way as ‘*Add*”.

To remove a group click on the ‘*Delete*” button.

NOTE! All connections for the group will be removed. No bookings are affected when you remove one or more groups.

The left list with all groups can be sorted with a mouse click on the header row. For each mouse click the list is sorted in ascending or descending order depending on previous sort order (alternating function).

”*Update*” will reread the information from the database (only applicable in a multi user environment).

When you click on the ‘*Close*’ button you will return to the main window.

Connect

To be able to use a group you have to state which resources that should be a part of (members) in the group. You do this by selecting the menu in the main window '*Show – Connections – Resource – Group*'.

At the bottom of the new window shown is four buttons. With these you navigate between the groups in the system. From left to right the buttons have the following functions: *go to first group, go to previous group, go to next group* and *go to last group*. At the top of the window is the group's name. You cannot change the name here, but you can use the above-described procedure to change the group name.

Figure: Connect resources to a group

When you selected the group you select resources in the list by selecting or deselecting the resource. To save your selections click on the '*Save*' button, which is only available if you made any changes. If you want to filter, i.e. only see those resources that are in the current group, in the main window, click on the '*Filter*' button to go to the filter window (more information later).

'*Update*' will reread the information from the database (only applicable in a multi user environment).

When you click on the '*Close*' button you will return to the main window.

Properties

Resources can have different properties that can be interesting to filter or search on. In Resource you can define properties and then connect resources to these. Which resources that should be connected to respective property, can all who have *Book* or *Admin* rights decide.

Add

With the menu selection '*Maintenance – Properties*' can authorized users in the system administer properties.

When you select the '*Add*' button you can create a property with a name on max 30 characters in the textbox up to the right. There is an '*Extra*' field to clarify the property. E.g. there can be different variants of a property. To save the new property, click on the '*Save*' button. To discard changes click on the '*Cancel*' button.

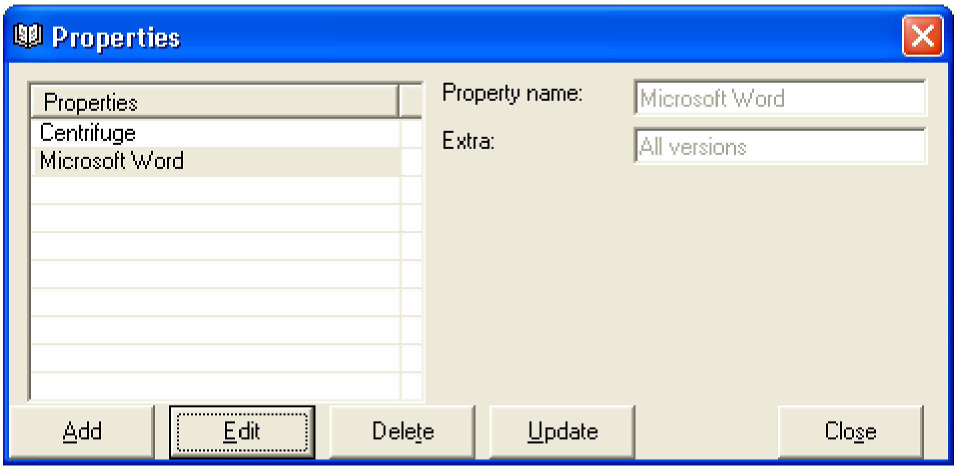


Figure: Properties

To change the name of a property click on the '*Edit*' button and make changes in the textboxes for *Property name* and *Extra*. Save in the same manor as '*Add*'.

Click on the '*Delete*' button to remove a property.

NOTE! All connections for the property will be deleted. No bookings or resources are affected if one or more properties are deleted.

'*Update*' will reread the information from the database (only applicable in a multi user environment).

When you click on the '*Close*' button you will return to the main window.

Connect

To be able to use a property you must state to Resource which resources have the property. Do that by selecting the menu '*Show – Connections – Resource – Property*' from the main window.

At the bottom of the new window shown is four buttons. With these you navigate between the groups in the system. From left to right the buttons have the following functions: *go to first property, go to previous property, go to next property* and *go to last property*. At the top of the window is the property name. You cannot change the name here, but you can use the above-described procedure to change the property name.

When you have selected a property you select resources in the resource list by selecting or deselecting the resource. To save your selections click on the '*Save*' button, which is only available if you made any changes. If you want to filter, i.e. only see those resources that are in the current group, in the main window, click on the '*Filter*' button to go to the filter window (more information later).

NOTE! Save any changes first!

Figure: Connect resources to a property

'*Update*' will reread the information from the database (only applicable in a multi user environment).

When you click on the '*Close*' button you will return to the main window.

Customers

A booking in Resource can be connected to a customer. In the system is an integrated customer register where you can define customers that can be used in bookings. First step is to add customers to the internal register. Apart from that it can be done manually you can import from an existing customer register statically. Read more about this under Data administration in this manual.

By selecting the menu '*Maintenance – Customers*' can those who are qualified administer the customer register in the system.

Add

If you select the button '*Add*' you can add a customer to the register. Here you find a number of different properties for a customer. The only required field is '*Company*' which has to be unique identity and is the information visible in other windows in the system. Other fields are optional. If you state '*E-mail*' you can in this window click on the button '*Send e-mail*' and will wind up in your e-mail program with the address stated here.

To save the customer, click on the '*Save*' button. To discard changes click on the '*Cancel*' button.

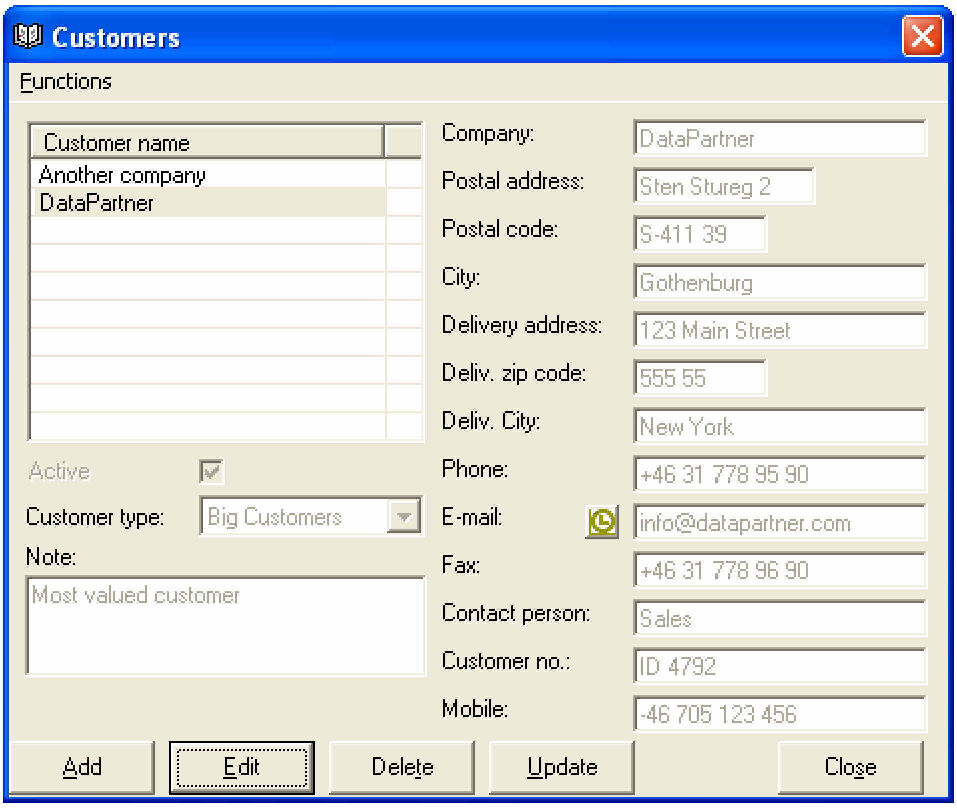


Figure: Customer register

To change a customer select it in the list on the left and click on the button '*Edit*' and then change the fields on the right. Save is done in the same manor as '*Add*'.

If you want to delete a customer click on the button '*Delete*'. No bookings are removed but will be marked with "customer removed'.

Customers can belong to a customer type that you set yourself (see more below). With the help of customer type, you can group customers to more easily identify them and collect statistics on them.

The list on the left side with all customers can be sorted with mouse click on the header row. For each mouse click the list is sorted in ascending or descending order depending on previous sort order (alternating function).

'*Update*' will reread the information from the database (only applicable in a multi user environment).

When you click on the '*Close*' button you will return to the main window.

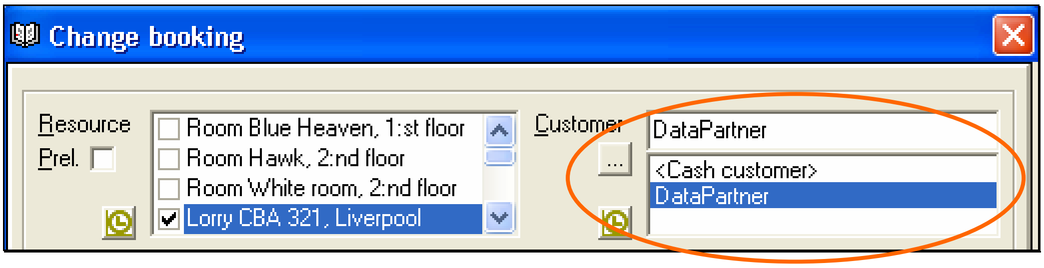


Figure: Customer for booking

Tip! In the booking window you can double click on a customer to go to the customer register with selected customer to see more information about the customer. You must have rights to do so.

Customer types

Customers can belong to one customer type to group them into logical units. In Resource you can define customer types, and then connect these to customers. Customers have to be linked to each customer type or none and can be done by anyone with booking or admin privileges.

Add

If you have proper rights, you can via menu item "*Maintenance – Customer Type*" administers the customer types in the system.

When you select the button "*Add*" you can enter a customer type with a name of max 30 characters in the text box at the top right. To save the new customer type, click on "*Save*" button. If you do not want to save, you click on "*Cancel*" button.

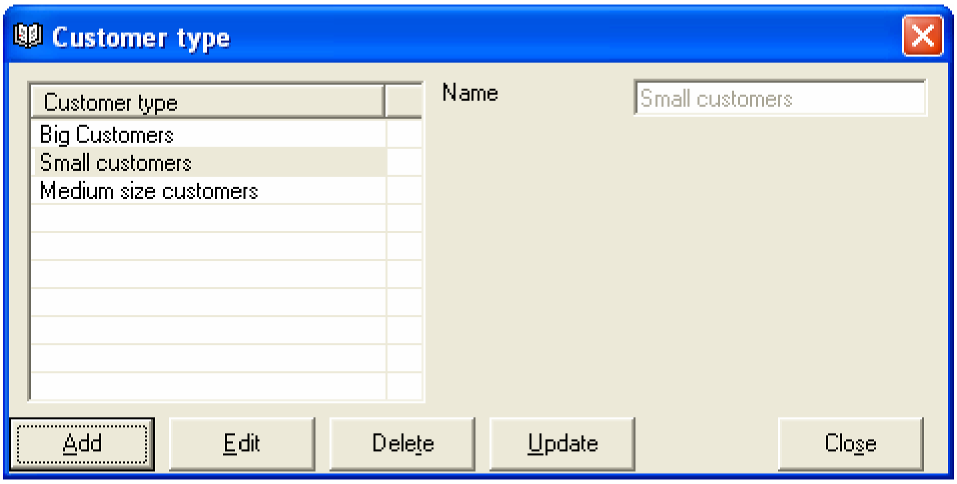


Figure: Customer types

To change the name of a customer type, click the "Edit" button and then modify the text boxes on the customer type *Name*. Saving is done in exactly the same way as "*Add*".

If you want to delete a customer type, click the button "Delete".

NOTE! All connections for customer type are removed. No bookings are concerned, however, by removing one or more customer types.

"*Update*" button is used by those who run the Resource in multi-user environment to read the customer types from the database again to see any changes.

Clicking on the button "*Close*" returns you to the main window.

Connect

To be able to use one type of customer must tell Resource to which customers to be connected with a customer type. This is done via the menu selection "*View - Couplings - Resources - Customer Type*" from the main window.

At the bottom of the window that appears there are four buttons. With them you navigate between the customer types in the system. From left to right are the following functionalities: *go to the first customer type, go to the previous customer type, go to the next customer type* and *go to the end customer type*. At the top of the window shows the name of the customer type. You can not change the name here, but must use the procedure described above to change the type of customer names.

Once you have selected customer type, select in the list by ticking on or of customers. To save these choices, you click on "*Save*" button.

NOTE! Any changes must be saved first!

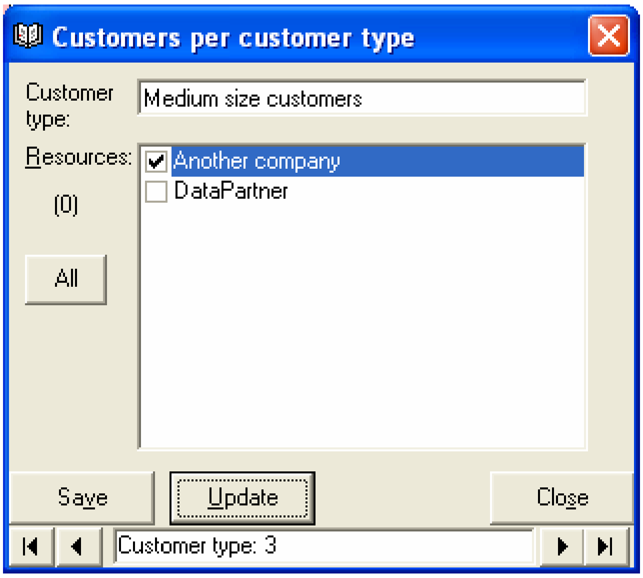


Figure: Connect customers with customer type

"*Update*" button is used by those who run the Resource in multi-user environment to read the customer types from the database again.

Clicking on the button "*Close*" returns you to the main window.

You can of course enter customer type when you create or alter a customer in the customer register (see above). These changes will appear in the window above.

Holidays

In Resource version 4 there are editable holidays within the system, which can be deleted and you can add your own holidays. The meaning is to see, in the main window, that it is a reserved time. Those holidays that are present in the register are those who 'float' i.e. don't have a fixed date from year to year. Fixed holidays such as Christmas Day etc. are indicated automatically and cannot be affected. "Floating" holidays such as Easter, Midsummer, etc. are also automatically selected in the main window of the Resource from 2009-01-01 and onwards.

Add

Through the menu '*Maintenance – Holidays*' users with rights can administer the holiday register in the system. If you select the button '*Add*' you can define your own holiday in the register. Select '*Date*' and state '*Name*'. The name field shall contain the text to be shown in the main window when you click on a 'red' day.

To save the holiday, click on the '*Save*' button. To discard changes click on the '*Cancel*' button.

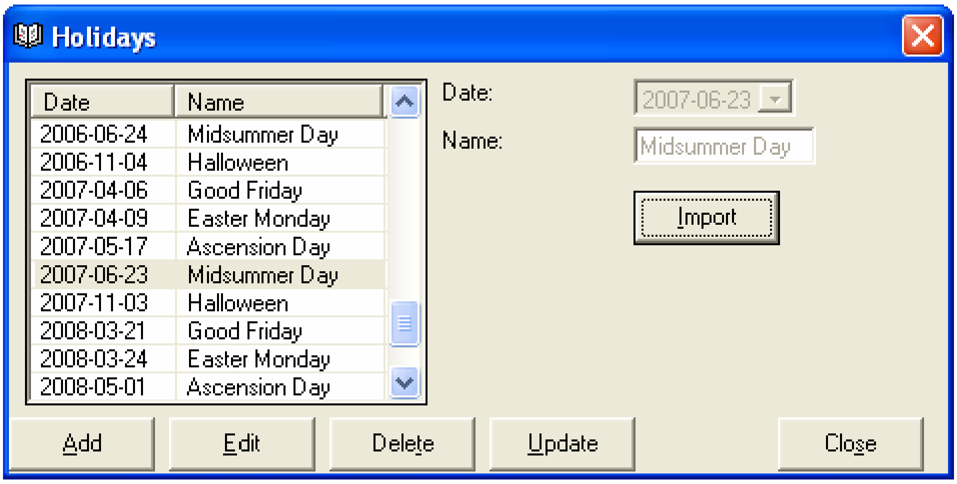


Figure: Holiday register

To change a holiday select it in the list on the left and click on the button '*Edit*' and then change the fields on the right. Save is done in the same manor as '*Add*'.

If you want to delete a holiday click on the button '*Delete*'. No bookings are affected.

If you want to import your country's holidays go to this address and pickup your choice of holiday file(s) www.mozilla.org/projects/calendar/holidays.html. When you have the file(s) in your computer you can import these holidays in to Resource by clicking the button "*Import*". Note! Resource will import all defined holidays in the file. If you just want to import a selection of these you will have to edit the file(s) before the import.

Status

New to Resource version 4 is the way you can handle status. Previous there was four different statuses that could not be changed other then the text. Today the four statuses are still present but you have the option to change, delete and add your own status.

Add

With the menu '*Maintenance – Status list*' users with rights can administer the status register in the system. If you select the button '*Add*' you can define your own status in the register. State '*Description*' and select '*Background colour*' and '*Text colour*'.

The description field shall contain the text shown in the main window when the mouse pointer is over a booking. The colours can be selected freely, where background colour is the colour that the booking is going to have when you select status. The text colour should contrast with the background colour so it will be easy to read the description text in the bookings.

NOTE! If you use the alarm function in Resource don't create a status with red background colour since that colour is used by alarms.

To save the status, click on the '*Save*' button. To discard changes click on the '*Cancel*' button.

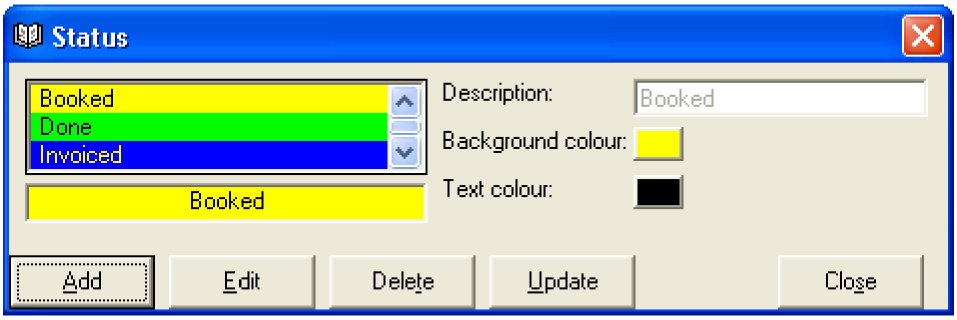


Figure: Status register

To change a status select it in the list on the left and click on the button '*Edit*' and then change the field and colours on the right. Save is done in the same manor as '*Add*'.

If you want to delete a status you click on the button '*Delete*'. No bookings are deleted, but bookings with the deleted status will be marked with a grey colour and a pattern.

Standard texts

In Resource version 4 the handling of standard texts is extended. In earlier versions there were three different standard texts for each user. Now you can define an unlimited number of standard texts with the possibility to change, delete and add your own standard texts. The functions of these buttons are the same as the above windows.

If you write the same text in the note for many bookings, this will give you help to get standardized outlook on the bookings. Only one of the standard texts can be shown at the time. By using the arrows to the left of the textbox you can browse between the different standard texts added here.

Figure: Standard texts

NOTE! These '*Standard texts*' are personal. It means that each user in Resource have his own '*Standard texts*'.

URLs

In Resource you can define Internet addresses (URLs) that will be available to all users of the system. They will be accessible from the main window in a drop down list. URL stands for Uniform Resource Locator and is the global address of documents and other resources on the World Wide Web.

Add

If you have proper rights, you can via menu item "*Maintenance – URLs*" administers the URLs in the system.

When you select the button "*Add*" you can enter an URL with a name of max 50 characters in the text box at the top right. You also need to state the complete address of the URL. To save the URL, click on the "*Save*" button. If you do not want to save you click on "*Cancel*" button.

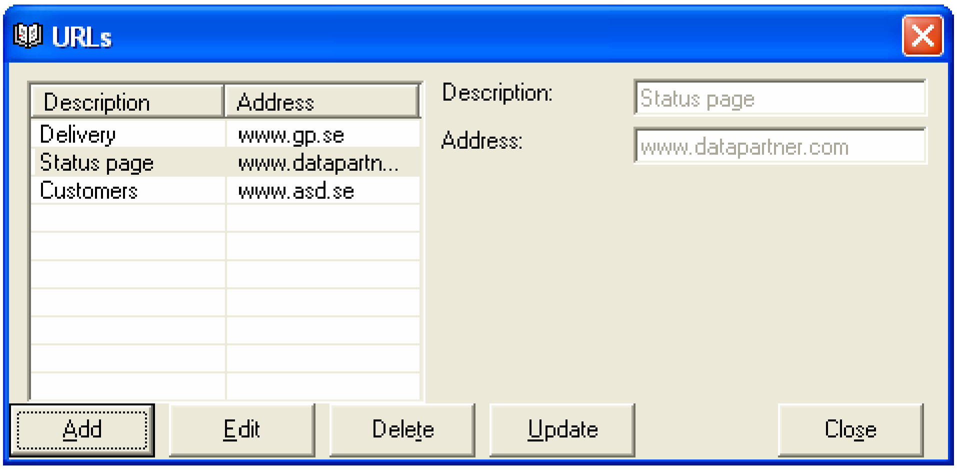


Figure: Maintaining URLs

To change an URL select it in the list on the left and click on the button '*Edit*' and then change the fields on the right. Save is done in the same manor as '*Add*'.

If you want to delete an URL you click on the button '*Delete*'. No bookings are affected.

Bookings

General

A booking consists of a time period and is shown in the right area in the main window. Bookings have a time span (start time ↔ end time) that is at least fifteen minutes in the day view and at least 1 day in other views. This is because the booking shall be visible in the main window and accessible with the mouse. Normally a booking in day view is max nine hours (eight hour working time plus one hour for lunch), but you can create a booking that stretches for several days or weeks. With bookings stretches over more than one day (in day view), you will get a question if the booking only shall occupy normal work hours or if the booking shall cover all the hours of the day (up to 24).

Each horizontal row represents a resource. The rows are divided in white and yellow rows so it's easier to follow row for a resource (horizontal). A resource can have one or many bookings on the same day. As default, bookings cannot overlap each other, i.e. a booking must end before the next one can start. A booking can however have the same end time as another booking have its start time, i.e. they can be close to each other.

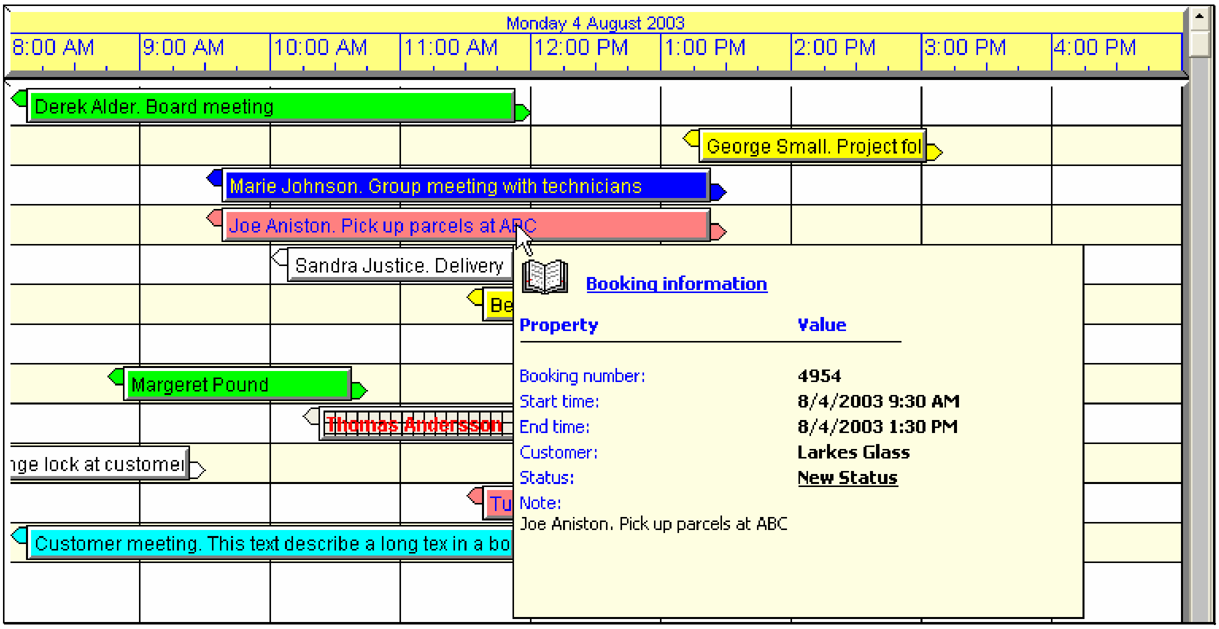


Figure: Bookings

Status for a booking is indicated with (different) colours. Initially there are 4 status defined with the colours yellow, green, blue and cyan as they were in the previous version of Resource. See chapter about status earlier in this manual. Alarm is shown as red bookings on their own row. More about alarm in a chapter later on.

