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Contents for Timewise Help

Logging Onto Timewise...

To use Timewise you must be previously set up. Select your name from the pull-down list and enter your password. Passwords are not case-sensitive.
In the event of three unsuccessful attempts of the password you will be returned back to Program Manager.

The Role of the Administrator

On installation of the product onto a network or standalone machine a 'User' called Administrator is automatically set up. A Default password is allocated which can be changed at a later date.

The role of an Administrator is to control and administer various system and housekeeping procedures within Timewise. It is advisable to appoint an Administrator, preferably someone who also uses the system.

Carrying out Administrator Tasks will keep your system lean and efficient.

Note
Consult your Administrator if you have password problems.

Client Portfolio Zone

Overview

Features List....

- View Portfolio
- Add Company
- Maintain Company Details
- Add Contacts
- Maintain Contacts
- Add Projects
- Maintain Projects
- Adding Images
- Portfolio Templates
- Project Correspondence
- Company Search
- Project Search
- Sort Order & Search
- Message Count
- Message Box
- Delete
- Reports

Accessing client information is both quick and easy. The Client Portfolio gives you the ability to maintain company details, contacts within a company and all the projects/actions within that company.

Portfolio templates allow you to maintain further details regarding your client, no matter how diverse they might be.

View Portfolio

Company Details

The 'VCR Panel' located on the Icon Bar can be used to move sequentially through company details. 'Fast Forward' and 'Fast Rewind' buttons allow rapid movement through the records. To stop a fast search, simply click on the left hand button of the mouse.

Alternatively you may search for a company using one of the following search facilities:

- Company Search
- Sort Order & Search

Contacts

Located on the bottom half of the screen, use the scroll bar to the right of the contacts to view all contacts for the current company.

Projects

The icon above will take you to the 'Projects By Company' view. The 'VCR Panel' will sequentially display projects assigned to the company.

Use the scroll bar located to the right to view all projects for the current company. Alternatively you may search for your project directly using the Project Search

Add Company

Company details are located at the top of the screen within the boundaries of the ring binder. To add new company records click on the above icon to invoke the 'Generate New Company' dialog box. Use the *Tab* key or the mouse to move between fields. Click on 'OK' to save your entry and display your record.

Note

To move the cursor to the next line when adding the address within the dialog box you must use *Ctrl+ Enter.*

Maintain Company Details

You must be viewing the record you wish to modify. Click anywhere within the diary boundary to invoke the View/Modify Company Details' dialog box. Use the *Tab* key or the mouse to move between fields when making your changes. Click on 'Save' to store your changes.

Note
You cannot change the Company Name as this is referenced in the Message Logging Zone.

Add Contacts

Contact details are located at the bottom half of the main screen. You must be viewing the company for which contacts are to be added. To add new contacts click on the above icon to invoke the 'Generate New Contacts' dialog box. Use the *Tab* key or the mouse to move between the fields. Click on 'OK' to save your entry and display your record.

Maintain Contacts

You must be viewing the contact you wish to maintain. Click on any of the fields within the record details to invoke the 'View/Modify Contact Details' dialog box. Use the *Tab* key or the mouse to move between fields when making your changes. Click on 'Save' to store your changes.

Add Projects

You must be viewing the company against which you wish to assign projects. Click on the above icon to invoke the 'Generate New Projects' dialog box. Use the *Tab* key or the mouse to move between fields. Click on 'OK' to save your entry and display your record.

Maintain Projects

You must be viewing the project details you wish to modify. Click anywhere within the project details section to invoke the 'View/Modify Project Details' dialog box. Use the *Tab* key or the mouse to move between fields when making your changes. Click on 'Save' to store your changes.

Adding Images

The Portfolio gives you the facility to display images. The following formats are supported;

BMP, WMF, TIF, PCX, EPS, CGM, TGA, DRW, CHT, GIF, CH3, DXF, IMG, PCT, WPG

To add your image, enter the full name of the image file (including the path) within the 'Image Path' field which is accessible via the 'Generate New Company Details' and 'View/Modify Company Details' dialog boxes.

for example ;   C:\ name of directory\name of file
                                    C:\IMAGES\PICTURE.BMP

On saving the record your image will be displayed.

Portfolio Templates

Invoking this option activates the 'Text Editor' containing the entire contents of the Portfolio for the corresponding record. This is displayed as a Master Template. (The title for this file will appear as TEMPLATE.SBT).

This template can be used to view/print the Portfolio details but the primary function is to give you the opportunity to set up and tailor the details to your needs. Simply edit the template as required and, using the 'Save As' function from the 'File' pull-down menu, save the template to a unique name. If you do not give it a unique name, i.e. just save as default name TEMPLATE.SBT, your edited information will be overwritten when you next re-invoke this option, because each Portfolio record is rewritten to TEMPLATE.SBT when this option is invoked.

Tailored templates can be accessed in the normal manner from the text editor. i.e. 'Open' from the 'File' pull-down list of the 'Text Editor'.

Files can also be viewed and maintained through the 'Text Editor' from the 'Utilities' pull-down menu.

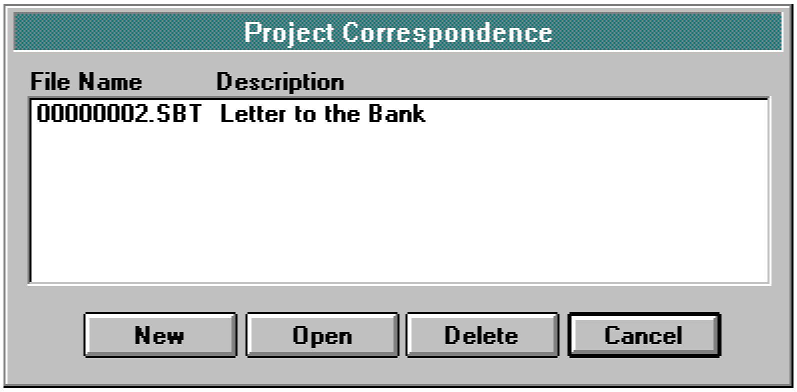
Important
Make sure the information is saved before leaving the 'Text Editor' otherwise your information will be **lost**.

The files saved are automatically saved with the extension '.SBT'. It is not recommended that this is changed.

All information contained within your new template is a snap shot of the client portfolio details at the time of creation. Any subsequent changes to the original record through the forms and fields will not affect your template.

Project Correspondence

This is a quick and simple method of generating letters using the 'Text Editor'. Invoking this function will display the 'Project Correspondence' dialog box. Through this dialog box you can generate 'New' letters, 'Open' existing letters and 'Delete' letters.



<u>New</u>

Before starting a new letter you will be prompted for a description/name, of up to 25 characters, for your new letter. This description will appear as the title in the 'Project Correspondence' dialog box when opening letters.

Once you have entered the description and clicked on 'OK' you will be presented with the 'Text Editor' containing the default letter template and the relevant project information already inserted. You are free to alter the format of the letter as you wish.

To save your entry simply click on 'Save' under the 'File' pull- down menu or use *Ctrl+S*.

<u>Open</u>

Highlight the title you require and click on the 'Open' button. Use the scroll bar to view all letters.

<u>Delete</u>

Highlight the title you wish to remove and click on the 'Delete' button.

Search Facility

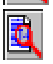
Company Search

Project Search

Person Search

Subject Search

Full Name Search



Quarterly Search

To use any of these searches simply :

- Ø Click on the Icon above to invoke the search dialog box.
- Ø Browse from the pull-down list and make your selection from the list of records.
- Ø Click 'OK' to confirm your choice and display your record.

Sort Order & Search

This unique feature allows a search by one of many key fields located within your view.

