

7.

FREQUENTLY ASKED QUESTIONS

7.1 Introduction

The list of questions and answers in this section is intended to:

- answer your questions directly
- provide signposts to the answers and further information within the user guide.

7.2 Questions and answers

Q: Can you view a job's detail in Resource Tracker without having to go back to Tracker?

A: Yes, use the "+" next to the Project Number in the project list, or the Job Info section in the bottom right-hand corner of the Resource Tracker screen.



Refer to Section 3.10, Viewing project information, for further information on viewing job details.

Q: Will Resource Tracker allow more than one job per person per day?

A: Yes, you can schedule any number of jobs, even if they overlap in time. Click on them to cycle around so that you can see the ones "hidden beneath" other jobs.



Refer to Section 3.4.4, Assigning a job by selecting the day, for further information.

Q: Will the system support more than one manager scheduling work at the same time?

A: Yes, any number of users can be scheduling staff and resources at the same time. The only limitation is that the system doesn't currently automatically refresh to reflect another user's changes - click the Refresh button to force a refresh.

Q: If required, how are job values/timescales altered retrospectively?

A: You can edit Resource Tracker entries in the past just as you would future appointments. You can also change the values (or durations) of jobs within Tracker itself. Resource Tracker will always use the latest values in the system to calculate the value of individual appointments.



Refer to Section 5.3, Displaying a Productivity Report, for further details on the calculation of the value of appointments.

Q: Can work quoted for and won be scheduled before the project sheet is produced?

A: Yes, but only if a project record within Tracker has been created. It is not possible to schedule a job which is only in the system as a quotation or order. You could create a temporary skeleton project, with a U code for unproductive time, in order to reserve time. Then, when the proper project record has been created, you would have to delete the temporary appointments and book the required people to the proper project.

Q: If a job has been booked to one surveyor, how do we move it to another?

A: Right-click on the appointment(s), choose *Edit, Cut* and then *Edit, Paste* on the new surveyor/date.



Refer to Section 3.8.3, Cutting and pasting an appointment, for further details on moving appointments in this way.

If you have dragging and dropping enabled, this is an even faster way to move appointments. Simply click and hold on the appointment you want to change, move the cursor to the new position and drop the appointment in place.



Refer to Section 3.8.2, Dragging and dropping an appointment, for further details on moving appointments in this way.

Q: How can managers view information relating only to their site?

A: Currently, the best way to view staff only at their site is by using the Staff Groups option, which is the second drop-down in the top right-hand corner of Resource Tracker, and then selecting the projects that they manage by using the top drop-down box.



Refer to Displaying staff in groups in Section 3.4.2, Selecting the staff, for further information on using the Staff drop-down, and Section 3.4.1, Selecting the job to assign, for details on the Projects drop-down.

Q: Is there an option to view "Projects for site X"?

A: Yes, options on the Projects drop-down let you filter the job list to show only open projects for specific offices. A regional manager, for example, might find it useful to filter the list according to specific offices.



Refer to Section 3.4.1, Selecting the job to assign, for details on selecting the filter.

Q: How is the staff list tidied?

A: The staff list comes from Tracker and changes made there will be reflected when Resource Tracker is next opened. The staff list can be sorted by distance from job to help make staff selection easier.



Refer to Section 3.4.2, Selecting the staff, for information on changes you can make on the Staff screen in Tracker and how to sort the list by distance from the job.

Q: Does Resource Tracker restrict the choice of suitable staff to those resident at the site owning the project?

A: No, any member of staff can be scheduled to any job.

Q: How do non fee-earning staff affect the statistics within Resource Tracker?

A: They don't, and they will only be reported if they have active appointments in the period chosen. Most Resource Tracker users put non fee-earning staff in a group with a name beginning "_" or "Z" or similar to make sure that they are at the bottom of the Resource Tracker staff list.