All bookings have two 'ears', one on the left side and one on the right side. By placing the mouse pointer over an 'ear' on a booking, you can change the time. To increase or decrease the time for the booking you hold left mouse button down over the 'ear' and drag to the left or to the right.

NOTE! The ‘ears’ are not visible to those who log in with just Read rights.

Types of bookings

There are three types of bookings: *ordinary, preliminary*, or *alarm*. Ordinary bookings and alarm are visible in the main window. Alarms are visible in the main window only if you selected it. See more on alarm.

Preliminary

Preliminary bookings are bookings that have no resource attached yet. These bookings are not visible in the main window, and can only be reached through the menu ‘*View*’ – ‘*Preliminary bookings*’ (see Figure below). A preliminary booking can be changed to an ordinary booking by assigning a resource to the booking. It will then be visible in the main window as an ordinary booking.

In the window preliminary bookings are shown in form of rows in a list box, with bookings number, customer and note.

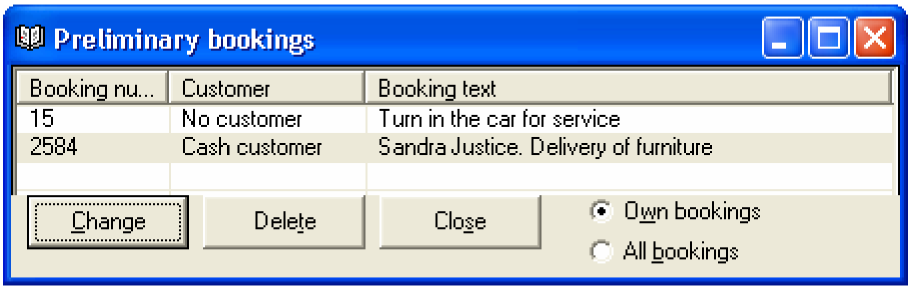


Figure: Preliminary bookings

To change a preliminary booking to an ordinary booking you open the window above. Then you mark the preliminary booking and select ‘*Change*’. You will be taken to the bookings window with the selected preliminary booking and you can select a resource. If you haven’t marked any booking, or marked more than one, you cannot select the button ‘*Change*’.

As default only the preliminary bookings created by the logged in user is shown. By selecting ‘*All bookings*’ you will see preliminary bookings made by everyone. You have the right to change and delete, both own and others preliminary bookings if you have the rights in the system, that is at least ‘Book’.

You can also delete preliminary bookings in this window. Mark one or more bookings and click on the button ‘*Delete*’.

NOTE! All selected bookings in the list will be deleted permanently! In other words, you cannot undo this.

An ordinary booking can be changed to a preliminary booking. See more below.

Tip! By holding down the ‘*Alt*’ key and drag a selected preliminary booking with the mouse to a resource and a time in the main window you can man easily change it to an ordinary booking.

The main window

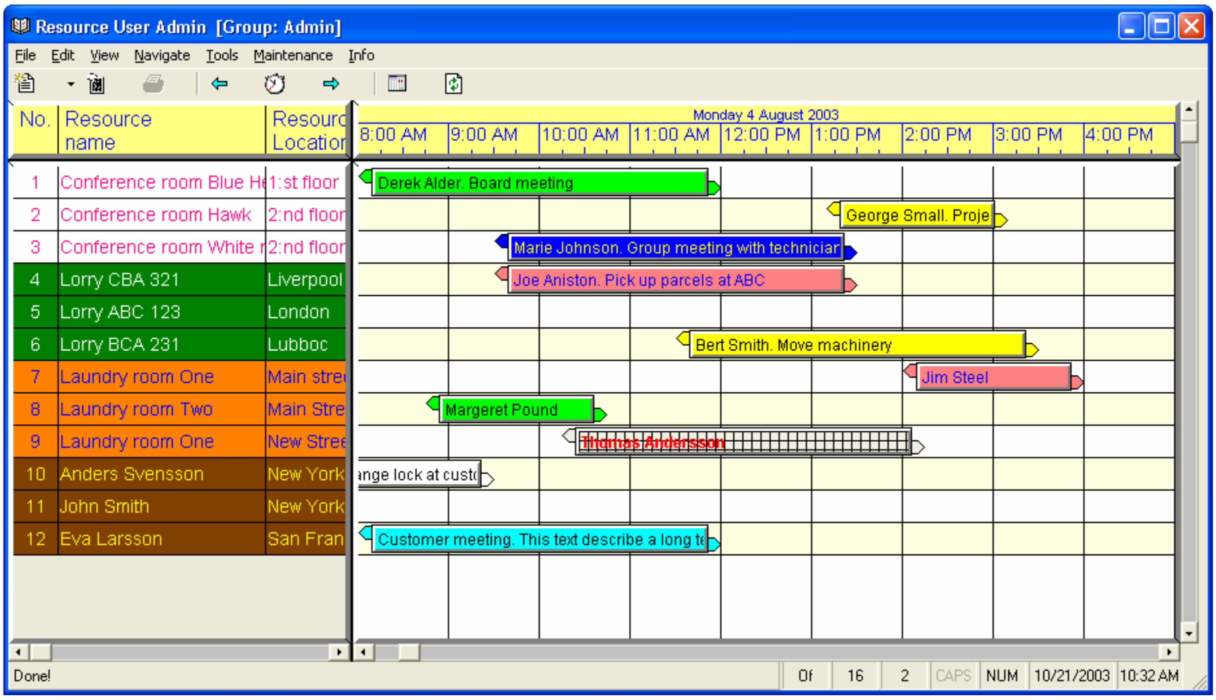


Figure: The main window

General

The main window is what is visible when you have logged in to Resource. Here are the resources to the left and bookings to the right. There are three different scrollbars, one vertical (on the right side) and two horizontal (at the bottom). The vertical scrollbar is used to browse between the resources and their bookings if there are more than can be shown in the window.

With the left, horizontal scrollbar you can select to see more of the columns on the left side, which constitute the resources in the main window. The right, horizontal scrollbar gives you a chance to, with the mouse, browse forward and backwards in time. It is easier to navigate with the buttons above. The interval can be select. Go to ‘*Options*’ under ‘*Tools*’ menu, and select the ‘*Time*’ tab. Under ‘*Times*’ you can select start date and end date.

At the bottom in the main window is the status bar. From left it contains: messages, filter indication, number of bookings, number of preliminary bookings, Caps-, Num Lock, date and time. The message panel (to the far left) shows information depending on what is done. Look here for any error messages. Filter indication shows '*On*' if you have filtered the resources otherwise it states '*Off*'. Next panel shows number of bookings and represents how many bookings that are visible in the main window (not alarm). The next panel is showing number of preliminary bookings for all users.

Most work with Resource takes place in the main window. Here can see what bookings a resource have for a time interval. If you have the right, you can add new bookings for a resource, change or delete bookings.

As default today's date is shown with normal work time 08:00 – 17:00 when Resource is started. Under the toolbar, at the top of the window, you can see date and hours in the time pane (with yellow surface). You can freely select what times that should be visible. Go to '*Options*' under the '*Tools*' menu, and select the '*Time*' tab. Under '*Times*' you can select your own configuration.

Views

A view is a way to look at bookings. Resource can show bookings in four different views; *day, week, month* or *year* view. You can easily change between the different views, but there are some restrictions for each view. Go to the menu '*Navigate*' and select between the four different views. Current view cannot be selected but the others are selectable.

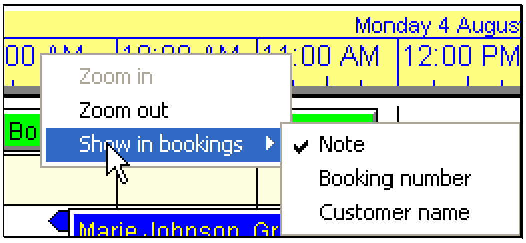


Figure: Zoom in & out

Tip! You can zoom in or out between the views by clicking with the right mouse button in the lower part of the yellow time area (see Figure above). This will show a menu with three options, '*Zoom in*', '*Zoom out*' and '*Show in booking*'. If you are in day view you cannot '*Zoom in*' and if you are in year view you cannot '*Zoom out*'. By aiming with the mouse you can zoom in on a month, week or day. When you zoom out from day view you automatically end up on the week that the day you were on belongs too. When zooming out from week view you will end up in the month, which that week belongs to. From month view you will go to year view.

Day view

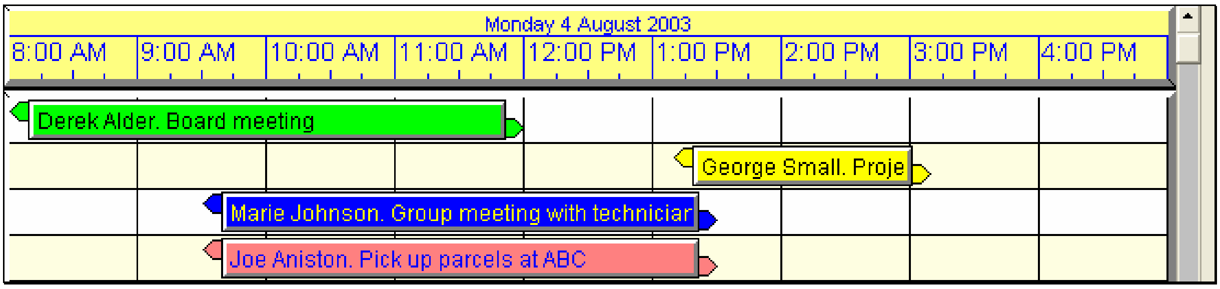


Figure: Day view (8:00 to 17:00)

In the main window the timescale is at the top of the booking area (see Figure above). When you are in *day view* two times are shown current date (e.g.: Tuesday 7 November 2000) and the work hours (08:00 to 17:00). There are options to manipulate these timescales (see more under options).

All bookings that are created in day view are counted in hours and minutes. Default time for these bookings can vary from 15 minutes and up. The steps a booking is ‘snapping to’, in day view, can be selected to 15, 30 or 60 minutes. Thanks to these steps it’s easier to move and change bookings with help of the mouse. Through the booking window you can set start and end time at minute level.

Week view

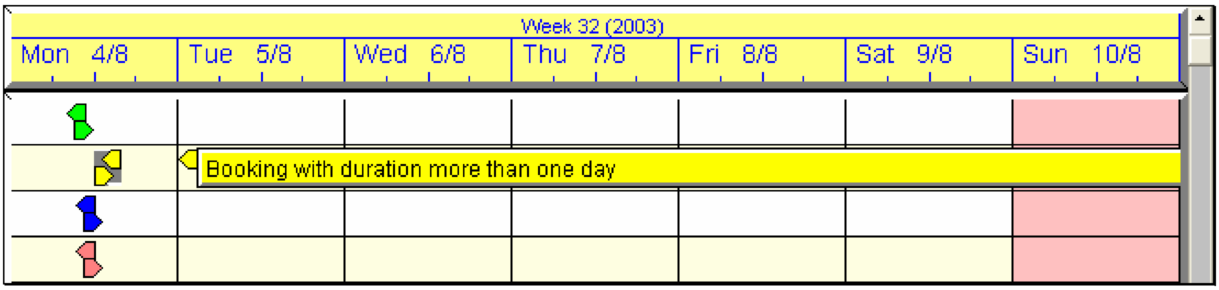


Figure: Week view

The week view shows seven days (Monday to Sunday). The timescale shows current week number and year at the top and days below.

NOTE! For week, month and year views, other time options than the day view, apply. E.g. a booking made in day view can only be moved whole days.

The Figure above shows the week view where some bookings are made in the day view. All bookings created in the week view are counted in full days. There is an option to show only five days in the week view (Monday till Friday). See options.

Default time for these bookings can vary between 1 to 30 days. The steps that a booking ‘snaps to’, in the week view, can be selected from 1 to 30 days.

Month view

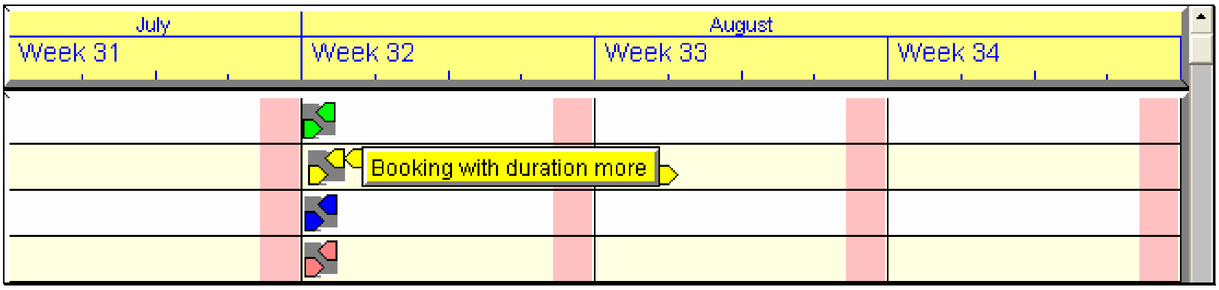


Figure: Month view

In *month view* four weeks are shown. In the top of the timescale there is the month or the month's that are applicable and below are the week numbers.

NOTE! If two months are shown it means that the first day of the month is in a week that also contains one or more days belonging to the previous month. This phenomenon can also arise when the timescale is at the outmost positions for the selected view.

Quarter view

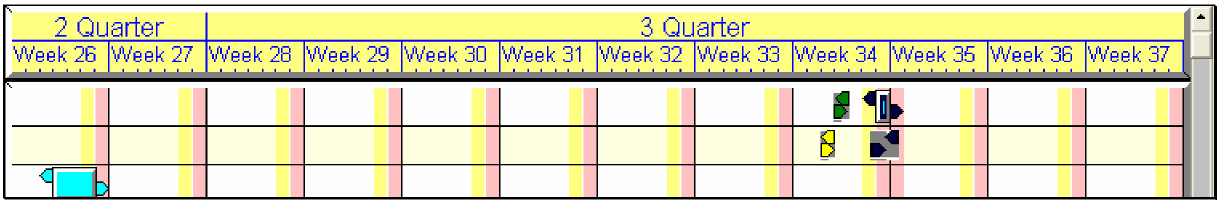


Figure: Quarter view

Quarter view displays three months (12 weeks). At the top of the timescale, it will appear or the quarter is concerned, and the bottom shows the week numbers.

NOTE! If two months are shown it means that the first day of the month is in a week that also contains one or more days belonging to the previous month. This phenomenon can also arise when the timescale is at the outmost positions for the selected view.

Year view

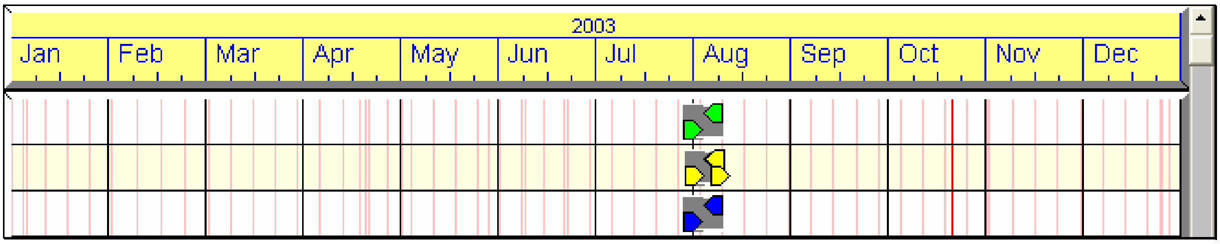


Figure: Year view

In *year view* there are 12 months shown. In the top of the timescale are the year and below are the month name abbreviated.

NOTE! If two years are shown it means that the first day in the first month is in another year. This phenomenon can also arise when the timescale is at the outmost positions for the selected view.

Tip! If you want to know what day a certain day is, you can click with the left mouse button in the lower part of the timescale on that day and the result is shown in the status bar in the main window e.g. 'Saturday 2 November 2002 (Halloween)'. This goes for all views except in day view. Red vertical markers indicate that a day is a Sunday or holiday and they are visible in all views.

Tool tip

As shown in the Figures above, bookings can be very small in size when you are in a zoomed out view since the timescale contains more time (compare day view with year view). To be able to know what a bookings is about you can, in all views, put the mouse pointer over any booking and get information in a yellow window, tool tip, about just that booking (see Figure below). The tool tip contains the following information: *Booking number, Start time, End time, Customer, Status* and *Note*.

Figure: Tool tip for a booking

Toolbar

At the top of the main window is the toolbar. If you have all rights you will see 8 buttons. If you don't have all rights you won't see the three first from left. Here is a description of the buttons, from left to right.

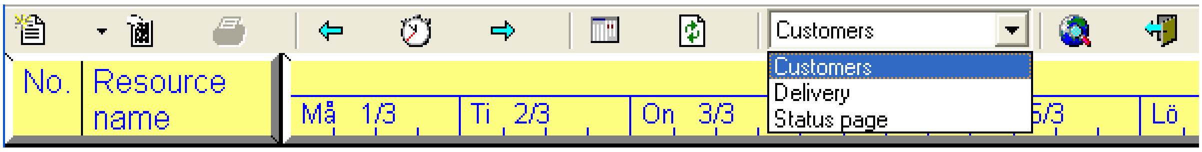


Figure: Toolbar (admin rights)

First we have '*New…*' which is a button with three functions, new *booking*, new *resource* or new *customer*. Only those with the rights can select new resource and new customer, while those who only have booking rights only sees one button and thus can only create new bookings. If you click direct on the button you will get a new booking. If you click on the arrow to the right of the button you will get a menu with the three above choices.

New *booking* will take you to the booking window to create a new booking. No resource is selected when you are coming into the booking window this way. This is a way to create a preliminary booking.

The button '*Drag & drop*' will also take you to the booking window for a new booking, but it will select a resource and a start time for the new booking. After you clicked on the button, you move the mouse pointer (in form of a pointing hand) to desired resource and desired hour in the booking area. You aim with the '*index finger*' in the mouse pointer. When you found the right spot just click with the left mouse button and you will be taken to the booking window.

With the button '*Print*' you can print selected bookings (one or more). This assumes that you have defined at least one report. More about reports later on.

To move in the main window a time unit backwards in time you use the '*Prev.*' button. The button '*Next*' will in this way take you a time unit forward in time. If you selected day view using these buttons you will always see the selected work time in the main window in difference from using the lower right scrollbar, which will advance you one hour at the time. These buttons will automatically skip Saturday and Sunday, if you selected so in options (see below). In week view the buttons will browse one week at the time and in month view one month at the time.

No matter where you are in time or which view you are in, you can easily go to today's date with the button '*Today*'. Today's date is based on current date in your computer.

At click on the button 'C*alendar*' the calendar window is shown. More information below.

The button '*Update*' will reread information from the database. This is only applicable for multi user environment, to see if any changes have been made in the database.

A new set has come into Resource, which allows you to have unlimited number of web addresses (URL). All addresses you put into Resource will be available here in the main window. By selecting the desired address and then click on the "*Internet*" button to the right you will see the selected address in your default web browser. Before using this function you have to add your addresses to the database and you will find it in this manual.

The last button "*Exit*" will terminate Resource and this is the same as selecting "*File – Exit*" in the menu system.

Calendar

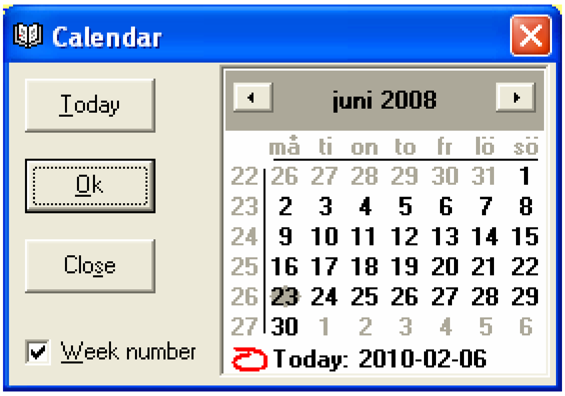


Figure: The Calendar

With the button '*Calendar*' a new window is shown. Here you can jump to any date in the main window. You can browse monthly, forward and backward, with the two buttons near the top. You can select if you want to see week number or not, by selecting the checkbox '*Week number*'. Today's date is marked with a red circle, and is visible only if it is part of current month. With the button '*Today*' you can jump automatically to today's date no matter where you are in the calendar.

In the calendar you can jump forward or backward between months by clicking with the left mouse button on the month name. You will see a list with all months where you select month by clicking on it. A similar function is also available for year. When you click on the year digits, two small buttons to the right of the digits will show up and with them you can change year.

When you browsed to the desired date and selected it (marked with a grey ellipse), you select '*Ok*', and you will return to the main window to selected date. If you state a date that is outside the interval selected for the main window, the first or last date in the interval (the closest) is selected. By default the interval is 6 months back and 6 months ahead in time, a span of 12 months (one year). Max interval is 6 years, i.e. 12 months (one year) back in time, and 60 months (5 years) ahead in time.

The booking window

General

The booking window can be shown in many ways: select the button ‘*New booking*’ or select ‘*New booking*’ under the menu ‘*File*’, via ‘*Drag & drop*’ or double click with left mouse button on a desired time for a desired resource.

You can also double click with the left mouse button on an existing booking or right click on it and select ‘*Change*’ from the context menu. The easiest way to create a new booking is to double click on desired time and resource. Irrespective of which method you use you will come to the booking window.

In this window you state properties for the booking. If you don’t state any resource the booking will be saved as a preliminary booking. You get a question if you want to save it as a preliminary booking and you select ‘Yes’ or ‘*No*’. If you select ‘*No*’ you will return to the booking window. By clicking in the checkbox ‘*Prel.*’ which reside at the top left, you will not get any question; the booking is automatically saved as preliminary. In this way you can change an ordinary booking to a preliminary. Start time, end time and status must be selected other properties are optional.

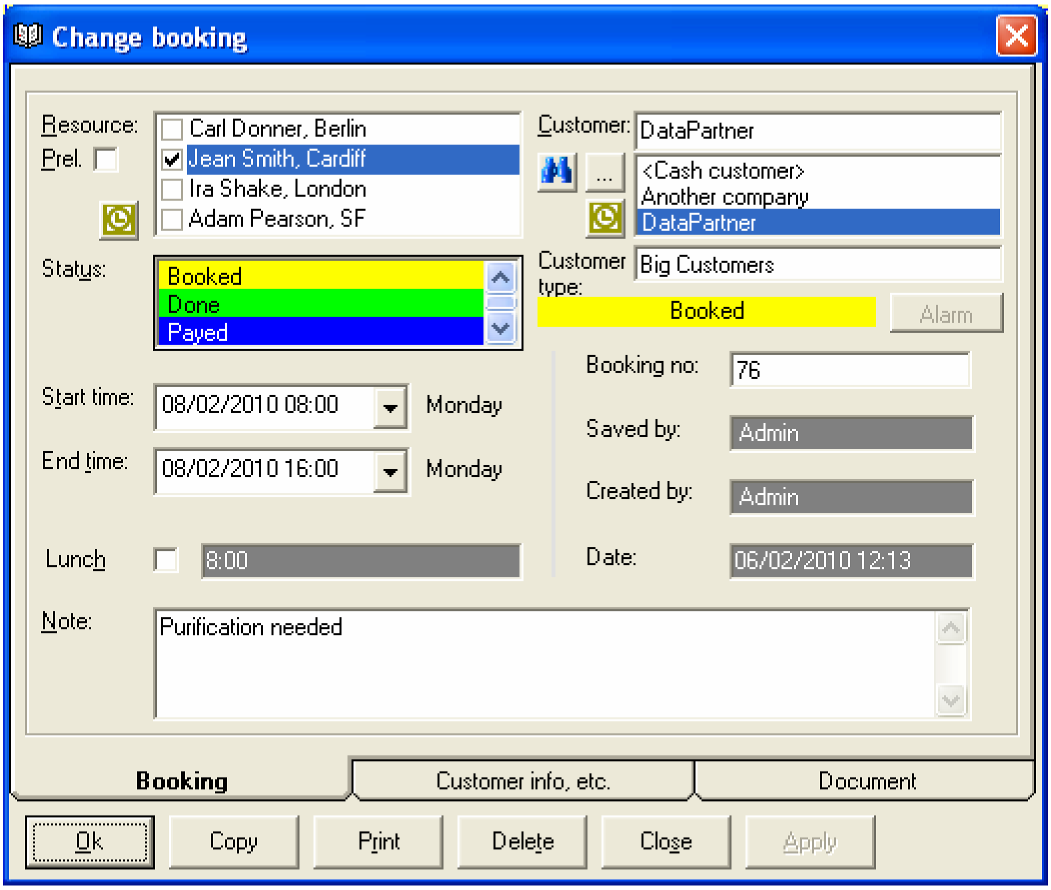


Figure: The booking window, tab one

At a **new** booking you can select more than one resource by selecting them in the resource list. The program will create one booking for each resource selected. The only exception to this is if you have selected no overlapping bookings and some of the bookings that is about to be created will overlap any existing booking. The overlapping bookings will not be created while the others will. All bookings have identical information except resource.

