

4.

USING THE WEEKLY PLANNER

4.1 Introduction

This chapter describes how you can use the new Weekly Planner in Tracker to help you manage bookings over a week. The Weekly Planner provides a more detailed view of a week's schedules than the All Staff Planner, while still allowing you to display bookings for all members of staff. It gives you a view of time allocations that lets you see who has time remaining and is therefore available for further appointments.

The Weekly Planner enables you to:

- display the diary for any week
- schedule projects/jobs
- assign staff to a project/job
- unassign staff from a project/job
- identify who has unscheduled time remaining.

4.2 Viewing the Weekly Planner

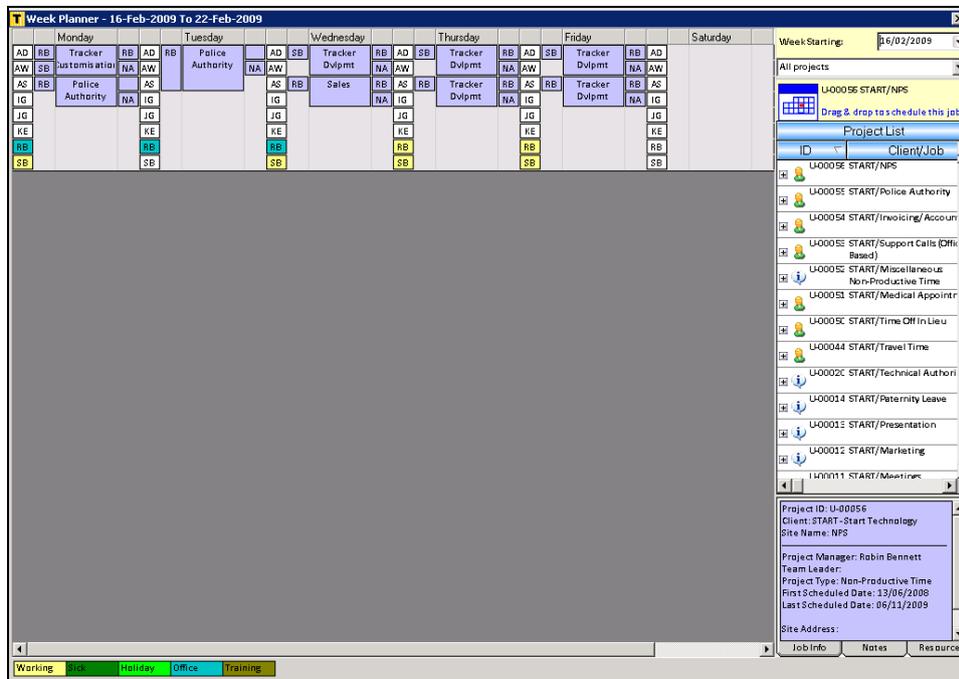
The Weekly Planner shows details for all members of staff over the period of one week. To display the Weekly Planner:

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 Weekly Planner.
5. Click on **OK** to display the Weekly Planner.



This screen shows an example of the Weekly Planner.

Each column represents a day of the week, running from Monday to Sunday, left to right. (You may have to scroll the screen to the right to see Saturday and Sunday.)

The current week is displayed by default.

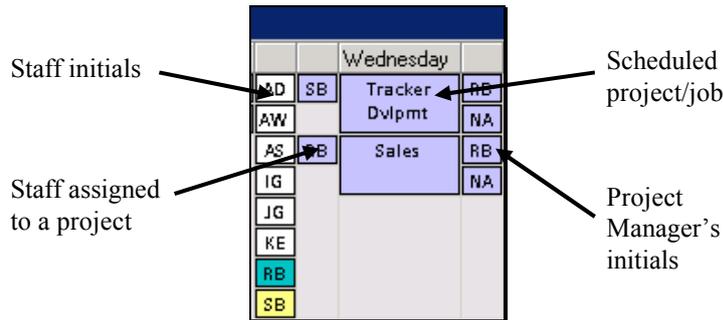
The right-hand side of the screen retains the same layout and content as the All Staff Planner.