To use this feature:

(a) Invoke the icon above.
(b) Browse through the list of available fields and highlight the field you wish to use for your search.
(c) Confirm your choice by clicking 'OK'; this will change the chosen field label to red. Only one field can be selected at any one time.
(d) You are now ready to search by the first letter of the data contained in your chosen key field. Using the vertical alphabet index located to the right of the screen, click the letter which corresponds to the first letter of the data you require (e.g. 'Postcode' selected as the key field and the 'B' button chosen on the alphabetic index to represent the first character to 'Bristol').
(e) This will search for all the records starting with the chosen letter and list them in a results dialog box.
(f) Browse through the list of records found and highlight your record with a single click. Clicking 'OK' will display your record in full.

<u>Asterisk</u>

The asterisk button located on the bottom of the alphabet search pad will clear the last search from the alphabet index.

Message Count

A 'Total' field notifies you of the total number of messages added for the person currently in view, added through the 'Message Logging Zone'. Use the Message Box to view those messages.

Message Box

With a click on the above icon, you can see a summary of all the messages assigned to that company through the Message Logging Zone.

Delete

Message Logging Zone

This feature is a quick method of deleting those messages opened or closed instantaneously. To remove closed messages in a controlled procedure see Remove Closed Messages By Company/Person/Subject as part of 'Administrator Tasks' for further details.

Client Portfolio Zone

Deleting a company will remove all associated contacts and projects.

Any company that has messages assigned through the Message Logging Zone can not be deleted. Any messages will have to be removed first. See Remove Closed Messages By Company/Person/Subject as part of 'Administrator Tasks'.

Timesheet Zone

This feature is a quick method of deleting timesheet records added instantaneously. To delete groups of records in a controlled manor see Delete Timesheet Records as part of 'Administrator Tasks' for further details.

Note
Deleting records must be carried out via individual zones unless stated above.

To use the 'Delete' function :

(a) Find the record you wish to delete.
(b) Invoke the 'View/Modify' dialog box for the appropriate section of the zone.
(c) Click on the 'Delete' button.

A 'Confirmation' dialog box will ask for a final confirmation.

Deletion of records throughout Timewise is restricted to the owner, the owner being the 'User' who created the record; the exception to this rule is the Message Logging Zone where the person receiving the message, not the sender, becomes the owner.

Reports

To select a report for any of the zones, you must be within the required zone. The available reports will be highlighted in the 'Reports' option of the 'Menu Bar'.

Booking Zone

Single Day Booking	This report gives a complete print of all appointments by day by resource. A dialog box is provided to select your resource owner and date range.
Several Day Booking	This report gives a complete print of all appointments for a date range by resource. A dialog box is provided for selection of your resource owner and date range.
Re-arrange Booking	This report is actioned in the normal way. See 'Re-arrange Booking' of Booking Zone.

Message Logging Zone

Messages By Date Messages By Subject Messages By Person Messages By Company	Each report will give a complete report of messages logged. Further filtering on each report can be made at the time of running each report.

Client Portfolio Zone

Business Contacts	A complete report of clients that have associated contact details.
Business Projects	A complete report of clients that have associated projects details.
Company Details	A report detailing all clients without contacts or projects added.

Name & Address Zone

Name & Address Listing	A complete listing of all the names and addresses.
Name & Address By Category	A complete listing of all the names and addresses by category.

Timesheet Zone

Timesheet By Project Timesheet By Person Timesheet By Date	Each report will give a complete report of timesheet details. Further filtering on each report can be made when running each report.

Quarterly Objective Zone

Quarterly Objectives By Quarter Quarterly Objectives By Person	Each report will give full details of objective. Further filtering on each report can be made when running each report.

Quick View Company Details

This quick-view feature can be invoked from within any zone.

View

A quick and easy method of viewing/adding & deleting company details. To find the appropriate company use the 'Company Name Search', enter the name and click on 'OK'.

To view 'Contacts' for a company, highlight the company required and click on 'Contacts'. You can view contacts in the same way as company details.

Add

To add a new company use the 'Add' button on the main 'Quick-View Company Details' dialog box. The same rules apply when adding via the 'Client Portfolio Zone' (see Add Company).

New 'Contacts' for a company can be added in the same way, except using the 'Add' button from the 'Quick-View Company Contacts' dialog box. The same rules apply when adding via the 'Client Portfolio Zone' (see Add Contacts).

Delete

Highlight the record required (which must belong to you, as you can only delete your own records). Click on the 'Delete' button to complete the deletion.

Message Logging Zone

Overview

Features List...

View Message
Maintain Company Category
Maintain Subject Category
Maintain Person Category
Log New Message
Date & Time Stamp
Urgent Messages
Maintain Message
Close Call/Message   Closed Message Display
Person Search
Subject Search
Delete
Message Count
Reports

The easy way to log and track messages and calls. Views by category give you fast and easy access to those messages. Each of the four views (Date, Person, Subject and Company) allow messages to be added, maintained and closed with minimal effort.

First Time Round...

Before you can use many of the features of Message Logging, you must set up the 'Subject' and 'Company' categories. Each user is set up as a 'Person' by default.

View Messages

You have the ability to view Messages by the following:

By Date -	all messages entered for the date in view.
By Company -	all records entered for the company in view.
By Person -	all records entered for the person in view.
By Subject -	all records entered for the subject in view.

The 'VCR Panel' located on the Icon Bar can be used to move sequentially through the categories (i.e. Date, Company, Person and Subject). 'Fast Forward' and 'Fast Rewind' buttons allow fast movement through the records. To stop a fast search, simply click on the left hand button of the mouse.

Alternatively you may wish to search for your message(s) using one of the following search facilities:

Subject Search

Person Search

The scroll bar located to the right of the messages can be used to view messages for the category in view.

Maintain Company Category

New company titles must be added through the Client Portfolio Zone. This will ensure data integrity for companies set up within Timewise.

Maintain Subject Category

To add new subjects invoke the 'Log New Message' dialog box and click on the 'New' button next to the 'Subject' drop-down box. Subject names can be up to 20 characters in length.

Note

To delete existing descriptions see Remove Message Category Heading of Administrator Tasks.

Maintain Person Category

Each user set up on Timewise is automatically set up in the 'Person' category. To add additional persons will involve setting up new users within Timewise. (see Configure User Details of Administrator Tasks if you require a diary to be added with the new person for use within the 'Booking Zone'). If you do not intend using the new person within the 'Booking Zone' you may add persons via the Timesheet Zone.

To set up a new person (a.k.a new user) whilst adding a message, invoke the 'Log New Message' dialog box and click on the 'New' button next to the 'Person' drop-down box.

Log New Message

To log a new message click on the above icon to invoke the 'Log New Message' dialog box. Use the pull-down lists to select company, subject and person details followed by the *Tab* key or the mouse to move between fields. Click on 'OK' to save your entry and display your message.

Each of the description fields 'Description Of Message' and 'Action Required' have a maximum length of 1000 characters. The first 150 characters of the message description are displayed on all viewing screens.

Date & Time Stamp

This is added automatically at the time of logging new messages.

When maintaining messages it is advisable to add an amendment date/time in the description/action boxes, as modifications will not change the date and time initiated.

Urgent Messages

When you require messages to be classified as urgent, activate the 'Urgent Attention' check box.
All urgent messages are highlighted on the viewing forms with a time-bomb symbol and will appear above any ordinary messages.

This feature can be activated when logging new messages or on modification of existing messages.

Maintain Messages

To modify a message within any view, click anywhere within the required record to invoke the 'View/Modify Message Details' dialog box. Use the *Tab* key or the mouse to move between fields. Click on 'Save' to save your entry and display your record.