You can select a customer for the booking, but it’s optional. To select customer can be done in two ways. Either you select a customer in the list (up to the right) by searching for the customer or you write some text in the textbox above the list of customers. For each letter you write in the textbox, the list will automatically move to the first that fits what you have written. If no customer matches what you have written in the textbox, no customer for the booking is selected and you get a message about it.

The customer information is in the database for Resource and is added via the menu ‘*Maintenance – Customers*’ (you must have the right to administer customers). You can also import customers from your existing customer register. See more in a chapter about database administration later in this manual.

Beneath the customer list, you may see what type of customer that the selected client. If the client does not belong to any customer type, this field is blank. You can not change the customer type here, but it’s described earlier in this manual.

A booking can have different *Status* (see chapter about status above) and they are represented with different colours. By browse with the arrows to the right in the status list and then select the status desired the booking gets its status.

‘*Start time*‘ states when the booking starts and ‘*End time*‘ states when the booking ends. For day view you state both date and time. You can type in the digits or select year, month, day, hour or minute and use the arrows. For week, month and year view you only state date since these views only work with date and no hours or minutes.

The arrow on the right side of start time and end time will show a Calendar (see above for description of the calendar) to quickly change date for the booking. As information day name for selected day is shown to the right of the date field where Sunday and holidays are shown in red.

NOTE! The calendar only changes the date and not the time in day view. ‘*Booking number*‘ is stated automatically when you create a new booking (not alarm). If you use ‘*Booking number*‘ you can search for it in Resource (‘*Tools*’ – ‘*Search*’ – ‘*Booking number*’). There is no requirement that it is unique. There can be bookings that involve more than one resource, and at coping of a booking the booking number stays the same. That is why there can be many bookings with same booking number.

Under booking number, is the identity of who made the last change of the booking (*Saved by*) and who created it (*Created by*) and which date and time the booking was created (*Date*). This information cannot be changed and is updated automatically.

The checkbox '*Lunch*' is only available for bookings covering 12:00-13:00 and when you are in day view. It is used to mark if the bookings lunch hour should be accounted for or not. If selected the hour is not accounted for within the working hours, otherwise it is accounted for in the total time for the booking. Example: a booking start at 11:00 and finish at 14:00. The period is 3 hours (14-11=3). If lunch is selected for the booking, it will be accounted for 2 hours, otherwise 3 hours.

In the textbox '*Note*' you can write an optional text that will partly be visible in the booking in the main window. If it is a **new** booking you can select which of your standard texts (see above in this manual) that should be used. The text can consist of one or more rows with a total of max 2000 characters. To write on a new line here use Ctrl + Enter. If you only press Enter the Ok button is activated and you will save any changes and leave the booking window.

At the bottom of the booking window are 5 buttons. With the button '*Ok*' changes in the booking are saved and the booking window is closed. '*Apply*' is accessible when you made any changes of the information and mean that the information is saved but you will remain in the booking window.

NOTE! Changes saved with the '*Apply*' button cannot be undone.

To print a booking select '*Print*'. If there are any defined reports in Resource you can select one and will get a report in Word. If there is only one report defined in Resource it will be selected automatically.

NOTE! Word (version Office 95 or newer) has to be installed in your computer and at least one report defined in Resource to be able to print.

You can read more about defining reports later in this manual. If it is a new booking, it must be saved before you can generate a report. You will get a question when you click on '*Print*' and the booking is not saved. If you don't want to save the booking, you can abort the report.

The button '*Delete*' will remove the booking. This means that the booking is not visible in the main window but can be restored by anyone having the proper rights. More information in the chapter about status below.

NOTE! If you set that a question should occur, you will get a question to confirm the deletion (default), otherwise not.

Up to the left is a small button (looks like a clock at 15:00) to the left of the resource list that will start your e-mail program and fill in information about the booking. Up to the right is also a small button to the left of the customer list that will send information about the booking to the selected customer. Both these e-mail functions demand that selected resource and/or customer have an e-mail address stated in Resource and that you have some e-mail program in your computer.

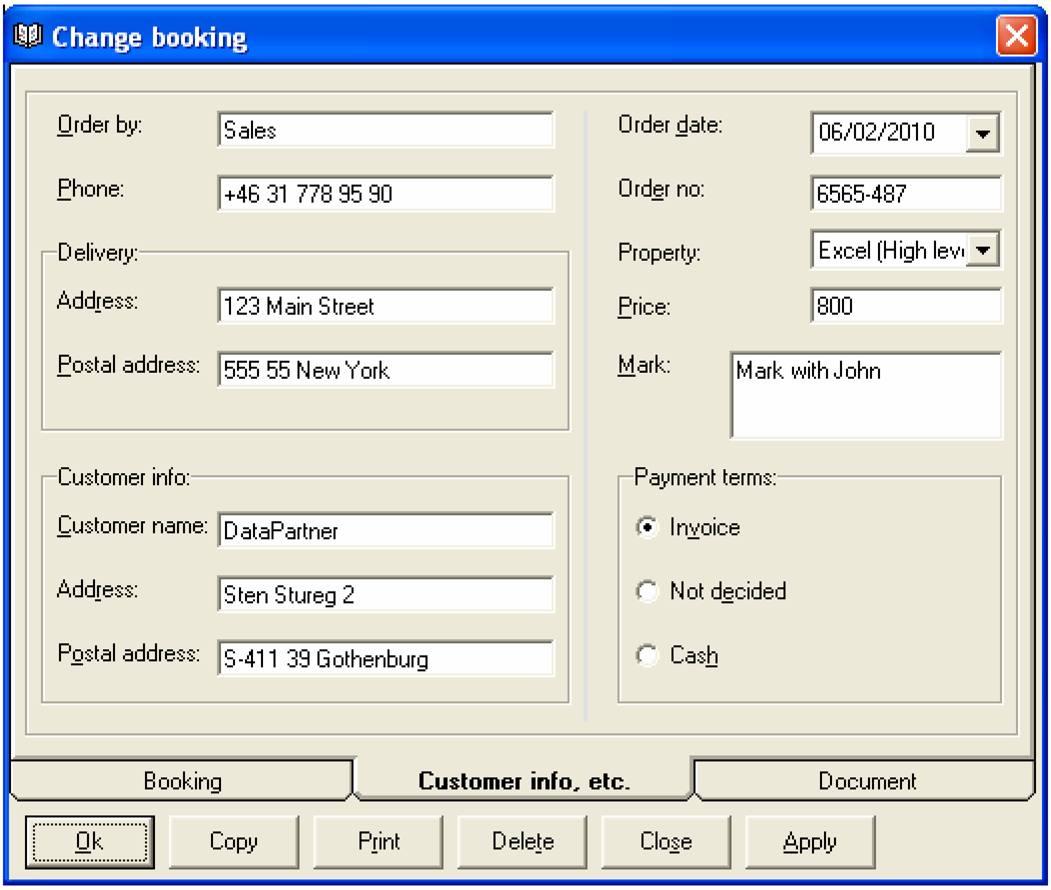


Figure: The booking window, customer information

On the second tab (customer information) is information about a customer and order date, order number, mark, etc. These fields can be used for optional information concerning the booking.

Here you can also choose whether the booking should be linked to a property and you select the property in the list at the top right.

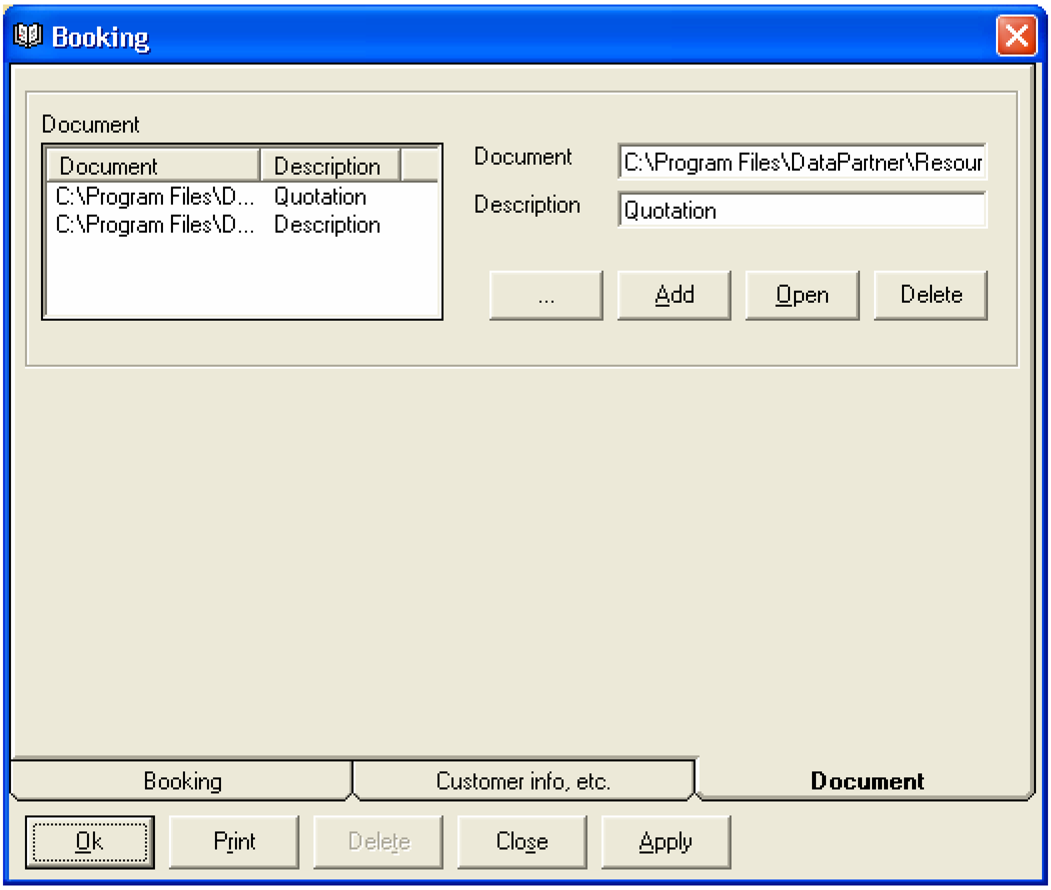


Figure: The booking window, Document

The last tab handles documents connected to the booking. You can associate (connect) one or more documents to a booking. Start with clicking on the button '...' too select a document. The field '*Document*' cannot be edited directly, you have to use the button '...'. Then you fill in a description in the textbox below. Then you click on the button '*Add*' to save the association. With the button '*Delete*' you remove an association.

If there is at least one document present you can open it by selecting it in the list and then click on the button '*Open*'.

NOTE! This assumes that the document is stored in a place where the user can read from, and that the program associated with the document type is installed in the computer running Resource.

With '*Close*' you will return to the main window without saving any made changes with the booking. Use this button to discard any changes. If anything is changed you still get a question if you want to save.

Change a booking

Changing a booking with the booking window can be made in one of the following ways: Mark the booking with single click with the left mouse button and then click with the right mouse button on the booking and select '*Change*' or double click with the left mouse button on the booking. Both methods will be shown in the booking window, where you can change the booking.

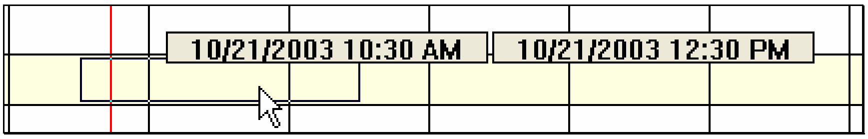


Figure: Change time with the mouse

You can also change the start time and the end time for a booking with the mouse. This is done by placing the mouse pointer over the '*ear*' in the left- or right edge of the booking. The mouse pointer changes form to an arrow with a line. Hold down the left mouse button and drag until the booking has reached the desired time, and then release the mouse button again. The bookings start time and/or end time can be extended or shorted to a time that is outside the visible time area. Continue to draw with the mouse to left or right and Resource will automatically scroll forward or backward in the timescale.

Tip! If you want to move a booking, see below.

By placing the mouse pointer over the right '*ear*' of the booking, and hold down the left mouse button, and drag to the right, you extend the booking with an hour (example: old end time = 13:00, new end time = 14:00).

Bookings can both be extended and shorted with help of this technique. You are bound to the step selected in options (default 30 minutes in day view, 1 day in other views). This means that you only can change the booking time in that size. If you temporally need to change in other steps it is easiest to do this in the booking window.

Move a booking

A booking can be moved either through changes in the booking window or direct with the mouse. In the booking window you change the start time and/or the end time and/or the resource and save changes with the Ok button as usually

With the mouse you hold down the left mouse button over the booking (not on the 'ears'), Resource will show full start and end time in a grey box and a cross of 4 arrows. Then drag the booking in the direction you want to move it (right, left, up or down).

This means that a booking also can be moved between resources with the mouse. This can also be done in the booking window.

As default you cannot put a booking that will overlap another booking for one resource. This can be changed it is not recommended because a booking can cover one or more other bookings.

From version 4.1.276 you can move several bookings simultaneously in time by selecting them. This can be done with the click of each booking and holding down CTRL while, alternatively, you can press CTRL + A to select all bookings that have visible start and end times. You can also select bookings by holding down SHIFT while you touch the bookings to be selected with the mouse.

When all bookings are selected, right-click on a booking and select "Change". Then a window will appear (see figure below) where you choose how many hours / days you want to move forward or backward. This means that only the start and end times for selected bookings are affected and everything else remains as before.

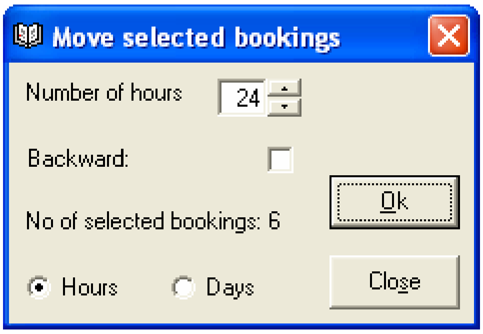


Figure: Move selected bookings

Note! If you do not allow overlapping bookings (the default), only the bookings that will have space at the new location will be move. If one or more bookings will not fit in the new location, it will be announced at the bottom of status bar in the program.

You can choose whether it is the number of hours or number of days selected bookings will be moved and if the bookings will be moved backward or forward in time.

Delete a booking

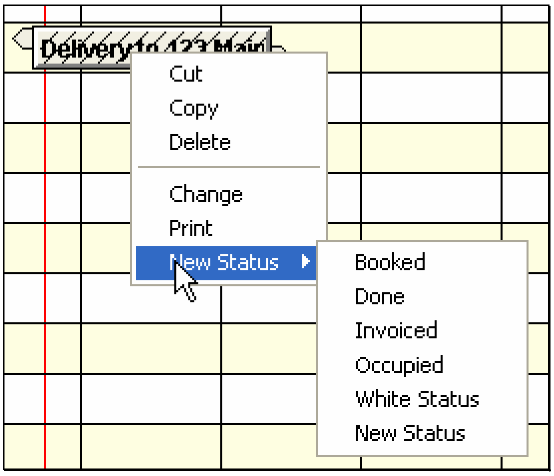


Figure: Delete a booking

To delete a booking, select the booking (or bookings). Then click with the right mouse button on the booking and select '*Delete*' in the context menu, or open the booking in the booking window where you select '*Delete*'.

You can also delete several bookings simultaneously. Hold down the Ctrl key as you click on each booking. Selected bookings are indicated with diagonal lines on a grey booking (see Figure above).

If all visible bookings in the main window should be selected, to be removed or printed, you can do this via menu '*Edit – Select all*'. This means that all bookings that have a start time greater than or equal to the first visible time and have an end time less than or equal to the last visible time in the main window. In other words, only those bookings you can see both start- **and** end time on.

Copy a booking

Bookings can easily be copied in Resource, both between resources and for one resource. This is easiest done with the mouse and the Ctrl key.

If you want to create one booking for more than one resource, do the following: create the booking with help of the booking window and there you select all desired resources. With the mouse: Mark the booking. Press and hold down the Ctrl key simultaneous as you drag the booking with the mouse to another resource or to a new time for the same resource.

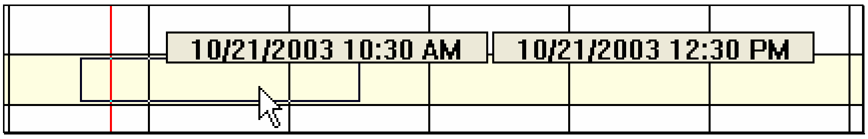


Figure: Copying en booking

When you copy a booking, the new booking will have the same values as the original one, except for resource when you copy a booking to another resource, and/or start and end time when copying to the same resource.

You can also copy a booking by right clicking on it and select '*Copy*'. Then you can right click on the resource and time you want to copy to and select '*Paste*'. You can paste the copied booking many times until you copy another booking

NOTE! There is a difference between bookings and alarms. You cannot copy or move a booking from a resource to the alarm row. The same goes for an alarm booking, which only can reside on the alarm row.

Alarm

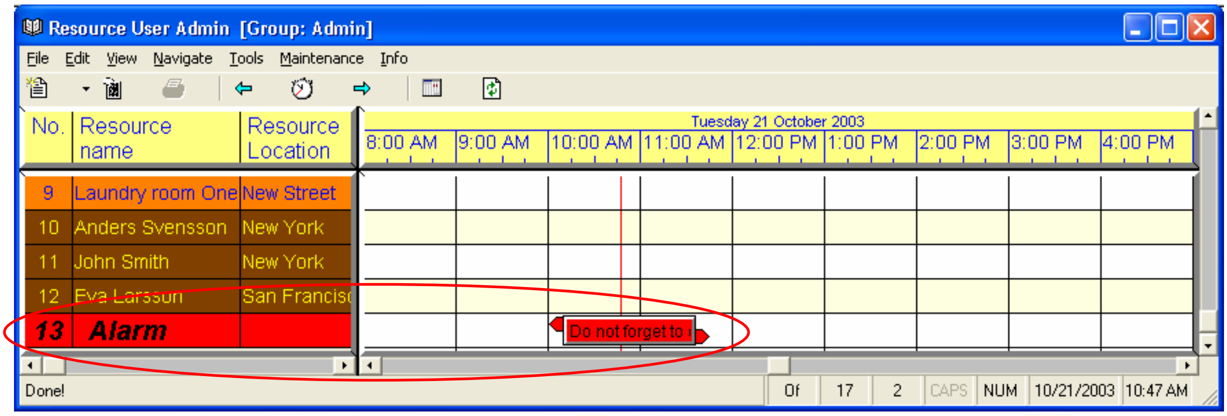


Figure: Alarm

Beside bookings you can have alarms in Resource. Alarms are shown as red bookings on their own row in the resource list (see Figure above). Normally they are shown at the bottom of the resource list in the main window. Depending on how you sort the resource list the alarm row can also be at the top of the list. These alarms are used as reminder at a specific time. The same rules apply for alarms as for ordinary bookings when it comes to copying and changes.

NOTE! Alarms are personal! I.e. they apply for logged in user. If one user creates them they will only be visible when that user is logged in to Resource.

The length of an alarm does not matter, since it's only the start time for the alarm booking that decides when an alarm should be activated. The alarm booking cannot be shorter than 15 minutes in day view. In other views the least time for a new alarm is 1 day.

Tip! If you have spaces make the alarm booking so long that you can read the text. Remember that alarm bookings cannot be overlapping if the options say so.

To show the alarm row it is easiest to right click in the yellow area at the top of the resource list and select alarm in the context menu. You can turn of alarms in the same way. There is also a possibility to show alarms in the options (see below).

When the time in the computer has reach the start time for the alarm you will get a message on the screen and when you acknowledge the message, it will be deleted. If Resource is not started when it is time for the alarm, the alarm will popup approximately 1 minute after the program is started the next time, and alarm function still is activated. In the same manor will 'old' alarms popup if the alarm function not is activated and then is activated.

Options

In Resource there are a number of options to facilitate your work in the system. The most options are unique to each user of the system. You will find options under '*Tools - Options*' on the menu. In the window shown, there are 4 tabs: *General*, *Time*, *Show* and *Other*. Depending on the users rights you can change different options. Those who have admin rights can only change two options. If you are logged in as 'Guest' you cannot see these options at all.

General

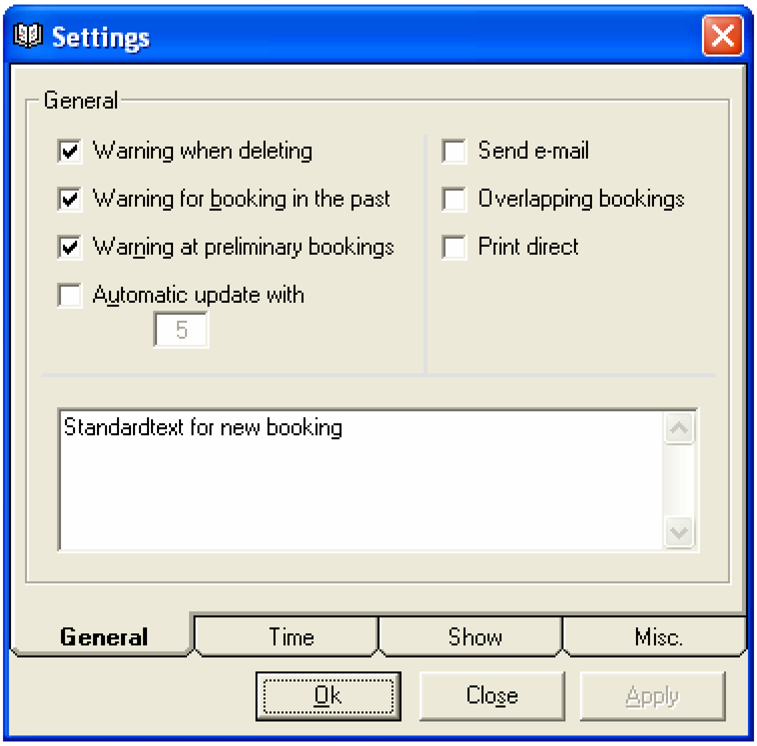


Figure: Options, General

The first tab '*General*' contains options that make it possible for you to decide if you want to have warnings in different situations. If 'W*arning at delete*' is selected, an acknowledgement is required when you delete a booking otherwise the booking is deleted without any question. It is selected by default.

If you selected 'W*arning at booking in the past*' you get a message about this. It is to stop you from create bookings which start time already has past. Selected by default.

'W*arning at preliminary bookings*' reminds you that no resource is selected for a booking. If you save a booking without select any resource you will get a question if it should be saved as a preliminary booking. No question will show if not selected. Selected by default.

To select '*Automatic updating with*' means that Resource automatically reread the database at a given interval. Max value for interval is 20 minutes. This option is not selected by default and can only be changed by users with admin rights. Only applicable in multi user environment when bookings can be changed by many persons.

NOTE! If you select this it can give extra payload in the network. The shorter updating interval you select, the more network traffic. The size of the traffic is depending on the number of selected resources and the time period selected. The more resources and time that is selected the slower the updating is. The speed is also depending on the computers capacity.

By checking the "*Send E-mail*" Resource will ask if you want to send email to resources and/or customers when you save a booking. This is for example, to remember to send a confirmation to a customer and to send information to a resource (if there is one person)

If you select 'O*verlapping bookings*' it will be possible to allow bookings to cover each other. We don't recommend this because a longer booking can cover a number of other bookings. This is not selected by default and can only be changed by those users who have admin rights.

By selecting '*Print direct*' Word will not be shown to the user at printing. The report will be written direct to the default printer in Windows.

In the textbox for '*Standard text for new bookings*' you can state a text that will be shown in new bookings if the user don't have any own standard texts (see earlier in this manual).

Time options

At tab 2 '*Time options*' you will find options concerning time in Resource.

First you have the options for '*Start*' and '*End date*'. This is the accessible time interval in the main window. The interval you select is calculated in relation to today's date in the computer when you start Resource. At '*Start date*' you select between –1 to –18 months and in '*End date*' you select between +1 to +60 months (5 years). This means that you can have a max time span of 6.5 years (-18 months and +60 months), and a minimum time span of 2 months (-1 months and +1 months).

To the right of '*Start date*' you can select the size of the '*Step*'. This is used e.g. when you move a booking with the mouse in the main window. If you select 30 minutes as '*step*' it means that the bookings only can be moved in step of 30 minutes, both forward and backward. This option is also used for minute information in the system, i.e. on all places where you can change a time in minutes. For day view you can select between 15, 30 or 60 minutes step in the list. Default value is 30 minutes. For other views you can select between 1-30 days. Default value is 1 day.