Refer to Chapter 3, Using the All Staff Planner, for details on the content of the right pane.

The information for each day is divided into four columns as follows:

- **Column 1:** Staff initials
These are displayed in alphabetical order. Hover over the initials to display the member of staff's full name.
- **Column 2:** Initials of staff assigned to a project
The initials are next to the project to which they are assigned.
- **Column 3:** Scheduled projects/jobs
Projects are displayed in project/job number order.
- **Column 4:** Initials of Project Manager and survey type if appropriate.
The initials are next to the appropriate project.

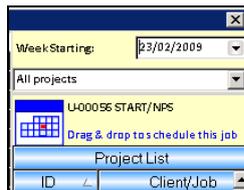


4.3 Changing the week displayed

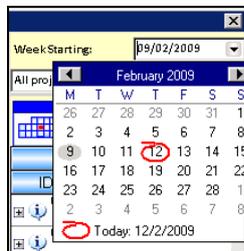
The current week is displayed by default when you open the Weekly Planner. You can select to view a different week.

To change the week displayed:

1. Locate the **Week Starting** field in the top right-hand corner of the screen.



2. Click on the arrow to the right of the **Week Starting** field to display a calendar:



3. Select any day in the week that you want to display.

The view changes to display the selected week.

4.4 Scheduling projects/jobs

To book an appointment for a project on a particular day, you need only drag and drop the project onto the required day and then assign staff to the booking.

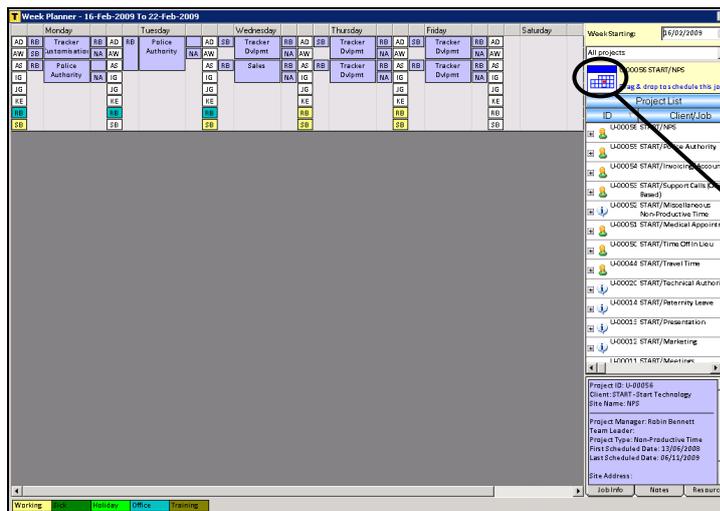
Any bookings that you make will appear in the members of staff's own Individual Planner and also in the All Staff Planner. In addition, whenever you make a booking Resource Tracker adds a day to the number of man days scheduled figure for that job. If this number goes over a certain limit (the total estimated number of man days), Resource Tracker marks the project as overscheduled. The number of man days scheduled is displayed to the right of the client/job in the project list. (If you cannot see the Scheduled and Estimated columns, use the scroll bar at the bottom of the project list or reduce the width of the ID and Client/Job columns until they come into view.)

To book a job by dragging and dropping:

1. Select the job to assign from the list on the right-hand side of the screen.

By default, all available jobs are displayed. You can filter the list by selecting one of the options from the **Projects** drop-down list.

2. Click on the job icon and hold down the mouse button.



Drag this icon to the appropriate day to schedule an appointment

3. Drag the job icon to the required day.
4. Release the mouse button on the required day to make a booking for the selected job.

A box is displayed in column 3 of the selected day, showing the project name. If you hover the mouse pointer over the project box, further project details are displayed.