Close Call/Message

To close a message, click on the 'Close Call' check box located in each of the dialog boxes for logging and maintaining messages.

A status column located on each view will identify all closed messages.

Messages can be re-opened by de-selecting the 'Close Call' check box.

Closed Message Display

To display all messages that have been closed, simply invoke this option. Reversing this option will display all options.

Quick View Message Logging

This quick-view feature may be invoked from within any zone.

View

A fast and effective method of viewing, adding and deleting messages for the logon user. Any messages added for the current day will be displayed here.

Add

The same rules apply as for 'Logging New Messages' within the 'Message Logging Zone' (See Log New Message for further details)

Delete

Highlight the record required remembering you must be the receiver in order to delete the record. Click on the 'Delete' button to complete the deletion.

Booking Zone

Overview

Features List...

Single Day View
Several Users Single Day View
Several Days Single User View
Resources
Add New Booking
Maintain Booking
Add Notes
Maintain Notes
Add Block-Booking
Remove Block-Booking
Find Next Free Appointment
Appointment Text Search Re-arrange Booking
Reports

Effective time management is key in any working environment. Timewise enables you to book and schedule time under pre-defined subjects and to set up diaries years ahead or as you need them. Simple-to-use features like 'Find Next Appointment' will remove the need to sequentially look for available time slots. 'Several Day Single User View ' will allow greater planning. Network users can view up to six users for a single day.

First time round...

To use the Booking Zone you should:

a) Build a calendar for the required year(s) for each user.
b) Add the subject categories you may wish to log time/ appointments against(e.g. holidays).

Single Day View

Invoking the Booking Zone displays the single day view with full calendar control. This view is divided into two functional areas. All control features are to the left of the form and booking details are to the right.

The current day and associated booking details are automatically displayed.

A number of methods are available when searching for a required date. On exploring all the different options you will soon develop your own preferences.

Years

To progress from year to year you can use the backward and forward arrows located on either side of the 'Year Panel' as shown above. This will move the diary to the same day and month of the following or previous year sequentially.

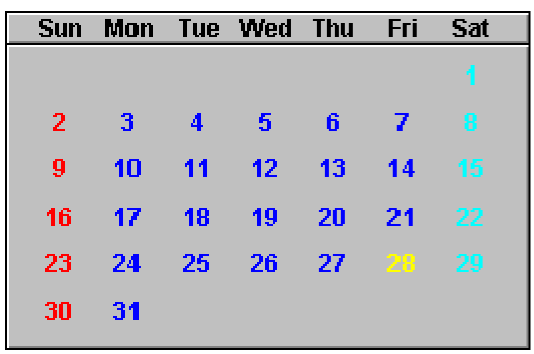
To move directly to a specific year, click on the 'Year Panel' display to invoke the 'Select Year' dialog box. Using the pull- down list, select from the years set up for the resource.(See Add Resource Years as part of 'Administrators Tasks' for further details)

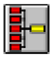
Months

To move to a particular month, simply click the 'Month Panel' as shown above and the diary will change month. If the same day does not exist for the chosen month the previous day will be displayed.

Days

To move to a day, you can either use the backward and forward arrow keys located on either side of the 'Viewing date' as shown above or you can directly click the 'Day Panel' as shown below.



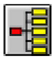


Several Users Single Day View

This view displays up to six users for the date (which is carried over from the main booking form). Use the VCR Panel' located on the Icon Bar to move sequentially through each day.

You have the ability to view, add and modify any appointment. Deletion is restricted to the diary owner.

Use the scroll bar located to the right of each day to view all appointments.



Several Days Single User View

This view displays a six day diary starting from the day carried over from the main booking form.   Use the 'VCR Panel' located on the Icon Bar to move sequentially through each day.

You have the ability to view, add and modify any appointment. Deletion is restricted to the diary owner.

Use the scroll bar located to the right of each day to view all appointments.

Resources

By default, every user set up on the system will automatically be added to the resource list. To change a resource, click on the 'Resource' button to invoke the 'Select Resource' dialog box and select from the pull-down list.

Adding New Resources

To add resources (a.k.a Users), see Configure User Details of 'Administrator Tasks' and decide on the type of time-slots required with your new resource.

Add New Booking

Click on the above icon to invoke the 'Add New Booking' dialog box. Use the mouse or *Tab* key to move between fields. The date will default to the current date and it may be changed by simply over typing a new date (in the format DDMMYY). The time will default to the current time. It is important to enter the exact time required; if the time-slot does not exist in the original diary a new slot will be created automatically.

Maintain Booking

You must be viewing the booking you wish to maintain. Click on the booking text description to invoke the 'View/Modify Booking' dialog box. Use the *Tab* key or the mouse to move between fields when making your changes. Click on 'Save' to store your changes.

Add Notes

Click on the above icon to invoke the 'View/Modify Notes' dialog box. Available for each day, with a free-format text capacity of 300 characters.

Note
This dialog box automatically wraps the word onto the next line. To force new line, you must use *Ctrl+Ente*r.

Maintain Notes

You must be viewing the notes you wish to maintain. Click anywhere within the boundaries of the 'Notes' field to invoke the 'View/Modify Notes' dialog box. Use the *Tab* key or mouse to make your changes. Click on 'Save' to store your changes.

Add Block-Booking

Add New Subjects

Before you can block-book time, you must set up the subjects. To add subjects click on the icon above to invoke the 'Block- Booking' dialog box. Click on the 'New' button next to the 'Subject' pull-down list. This will in turn invoke the 'Add New Subject' dialog box where you should enter your subject (up to a maximum of 18 characters long).

Maintain Subjects

Once subject descriptions have been entered, they can not be altered but you can add a new description and remove any descriptions no longer required. (See Remove Booking Reason as part of 'Administrators Tasks' for further details)

Add Block-Booking

You have the ability to enter a block-booking for any chosen resource.

Time Range

This will be from the first hour of the day of the 'Date From' day right through to the 'Time To' on the last day selected in the 'Date To'. The days between these dates will automatically be fully booked.

For example :Training period block-booked for 2.5 days starting at 9.00 on 01//02/94 through to 1.00 p.m. on 03/02/94

Note
Partial booking for a single day is not supported unless the period booked includes a complete day.

Remove Block-Booking

Any block-booking made through the 'Block-Booking' facility can be removed. This feature works in exactly the reverse way of the 'Add Block-Booking' facility.

<u>Time Range</u>

This will be from the first hour of the day of the 'Date From' day, right through to the 'Time To' on the last day selected in the 'Date To'.

Find Next Free Appointment

This facility gives you the ability to find free appointments within your diary for the resource selected. If the required time-slot or range of time-slots is booked, the next available date will be selected.

Dates must be entered in the format of DDMMYY (day then month then year). Enter the time range you wish to book. If a 'Time To' is not entered, the system will assume you want a date anywhere within that day. Specifying a time range assumes a spare slot anywhere within the range.

The search is carried out in blocks of 30 days. If a free time-slot is not found you will be notified. Simply re-invoke the option to look through the next 30 days.

Appointment Text Search

This allows you to search for booked appointments using the appointment text.

To use this facility simply invoke the above icon to display the 'Appointment Text Search' dialog box.
Enter part of the description or enough to identify the appointment required.

The search will work in blocks of 30 days from the date entered. If the match is not found a dialog box will notify you of this. Simply repeat the process with a start date 30 days later.

Re-arrange Booking

Whilst allocating block-bookings, you may double-book time slots already allocated. Once you have committed to a block-booking any double-booking will be highlighted in the 'Re-arrange Booking' report. (See Reports for further details).