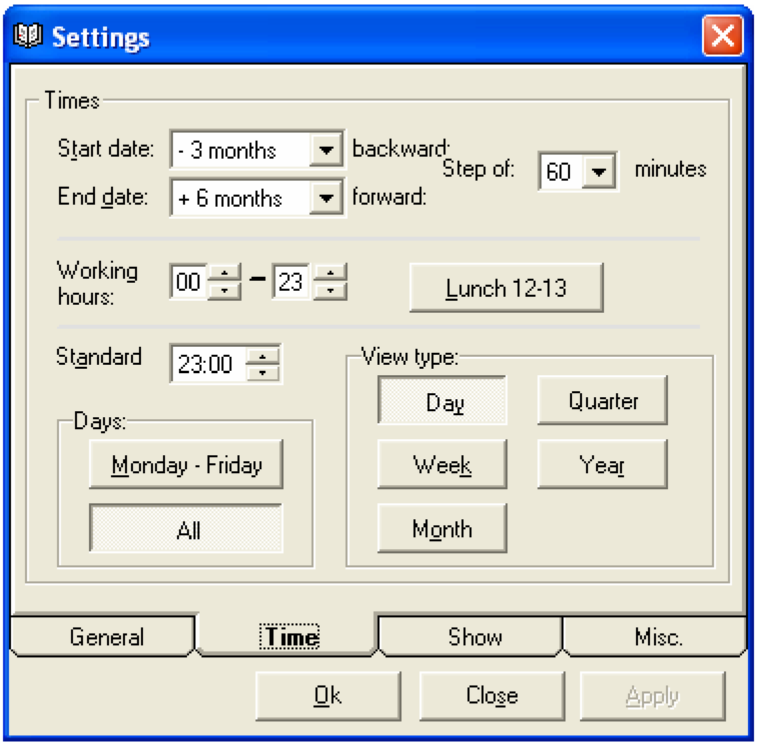


Figure: Options, tab time

‘*Work time*‘, states what hours that shall be visible in the main window in day view and also used for control of over time, etc. By default it is set to 08:00 to 17:00. **NOTE!** You don’t see the hour 17 since work time ends at 17:00. If you want to see the hour for 17, select 18:00 as end time. This property is only available for day view.

In ‘*Standard time*’ you can state the time interval that a new booking will have automatically. The time is stated in hours and minutes for day view. Max time is 23 hours and 59 minutes. You can mark either hours or minutes and type in digits or use the arrows to increase or decrease the time. For other views you select number of days, from 1 to 30 days.

The option regarding standard time is the general and will be used if a resource has no own standard time. If you want different standard times for each resource, use the options for resources (see earlier in this manual for resources). Those resources that have no standard time stated use the standard time stated here. If the resource has a standard time it will be used and this option will be ignored.

NOTE! Standard time is also used for other functions in Resource. E.g. when you search for free time for a resource if the resource doesn’t have an own standard time. State the most common time used here.

When you select ‘*Lunch 12-13*’ all new bookings that covers the hour between the hours 12 and 13, will automatically deduct 1 (one) hour for the booking. You can change this for each booking when you are in the booking window. This option is selected by default and can only be changed by users with admin rights.

Example: You have a booking that starts at 10:00 and ends at 15:00. If '*Lunch 12-13*' is selected, it means that the total time for the booking is 4 hours. If '*Lunch 12-13*' not is selected, the total time for the booking is 5 hours.

At the bottom of this tab you can select '*Day*'. If you select '*Monday – Friday*' and uses the navigation functions in Resource, the system will automatically skip Saturdays and Sundays. If you move in time with help of the scrollbar in the main window instead of the navigation functions, both Saturdays and Sundays will be shown, despite your selection in these options. If you select '*All*' all days of the week will be shown.

This option will also affect how the week view looks. If '*All*' is selected 7 days per week is shown and if '*Monday – Friday*' is selected only 5 days is shown.

On this tab you can also select what view you want to see in the main window, day, week month or year view. Some properties on this tab are only accessible in some views.

Tip! Select another '*View type*' on this tab, to access these properties.

Show

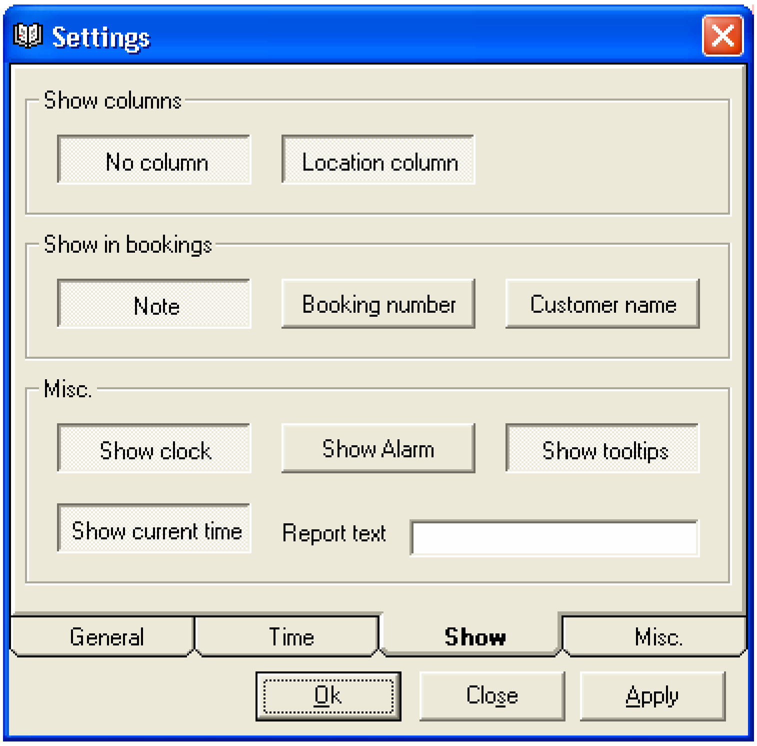


Figure: Options, tab show

In '*Show columns*' you can select if the "*No*" (serial number) and "*Location*" column should be visible or not. The "*Resource name*" column cannot be hidden.

With ‘*Show in bookings*’ you can select what should be visible in the bookings in the main window. There are 3 different alternatives: “*Note”* shows the note text, “*Booking number”* shows the automatically generated number and “*Customer name”* shows the selected customer. “*Customer name”* can show a customer name for a customer from the internal customer register, stated customer name in the booking for a cash customer or ‘*<No customer selected!>*‘ if you have not selected any customer at all. If the customer has been deleted from the internal register ‘<<<DELETED!>>>‘ is shown.

At the bottom of the main window time (hours and minutes) can be shown in the status list, which indicates what time it is in your computer. Select it with ‘*Show time*’.

‘*Show Alarm*‘ gives one additional row in the resource list at the left part of the main window. It will show any alarms registered in the system. The row can also be shown with a right click on the yellow area in the resource list in the main window and select ‘*Alarm*’. See more under alarms earlier in this manual.

Resource can give the user help in form of tool tips when the mouse pointer is still over objects in the program. If you selected ‘*Show tool tips*’ they are shown in a yellow window where the mouse pointer is. When you have become more familiar working with Resource you can turn of these tool tips with this option.

If ‘*Show current time*‘ is selected you will see a red vertical line in the main window, which indicates what time it is right now. The time is taken from the computer, which means if the clock in the computer has wrong time, so will Resource show this faulty time.

In the textbox ‘*Report text*’ you can state the text that should be printed in reports when there is no value or for a property. You can leave this textbox empty and nothing will be printed when a value is missing.

Other

On the last tab ‘*Other*’ is the following options:

In ‘*Booking number*‘ you can state the start value that is to be used for the next new booking. The value is incremented automatically for each time a new booking is started, i.e. if a new booking is started and you discard the creation, the booking number still will be incremented. You can any start value, however max 8 digits representation. The value can only be changed of users with admin rights.

NOTE! If you decrease the value there is a risk that bookings will wind up with same booking number.

With the "*Size of Resource %*" you can change the height of the resource row in the main window. The value can be varied between 10 and 70%. Smaller value gives a lower (less) height of a resource row.

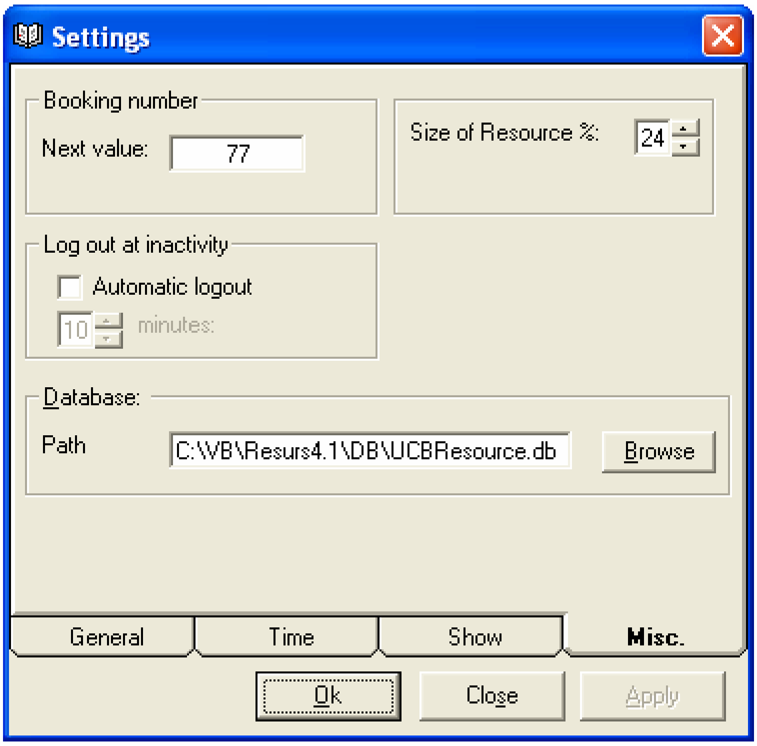


Figure: Options, tab other

'*Log out at inactivity*' is used for security reasons to automatically log out a user that have not touched the mouse or keyboard for the stated time. The time can be stated from 1 to 60 minutes and you use the small buttons to change number of minutes.

'*Database*' states which database that is currently used and its fully qualified path. You can change this for example when you go from 1 user to use Resource in a multi user environment in a network. Use the '*Browse*' button to specify the path to the database.

NOTE! Resource must be restarted in order to log in to the new database. You will be using the old database until you have restarted the program.

Functions

Resource has other functions to facilitate your work. You can filter both resources and bookings. There are functions to search for booking number, customers, note texts or available time for a resource. You can also clear the database of bookings and see information about the database. Below you will find description of these functions.

Filtering resources

Sometimes you don't want too see all the resources simultaneously, above all when you have many resources. You can have different types of resources in the same database and create different groups and show them at different occasions. It goes faster to read bookings from the database the fewer they are. Because of this there are several possibilities in Resource to both filter on resources and limit the times in the main window.

Under menu '*View'* you can select to see all or certain resources.

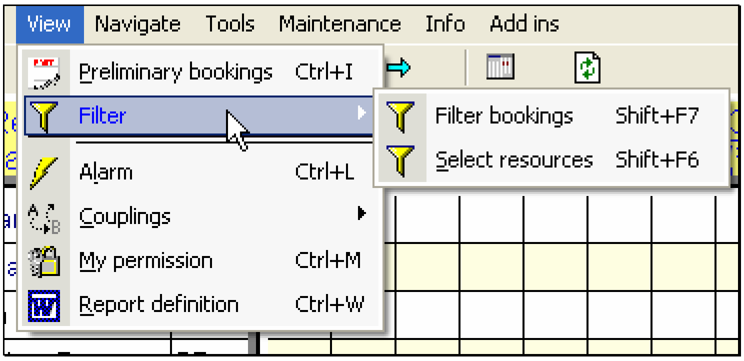


Figure: View menu

If you select '*Select resources*', you will see the window below. Here you can select if you want to see resources from a certain group and/or those who have a certain location and/or those who have a certain property.

First you select "Selected resources' at the top of the window. By selecting '*Group*' you are given the opportunity to select in the list below, the groups that shall be shown in the main window. If you select '*Location*' you can select in the list below, the locations which resources are located in and should be shown in the main window. If you select '*Property*' you can select from the list with properties in the same way.

If you select more than 1 row in the lists it is considered as an **or** combination. Example: if you select both location '*Chicago*' and '*New York*' all resources that are located at Chicago **or** at New York will be present in the resource list.

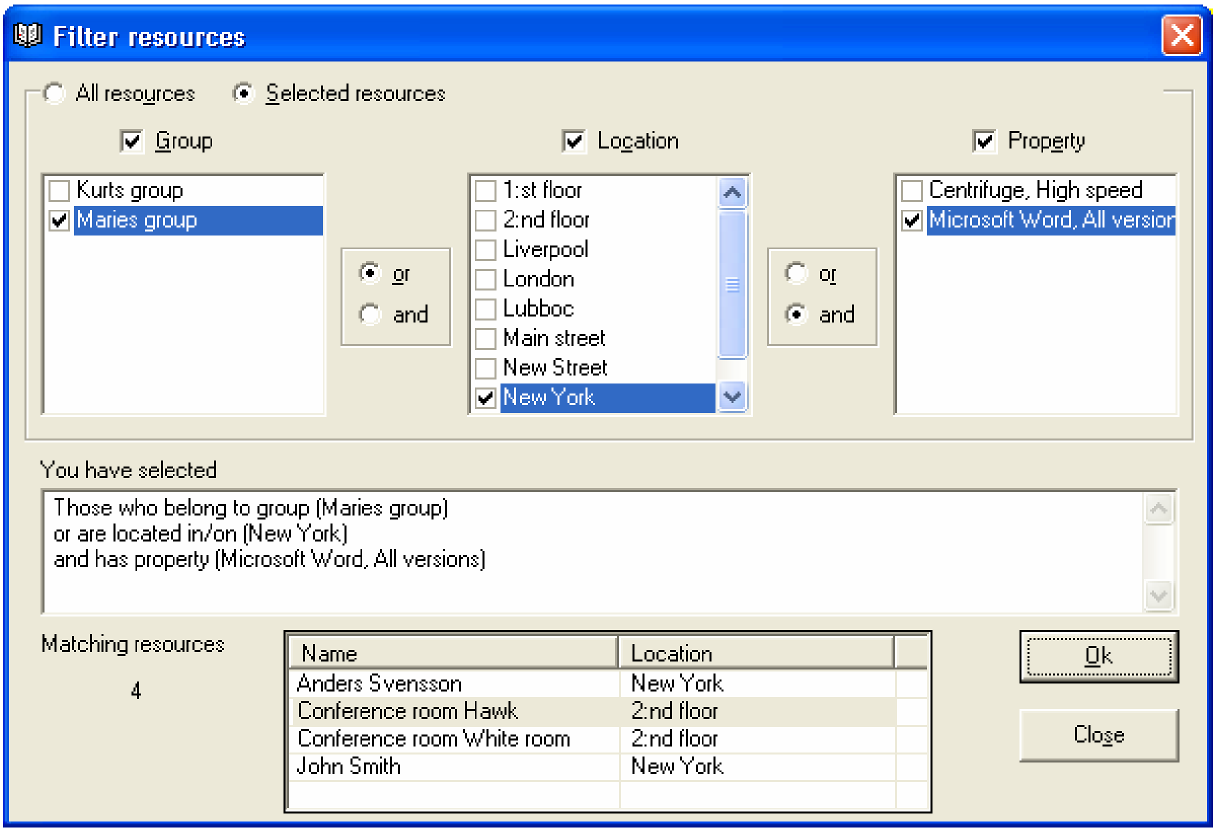


Figure: Filter resources

You can select a combination of '*Group*', '*Location*' and '*Property*'. If you choose to filter on more than one you can also select how they shall be combined with each other with '*and*' respectively '*or*'. If you select '*and*' both lists selections must match for the resource to be shown in the main window. If you select '*or*' all resources that match at least one of the selections in one of the lists will be shown in the main window.

You can see the logic as in the Figure above where it is shown in plain English what you have selected: Those who belong to the group (*Marie's group*) **or** are located at (*New York*) **and** have the property (*Microsoft Word*).

When you select a combination of group, location and/or property you will see a list of matching resources at the bottom of this window. The list has the columns name and location. The list can be sorted on the columns (on at the time) and is done by clicking on the header for each column.

NOTE! A resource can **only** be located at one location but one resource can be part of none, one or more groups. The same apply for relations between resource and properties.

To delete all filters to show all resources, you select '*All resources*' (see Figure above).

Under the "*View*' menu you can also see preliminary bookings by selecting it from the menu. For a description of preliminary bookings see earlier in this manual.

By selecting '*My rights*' the user sees what rights he/she has.

For '*Report definition*' we refer to the chapter with reports later in this manual and the same goes for '*Alarm*'.

For description of the menu '*Connections*' see earlier in this manual at groups and properties.

Filtering bookings

To facilitate the work in Resource, there is a function to select which bookings you wish to see. You choose which statuses you want to see in the main window by selecting them in the list on the left.

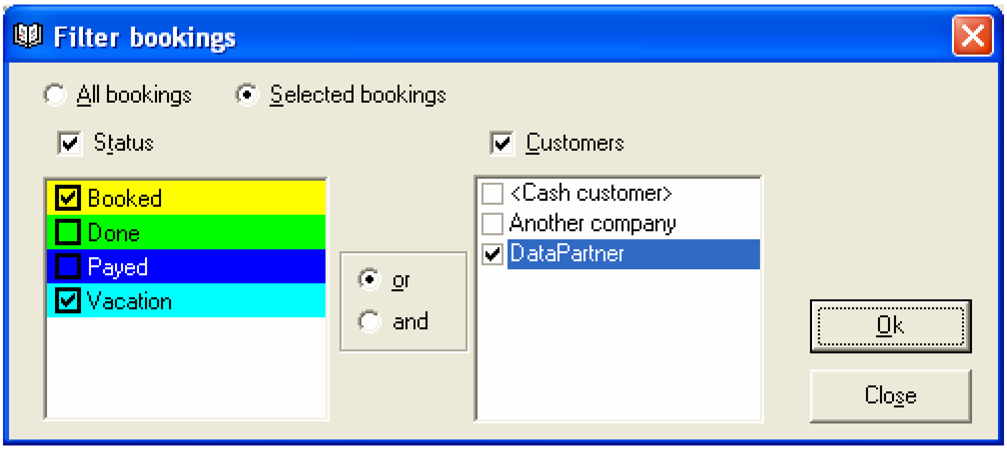


Figure: Filtering bookings

If you want to see only bookings concerning one or more customers you choose this in the same way by checking them in the list to the right. If you have chosen to filter **both** Statuses and Customers you choose which combination it should be between them. If "*or*" is selected Resource will show any bookings that meets the selected statuses **or** customer selections. If you choose "*and*" you will only see bookings that meet the selected statuses **and** customers.

To view all bookings, select "*All bookings*".

Repeated bookings

In many cases there is a need to book a resource continuously. For example a conference room can be booked for reoccurring board meeting every third Tuesday between 10:00 and 12:00, a football team want to book a stadium each Monday between 18:30 and 21:00 etc. This can be done in an easy way in Resource by using the function '*Repeated bookings*' which you will find under the menu '*Tools*'. The following options are done here.

Under '*Frequency type*' you select how often the booking should be repeated. You can select all from e*ach* to every *10:th*. Example if you select every third and '*Time unit*' is week it means that a booking will be created every third week for the selected resource.

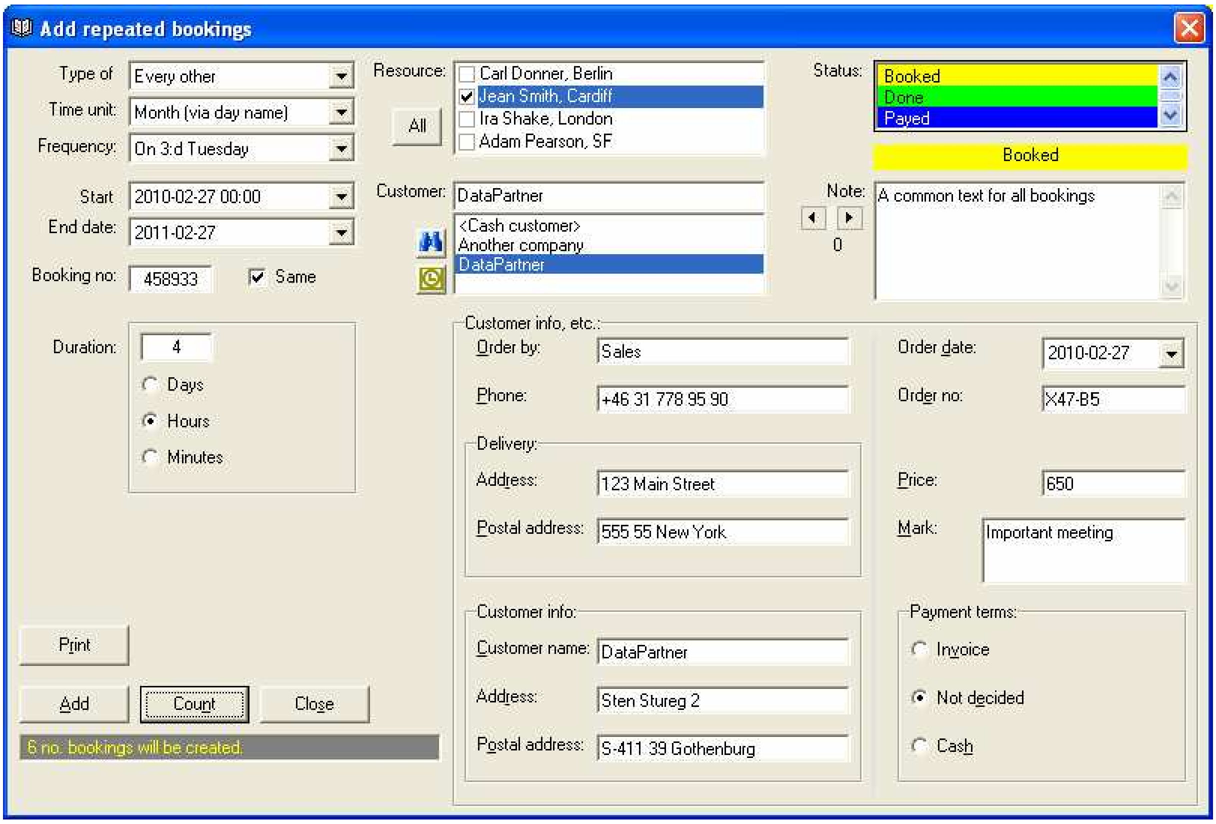


Figure: Repeated bookings

Then you select '*Time unit*' which consist of Year*, Quarter, Month, Week* and *Day*. The selection month can be done in two ways, via *day name* or *day number*.

The difference between *day name* and *day number* is the representation. *Day name* means that you select between the weeks 7 different days and if it should be the first, second, third, forth, fifth or last weekday. With *day number* you select the 1, 2… 31 in a month.

Next selection is '*Frequency*' which is depending on '*Time unit*'. The selection is **not** applicable if you in the '*Time unit*' selected *Year, Quarter,* or *Day*. See '*Time unit*' above.

'*Start date/time*' states when bookings shall begin adding and '*End date*' states when bookings should stop being added. '*Booking no*' can be stated for all the bookings that will be created. If you want all bookings to have the same booking number you select '*Same*', otherwise each booking will get its own booking number. If you don't want any booking number type zero in the field and select '*Same*'.

With '*Duration*' you state how long each booking should be. Duration can be expressed in *Days*, *Hours* or *Minutes* and are selected to the right of the field. You can only type digits in the field and minimal time cannot be less that 15 minutes.

In the list '*Resource*' at upper right you select the resource or resources that the bookings are aimed at by selecting them. At least one resource must be selected. The button '*All*' will select all resources in the list.

You can select a '*Customer*' which will be stored with all bookings that are created. This is optional.

'*Note*' is the text that describes the booking/bookings. Under status you select '*Status*' which all bookings will have.

At the bottom left is 3 buttons. The button '*Count*' will calculate the number of bookings that will be created if you select '*Add*'. The result is shown in the grey area below the buttons. If there are bookings that will be overlapped and it is not allowed in the system the function will not add them, that is why it can be shown in the grey area in the following way: '*13 bookings created of 14 possible*'.

With a click on '*Add*' bookings are created and you return to the main window. You will have a question if you want to add more bookings before the window is closed. If you select '*Close*' you will return to the main window without creating any bookings.

Search

There are 4 powerful search functions in Resource to search for bookings. You will find them under the menu '*Tools*' – '*Search*'.

