

CONTENTS

1. INTRODUCTION

1.1	Introduction	1-1
1.2	What is Resource Tracker?	1-1
1.2.1	Individual Planner	1-1
1.2.2	All Staff Planner.....	1-2
1.2.3	Weekly Planner	1-2
1.2.4	Executive Overview	1-3
1.3	Getting started with Resource Tracker.....	1-3

2. USING THE INDIVIDUAL PLANNER

2.1	Introduction	2-1
2.2	Viewing your planner	2-1
2.3	Booking time off.....	2-4
2.4	Amending time booked off	2-4
2.5	Managing your holiday entitlement	2-5
2.6	Printing from your Individual Planner	2-5
2.7	Obtaining directions to a job.....	2-6

3. USING THE ALL STAFF PLANNER

3.1	Introduction	3-1
3.2	Displaying the All Staff Planner	3-2
3.3	Changing the view	3-4
3.3.1	Using View mode.....	3-4
3.3.2	Displaying and removing grid lines.....	3-4
3.3.3	Changing the scale	3-5
3.3.4	Zooming in and out	3-6
3.3.5	Changing the focus of the schedule.....	3-7
3.3.6	View details by resource or project.....	3-8
3.3.7	Changing the colour view.....	3-9
3.4	Assigning jobs to staff	3-11
3.4.1	Selecting the job to assign.....	3-11
3.4.2	Selecting the staff.....	3-12
3.4.3	Assigning a job by dragging and dropping.....	3-15
3.4.4	Assigning a job by selecting the day	3-17
3.4.5	Assigning a job by selecting the person	3-19
3.5	Editing a booking.....	3-21
3.6	Removing an assignment	3-23
3.7	Linking appointments	3-24

3.8	Moving and copying appointments.....	3-25
3.8.1	Moving an appointment back.....	3-25
3.8.2	Dragging and dropping an appointment.....	3-26
3.8.3	Cutting and pasting an appointment.....	3-26
3.8.4	Copying an appointment.....	3-27
3.8.5	Setting up a repeating schedule.....	3-28
3.9	Displaying maps.....	3-29
3.9.1	Displaying maps from the tooltip.....	3-29
3.9.2	Displaying maps from the right-click menu.....	3-31
3.10	Viewing project information.....	3-32
3.11	Adding notes to assigned jobs.....	3-33
3.12	Recording time off.....	3-35
3.13	Authorising time off.....	3-35
3.14	Sending diary e-mails.....	3-36
3.15	Printing reports.....	3-36
3.16	Exporting data to other applications.....	3-37
3.17	Changing the content of the diary emails.....	3-38
3.17.1	Amending the diary email.....	3-38
3.17.2	Amending the diary appointment attachment.....	3-39
4.	USING THE WEEKLY PLANNER	
4.1	Introduction.....	4-1
4.2	Viewing the Weekly Planner.....	4-1
4.3	Changing the week displayed.....	4-3
4.4	Scheduling projects/jobs.....	4-4
4.5	Assigning staff to a booking.....	4-5
4.6	Removing staff from a booking.....	4-6
4.7	Identifying unscheduled time remaining.....	4-6
4.8	Deleting bookings.....	4-7
4.9	Amending bookings spread over multiple days.....	4-7
5.	USING THE EXECUTIVE OVERVIEW	
5.1	Introduction.....	5-1
5.2	Displaying the Executive Overview.....	5-1
5.3	Displaying a Productivity Report.....	5-3
6.	CALENDAR SYNC	
6.1	Introduction.....	6-1
6.2	Setting the structure of your calendars.....	6-1
6.3	Linking the calendars to Tracker.....	6-5

7. FREQUENTLY ASKED QUESTIONS

7.1 Introduction 7-1
7.2 Questions and answers 7-1

A. APPENDIX A

A.1 INI file settings A-1
A.2 Diary email field codes A-3