Note
It is important to check the report before carrying out further block-booking as any new double-booking will overwrite the 'Re-arrange Booking' report.

Quick View Booking

This quick-view feature can be invoked from within any zone and provides a fast and effective facility to view, add and delete appointments for any diary on the system

Note

You may only delete appointments from your own diary.

View

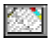
Enter the date required and choose from the 'User' pull-down list to select your resource. Click 'OK' to confirm your choice and display the diary.

Add

The same rules apply as for 'Add New Booking' in the *Booking Zone* (See Add New Booking for further details)

Delete

Deletion will not only remove the appointment but also remove the time-slot. To use this function, find the time-slot on the correct diary, click on it to highlight it and then click on 'Delete' . The same rules apply as for deleting within the 'Booking Zone'*;* you can only delete from your own diary.

 Name & Address Zone

Overview

Features List....

- View Address
- Add Address
- Maintain Address
- Full Name Search
- Letters
- Delete
- Reports

Holding name and address details is made easy with this zone. Unlimited entries coupled with a unique search facility on key fields allow fast search of any address.

View Address

The 'VCR Panel' located on the Icon Bar can be used to move sequentially through addresses. 'Fast Forward' and 'Fast Rewind' buttons allow fast movement through the records. To stop fast search, simply click on the left 'button' of the mouse.

Alternatively you may search for your address using one of the following search facilities:

Full Name Search
Sort Order & Search

Add Address

Click on the above icon to invoke the 'Add New Address' dialog box. Use the mouse to select a title from one of the radio buttons , the *Tab* key or the mouse to move between fields. Click 'OK' to save your entry.

Note

To move the cursor to the next line when adding the address within the dialog box, you must use *Ctrl+ Enter* together.

Addresses added are automatically sorted when saved If your record is not visible, this is because the record has been placed in the sorted order. Use the 'VCR Panel' or search facility to view your entry.

Maintain Address

You must be viewing the record you wish to maintain. Click on any of the fields within the address you wish to change to invoke the 'Maintain Address' dialog box. Use the *Tab* key or the mouse to move between fields when making your changes. Click on 'Save' to store your changes.

Letters

This is a quick and simple method of generating letters using the 'Text Editor'. Invoking this function will display the 'Personal Correspondence' dialog box which shows the history of letters. Through this dialog box you can generate 'New' letters, 'Open' existing letters and 'Delete' letters.

<u>New</u>

Before starting a new letter you will be prompted for a description/name for your new letter (up to 25 characters can be entered). This text file description will appear as the title in the 'Personal Correspondence' dialog box when opening letters.

Once you have entered the description and clicked on 'OK' you will be presented with the 'Text Editor' containing the default letter template and the address already inserted. You are free to alter the format of the letter and contents as you wish.

To save your entry simply click on 'Save' under the 'File' pull- down menu or use *Ctrl S*

<u>Open</u>

Highlight the title you require and click on the 'Open' button. Use the scroll bar to view all letters.

<u>Delete</u>

Highlight the text description you wish to remove and click on the 'Delete' button.

Note
Once you have used the 'Save As' option within the 'Text Editor' the text file cannot be accessed via the zones. To reference this letter/text file you must use the file name. The 'Text Editor' can also be accessed via the menu option 'Utilities'.

Quick-View Name & Address

This quick-view feature may be invoked from within any zone.

<u>View</u>

A fast and effective method of viewing, adding and deleting any address held within the 'Name & Address Zone'.

A search facility allows you the flexibility to carry out the search on a number of key fields. Select the search item from the pull-down list and enter your search criteria.

<u>Add</u>

The same rules apply as for 'Add Address' within the 'Name & Address Zone' (See Add Address for further details)

<u>Delete</u>

Highlight the record required (which must belong to you, as you can only delete your own records). Click on the 'Delete' button to complete the deletion.

Timesheet Zone

Overview

Features List...

- View Timesheet
- Add Project Codes
- Maintain the Person Category
- Log Timesheet Records
- Maintain Timesheet Records
- Person Search
- Project Search
- Delete
- Message Box
- Message Count
- Reports

Manual timesheet recording can now be replaced by this quick and easy automated method. Log time against pre-defined projects for any person and view them by date, person or project for quick and easy analysis. Costing time has never been easier.

First time round...

Before logging time, the project codes must be set up.

View Timesheet

You have the ability to view timesheets by the following:

 By Date - all records entered for the date in view.

 By Person - all records entered for the person in view.

 By Project Name - all records entered for the project name in view.

The 'VCR Panel' located on the Icon Bar can be used to move sequentially through the category in view. 'Fast Forward' and 'Fast Rewind' buttons allow fast movement through the records. To stop fast search, simply click on the left button of the mouse.

Alternatively you may wish to search for your message(s) using one of the following search facilities:

 Project Search

 Person Search

The scroll bar located to the right of the records can be used to view timesheet details for the category in view.

Add Project Codes

Each unique code can be up to 8 characters in length. To add a new project code invoke the above icon to display 'New Timesheet Details' dialog box. Click on the 'New' button next to the 'Project' pull-down menu to display the 'New Project Details' dialog box.

A project's name can be up to 20 characters in length.
A project's description can be up to 100 characters.

Note
Once project codes and project descriptions have been added they cannot be changed. To make changes you must delete and re-add codes and descriptions.

Maintain the Person Category

Each user set up on Timewise is automatically set up in the 'Person' category. To add additional persons will involve setting up new users within Timewise. (see Configure User Details of 'Administrator Tasks' if you require a diary to be added with this new person for use within the 'Booking Zone'). If you do not intend using the new person within the 'Booking Zone' you may add persons via the 'Timsheet Zone'.

To set up a new person (a.k.a new user) whilst adding a Timesheet record, invoke the 'New Timesheet Details' dialog box and click on the 'New' button next to the 'Person' drop-down box.

Log Timesheet Records

Click on the above icon to invoke the 'Log Timesheet Details' dialog box.   All fields shown are required fields and therefore require valid values. Use the *Tab* key or the mouse to move between fields. Click on 'OK' to save your entry and display your record.

Note
This is designed as a daily category therefore the maximum time allowed at any one time cannot exceed 23:59 minutes.

Maintain Timesheet Records

To modify a record within any view, click anywhere within the required record to invoke the 'View/Modify Timesheet Details' dialog box. Use the *Tab* key or the mouse to move between fields. Click on 'Save' to save your entry and display your record.

Quick View Timesheets

This quick-view feature can be invoked from within any zone and provides a quick method of viewing, adding and deleting timesheet details by user.

A pull-down list allows addition and deletion by user.
Select the search item from the pull-down list and enter your search criteria.

Add

The same rules apply as for 'Log Timesheet Details' from within the 'Timesheet Zone' (See Log Timesheet Records for further details)

Delete

Highlight the record required (which must belong to you, as you can only delete your own records). Click on the 'Delete' button to complete the deletion.

Forecasting Zone

Overview

Features List....

- View Forecasts
- Add Forecast
- Maintain Forecast
- Forecast Search
- Message Count
- Message Box
- Delete

Are you meeting your targets ?.......sales/orders/fault fixing etc.

The most straightforward forecasting system you will ever find. Why complicate forecasting, all you need to know is

What is it you want to forecast ?
What is the unit of measure ?
What is the time period of your forecast ?
What is the forecast value ?

All that is required after that is for you to enter your monthly 'actuals' to produce the variances.

View Forecasts

On selection of this option the 'Single Forecast View' will be displayed. This will give a complete breakdown of the components of the forecast.

Alternatively, you may wish to view a forecast with cumulative totals. In this instance invoke the icon below to display up to three forecasts with cumulative totals.