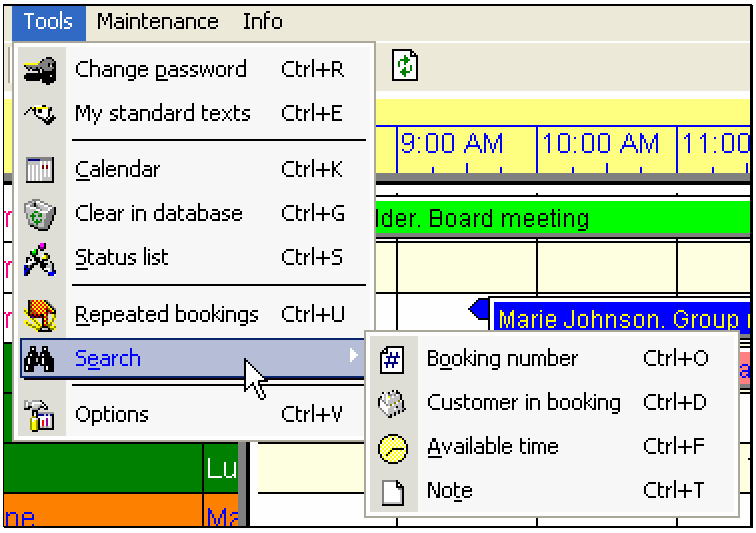


Figure: Search menu

Booking number

To search for a certain booking number, you select '*Booking number*' and in the shown window you state which booking number you want to search for.

NOTE! Booking number doesn't have to be unique, and a search can result in many bookings.

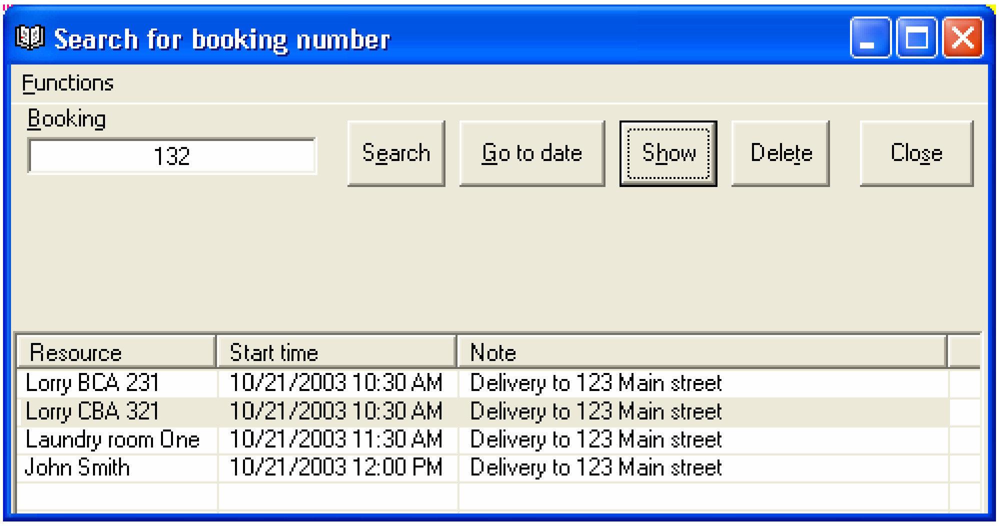


Figure: Search booking number

When you have stated booking number you click on '*Search*' and the program will show the bookings that matches the sought booking number. The list consists of Resources, start times and note text. If it is a preliminary booking the text '*<<PRELIMINARY>>*' is shown instead of resource name in first the column.

You can select one of these bookings and click on '*Go to date*' to put the main window on the date the booking is. The list can be sorted, ascending or descending, on any column (one at a time) and clicking on the header for each column does it.

NOTE! You got to remember which resource the booking was for, and which start time. There might be many bookings on the date you wind up on by clicking the '*Go to date*' button.

By select the button '*Show*' you will see the selected booking in the booking window and can change its properties. When you are finished you return to the search window. If you have selected more than one booking when you click on the button '*Show*' the first selected booking is shown.

With the button '*Delete*' you remove all the selected bookings.

You can also perform a new search by typing in a new booking number and select '*Search*' again. If you click on '*Close*', you will return to the main window.

There is a menu '*Functions*' that contains all the button functions and a print function. With the print function you can print the content in the list.

Customer in bookings

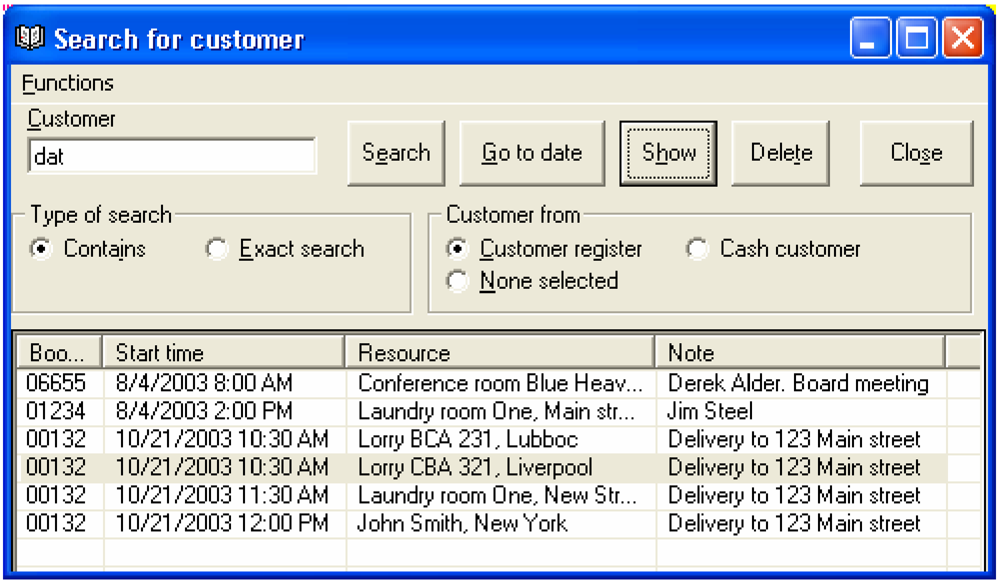


Figure: Search customer

Med the search function '*Customer in bookings*' you can find bookings for a customer. In the window shown above you can state a part of ('*Contains*'), or exact ('*Exact search*'), customer name. With exact search you must state the customer name exact in the same way as it is stated in the booking, with the alternative '*Contains*' it is enough with a part of the customer name.

Tip! If you type just a few characters and search you might have many hits. In that case, try to type some more characters and search again.

You can select if the sought customer is in the internal customer register in Resource or if it is a cash customer.

If there are any bookings matching the selected criteria they will be shown in the list in the lower part of the window. The list shows booking number, start time, resource and the note text. The list can be sorted, ascending or descending, on any column (one at a time) and clicking on the header for desired column does it.

Mark the booking you want and select '*Go to date*' and the main window is positioned at the date of the booking.

NOTE! You got to remember which resource the booking was for, and which start time. There might be many bookings on the date you wind up on by clicking the '*Go to date*' button.

The buttons '*Show*', '*Delete*' and '*Close*' have the same function as the search '*booking number*' (see above). Here is also a menu '*Functions*' which contains all the button functions and a print function. This is the same function as stated above.

The note text

You have a function that makes it possible to search for text in the note field in one or more bookings. The function is found under the menu '*Tools – Search – Note*'.

In the window you state the sought text and then you select '*Search*'. If there are any bookings whose note texts contain the sought text they are shown in the list in the lower part of the window. The list can be sorted, ascending or descending, on any column (one at a time) and clicking on the header for desired column does it.

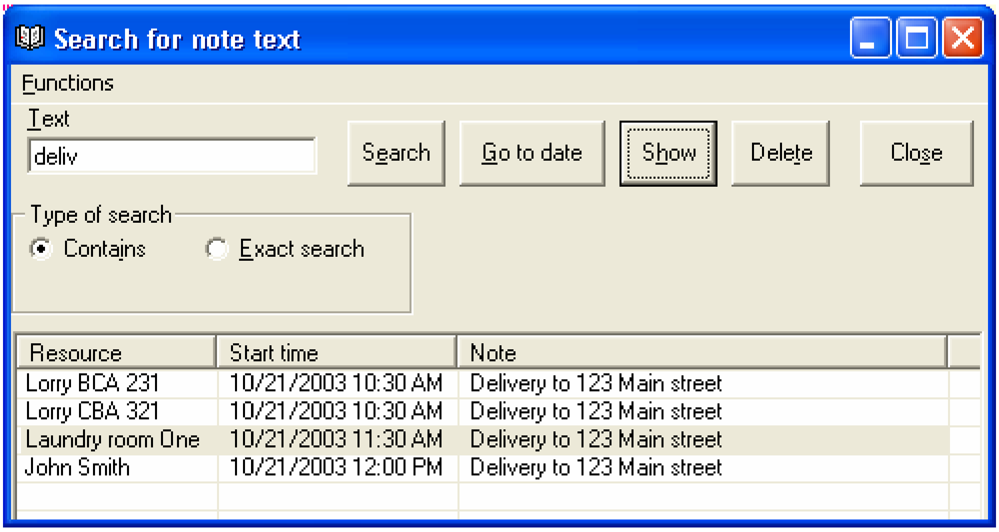


Figure: Search for note text

Mark the booking you want and select '*Go to date*' and the main window is positioned at the date of the booking.

NOTE! You got to remember which resource the booking was for, and which start time. There might be many bookings on the date you wind up on by clicking the '*Go to date*' button.

The buttons '*Show*', '*Delete*' and '*Close*' have the same function as the search '*booking number*' (see above). Here is also a menu '*Functions*' which contains all the button functions and a print function. This is the same function as stated above.

Available time

Figure: Search available time, resource selection

To search for an available time for a resource can be made in different ways. You can search for the first available time for a resource, for resources that are located at a special location or for resources that belongs to a special group. In the resource list you can select a resource, a location (in [ ]) or a group (in < >).

There is two ways to come to the guide to search for available time, which consists of three steps. If you want to search available time for a specific resource, it is easiest to right click on the resource in the main window (in the resource area), and select '*Search 1:st available time*' from the context menu. You will come to a guide with the selected resource stated in the resource list. Pre selected values in the window are: **resource**, **date** (current date in the main window) and **time** (default time for a new booking for the selected resource).

Alternatively you can select the menu '*Tools – Search – Available time*'. This way you won't get any pre selected values so you have to select it yourself.

You can select '*First available*' which will give you the resource that first are available among the resources visible in the main window.

In the frame '*Time*' you state the time you are searching for. Depending on which view you are in the main window time is stated in hours and minutes (day view) or in number of days (other views).

By checking '*Overtime*' you allow the booking to go beyond the stated working hours in the day view. If you want to create a booking that consists of longer time than the stated working time, you have to select 'O*vertime*'. The checkbox is only available when you are in day view.

Click on '*Prev.*' to go one step backward to change values before a new search. The button is not available in the first step.

When you click on '*Next*' the search is performed if you have selected a specific resource. If you selected '*First available*', '*Location*' or '*Group*' you will see step two which gives you a possibility to select one or more properties (if you have defined any properties) that should match the resources you are searching available time for. See Figure below.

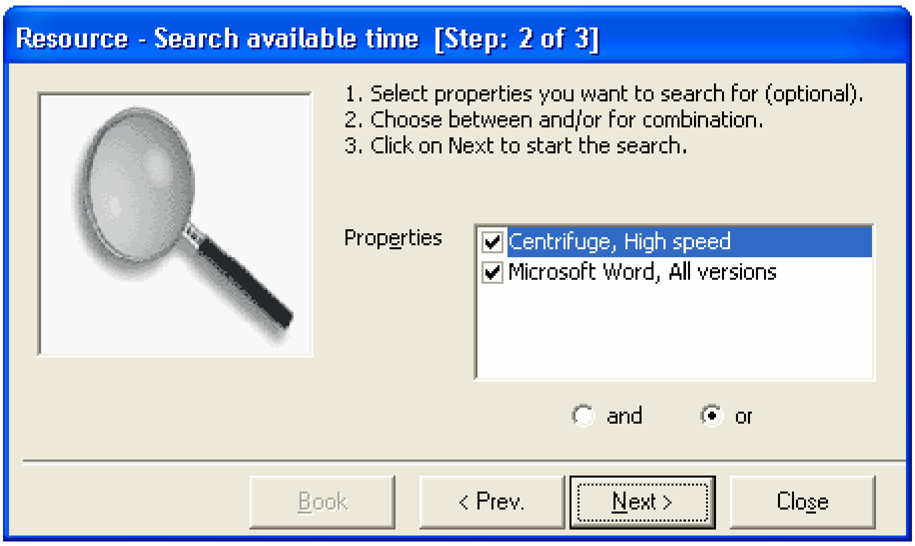


Figure: Search available time, properties

If you select more than one property you can also select how these properties shall be combined. ‘*and*’ means that the resource must have all selected properties. If you select ‘*or*’ it is enough if the resource have one of the selected properties.

Figure: Search available time, result

Resource shows start time and resource in a list as result. The last step in the guide shows a list with zero, one or more resources (see Figure above). In the list you can select one or more resources, which you want to book.

NOTE! When selecting more than one resource, **must** all the selected resources have the exact same start time to be able to create bookings for all selected resources.

If date and time is what you want, you select the button ‘*Book*’ to go directly to the booking window. In the booking window start time, end time and resources is set automatically.

If you click on ‘*Close*’ you will return to the main window.

Status list

Resource has a function easily handle status for many bookings. By selecting different combinations in the status list according to the descriptions below, you can see all bookings that match these combinations.

By selecting '*Start time*' respectively '*End time*' you can limit the number of bookings that will be shown. By default the time interval that the main window has, is shown.

You can also select to only see the bookings for a certain '*Customer*', the bookings a certain '*User*' of the system created and/or the bookings for a certain '*Resource*', location or group. If you select any combination of these all must be fulfilled for the bookings to be shown in the list.

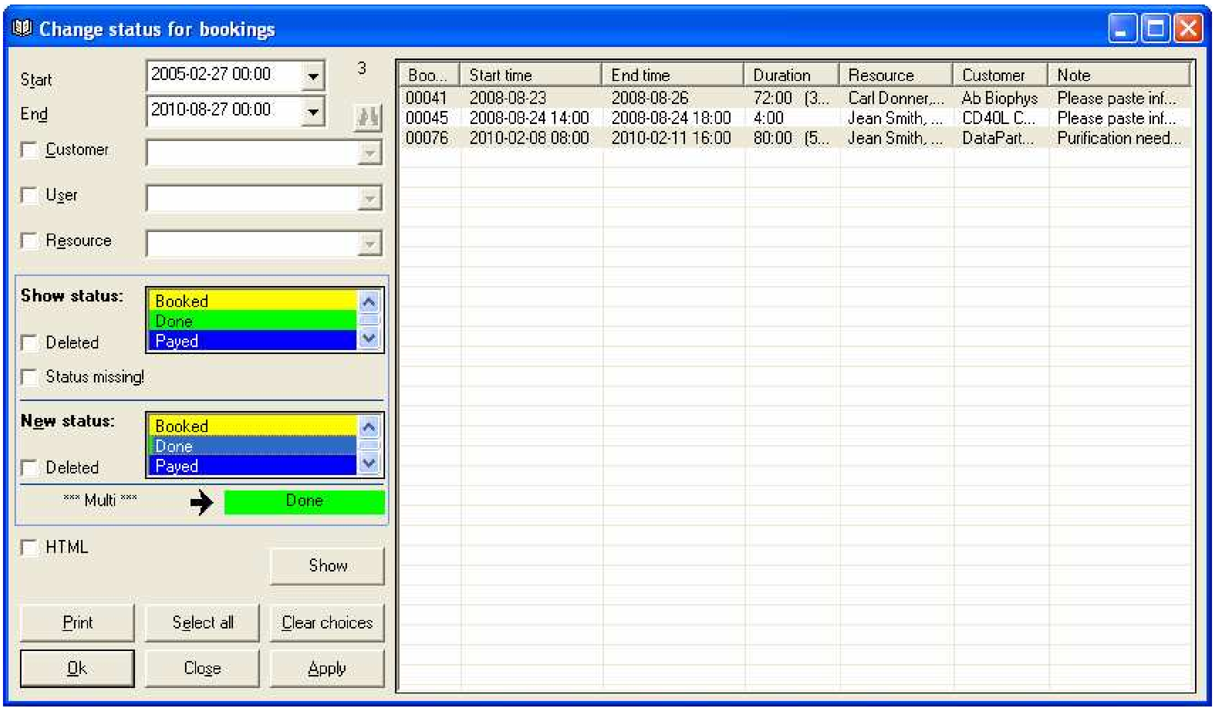


Figure: Status window

'*Show status*' is where you select the status that the bookings **have** that shall be shown in the list to the right. You can also select '*Deleted*' to restore deleted bookings.

NOTE! '*Deleted*' is only available for those who have the right to restore deleted bookings (see rights earlier in this manual). When you selected a status the list will automatically be filled with the bookings that have the selected status.

Next status '*New status*' is where you select the **new** status the selected bookings shall have. You must select a new status to activate the button '*Apply*'.

In the list to the right are the bookings number, start time, end time, resource and the note text shown. You can sort the bookings on any column. Just click on the header of the column you want to sort on and the list is sorted automatically according to the column. First click gives you ascending and the second descending sorting of the column.

The Lists columns can also be changed in size by placing the mouse pointer between the headers at the top of the list. Hold down the left mouse button and drag to the right or to the left. The window can also be changed in size as most programs in Windows can.

NOTE! When you select '*Ok*' or '*Apply*' the status of the selected bookings will be changed to the new selected status. Exception is if you don't have the right to do so. E.g.: the user have book right but may not change others bookings.

If the user selects a number of bookings in the list will only those created by the user to change status, while the other will remain unchanged.

With the buttons '*Select all*' and '*Clear choices*' you can select/deselect all the bookings in the list.

The button '*Print*' will print what's in the list. Only selected bookings are printed. If you check the HTML, a simple printout for the Web consisting of an HTML file and a CSS file is created. In this way you can quickly post information on a website or the Intranet.

The printout is shown in a preview window where you can browse and look at the different pages if you have not selected Print direct in options (see earlier in this manual).

Clean the database

After some time of use of Resource there might be a lot of bookings in the database. Depending on how much disk space there is for the database, you can let all the bookings stay in the database. Since it is practice to take a backup of data, it can be recommendable to every now and then clean up the database from old bookings. You will have a quicker access if there are fewer bookings in the database.

Resource does not remove any bookings from the database when a user deletes a booking it's only marked as deleted but still remains in the database. This is because you shall be able to restore bookings that have been deleted by mistake. Only by '*Clear in database*' can you remove deleted bookings permanent from the database.

To clear 'old' bookings select the menu '*Tools*' – '*Clear in database*', which will give you a window with a date at the top of the window, and database information. You can be logged in with the book right, but you must know the password for Admin to get to the '*Clear in database*'.

At the bottom of the window is a checkbox with the text '*Only deleted*'. If you select it the program will only remove the bookings with status deleted in the database. If it's not selected all types of bookings will be removed, except preliminary bookings. Regardless if you select this or not, bookings will only be removed up to the selected date.

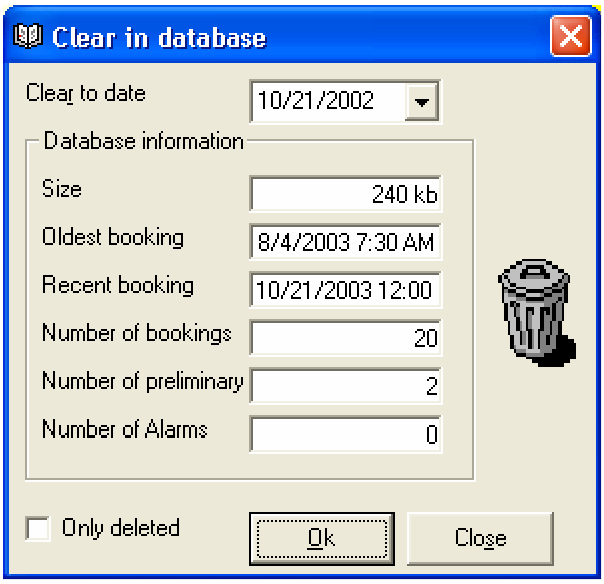


Figure: Clear in the database

NOTE! This function will only remove ordinary bookings - <u>not</u> preliminary bookings. Preliminary bookings are removed through menu '*Show – Preliminary bookings*' (see above).

At the top of the window you select the date you want to remove bookings up to. You can change date by clicking on the arrow to the right of the date and a calendar is shown in which you select a date. You can also type digits direct in the date field. By default the date is the same as the main window is starting at (the first date in the selected time interval), i.e. the program suggests a removal of the bookings that are not shown in the main window.

If there are no bookings before the selected date, you will get a message.

If you select '*Ok*' the program will remove all bookings **before** the selected date but not bookings that have the selected date. You have to acknowledge before any bookings are removed. Afterwards you will be noted of how many bookings that were removed.

By clicking on '*Close*' you will return to the main window.

NOTE! Bookings before the stated date are removed from the database **permanent**. This action cannot be restored in anyway other then by a restore from your own backups!

Reports with Microsoft Word

Resource handles printing of booking fully dynamical. To use this functionality you are required to have Microsoft Word version 7 (Office 95) or newer installed in your computer and at least one template with bookmarks. Here is a short description on how to create bookmarks in Word. For more information on bookmarks please look at the manuals for your version of Word.

Tip! There is a sample template in the folder where Resource is installed, which has all fields defined and shows you how it looks when you have added bookmarks. Please test it to see the result for different bookings.

Start by creating a new template in Word. Select File – New and select template.

1. Format the template in the way you want, i.e. type the fixed texts and format then as you like. When you are finished formatting you insert bookmarks in those places in the template where Resource shall put in the dynamic information coming from a booking.

2. Select Insert – Bookmark from the menu in Word. You will see a dialog box (see Figure above) where you type in a name for the bookmark. **Tip!** Select a name that easily can be associated with the fields in Resource (see table below). Repeat this step, with unique bookmark name, for each value you want to print out from a booking.

3. Save the template in the folder Word uses for templates and Resource will find it.

In Resource you have these fields that can deliver information to a report.

Booking number	Delivery postal address	Orderer
Create by	Document	Payment terms
Customer address	Email customer	Phone
Customer name	Email resource	Price
Customer no	End time	Resource
Customer postal address	Lunch hour	Resource note
Customer type	Mark	Saved by
Date created	Note	Start time
Deleted by	Order date	Status
Delivery address	Order number	

Table: Readable fields in a booking.

When one or more templates are defined according to the above, it's time to connect the bookmarks in the template with fields in Resource. Go to the menu '*View*' and select '*Report definition*'.

NOTE! This requires that you have Word installed in your computer!

In the new window (see Figure below) you can select a saved '*Report*' up to the left. First time you visit here there are no reports defined and you have to create one.

State a name for the new report by typing in a unique name above the Report list. Then you select the template you want to use for this report. Click on the '*Select template*' button and you end up in the folder where Word has its templates. Find the template to be used for the report and select '*Open*'. Now you see the name of the selected template in the textbox above the button.

Below '*Report*' and '*Template*' are two lists, the left one with all fields available in Resource, the right with all bookmarks available in the selected template. Select a row in each list and click on the button '*Add*' to add the connection of selected field and selected bookmark to the list below, which shows all connections. With the button '*Auto*' the list is filled automatically with all bookmarks that have same name as the fields in Resource.

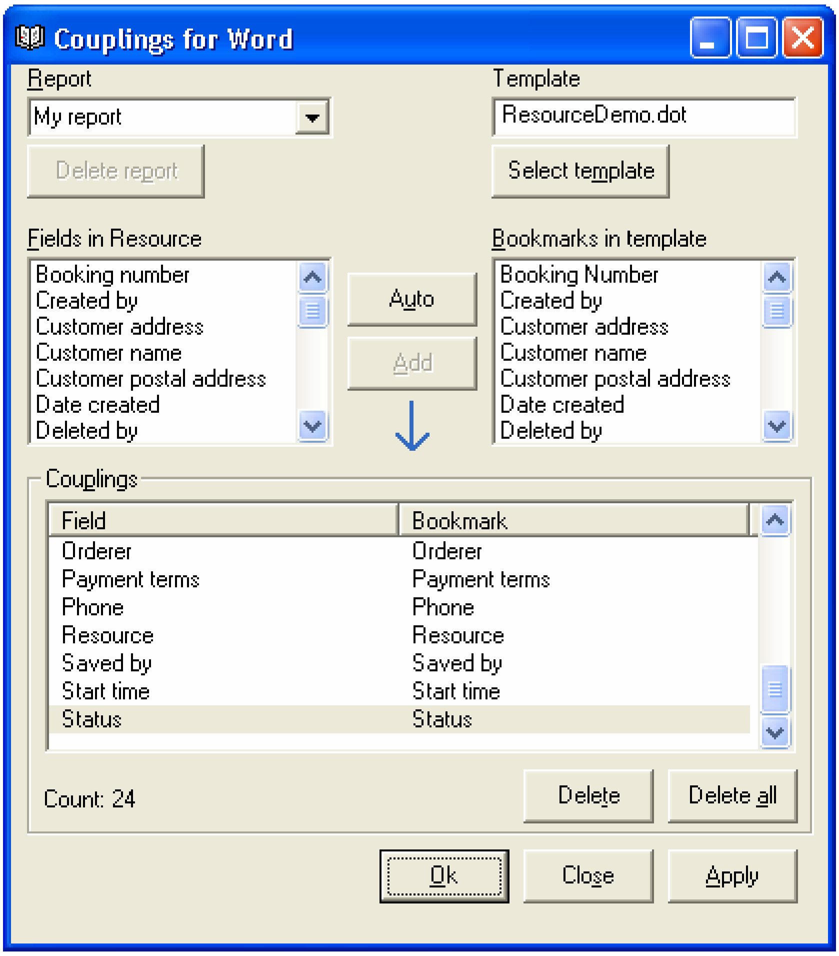


Figure: Connect to Word

NOTE! No control is performed if you use a field in Resource and connect it to several fields in the template. This can be used if you want the same value from Resource to be printed out in several places (bookmarks) in the template.

