

## 2.

# USING THE INDIVIDUAL PLANNER

## 2.1 Introduction

This chapter explores how you can use the Individual Planner in Tracker to maintain and manage your diary. The Individual Planner is linked to the All Staff Planner and Weekly Planner so that any bookings made for you are displayed on your individual planner, and any requests for time off that you make are fed through to the All Staff Planner for authorisation.

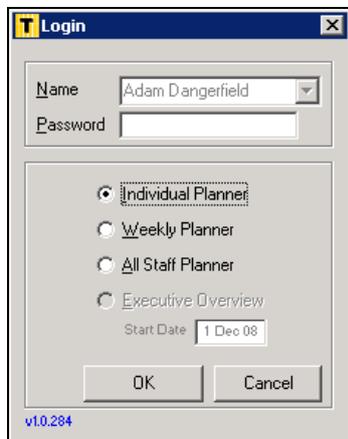
The Individual Planner enables you to:

- display your diary
- book time off
- amend time that you have booked off
- manage your holiday entitlement
- print a page from your Individual Planner
- obtain directions to a client's site.

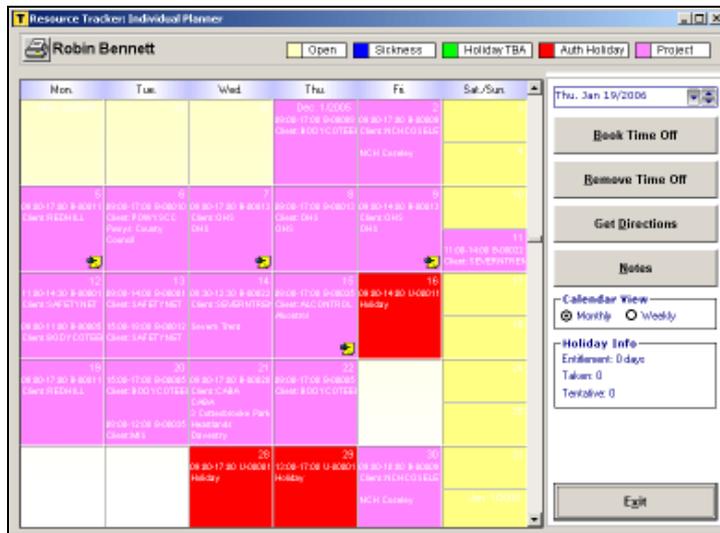
## 2.2 Viewing your planner

The Individual Planner is personal to you. It displays the details Tracker holds relating to your work time. To display your Individual Planner:

1. Display the Resource Tracker Login screen by double-clicking on the Resource Tracker icon.



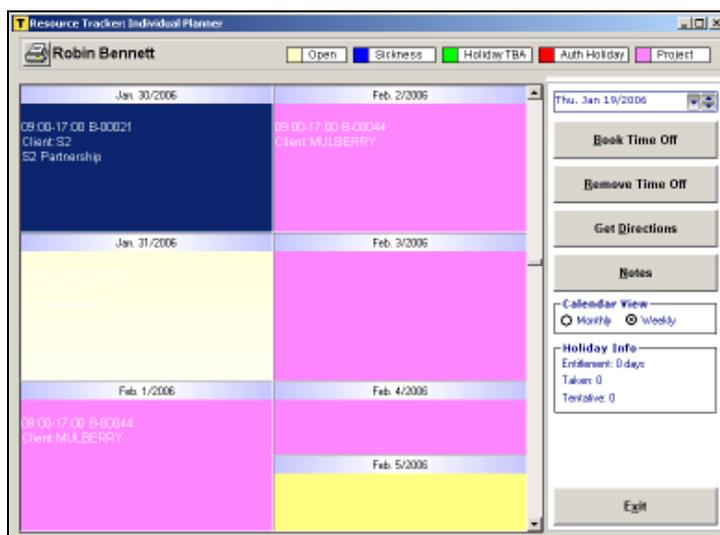
2. Select your name from the drop-down list on the **Name** field.
3. If you have a password, type it in the **Password** field.
4. Select Individual Planner.
5. Click on **OK** to display your Individual Planner.