Further boxes are displayed on either side of the new project booking, in columns 2 and 4. These show the following:

- **Column 2:** Initials of staff assigned to a project

Initially, 'UN' (Unknown) is displayed to show that no-one is assigned to the project yet

- **Column 4:** Initials of Project Manager

The initials of the Project Manager assigned to the project are displayed in the top box to the right of the project, in column 4. Also in column 4, below the Project Manager initials, there is a second box. This box displays either:

- survey type, if applicable, eg 'T2' or 'T3'
- 'NA' (Not Applicable) if the project is not a survey.

The grid extends downwards, as necessary, to accommodate the bookings you make.

4.5 Assigning staff to a booking

Once a booking has been made for a project, you can assign staff to the booking.

To assign staff:

1. Click on the initials of the required member of staff and hold down the mouse button.



If you need to check that you have selected the correct member of staff, you can hover over the initials to display the member of staff's full name.

2. Drag the initials to the required project booking.
3. Release the mouse button on the required project booking to assign the member of staff to that appointment.

A box is displayed for you to enter the time of the booking.

4. Specify the **From** time and **To** time of the appointment, then click OK.

A prompt asks if you would like to email details of the appointment.

5. Click Yes or No, as appropriate, in response to the message to email details of the appointment to the member of staff.

4.6 Removing staff from a booking

You may at times need to change the staff assigned to a booking. You can easily unassign a member of staff from a booking by dragging and dropping their initials as follows:

1. In column 2, next to the appropriate booking, click on the initials of the assigned member of staff and hold down the mouse button.

For example, click on these initials

Week Planner - 16-Feb-2009 To 22-Feb-2009																							
Monday				Tuesday				Wednesday				Thursday				Friday				Saturday			
AD	RB	Tracker	RB	AD	RB	Police	AD	SB	Tracker	RB	AD	SB	Tracker	RB	AD	SB	Tracker	RB	AD				
AW	SB	ustomisation	NA	AW		Authority	NA	AW	Dvlpmt	NA	AW		Dvlpmt	NA	AW		Dvlpmt	NA	AW				
AS	RB	Police	AS						Sales	RB	AS	RB	Tracker	RB	AS	RB	Tracker	RB	AS				
IG		Authority	NA	IG						NA	IG		Dvlpmt	NA	IG		Dvlpmt	NA	IG				
JG				JG								JG				JG							
KE				KE								KE				KE							
RB				RB								RB				RB							
SB				SB								SB				SB							



Hovering over the initials displays the member of staff's full name, time of booking and any appointment notes.

2. Drag the initials back to column 1 of the day with which you are working, the column of staff initials.
3. Release the mouse button on column 1 to remove the member of staff from the booking.



Note that once the last person assigned to an appointment is removed, so that no members of staff remain assigned to the booking, the booking itself is automatically deleted.

4.7 Identifying unscheduled time remaining

As you assign people to projects, the time they have available during the day is taken up. To help you to identify when a member of staff is fully booked and when they have time remaining, colour-coding is used.

If a member of staff's initials are coloured in column 1 of a selected day, then they are fully booked.

The actual colour displayed varies according to the type of project, which is usually as follows:



These are defined as:

- Working = non-U projects
- Sick = U-0003
- Holiday = U-0001
- Office = any other U project
- Training = U-0004.



The types of projects and the colours in which they are displayed can be changed if required. Contact Start Software for help if you would like to change the projects or colours.

4.8 Deleting bookings

You delete bookings by unassigning all the members of staff who have been assigned to the appointment.

Once the last person assigned to an appointment is removed, so that no members of staff remain assigned to the booking, the booking itself is automatically deleted.

4.9 Amending bookings spread over multiple days

If an appointment is spread over a number of days as one continuous stretch, it may be necessary to use the All Staff Planner to implement any amendments that you wish to make.



Refer to Chapter 3, Using The All Staff Planner, for full instructions on how to use the All Staff Planner.

Using the Weekly Planner, you are able to amend the first and the last day of the booking, for example by assigning or unassigning members of staff. It is not however possible to amend or delete a day in the middle of a booking spread over multiple days. If you attempt to do so, a message asks you to use the All Staff Planner.