In the list with connections you can delete a connection by selecting the connection and click on the button '*Delete*'. To delete all connections you click on the button '*Delete all*'.

Save the report by clicking on the button '*Apply*'. If you select the button '*Ok*' any changes are saved and you return to the main window.

To use a report you mark one or more bookings in the main window and select '*Print*'. If you have more than one report defined a window is shown where you select which report you want to use for the print out. If there is only one report defined, there is no need to select it.

Reports with Microsoft Excel

You can also write reports with Excel as reporting tool. I.e. you can select Excel instead of Word for printed reports. It works in the same way with Excel but it has no bookmarks in Excel they call it a name. You define names by selecting the "*Name*" in the "*Insert*" menu. For more information please refer to the manuals for your version of Excel.

Database information

The information on how many bookings, etc. you have in the database can be seen in two places. You can find this in the 'Clear in database window' (see above) and in '*About Resource*' which you find under the menu '*Info*' in the main window. Here you can see the start time for the oldest booking, the newest booking, number of bookings, number of Preliminary bookings and number of Alarm.

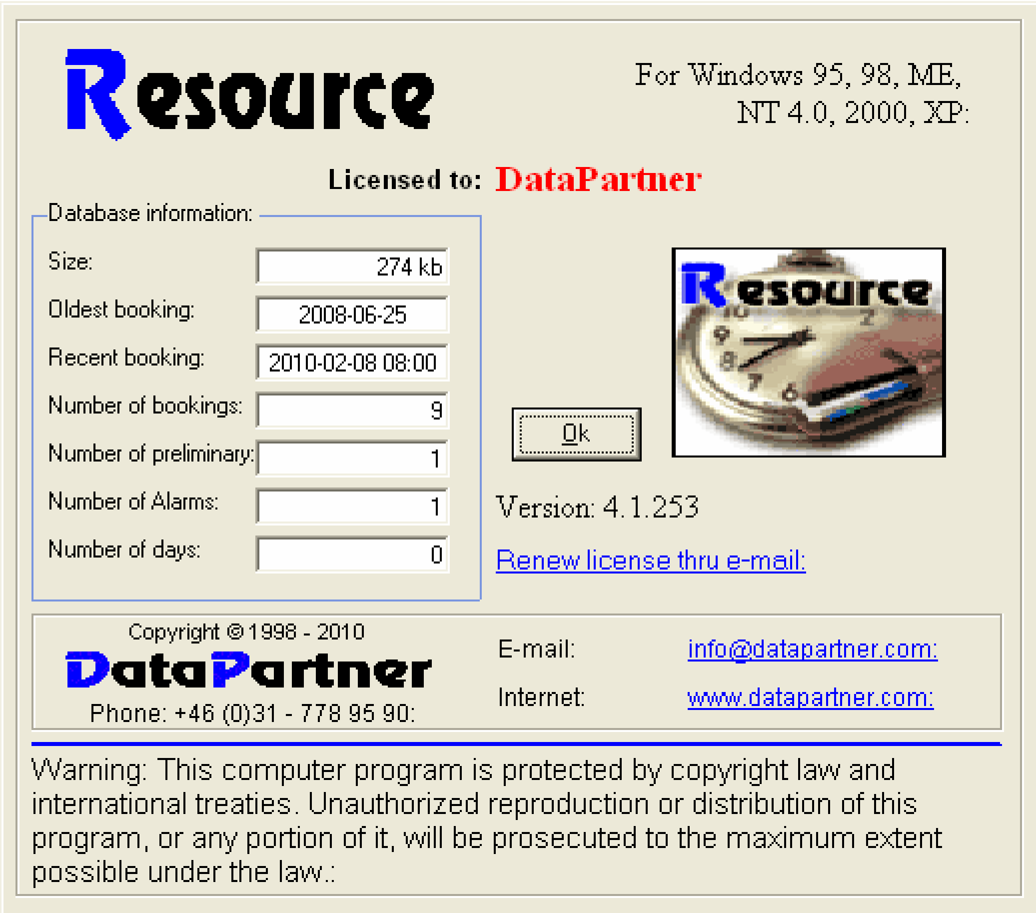


Figure: About Resource

If you click with the mouse on the Internet address you will be taken to DataPartners home page on the Internet. Here you can find possible updates, information about new versions and other tips. The same goes for e-mail information. You will be taken to your e-mail program with the address to DataPartner filled in.

These functions e-mail and Internet address can also be reached under the menu '*Info*' in the main window.

By clicking on '*Renew licence thru e-mail*' will open your e-mail program with information needed to order a renewal through e-mail.

NOTE! When you contact DataPartner please state the licence name you find in this window (see Figure above: 'Licensed to DataPartner').

Database administration

With Resource you will get another program to handle the database. It is used to *compress*, *copy* and *repair* the database. You can only use this program, if you use the standard database that comes with Resource.

NOTE! If you use any other database, e.g. Oracle, SQL-Server, etc. you **cannot** use this program. Administrations of such databases are done with programs from the supplier of the database. The information below is not for other databases than the one that comes with Resource.

At start of the program you will see the database, at the top of the window that you normally work with. If you want to work with another database use the button '*State database*'. In the new window you can state the database you want to work with. Use the button '*Browse*' to locate the database.

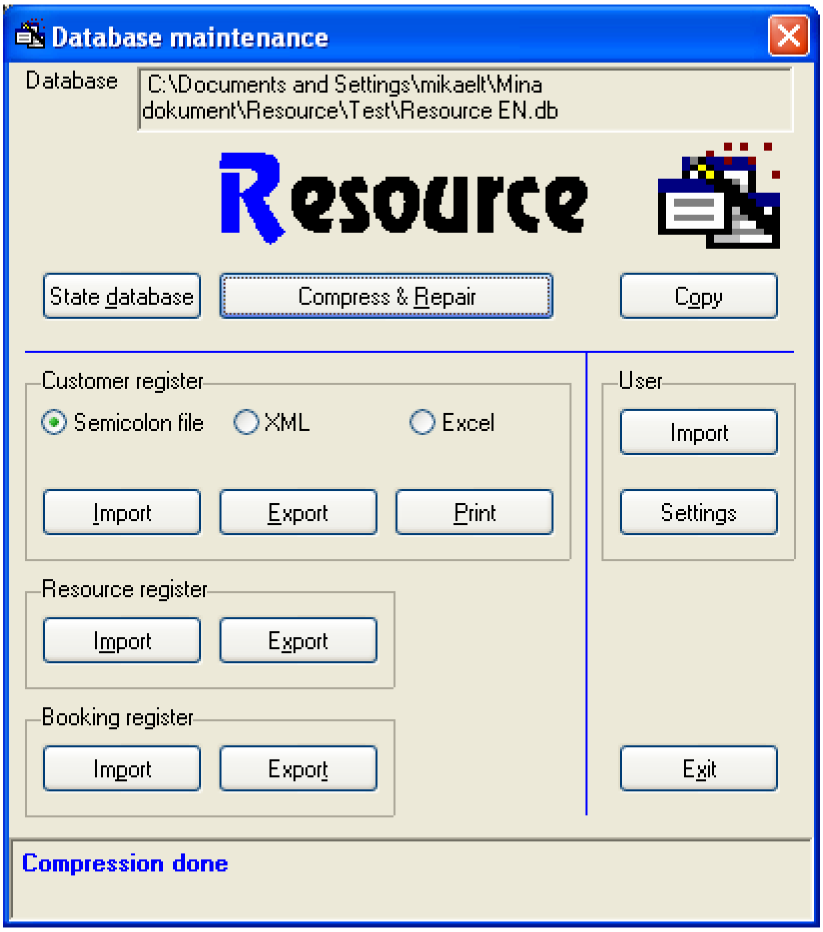


Figure: Database administration

NOTE! Make sure that nobody else is using the database when you shall administer the database. You cannot perform any functions in this program if someone else is connected to the database.

Compress

When you have deleted bookings, the size of the database is unchanged. To bring down the size of the database use the button '*Compress*'. This function will remove any 'holes' left by the deleted bookings. This can be done as often as you like, but it is no requirement. The advantage that you will get a faster database and it will take less disk space on the hard disk.

Repair

It can happen that the database gets damaged. The reason for this can be power failure, disturbance in the power or similar. If Resource complains that it cannot open the database or not working with it, as usually, this is one way to restore the database. Use the button '*Repair*' to restore the database. After a repair a compress is done automatically.

Copy

If you want to create a copy of the database, use the button '*Copy*'. The path must be stated and the new name of the database. As a proposal you get the same path as the current database is located in and the name '*Copy.db*'. Of course you can change both path and name. The folder that the path is stating must exist before the copying can take place. If you don't perform any backup, central or locally, this can be a good function to use.

When you click on the button '*Copy*' you will get the question '*Do you want to save an interval of selected database?*'. If you answer yes to the question you will have to state '*Start time*' and '*End time*' and the program copies only the bookings which falls within the stated times. Use this function to save an earlier year of bookings. If you answer no the whole database is copied.

After the interval comes the question of whether you want to send the copy via email to anyone. If you answer yes to it the window below is shown. Here you enter information needed to send the copy of the database to a recipient. For the SMTP server you enter the server for outgoing e-mail and the boxes for the sender (you) name and email address. The next field is the name and email address for the recipient and in topic you enter a title for the e-mail (optional) and a message to the recipient (optionally).

When everything is completed, click on the button with the letter at the top right. If you repent, you click on the button "*Cancel*". The window also shows the path and name of the database that will be sent. At the bottom there is a box to show what happens (Status) while sending the email.

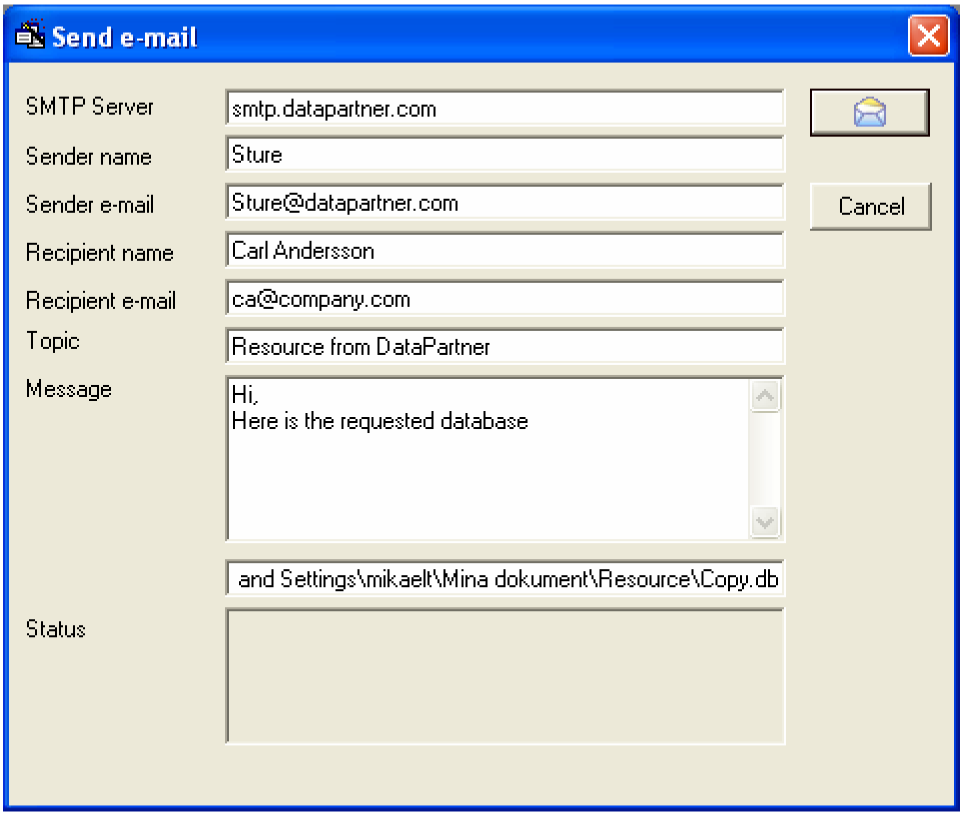


Figure: Send database via e-mail

Import and Export

You can import and export some of the data contained within the Resource database. This is to facilitate exchange of information with other systems. In the administration program you can select to import and export data from the *bookings*, *customers* and *resource* register. You have to log in with user name and password for a user with admin rights in Resource to use these functions.

The program works with semicolon separated files (.skv).

NOTE! To see the format Resource uses do an export from the register to a file and then read the file in Excel or another program. If the register is empty you only get one row that states the different fields in the register in Resource.

Example on an export from the customer register:

ID;Name;Address;Address2;Postal address;OrgNo;Telephone;Discount;Delivery Address;Delivery Postal Address;E-mail;Delivery City;Fax;Contact person

0;DataPartner;Sten Sturegatan 2;S-411 39;Gothenburg;;+46 31-778 95 90;0;123 Main Street;555 55;info@datapartner.com;New York;+46 31-778 96 90;Sales

The first row states the names of the fields with a semicolon between each field name and the second row is a customer. In the example above we can see that **not** all fields have values for this customer. It lacks the value for the field **OrgNo**. You can see this because **two** semicolons between Gothenburg and +46 31-778 95 90. In the example above it is only one customer otherwise it is one row for each customer.

Make sure that you have selected the correct database. Then select what register should be imported or exported by clicking on the button for the corresponding function and register. Then you log in with user name and password.

At export you state a file name that the information shall be saved in. Don't forget to terminate the file name with .skv! Then click on the button "*Open*' and the information are saved to the selected file name.

To do an import it is required to connect the fields from the file with the fields in the database. After the log in a window is shown to connect the information (see Figure below).

The first step is to state the file that shall be imported and clicking on the button 'Select file' does this. Locate the file, select it and click on '*Open*'.

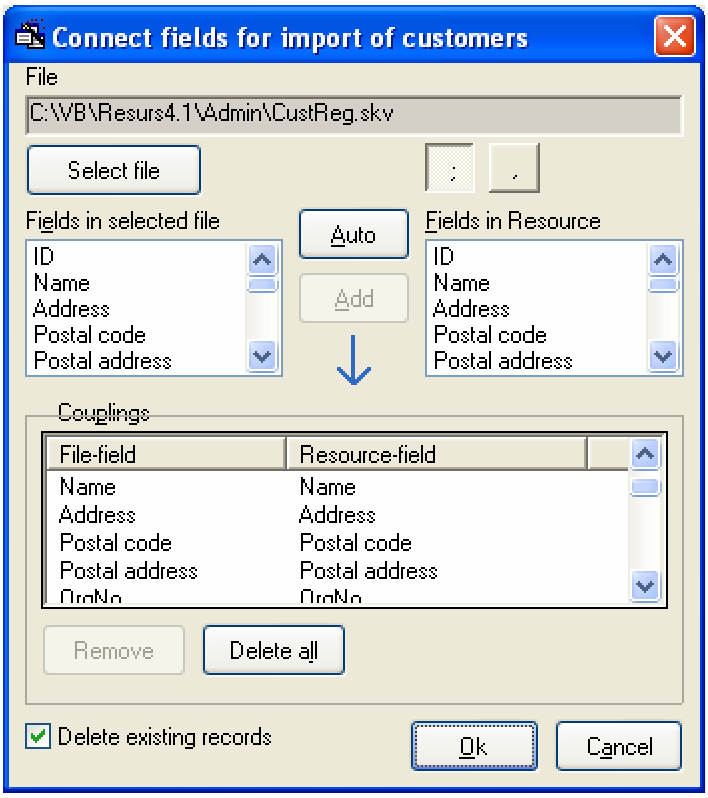


Figure: Import (of customers)

When you selected a file you have to connect the fields in the file with the fields in the database. Selecting one field in both lists and select 'Add' does this. The button '*Add*' is only available when you selected one field in each list. Repeat this until all fields are connected. The button '*Auto*' matches all fields that have the same name and adds them to the list.

You can delete existing records in the register before adding the new. If you want to do this select the checkbox '*Remove existing records*' at the bottom left in the window. To start the import, select '*Ok*'. If you don't want to do any imports select '*Cancel*'.

Here you can also print your customer register by clicking the button "Print". A new window appears (see Figure below) where you can select which fields (values) to be printed by ticking them.

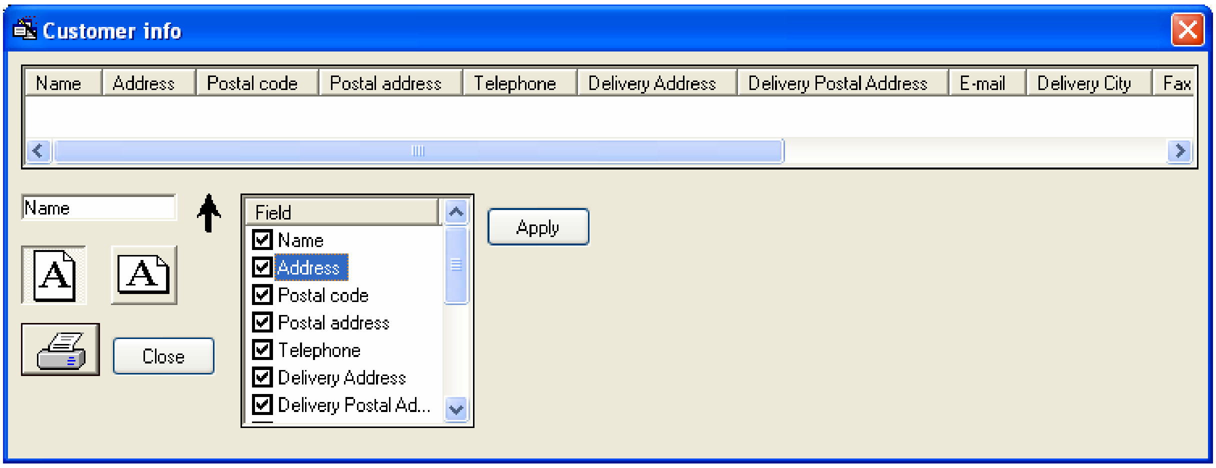


Figure: Print customer information

You can also choose if you want to print portrait or landscape. Click on the buttons with the symbols on the left side. By clicking on one of the fields in the list at the top of the window, you can choose the fields that to be sorted (ascending order) by. Clicking once again on the same field the sorting will be in descending order.

In the Figure above the report is printed out in portrait format, sorted by Name, ascending (arrow indicates). All fields (values) are selected and will be printed.

Import of users

The program can also add users by retrieving them from a domain controller. Click the "*Import*" in the "*Users*" frame on the right in the program to access this feature. Make the import by entering the domain name and server (see picture below) and then click "*Update*" button to retrieve all users from the domain and the server. The list "*User*" at the bottom will be filled with users and we see these values for each user (if value is set for them); *Name, Account Name, Email, Phone* and *Mobile*.

Then select the users to insert in Resource by checking them in the list. You can choose whether it should be "*Name*" or "*Account Name*" as user name in Resource by selecting the respective radio button.

Note! What you select here is what the user must enter while log on!

If you choose to tick the "*Delete existing records*", any user that you have added to Resource earlier will be removed before the imported users to Resource. Note that the three users who are in the Resource from the beginning; Admin, Book and Guest will remain unless you have removed them yourself. Admin users can not be removed so it will always remain.

At the top of the window you select the "*Group*" the imported users belong to, which means that all imported user will belong to the selected group. You can also specify a password for all imported users in the "*Password*" box but it is not necessary.

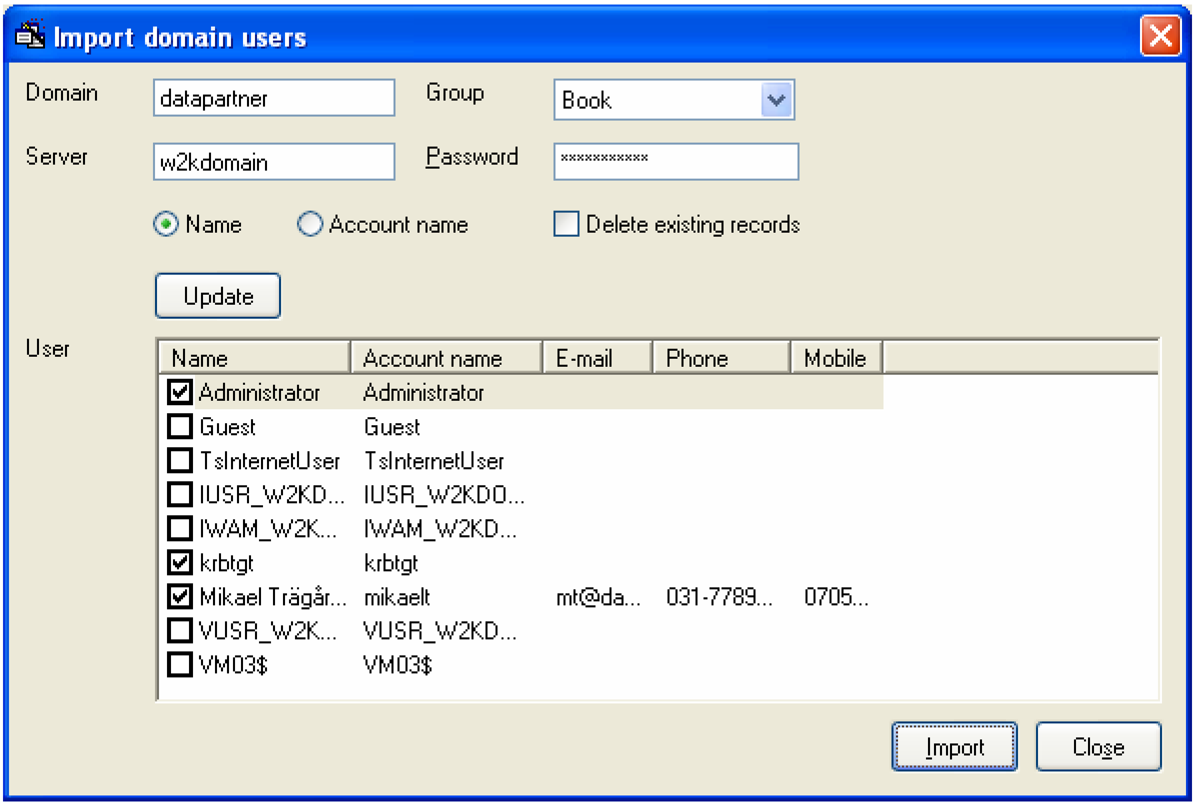


Figure: Import domain users

Once you have selected everything, click the button "*Import*" and the import starts. After the import is complete you will return to the main window and get an indication of how many items were imported into Resource.

Under the "*Import*" users button, there is a "*Settings*" button that takes you to the following window to adjust the settings file Resource.ini located in the user's folder "*My Documents\Resource*". These settings allow you to change the appearance and simplify certain operations.

In turn, here's an explanation of these settings. The settings do not affect any functionality of Resource, but only a different approach and access to more features. Each setting here is selectable by placing a tick in the box or to remove the tick.

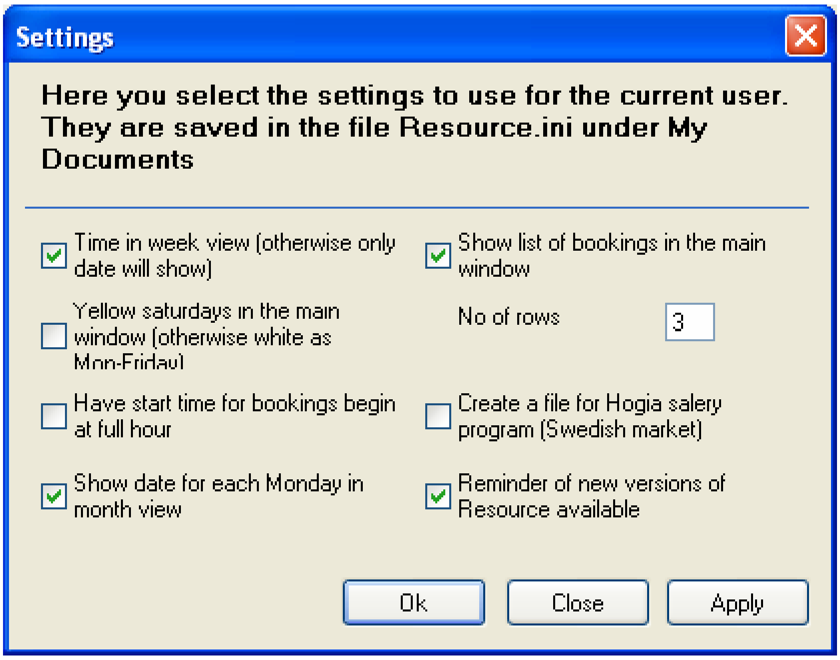


Figure: Additional settings for users

The first setting is "*Time in week view*" which means if it is selected you will be able to work with the hours and minutes in the week view. Normally you can only work with the hours and minutes in the day view.