The 'VCR Panel' located on the Icon Bar can be used to move sequentially through each forecast. To move directly to the desired forecast, use the 'Forecast Search' facility.

Single Forecast View

Cumulative Forecasts View

Forecast Search

Add Forecast

Use the icon above to invoke the 'Add New Forecast' dialog box. Use the *Tab* key or the mouse to move between fields.   Click on 'OK' to save your entry and display your record.

Maintain Forecast

You must be viewing the record you wish to modify. Click on any of the fields within the forecast you wish to change to invoke the 'View/Modify Forecast' dialog box. Use the *Tab* key or the mouse to move between fields when making your changes. Click 'Save' to save your changes.

Quarterly Objective Recording Zone

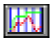
Overview

Features List....

- View Objectives
- Add Objective
- Maintain Objective
- Message Count
- Message Box
- Delete
- Reports

Overview - Quarterly Objective Recording Zone

Planning your quarterly objectives is vital. Tracking and keeping details of your quarterly objectives are equally important. This zone allows you to address a number of aspects of objective recording.



View Objective

The 'VCR Panel' located on the Icon Bar can be used to move through each person against whom objectives have been set. 'Fast Forward' and 'Fast Rewind' buttons allow fast movement through the records. To stop fast search, simply click on the left button on the mouse.
To view all objectives set up for a person use the scroll bar located to the right of the view.

Add Objective

Use the icon above to invoke the 'Add New Objectives' dialog box. Use the *Tab* key or the mouse to move between fields.   Click on 'OK' to save your entry and display your record.

Once the objective has been added the record is automatically sorted and posted in the correct sequence. In order to view records just added you may need to use the scroll bars to the right or use the search facility.

Note
Each of the text fields 'Main Objective', 'Activity', 'Target Audience', 'Partners' and 'Comments' have a capacity of up to 400 characters.

Maintain Objective

You must be viewing the record you wish to modify. Click on any of the fields within the objective which you wish to change to invoke the 'View/Modify Objectives' dialog box. Use the *Tab* key or the mouse to move between fields when making your changes. Click 'Save' to save your changes.

File

Features List...

- Print
- Print Setup
- Export
- Send Mail

Print

A variety of information about the database can be directed to the printer. This can be selected from the 'Print Selection' dialog box. Click the appropriate radio button for your choice.
See list below for an explanation of each option;

To Print:	**Action:**
Current Record	Select 'Record/Form', and click 'OK'
A group of records	Select 'File/Forms', then click 'OK'. A filter dialog will be displayed to print the group of records you want to print.
Status Details	Select one of the following, 'System Status', 'File Status' or 'Form'.
A list of files for a directory	Select 'Directory', then click OK. A Filename dialog box will be displayed so you can select the directory whose files you want to list.

Minimize On Print

You can minimise Timewise to an icon while your selection prints. this is particularly useful for large prints as it lets you continue working in other Windows applications whilst Timewise prints in the background.

<u>Setup</u>

This gives you access to the standard Windows ''Print Setup' dialog box. All changes will apply for the duration of the session. Permanent changes must be actioned through the Windows 'Control Panel'.

Please consult your Windows manual for further information

Print Setup

When you print within Timewise, Timewise uses the printer settings selected at the 'Control Panel' from within Windows. If you want to use different settings for the duration of the session, you can change printer settings here.

You can choose:

(a) Which printer you want Timewise to use
(b) The paper orientation
(c) The paper size
(d) Which paper tray to use
(e) Additional options for the selected printer, such as a scaling percentage

Please consult your Windows manual for further information

Export

This is a utility to export data from a Timewise file to an external file.(See Internal File Index for an explanation of Timewise files)

Choose the name of the file you wish to export and the format type from the pull-down list then enter the new name of the file to which the data is to be exported. By default the file will be placed in the current directory. To export the file to a specific directory ensure this is added to the path of the new file.

e.g. c:\temp\lotus123

Use this extension:	To export to this format:
.DBF	dBASE II, III PLUS, IV and Enable versions 1 and 2
.DB	Paradox (version 3.5 and earlier)
.XLS	Excel (version 3 and earlier)
.WKS	Lotus 1-2-3
.LGX	Logistix
.DIF	VisiCalc and others
.SPP	Superplan
Anything else or no extension	ASCII

Clicking 'OK' will activate the export filter box. (Click on Filter for an explanation on filters) This gives you the opportunity to specify your own formulae and filter specific data. Clicking 'OK' without entering a formula will export the complete file.

Send Mail

Timewise is MAPI enabled. To send mail consult your Mail application for compatibility.

Data

Features List...

- Mail Merge
- Labels

Mail Merge

About Mail Merge

Using the 'Text Editor' and the 'Mail Merge' command you can create personalised letters or documents that merge 'text file' data with a 'data file'. (e.g. print a standard letter addressed to each customer in the 'Name & Address Zone').

The 'text file' contains the standard text and 'merge fields' while the 'data file' contains the data values for those fields. At the time of printing, the 'merge fields' will be replaced with the data values, printing one letter/document for each record, one at a time.

Note
You can only merge data from one file at a time.

Adding Merge Fields to Text Files

1. Open the text file in the text editor.
2. Position the cursor where you wish the first 'merge field' to appear.
3. Click on 'Edit*'* from the Menu Bar, followed by 'Merge field'.
4. Select the first field (e.g. FullName) and double-click or click 'OK' to insert the field from the data file as a 'merge field'. This will be surrounded in ampersands (&) to denote it is a merge field.
5. After you have entered all the relevant fields, remember to save the text file.

Today Function

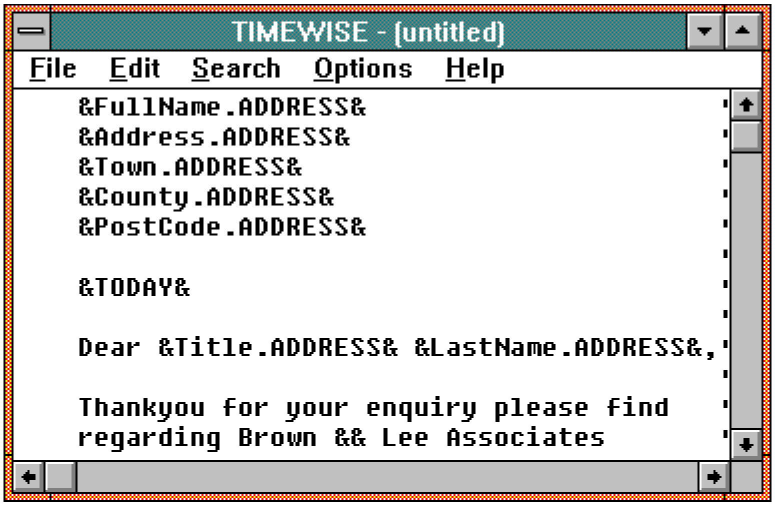
A 'Today' function is provided which, when entered as a 'merge field'*,* will display the system date. This must be physically entered i.e. &TODAY&

Important
To use ampersands (&) anywhere within the text file, prefix it with a further '&' - e.g. Done & Co. should be displayed as Done && Co - otherwise the name will be treated as a 'merge field'.

Fixed length fields

You have the option to fix the length of each field by inserting dashes after the field name e.g. '*&FullName.Address- - - - - -&'* will allow the first 25 characters of the 'Full Name' to appear. The first ampersand marks the start of the count and the last ampersand marks the end of the count. Dashes should always placed *after* the field name.

See example below.



Merge

Select the 'Mail Merge' option from the Menu Bar, which presents you with a filter dialog box *(See* Filter for an explanation on filters) from which to select your group of records.