This screen shows an example of an Individual Planner. It looks like a calendar, displaying a month-to-view.

Each row represents a week, running from Monday to Sunday, with the weekend displayed in yellow on the right. Each box, or cell, represents a day. The date is displayed in the top right-hand corner of each cell. The times booked to a project, and the project number, are displayed for days with jobs scheduled.

6. Change the view to display a week-to-view by clicking on the **Weekly** radio button.



Change back by clicking on the **Monthly** radio button.

Whichever view you are using, the cells are colour coded as follows so that you can see at a glance the main activities for the day:

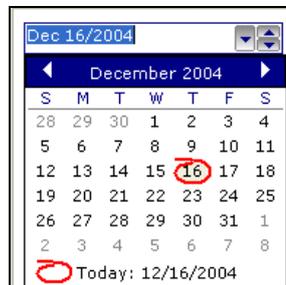


Description	Meaning
Open	There are no bookings on this day
Sickness	Time off for sickness has been booked
Holiday TBA	Time off has been requested on this day but has not yet been authorised
Auth Holiday	Time off on this day has been authorised
Project	A project, or job, is booked on this day; the job number is displayed

7. Change the focus of the schedule to display dates in the past or future by:
  - using the scroll bar at the side of the calendar to scroll backwards or forwards
  - using the calendar to select the date that you want to display.

To select the date:

Click on the single down arrow next to the date in the top right-hand corner to display a calendar.



Today's date is circled in red.

Select the date for which you want to view the schedule.

The left and right arrows on the month title bar allow you to scroll through the months. Click on the required date to re-focus the display onto that date.



*You can also use the up and down arrows next to the date to move the display forwards and backwards a day at a time.*

8. When you have finished viewing your Individual Planner, return to the Resource Tracker Login screen by clicking on **Exit**.

## 2.3 Booking time off

To book time off you must select the days that you wish to book. Time off that has been requested but has not yet been authorised is displayed in green on your Individual Planner. This request is then fed through to the All Staff Planner. When the time off has been authorised, the relevant days are displayed in red.

To book time off:

1. Click on the **Book Time Off** button to display a dialog box.



2. Select the reason for the time off by selecting either **Holiday** or **Sickness**.
3. Enter a description in the box, for example 'Annual leave' or 'Hospital appointment'.
4. Click on **Close** to close the dialog box.
5. Click on the day(s) which you want to book off.



*The day(s) you select must be in the future. Resource Tracker does not allow you to book time off retrospectively.*

As you select the days to book off, a description of the time off (eg Booking Holiday) is displayed on the bottom right of the screen. This serves to remind you of what you are currently booking.

6. Click on **Book Time Off** again (or any other button) to switch off the booking time off facility.

## 2.4 Amending time booked off

If you no longer require the time off that you have booked, you can delete the booking on your Individual Planner.

To remove time booked off:

1. Click on the **Remove Time Off** button.
2. Click on the day(s) for which you want to remove the time booked off.
3. Click on **Remove Time Off** again (or any other button) to switch off the remove time off facility.

## 2.5 Managing your holiday entitlement

The Individual Planner lets you see at a glance your holiday information by displaying on the right-hand side of the screen:

- Entitlement – your holiday entitlement
- Taken – number of days holiday taken
- Tentative – number of days holiday tentatively booked but not yet authorised.



The screenshot shows a sidebar with three sections:

- Calendar View:** Radio buttons for 'Monthly' (selected) and 'Weekly'.
- Holiday Info:** Text fields showing 'Entitlement: 0 days', 'Taken: <Not calculated>', and 'Tentative: <Not calculated>'.
- Other Time:** An empty box with up and down arrow buttons on the right side.



*Holiday entitlement is set up on the Staff screen in Tracker.*

The Other Time box is used to list time that has been taken off that is not holiday, such as sickness or paternity leave.