"*Yellow saturdays*" gives yellowish Saturdays in all views. Sundays are always slightly red in color and with this setting you can get further clarification.

"*Have start time for…*" means if it is selected that when you double-click in the time portion of the main window in the day view, you will have start time as a full hour. Typically, the resource to bring the start time to the nearest quarter, e.g. 14:45 instead of 14:00 (military time).

The month view shows name of the month and four weeks and their numbers. By selecting "*Show date for each Monday*" you will get dates for the four Mondays in the view.

When selecting "*Show list of bookings…*" you will see a list in the main window with all bookings that are loaded for the selected time range. The list can be sorted by any column simply by clicking on each columns header. If you double-click the left mouse button on a booking in the list it will be displayed in the booking window as usual and you can make any changes to it. By right-clicking a booking in the list, the start date of the booking will appear in the main window.

If you select this setting you can also tell you how many rows to be displayed by typing in "*No of rows*". A higher value indicates more vertical space will be taken for the list window.

Resource can now create documents (file) for Hogia payroll system and to get this function visible check the box "*Create a file for Hogia...*". Hogia payroll system is a Swedish program.

Finally, you are able to turn off the reminder to the user if newer version of Resource exists by unchecking the "*Remind of new versions...*".

Appendix

The file ReadMe

With the installation of Resource is a file named 'ReadMe.txt'. This file contains information about the program added after this manual was made. We recommend that you always read this file, before you contact DataPartner, to take part of the latest information about the program.

After the installation of Resource, you can reach this file by selecting '*Start button – Program – Resource – ReadMe*'.

Tips

You cannot create bookings if there are **no** resources defined in Resource. This goes for both ordinary and preliminary bookings.

Resource can show max 10 000 resources simultaneously in the main window. However we want to point out that the number of resources and bookings shown in the main window affect the performance in the system.

Resource can show max 16 000 bookings simultaneously in the main window, but the database can contain many more. To have a speedy system we recommend showing as few bookings as possible.

If you experience problems with too many bookings, select a shorter time interval under '*Tools – Options*' and '*Times*' and/or filter the resources to a smaller quantity in the main window.

If you experience problems with getting in to Resource, there might be problems with the database. If you start the program with the switch "/d' you can state database when the program starts instead of doing this from within Resource. Select '*Run*' under '*Start button*' and locate Resource with the '*Browse*' button.

An example: **C:\Program Files\DataPartner\ Resource \Resource.exe /d** where the pat is depending on where Resource is located.

Figure: Start with stating database

Also the administration program for databases can be started with a switch. This is to be able to run the program in batch mode.
Example: 'AdminDB */d 'E:\Progam Files\DataPartner\Resource\Resource.db*' /a r' will repair the database. The switch /d is used to state what database should be used and the switch "/a' states the action you want to do with the database. To the switch "/a', you state either 'r' (repair) or 'c' (compress).

If you only want to change status on one or more bookings you can click with the right mouse button and select '*New status*' and select the new status. **NOTE!** The bookings must be selected first.

In Resource you can print out the view you are in. Select '*File*' and then '*Print current view*'. First is a window shown where you can select which printer that Resource should print to. The print out is in colour if you have a colour printer.

If you want to find out how far into the future a resource is available just click with the right mouse button in time area. There cannot be any bookings under the mouse pointer. Select '*Available time?*' from the menu shown. At the bottom of the main window the program will show when the next booking starts, for the selected resource. If the selected resource is available for more than 100 days you will see a message like: '*Available at least 100 days forward!*'.

Short keys

Most functions in Resource can be reached via short keys. This means that, instead of using the mouse, you can use combinations of keys on the keyboard to perform or reach a certain function. Below you find a table with the short keys available in Resource. Of course the access to these short keys depend on the users rights in the system. CTRL means the control key and Fx (where x is a digit) means a function key.

Key combination	Description
CTRL + A	Mark all bookings
CTRL + C	Copy a booking
CTRL + D	Search customer in booking
CTRL + E	My standard texts
CTRL + F	Search available time for resources
CTRL + G	Clear in database
CTRL + I	Preliminary bookings
CTRL + K	The calendar
CTRL + L	Show/hide Alarm
CTRL + M	Show current users rights
CTRL + N	New booking
CTRL + O	Search for a booking number
CTRL + P	Print selected bookings
CTRL + R	Change password
CTRL + S	Show status list
CTRL + T	Search for a note text
CTRL + U	Show repeated bookings
CTRL + V	Options
CTRL + W	Report definition
CTRL + X	Cut a booking
CTRL + Y	Print current view
CTRL + F1	About Resource
CTRL + F2	E-mail to DataPartner
CTRL + F3	To DataPartner on the Internet
CTRL + F4	Quarter view
CTRL + F8	Day view
CTRL + F9	Week view
CTRL + F11	Month view
CTRL + F12	Year view
Del	Delete selected bookings
F2	Zoom in
F3	Zoom out
F5	Update bookings (reread from database)
F6	Previous time unit
F7	Today
F8	Next time unit
Skift + F5	Update all (reread from database)
Skift + F6	Filter resources
Skift + CTRL + F6	Previous week (only in day view)
Skift + CTRL + F8	Next week (only in day view)

Statistics module

The statistics module is designed as a guide and takes you through a number of steps, depending on what you choose. You can navigate both forward and backward through the guide. At anytime you can finish the guide by selecting the "*Close*" button.

When you start the guide shows the window below. This is the Introduction that you can choose to not see in the future by checking the "*Don't show this info anymore*". In order to proceed with the guide, select "*Next*".

Figure: Introduction

Report selection

The next step in the guide is to choose if you want to create a report or a chart. By choosing either "*Report*" or "C*hart*" the available reports for selection are shown.

When selecting "*Report*" you will receive the following reports:

1. *"Bookings (counts per status)"* shows the number of bookings made for the selected resources and selected status.
2. *"Bookings (time per resource)"* shows total booked time and percent of normal working hours for selected resources and selected status.
3. *"Starting bookings"* shows bookings that have their start time within the specified interval. Printing is done by bookings start time, status and note.
4. *"Optional field & statistical"* displays selected fields for bookings and statistics for the selected resources.
5. *"Older bookings"* shows booking number, start time and customer name for booking for selected statuses.

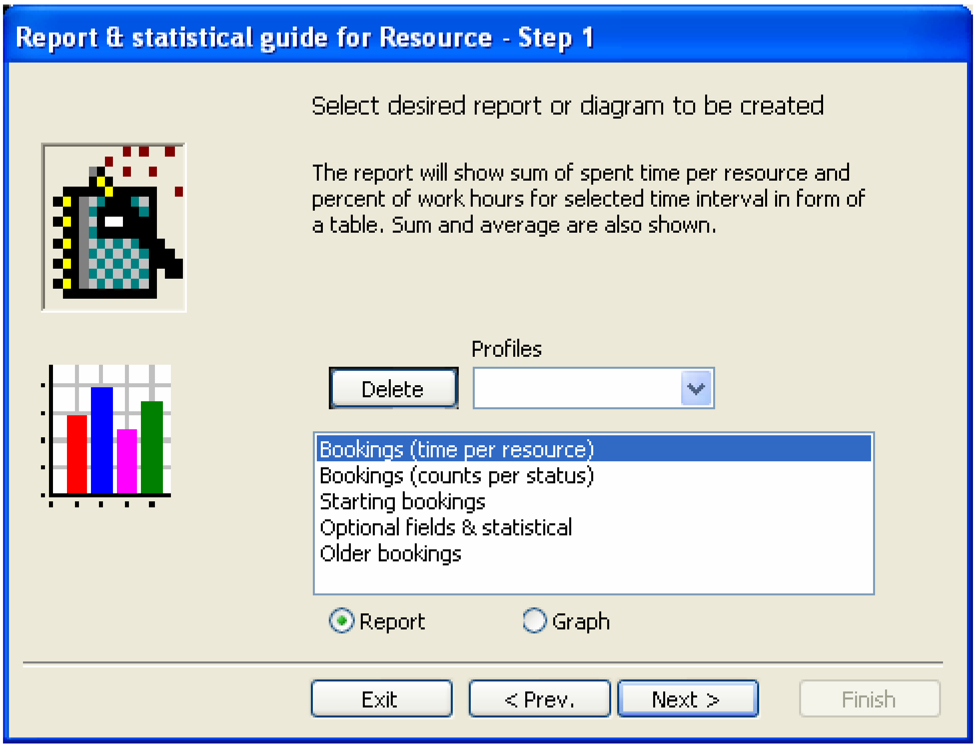


Figure: Report selection

NOTE! To create diagrams you must have Microsoft Excel installed on your PC.

When selecting "Graph" the following reports will appear:

1. *"Counts per status (graph)"* shows the number of bookings made for the selected resources and selected status. Average values per status are displayed in tabular form. Each selected resources are also available in a chart with one bar for each selected status.
2. *"Time per resource & status (graph)"* shows sum of booked time and percentage of normal working hours for selected resources and selected status. It also creates a

diagram showing a stack of selected status for each resource. You can select an alert level for the chart. More about the warning level later.

3. *Number of starting per interval (graph)"* shows the number of bookings in each time slot depending on starting time.
4. *"Time per resource & customer (graph)"* shows sum of booked time grouped by customer.

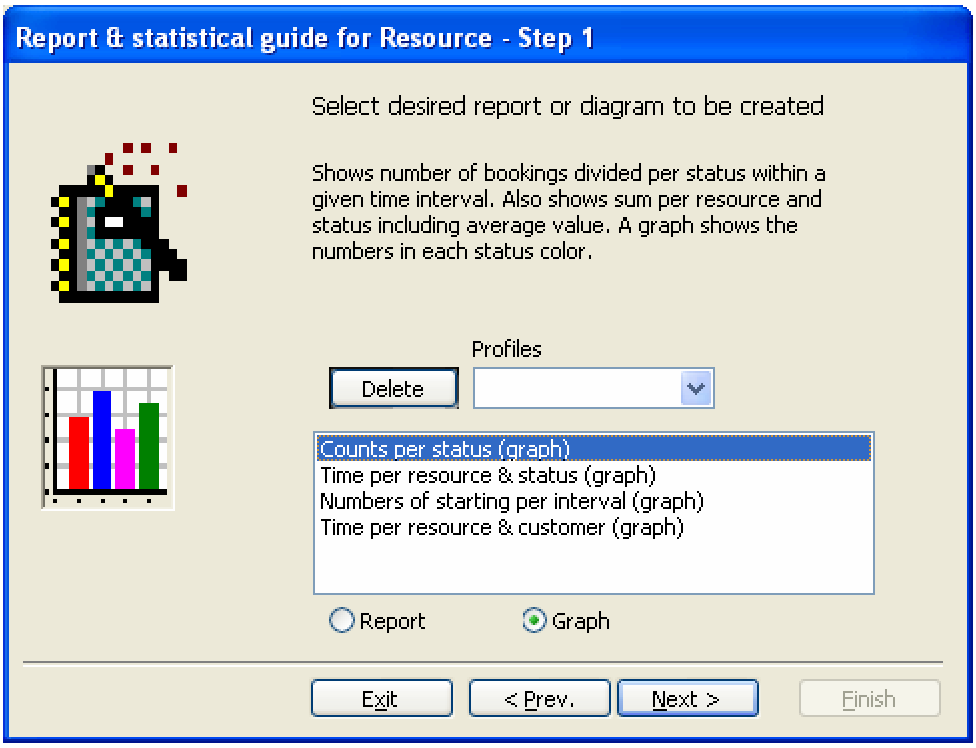


Figure: Graph selection

Interval and tools

In the third step (see Figure below), choose what database you want to work with. Here you select the time interval covered by the report.

By default, the guide displays the database you normally work with in Resource. If you want to select another database, click the button "...". Here you can select another resource database.

Interval is the time span that you want to base the report on. Enter the start and end dates here. **Note!** Start and end dates may not be the same hence the smallest interval is 24 hours.

If you select the graph "Bookings (time per resource & status)" you can choose if a warning level is to be shown in the diagram. The level indicates the percentage of working time. This level is shown as a red line in the graph.

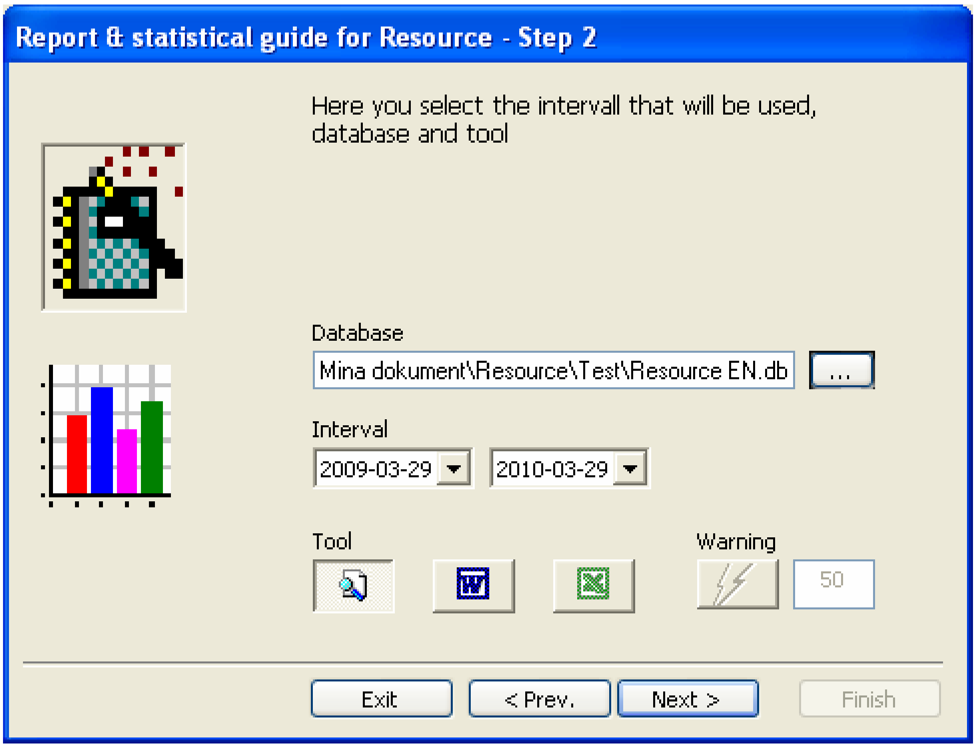


Figure: Selecting interval and tool

If you want to create a graph you can only select "*Excel*" as a tool. For other types of reports, you can choose between internal tool, "*Word*" or "*Excel*". The internal tool is fastest, but you can not make any changes to the layout in that position. If you choose "*Word*" or "*Excel*" you have the opportunity to make your own changes in these tools.

Resources

The next step in the guide is to select the resources that the report should include.

To the left you can choose what type of resources you want to select from. By default resources are shown. By selecting "*Locations*" all the locations are listed in the list on the right. Similarly, you can select "*Groups*", "*Properties*" or "*Customers*".

In order to select "*Groups*" or "*Properties*" we assumes that there is at least one group or property in the Resource database selected above.

You can choose one or more resources or customers in the list. <u>At least one</u> resource, location, group, or customer must be selected.

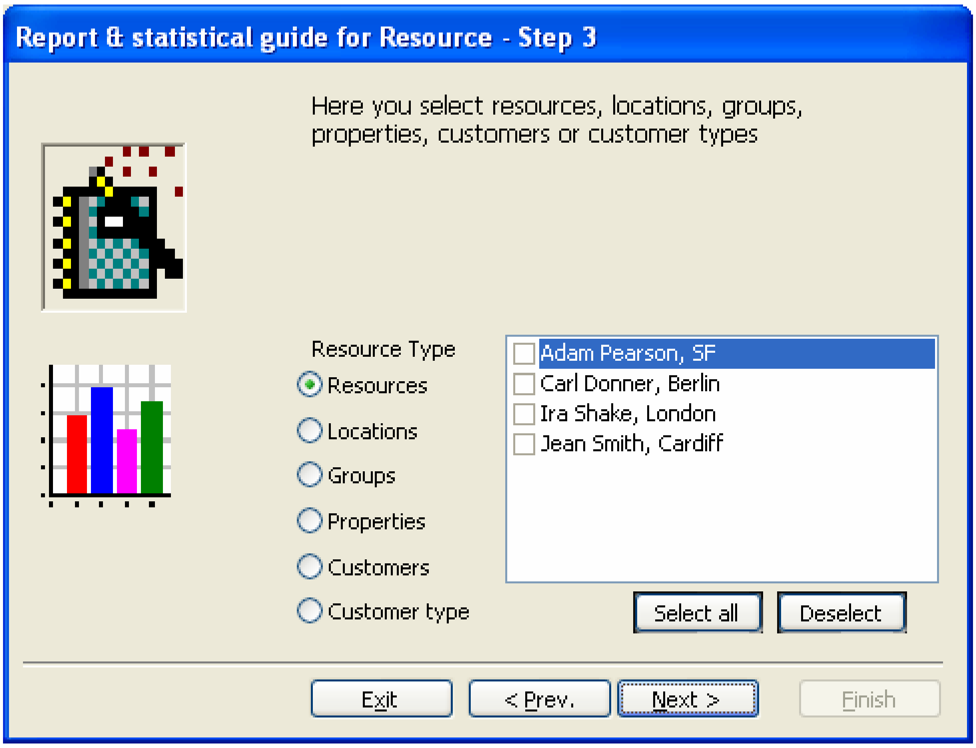


Figure: Selection of resources

With the button "*Select all*" selects all the resources and the "*Deselect*" button will deselect all the resources.

Statistics

If you have chosen the report "*Optional fields & statistics*" you will be able to select which data values should be shown (see Figure below).

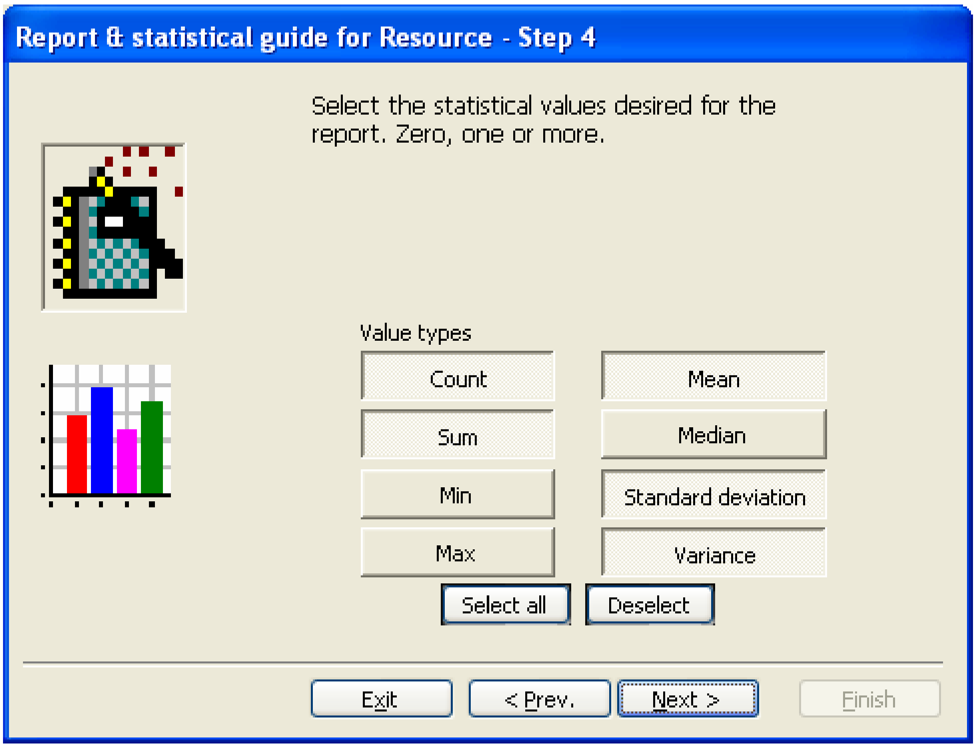


Figure: Selection of statistics

Each selected value type is displayed for each selected status and resource in the report. "*Count*" shows the count of bookings grouped by status and resources. "*Sum*" gives the total time per status and resources. "*Min*" shows the minimum booking time (duration) per status and resources. "*Max*" shows the maximum booking time (duration) per status and resources.

"*Mean*" indicates the mean duration of all bookings that apply to your selections. Similarly, select the "*Median*", "*Standard deviation*" and "*Variance*" to obtain these values.

With the button "*Select all*" selects all value types and the "*Deselect*" button deselects all value types.

Statuses and fields

In step five you select the statuses and potential fields. At least one status must be selected.

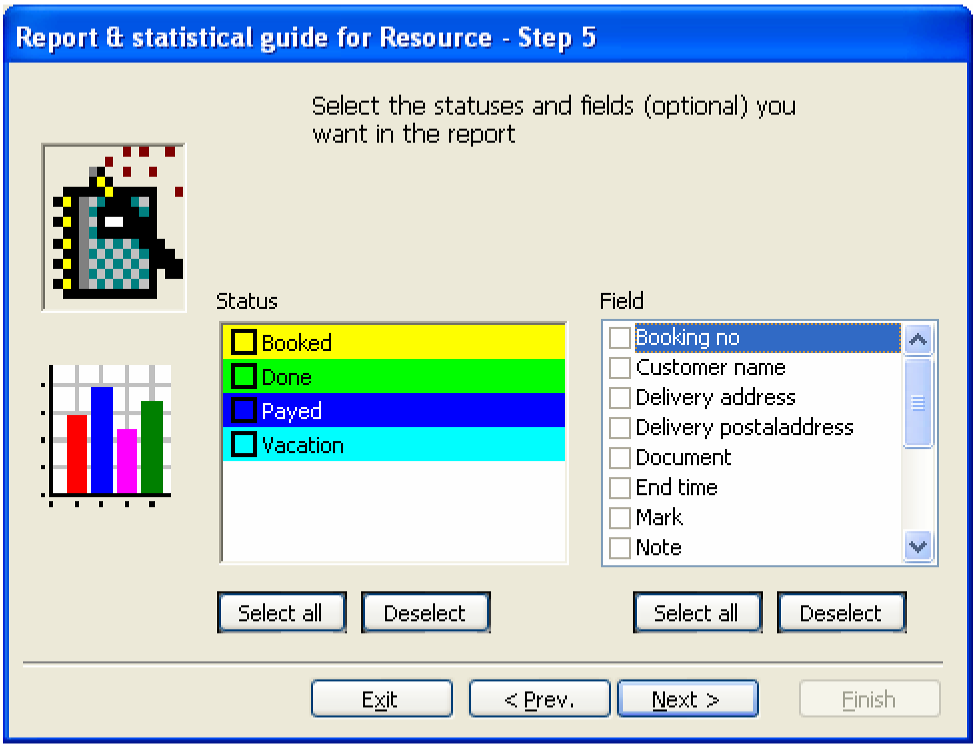


Figure: Selection of statuses and fields

For all reports, you can choose one or more status. The exception is the report "*Older bookings*" where you only can choose one status at a time.

If you have selected "*Optional fields & statistics*" report you can also choose which fields to print. All fields marked with a tick in the right list will be printed in the report.

With the button "*Select all*" you automatically tick all the fields and the "*Deselect*" button will remove all ticks.

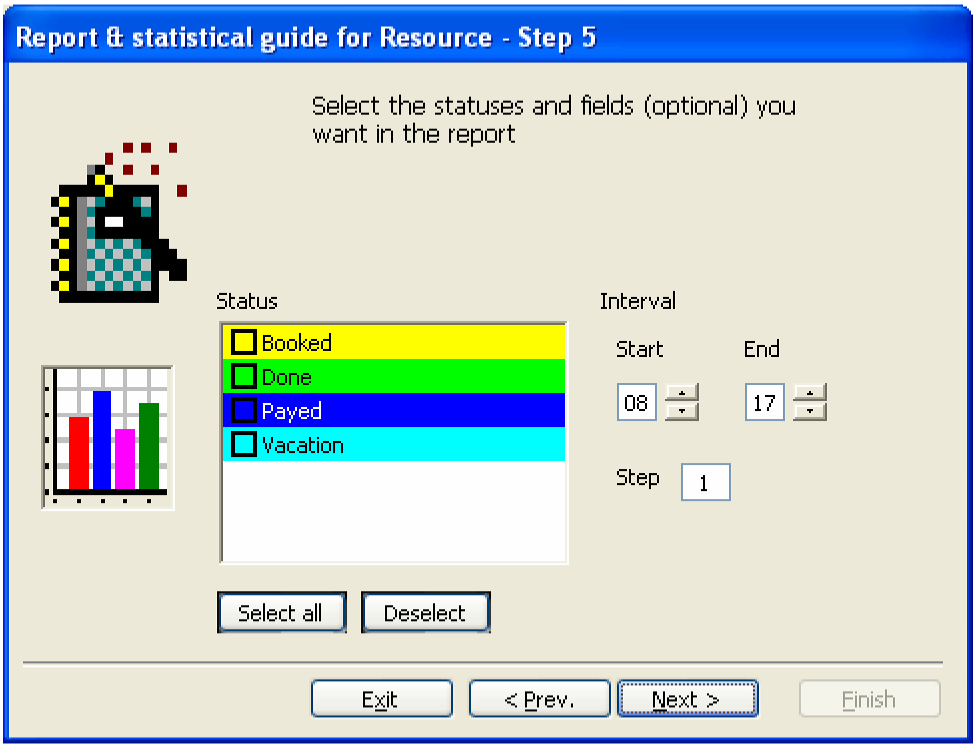


Figure: Selection of statuses and interval

If you select the report "*Numbers of starting per interval*" you will see the picture above. Besides choosing statuses here you also select start and end of the interval you want. With the "*Step*" you can decide how many hours there should be in each time slot. Default value is 1 which means that you will get a value for each hour between start time and end time. If you put 3 in "*Step*" you will have 3 hours in each slot.