The next stage will be to select the text file. If you have not closed a previous file within the text editor, the file that is open will be designated as the text file to be used, otherwise you will be presented with the 'Open Merge Document' dialog box to select your file.

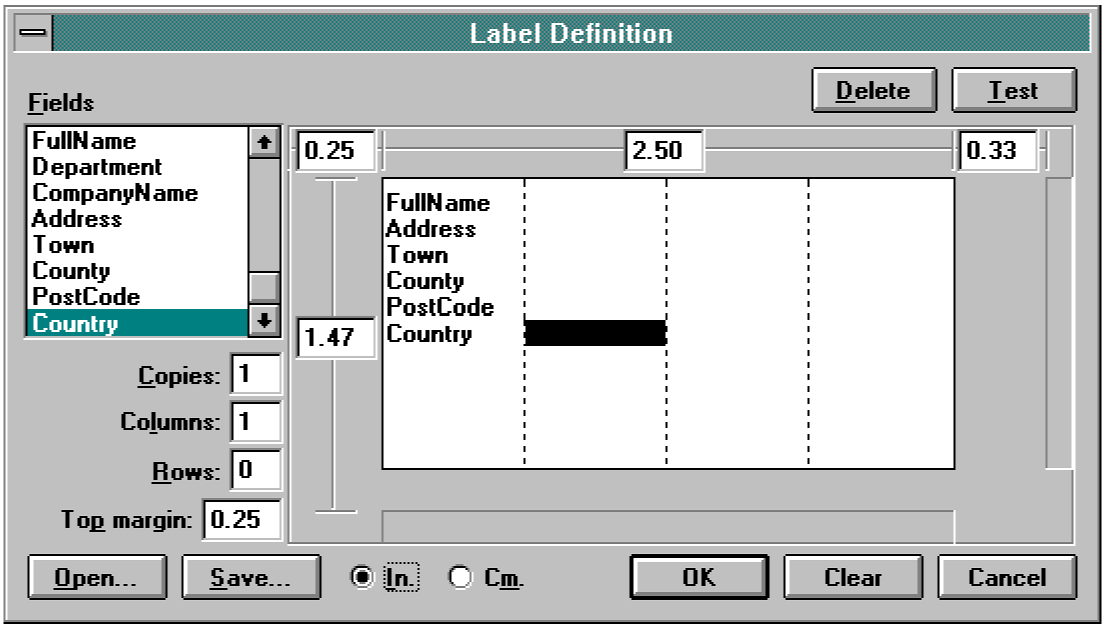
After selecting your file, click 'OK' to continue. You will now have the choice to print the merge to printer or, by clicking 'No', to direct output to the screen

Labels

On activating the 'Label' icon two choices will be available: 'Client Portfolio' and 'Name & Address'. On making your selection the 'Label Definition' dialog box will appear with the necessary data fields.

You may define the data you require on your label.

Defining and printing labels.



If you do not wish to use the default dimensions, determine the size of each label. To set new dimensions, click the dimension box you wish to change and enter the new value.

Dimension Boxes:-

Top Left:	The distance from the edge of the paper to a label
Top Middle:	The width of the label
Top Right:	The distance from one column of labels to the next
Middle Left:	The distance from top of one label to the start of the next label underneath.

Once you have decided on the size of your labels , you are ready to enter the data.

The Data

1. First you must position the field cursor, denoted by an inverse block, on the label area itself. Click the position at which you wish the field to appear on the label. The field cursor will re-position itself.

2. Select the field from the list in the top left corner. This will instantly appear in your selected location. At the same time the field cursor will move horizontal to the same position in the next column for you to place the next field. Remember to insert fields in the order in which you wish them to appear.

3. Repeat the two previous steps until all the fields necessary have been entered.

Delete

You can remove fields at any time from anywhere within the label by highlighting the field and clicking 'Delete'. If you wish to clear all the fields use the 'Clear' ***option.***

Printing

Click 'OK' when you are ready to print. You will then be presented with the 'Label Filter' dialog box (See Filter for an explanation on Filters)

Check 'Page Setup' and 'Printer Setup' before committing the print.

Test

Once you have finished defining the label it is recommended that you test it to check the size and orientation of the labels for the paper you will be using for printing.
On invoking the 'Test' option, each field will be fully substituted with blocks of 'X's. Actual data is not printed. You can check the size and orientation and adjust as needed.

Save

You have the option to save the label definition for future use. You must save the label with the file name extension of '.SBB' (default extension), including the path (the drive and directory) as required.

Open

Any label saved with the .SBB filename extension can be opened for use.

*For examples of labels see **COMPANY.SBB** and **PERSONAL.SBB.***

Important
Blank lines will automatically be suppressed.
Lines that are too long are automatically truncated on the right.

Utilities

Features List....

- Text Editor
- Quick Reports
- Administrator Tasks

Text Editor

A full text editor is available for your use.

You already make use of this utility when creating 'Letters' and 'Portfolio Templates' through the 'Client Portfolio'.

Quick Reports

New Report
Load Report
Save Report

New Report

You can create reports that can be as simple or as complex as you need; with the option to display your report on screen or send to a printer or file.

What can you do with Quick Reports ?

You can create reports that include column heading, page breaks, calculated totals, report headers, or a title that appears at the beginning of the report and you can sort data in ascending or descending order.

Define Quick Report Dialog Box

You can create reports that can be as simple or as complex as you need; with the option to display your report on screen or send to a printer or file.

What can you do with Quick Reports ?

You can create reports that include column heading, page breaks, calculated totals, report headers, or a title that appears at the beginning of the report and you can sort data in ascending or descending order.

Examples

To view examples of quick reports use the 'Load Report' option to select **CMPYCLIN.SBQ OR CMPLYMESG.SBQ.**

Define Quick Report Dialog Box

Use this dialog box to create and run reports. The 'Files List' column displays files available to you and the column commands you can use in your report. (See Column Commands for further information)

Many of the options you select from the 'Quick Report' dialog box lead to other dialog boxes where you can further define the data you want to appear in your report and how you want it to appear.

Producing a Report

Select a file from the list you wish to work with. To do this, click on the 'Files' pull-down list and click on your desired file. Timewise will display the file in the 'file box' and the file's fields in the 'field list'.(See internal file index for a brief explanation of files.)

Select the fields you want to appear in your report and insert them into the 'columns' list box. To insert a specific field, double-click or select the field and click 'Insert'. To insert all fields, click 'insert all'.

When you position the cursor over the fields within the 'column list' the cursor changes to indicate that you can move the order of the fields. To move a field, place the cursor over it, click and hold down the mouse button while you drag the field up or down releasing the mouse button when the field is in the position you want.

Use the options below to define in detail how you wish your report to appear.

Options
Groups
Filter
Order

Header

Edit

Distinct

Use Query Optimizer

Enforce Data Consistency

Column CommandsReport DestinationRun A Report

Options

These options can be applied to each field inserted into the 'Column List'.

Header

Specify a different column header instead of the default name. This can be up to 80 characters in length.

Width

Change column width e.g. if the report contains uppercase text or proportional fonts, increase the width of report to ensure that all data is displayed.

Column

Define your own start position for the column instead of the default. e.g. to start the first column in the 12th space from the left margin, just type in 12. If you enter a number below the default position Timewise inserts a new line before it starts the column.

Row

Position the data for the column at the row you specify e.g. to start the data at the 5th row down from the top margin, type 10. If you enter a number less than the default Timewise starts a new page.

Note
You must specify column positions before row positions. Row positions are not valid for reports sent to the screen.

Do not use the 'Wrap' option when changing column and row positions.