## 2.6 Printing from your Individual Planner

You can print out a page from your Individual Planner by using the print button. To print from your Individual Planner:

1. Set the display of Individual Planner to show the information that you want to print.

For example you might want to set the display to show a week-to-view or a month-to-view, or you might want to change the focus of the schedule to display dates in the past or future.



See Section 2.2, Viewing your planner, for details on how to change the display.

2. Click on the Print button in the top left-hand corner of the screen to print the planner as displayed on your screen:



## 2.7 Obtaining directions to a job

Resource Tracker provides you with access to maps live over the Internet which enable you to obtain directions to a client's site. You can use these to:

- display a map showing the client's site
- zoom in on the map
- print out the map.

The maps not only display the destination address; you can also choose to display a map of the route from home (or office) to an appointment, and the route from one appointment to another.

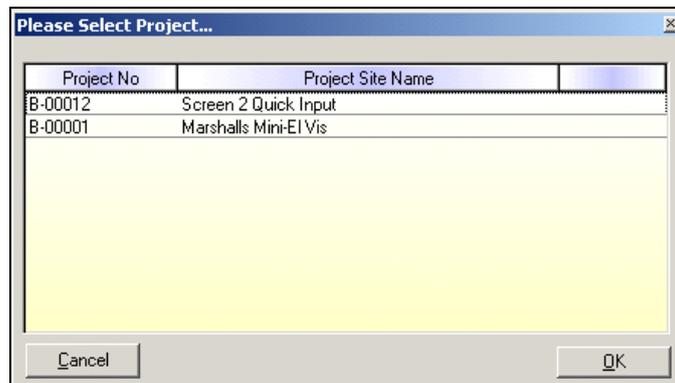
To display a map:

1. Click on the day of the booking for which you want to obtain directions.
2. Select one of the four map buttons from the right-hand panel.

The map button you select depends on the map that you want to display:

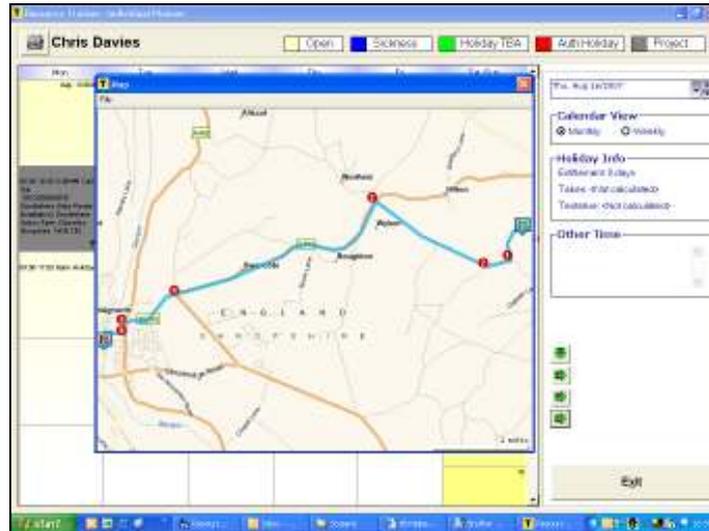
-  – displays a map of the **D**estination site
-  – displays a route from your **H**ome postcode to the site
-  – displays a route from your **O**ffice postcode to the site
-  – displays a route from the site address of your **P**revious appointment to the current appointment.

If there is more than one booking for the selected day, a selection dialog box is displayed.



Select the booking for which you require directions, then click on **OK**.

A map window is displayed showing the suggested route to the client's site, as in the following example:



3. Zoom in and out on the map as required by using the mouse wheel.
4. Change the centre point of the map as required by clicking and holding down the left mouse button over the map and dragging the map to the desired position.  
Changing the centre point enables you to follow a route in detail while zoomed in.
5. Print the map by clicking on the File menu and selecting the *Print* option.
6. Close the map window and return to the Individual Planner by clicking on the  in the top right-hand corner of the window.