Selections

The last step displays a summary of selections, such as reports, tools, range, resources, status, etc. If everything is correct, just click the "*Finish*" to create the report. If you use the internal tool for the report you can select which printer to use here.

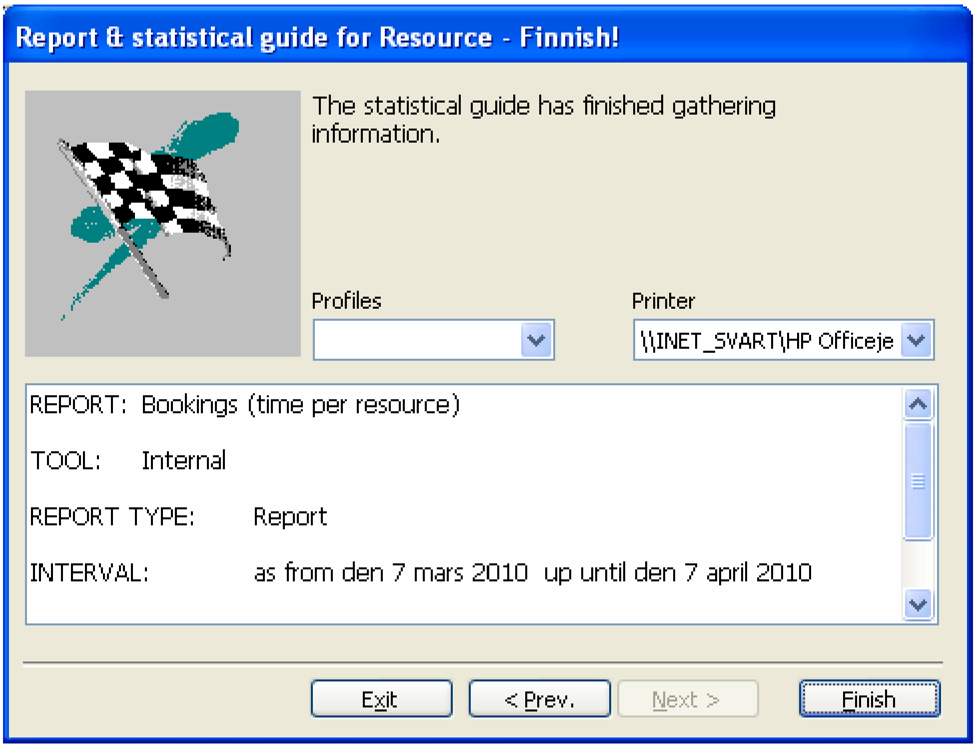


Figure: Description of selections made

After the report is complete, the window below is shown. If "*More Reports*" is selected (it is selected by default) you will return to the description and thus can back up between the above described steps to make any change to the settings and produce a new report.

Figure: Report created

If "More Reports" is not selected the guide ends.

Outlook module

Introduction

The Outlook module is an easy to use guide and is used in conjunction with the booking program Resource. Using the guide, you can transfer bookings from both Resource to Outlook and vice versa. There is a direct link to a user's Outlook and not a link to Exchange Server (mail server). In the guide you select which information is transmitted by connecting the fields in Resource and Outlook

Using the Resource Outlook Guide, you can transfer information between resources and most mobile phones and PDAs on the market. An intermediate storage is made in Outlook. These handhelds/mobiles can be synchronized with Outlook and thus take the information from Resource out into the field. It can also bring back information from the PDA back to the resource via synchronization engine of Outlook.

Profiles

The guide works with profiles to facilitate the work. A profile will remember the settings you have made earlier in the guide. After you have made a transfer of information between Resource and Outlook you can save the settings to use them again for similar transfers. All values used for the transfer will not be saved but only those which can be static. For example, starting and ending dates will not be saved since they are not relevant from time to time.

You can have an unlimited number of profiles. Of course you have to give the profiles good name that makes you remember what kind of settings they represent. The profile that might be used will be selected no the first step of the guide. Of course you can make all the settings again by not selecting any profile.

Step one

In the first step of the guide (see Figure below) you choose start time and end time, and which way to transfer attendees. The guide identifies the database normally used in the Resource. If you want to work with another database, click the button (...) and select another database.

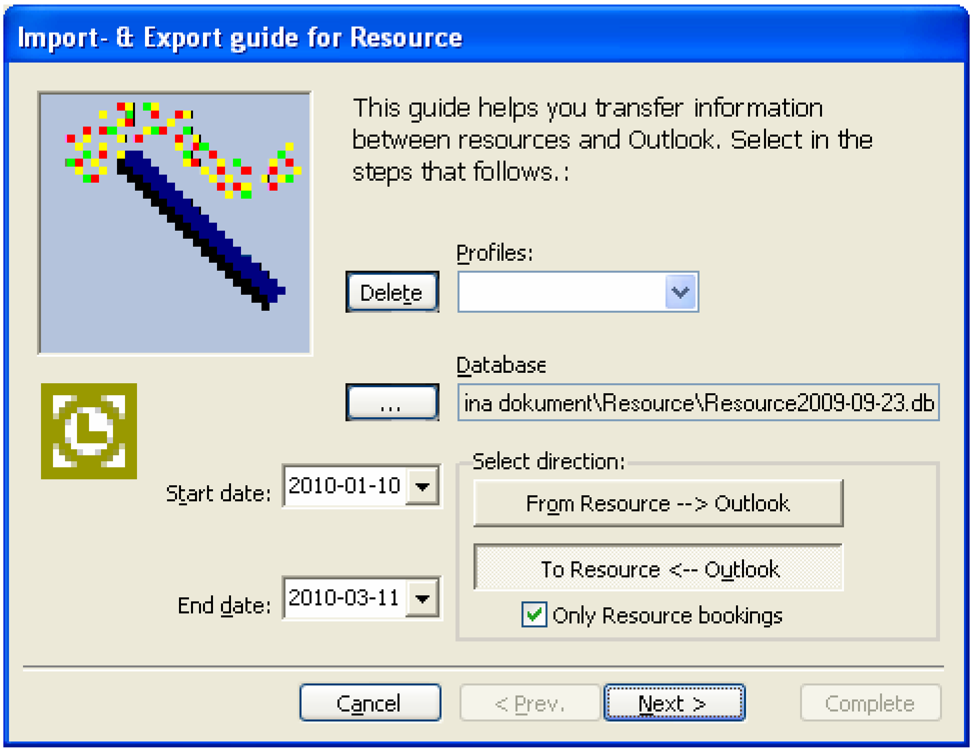


Figure: Step one no profile selected

Here you set start and end times. It decides which time span that the guide will look for bookings, both in Resource and in Outlook. If you do not set the start and end times correctly, the guide will tell you that there are no bookings within the selected time range.

You also select which direction the data should go through to choose either "*To Resource from Outlook*" or "*From Resource to Outlook*". If you choose the first choice, you can also choose to let the guide only show items that come from Resource by checking the "*Only Resource bookings*".

There are four buttons at the bottom of the guide. With these you can navigate between the different steps. The first "*Cancel*" button will exit the guide and is available in any step of the guide. The "*Prev.*" takes you to the previous step in the guide. If you are on the first step you cannot move to the previous step. In the same way the "*Next*" button moves you to the next step in the guide. With the "*Finish*" button you start the transfer between Resource and Outlook or vice versa. The "*Finish*" button is only available in the last step of the guide.

Step two

The second step will look different depending on what was on selected in step one. If you chose "*From Outlook to Resource*" bookings that exist in the calendar in your Outlook (see figure below) or if you chose "*From Resource to Outlook*" You will see bookings from Resource (see next figure below). In both cases, only bookings that fall within the range setting forth in step one.

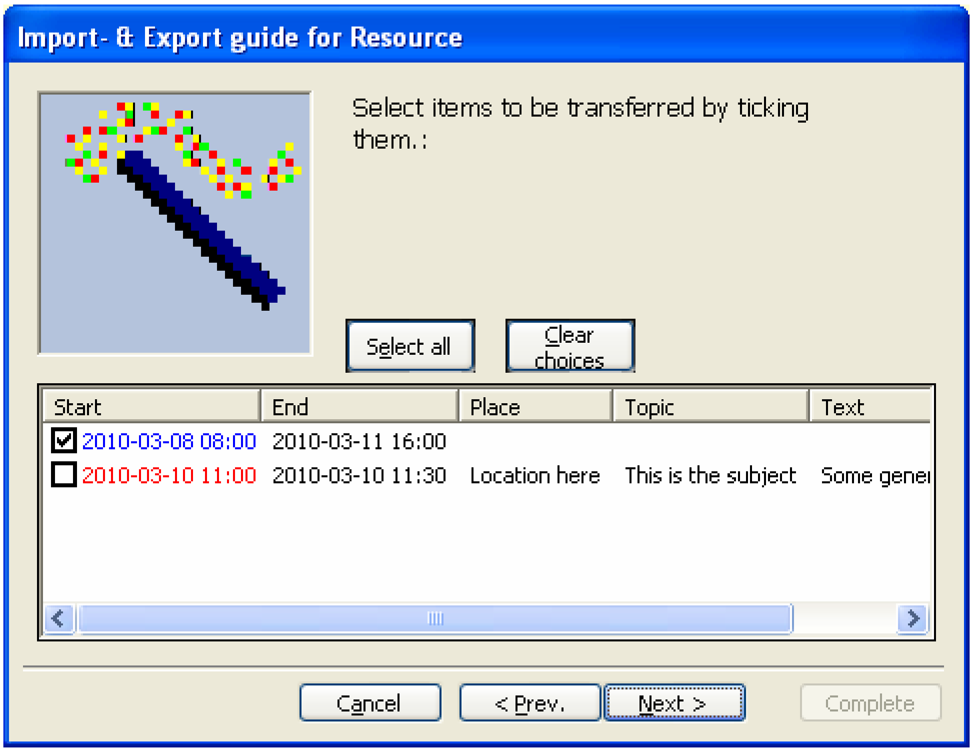


Figure: Bookings from Outlook

If you select bookings from Outlook in the previous step you could choose if you only want to see the bookings coming from Resource. If you chose to not tick this you will also see bookings created in Outlook (not originating from Resource) and they are red in color in the first column "*Start*" (see number two in the figure above). Is the booking has a blue color it is a booking that the guide can handle these automatically, i.e. updating that booking in Resource. The red bookings the user needs to choose which resource that should receive these bookings.

Whichever route was chosen in step one, here you select the bookings that you want to transfer. With the button "*Select all*" you ticked all the bookings and they will be included in the above transfer and with the "*Clear Choice*" you deselect all selected bookings.

If you chosen "*From Resource to Outlook*" there is also an opportunity to select a specific resource or all resources. Default is that bookings for all resources are shown. By selecting a specific resource only the selected resource bookings are shown if any.

Tip! All the columns in the list of bookings can be sorted on. Click on the header for each column, such as "*Start*" will then sort by that column. This function is alternating, i.e. for each click on the header of a column will sort either ascending (A → Z) or descending (Z →A). This makes it easier to find the bookings that you are looking for.

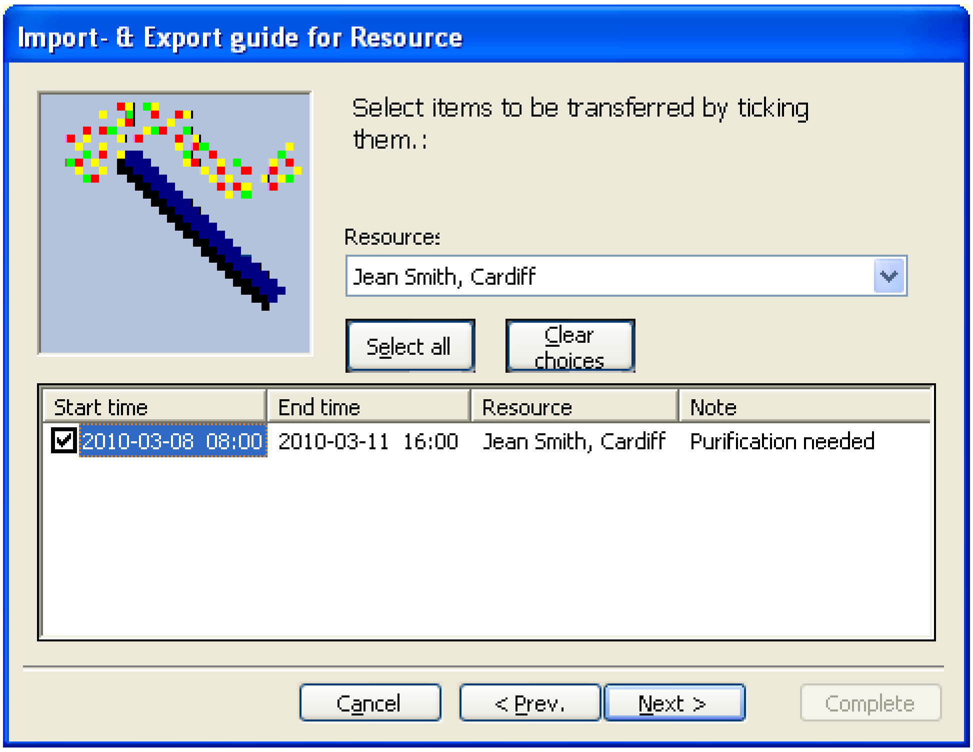


Figure: Bookings from Resource

If you have chosen to transfer the booking information from Resource to Outlook, you can choose whether all the resources bookings should appear ("<*All*>") or if you want to select a specific resource.

Step two - additional

If you chose "*From Outlook to Resource*" an extra step is displayed where you select which resource that should receive the bookings from Outlook. You can only select one destination resource.

If you have bookings coming from Resource these can be updated by checking "*Update existing booking*" instead of selecting a destination resource.

NOTE! This does <u>not</u> work on bookings created in Outlook! They have no natural connection to a resource in Resource. For such bookings you have to tell what resources they should be booked on in Resource.

In this step, you also select the status the new bookings will receive in Resource and if it is allowed to overlap bookings in Resource. Learn more about overlapping bookings in this manual.

If you select "*From Resource to Outlook*" this step will not appear hence you will go directly to step 3.

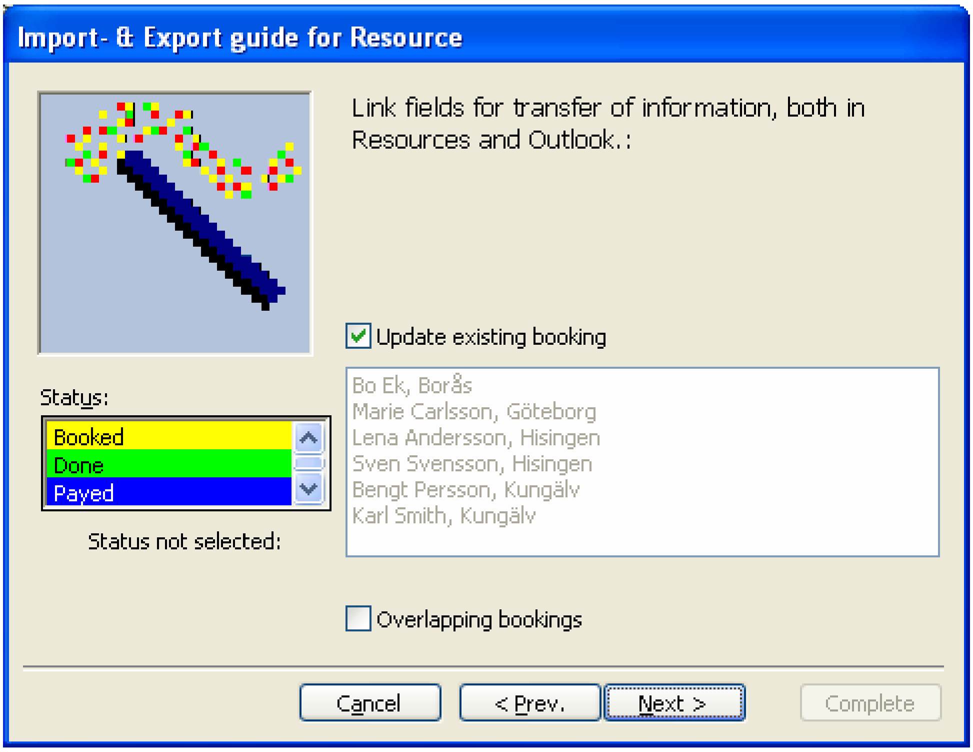


Figure: Select a status and receiving resource

Step three

The third step (see figure below) is where you link fields in Resource and Outlook. Here you select where the information will end up in the receiving program. The links are for the transmission of information to both Resource and Outlook. The arrow above the button "*Add*" indicate which direction the information goes. In figure below bookings are retrieved from Resource to Outlook.

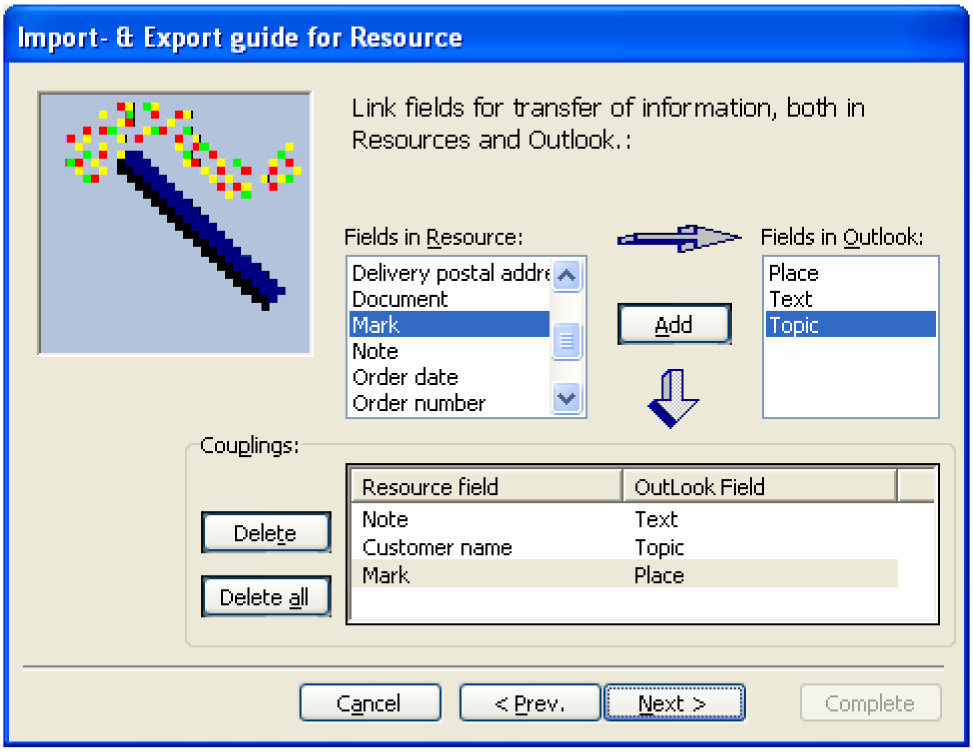


Figure: Link fields

By selecting a field in the left list (*Fields in Resource*) and then select a field in the right list is activating the button "*Add*". When you click on the button your choice will be added to the bottom list, "*Couplings*". This is repeated for each field you want to have in the transfer.

Tip! It is possible to repeat a field several times, for example, you can link "*Note*" to both the "Text" and "Subject". You can even connect several different fields from the Resource for one and the same field in Outlook. However, one should be cautious with this as it may be undesirable if we want to bring back values to the same field in Resource.

You don't have to specify "*Start Time*" and "*End Time*" because the guide will connect it automatically since they are mandatory fields.

Step four

In the final step of the guide, you select if you want to save the selections to a profile. If you chose a profile in step one of this guide the profile name is shown here. You can change the profile to a different name by typing the new name in the "*Profiles*".

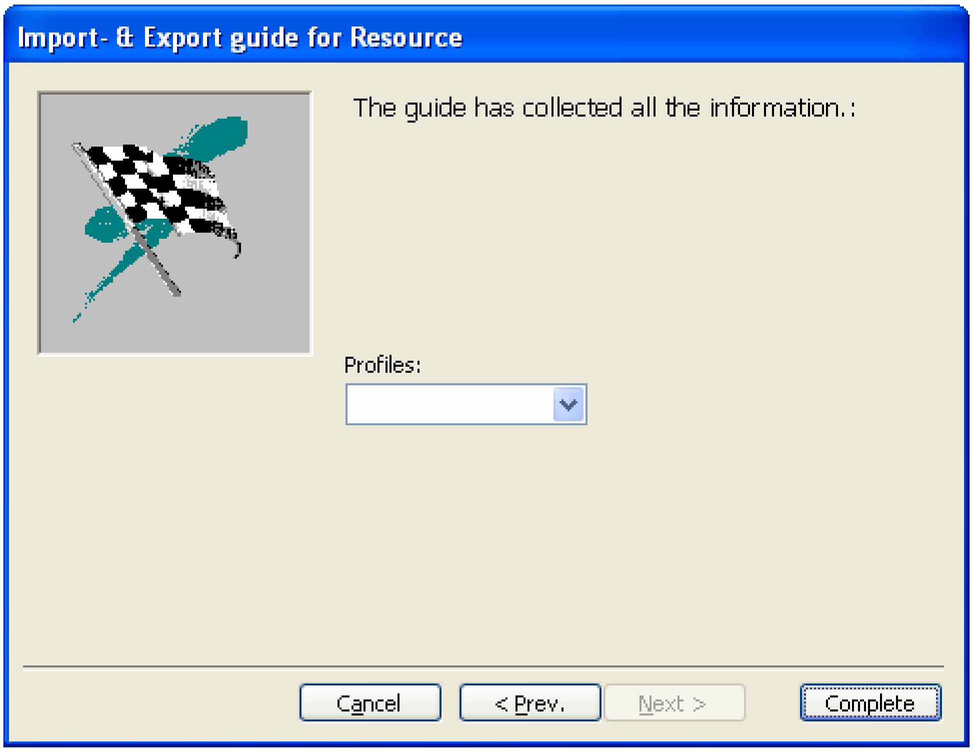


Figure: Time for the transfer itself

Now it only remains to click on the "*Complete*" button and the transfer will started. When the guide has made the transfer, a window with information about the number of bookings created. If you check the "*Exit*" the guide will terminate, otherwise it will return to step four and you can thus make changes in the various steps and execute additional transfers.

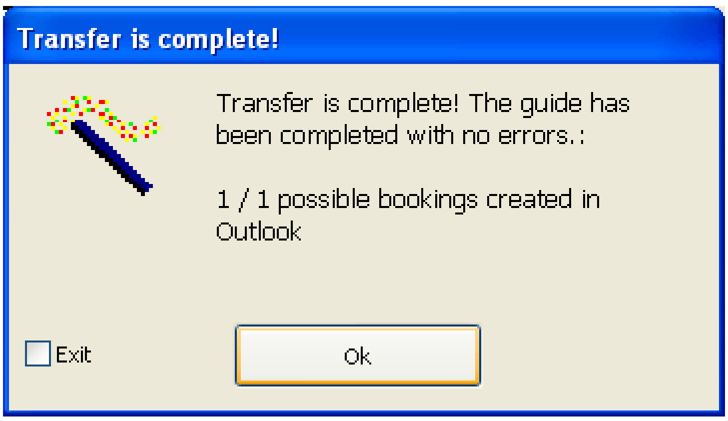


Figure: Transfer done.

Licence agreement

See the file Licence.txt in the folder where you installed the program.

If you have any questions please contact DataPartner. State your company name when communicating with DataPartner.

DataPartner
Sten Sturegatan 2
SE-411 39 Gothenburg
Telefon: +46 31 778 95 90
E-mail: info@datapartner.com
Internet: www.datapartner.com

The program/the system is owned by DataPartner in Gothenburg.