Justify

Left-justify, right-justify or centre data in the column (right-justify is the default). You can select right-justify or centre when you specify a column width.

No Space After

Suppress the blank space that follows a column.

Wrap Overflow

Wrap any data that does not fit on one line of a column onto next line. This feature should not be used if the commands 'Down' or 'Newline' are used and if the column and row positions have been changed from the default.

Unique

Suppress repeated column data, this option is effective only when you 'sort' on the field. See Order later in this chapter.

Print A New Page

Always print repeated data in the first row of the new page. This option is only available when you select 'Unique'.

Groups

This allows you to produce a more meaningful report by allowing you to group relevant data and produce grouped totals.

At the 'Quick Report Group' dialog box insert the fields required for grouping. To insert a specific field, double-click or select the field and click 'Insert'. To insert all fields, click 'Insert all'.

When you position the cursor over the fields within the 'Group list' the cursor changes to indicate that you can move the order of the fields. To move a field, place the cursor over it, click and hold down the mouse button while you drag the field up or down and release the mouse button when the field is in the position you want.

Summarise

To display only the totals for groups and the report,rather than for the data in each record, click here on 'Summarise'. Your report will not contain any group totals if it does not contain any calculated totals.

Totals

You can use aggregate functions to calculate totals for the whole report or for fields that you have inserted in the 'Group list'.

Report

'Report' is provided as a 'group option' at the top of the 'Group List'. This can be used to calculate totals for the report as a whole instead of individual groups.

To add a total, highlight the field you wish to perform the aggregate function on and double-click the function required.

Calculate

Invoke this to call the 'Define Calculated Group' Dialog box and perform a calculated filter. (See Filter for more information on Filters).

All

This includes null values.

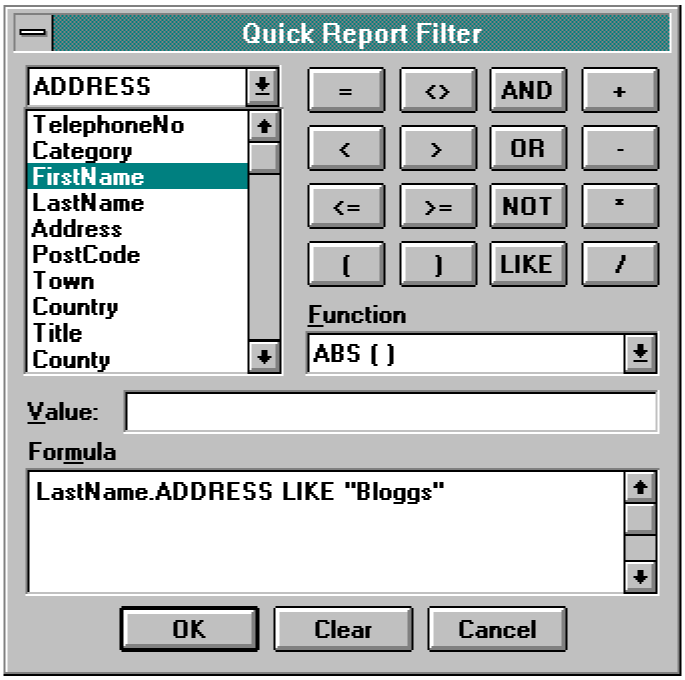
Count Group

Counts the records in the group.

Filter

This facility allows you to define your own selection criteria before retrieval. Records that match this criteria are *filtered through. (e.g. Selecting those records that match the town of 'Devon' from a collection of thousands of client records).*

The filter box is provided as an optional feature. Simply clicking 'OK' without entering any criteria will bypass this extra level of filtering.



A filter can be broken into three elements:

Field-expression - This is the first stage of the filter and will be a field name and its associated file. This is chosen from the top left corner, where a pull-down list is provided for files, and scroll bars show the respective fields. (e.g. Town.Clients)

Operator - This shows how the Field-expression should relate to the Comparison value.(displayed on the keypad located in the top right corner. (e.g. = or <=) This must be added after the Field-expression and before the Comparison.

Note Using '=' assumes an exact match.

*Comparison - A value against which the Field-expression is to be tested. This may be a single value or any operation that produces a single value (e.g. 'Devon' or '3*2') To enter your comparison, click on the 'Value Line' located above the 'formula' box.*
NB: text expressions are automatically enclosed by double quotation marks.

You may create your formula by either typing in the expressions and operators or by building the formula using the elements displayed.

As you build the filter, the formula will appear in the 'formula' box located at the bottom of the dialog box.

Clear

This will remove the complete formula from the 'formula*' box ready to start again or to add a new filter.*

Function

A pull-down list provides all supported functions. When selected your choice will be displayed, beginning with an open parenthesis('['), in the 'formula' *box ready for you to enter your argument(s). Make sure you close your function with a closing parenthesis. You can also use the operator pad to select this.*
Text arguments/values must be entered with double quotation marks e.g. "Devon".

Files

Available files are provided in a pull-down list. Selecting a file will display the relevant fields.

Note

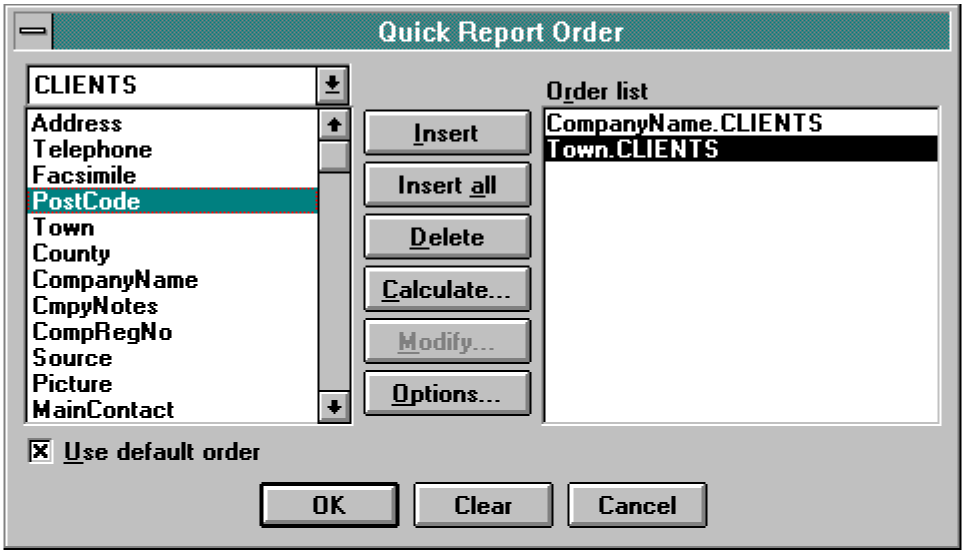
Only single file filters can be constructed.

Order

An 'Order' dialog box is provided, where applicable, to give you the opportunity to specify the sort order of the report. Double clicking on the required fields or using 'Insert' will move them to the right. Clicking 'OK' without adding any fields will invoke the default sort order.

Note
Using multiple sorts will increase the length of time taken to run a report, due to the increased processing required.

This dialog box is invoked after the filter dialog box. See example below.



<u>Options</u>

The choice of ascending or descending order sequence can be controlled here.

Header

You can define the header or title that you wish to appear at the top of each page of your report. The option to include current date and page number is also provided.

Edit

When you create a report, Superbase SBL code is generated; this defines the report. This code should only be edited if you are familiar with Superbase's SBL code. Otherwise continue using the dialog boxes.

Distinct

This will suppress rows that contain data identical to another row. This option also excludes repeated rows from calculations.

Use Query Optimizer

This feature will improve the performance of any reports which involve several files and contain many expressions, functions or variables

For simple reports this option is not required; using the Optimizer in these circumstances may slow down the report.

Enforce Data Consistency

When using Timewise in a network environment it may be possible that other users may change the data in the files you are accessing in your report as you run the report; this could lead to unexpected data in your report.

Use this option to ensure consistent data.

Column Commands

These can be at the bottom of the 'file list'. Click on 'Column Commands' to display a list of commands available. The commands can be inserted in the same way as fields.

Down

This will position the next fields on the next line. Inserting 'Down' at the top of the list produces the best results.

Do not use this command if 'Wrap Overflow' is being used.

Eject

To force a page break insert 'Eject'. Ensure this is inserted at the bottom of the list. To specify where you require the page break to be performed, double-click 'Eject' to display the 'eject options' dialog box.

Eject if lines remaining less than

A value must be entered here. If left blank or equal to 0 the result will be a page break after each record.

Suppress eject on last group

Click here to suppress the page break after the last record.

Field

Suppress the column header with this option. To suppress headers for all columns, insert at the top of the columns.

Newline

Starts the next field on a new line. Do not use if 'Wrap Overflow' is active.

On

Displays field data only when the record changes. You can achieve the same results by using 'Unique' from the 'Column Options' dialog box. It is recommended that you use 'Unique'.

Report Destination

A 'Report Destination' dialog box is provided as the last stage before committing the print.

Reports can be output to either a pre-defined printer (check printer setup before committing to print) or to the screen.

Output To Window

Use the scroll bars to view each complete page of the report.

'Next Page' - will display a single page at a time.

Alternatively you may wish to size a complete page to the size of your screen.

'Zoom' - will allow you vary the way you view the report.

Zoom Scroll Bar

Increase or decrease size of output.

Apply

Reset

Reset report back to original size of 100%.

Once you have adjusted the size from the original 100%, click on 'Apply' to see the new size.
When you are happy with the output, click on 'OK' to remove the 'Zoom' dialog box.

Page

Automatically sets the page size to be displayed in full.

Run A Report

Before printing each report, you are given the opportunity to add further selection to your report before printing. This is carried out by using the 'Filter' dialog Box which is the first stage of running the report. Click on Filter for help. Next you have the ability to define the order of the report format, using the 'Order' *dialog box. Click on* Order for help. Finally you are given a choice as to the output format of your report either screen or printer using the 'Report Destination' *dialog box.. Click on* Report Destination for help.

Load Report

Use this option to load an existing report saved with a unique 8 character name and the extension '.SBQ'.

Invoking this option will display the 'Open Quick Report' dialog box. All reports will be listed in the left-hand list if they have been saved in the default directory with the extension '.SBQ'. If you have used another directory, double-click the appropriate directory to display the reports.

To retrieve the report, either double-click the name from the left-hand list or enter the name in the line at the bottom of the dialog box and click on 'OK'.

Save Report

Use this option immediately after creating a 'New Report' to save the last report created/modified because Timewise stores the last report created in memory.

Invoking this option will display the 'Save Quick Report' dialog box. Here you can give your report a unique 8 character name which can be saved in the directory of your choice (it is recommended that reports are stored in the default directory for simplicity). Ensure the filter extension is '.SBQ'.

Administrator Tasks

Features List....

Configure User Details

Add New User
Add New Diary
Edit Current User
Delete Users and Details
Delete Diary for a given Year
Delete Calender Year

Add New User

This will allow a user to be set up with time-slots for the 'Booking Zone' and added for the entire application.

Add New Diary

This will allow a user to be set up with hourly time-slots for each day of the current year. Due to the number of time-slots being generated, this exercise may take up to 90 minutes. Default is 5 Time slots, 9,11,13,15,17 Hours. You can then add to this.

Edit Current User

Each user has access to change their own individual passwords.

PASSWORD : It is important that the password is kept safe. Loss of the password will prohibit any persons entering the system.

Delete User & Details

This powerful procedure will remove all references for a single user within Timewise. This includes the following;

(a) All diaries created and associated records
(b) Open and closed messages for that user
(c) Client Portfolio records
(d) Timesheet records
(e) Quarterly Objectives
(f) Timesheet records
(g) Logon Details

Delete Diary For A Given Year

To remove a complete diary including all the time-slots simply select from the pull-down lists the 'Resource' and the year required, click on 'OK' to proceed with deletion. This may take several minutes to complete.

Delete Calender Year

To remove a calender you must first remove any diaries that exist for the same year that belong to any of the Resources. To remove a year select from the pull-down list and click on 'OK'.

Remove Planner Periods & All Associated Data

To remove periods for the 'Quarterly Objective Zone' simply select from the pull-down list and click on 'OK'. A further 'Confirm Delete' dialog box will display the period to be removed. Click 'OK' to <u>remove the period and associated description along with any records from any user that access the period.</u>

Remove Booking Reason

To remove booking reasons for the 'Booking Zone' select from the pull-down list and click on 'OK'. A further 'Confirm Delete' dialog box will display the reason to be removed. Click 'OK' to remove the booking reason along with any records from any user that access the reason.

Remove Message Category Heading & All Associated Data

To remove message a category heading for the 'Message Logging Zone' simply, select from the pull-down list and click on 'OK'. A further 'Confirm Delete' dialog box will display the heading to be removed. Click 'OK' to <u>remove the heading along with any records from any user that access the heading.</u>

Remove Timesheet Heading & All Associated Data

To remove a timesheet heading for the 'Timesheet Zone' select from the pull-down list and click on 'OK'. A further 'Confirm Delete' dialog box will display the heading to be removed. Click 'OK' to remove the heading along with any records from any user that access the heading.

Remove Closed Messages By Company/Person/Subject

To remove closed messages By company/person/subject for the 'Message Logging Zone' select from the pull-down list and click on 'OK'. A further 'Confirm Delete' dialog box will display the company/person/subject selected. Click 'OK' to remove closed messages for the chosen company/person/subject.

Tidy & Re-organise Tables and Indexes

This utility should be used after removing records using the 'Administrators Tasks' in order to maximise your disc space. When a volume of records is deleted the disk space originally allocated is not freed up for public use.

For example, deleting a one year calendar and then using this option on the APPOINTS file will release approximately 0.5MB of disk space.

Important

Before invoking this option ensure you have adequate free disk space. The amount of free disk space required usually is equivelant to that of the table due to be re-organised. This space is used to create a duplicate copy of the table inorder to carry out the re-organise, which is removed on completion.

File Name	Usage
ADDRESS	Main name & address file - Name & Address Zone
ADDRTEXT	Text related to each project - Client Portfolio Zone
ANSWER	Contacts details - Client Portfolio Zone
BDNAMES	Block-booking descriptions - Booking Zone
CALLSUBJ	Subject descriptions - Message Logging Zone
CLIENTS	Main client file - Client Portfolio Zone
CLIENDETS	Client project Details - Client Portfolio Zone
COUNTREC	System record count
CUSTCONT	Client contact details - Client Portfolio Zone
DATES	Each calendar year
DBLBOKED	Block-booking details - Booking Zone
FORECAST	All details relating to your forecast
NOTEORDER	Daily Notes for each calendar day
PERIODS	Objective planning periods
PLANNER	Main objectives file - Objective Recording Zone
PROJECTS	Main projects file - Client Portfolio Zone
PROJTEXT	Text related to each project - Client Portfolio Zone
RECORDNO	Internal Record Number Generation
SHADOW	Temporary User file
TIMES	Diary time-slot information - Booking Zone
TIMESHEET	Main timesheet file - Timesheet Zone
TRACKER	Main message logging file - Message Logging Zone
USERS	User logon details