1 Getting Started

1.1 What is Master Planner?

Master Planner is a graphical version of a wall planner, presented as a grid, with names of resources, such as employees, down the left and dates across the top. A planner may show a number of weeks, or a whole year, or you can specify exact dates. Add icons to grid squares to indicate the activities of employees on selected dates - holidays, project work, conferences and so on.

Each resource has from 1 to 12 lines for icons on the planner, for activities during different time periods. For each resource, you can specify start, finish and birthdates, if required, and assign them to categories defined by you. A wide range of icons is available, from which you can choose just the ones appropriate to your company. A text note may be added to any grid square to record additional information.

A series of toolbars give access to editing functions, and these can float or be docked to the top of the planner window. Moving around the planner may be achieved using mouse or keyboard operations. An undo function is available. A status bar, tooltips and full on-line help make Master Planner easy to use.

For larger planners, you can view a specific category, or a group of resources, or search on a number of categories at once, eg all male staff with more than 20 years experience. The statistics function shows the number of times an icon has been used for a time period. Icon tracking allows you to control how much an icon is used, for instance when scheduling staff leave or training.

Planner information may be printed as shown on screen, as individual schedules or showing text notes, and full backup and restore functions are available.

1.2 Starting Master Planner

Starting Master Planner

Your Network Administrator may have created shortcuts when Master Planner was installed, either on your desktop or in the **Start** menu. Look for the Master Planner icon Click one of these to start the program. Alternatively, start Master Planner by clicking the **Start** menu, selecting **Programs** then **Master Planner** and clicking **Master Planner 4**.

If the program opens a planner

You will see the Master Planner main screen, showing an existing planner. If you're not sure what to do next, the **Summary** page below will help you understand the basics. Click **F1** on any screen to get more help. If you want to practise a bit before you try your hand with real data, select one of the sample planners from the **Help** menu (see below for some hints).

If the program opens the Welcome screen

This will happen if this is a brand-new installation; once you set a default planner to open when Master Planner starts, you will not see the Welcome screen again. You have the option to:

- **Start a new planner** - if you want to start adding your own data straight away. Read the section **Creating your first planner**, below, for help with this.
- **View the sample planner** - if you want to try out the program's features first (see below for some hints).
- **Browse for an existing planner** - if you have used the program before.

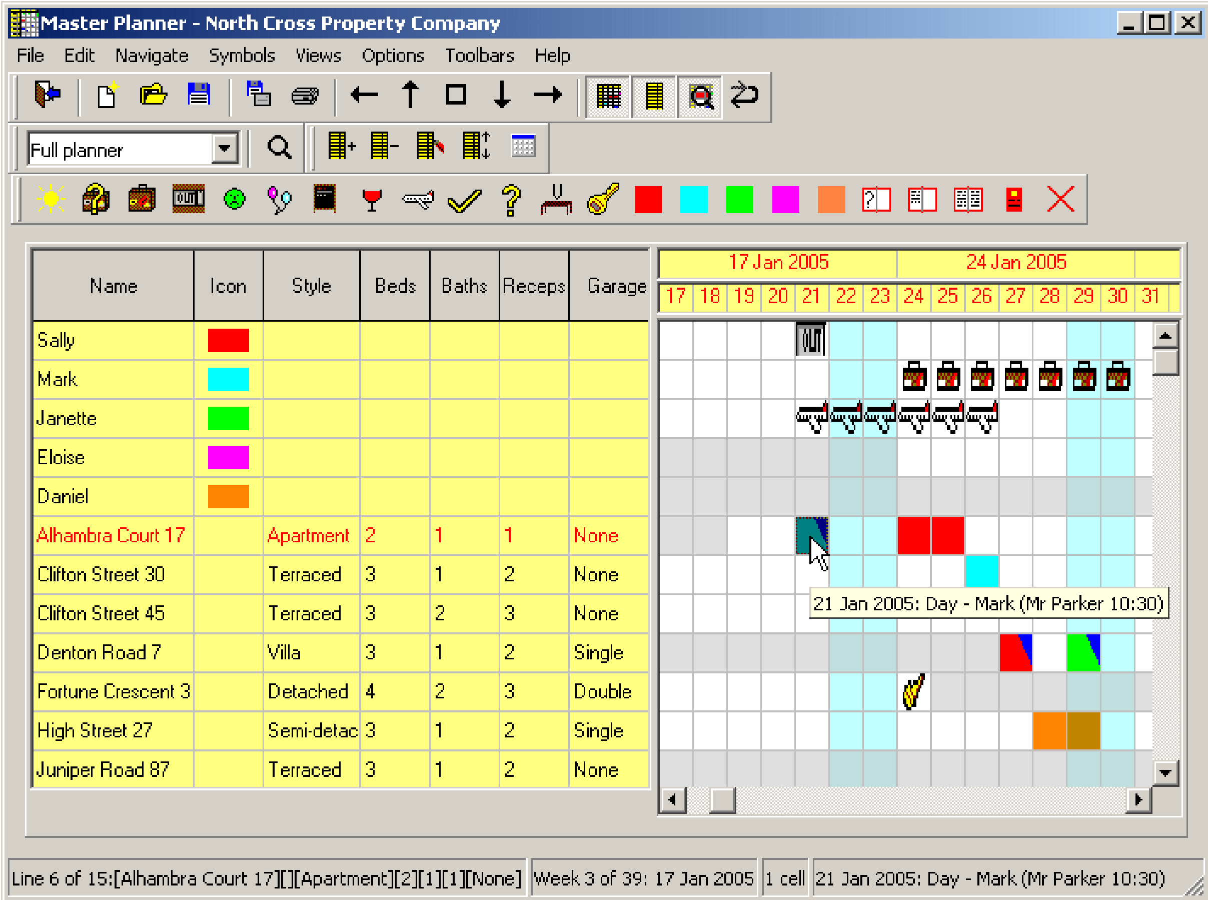
I've opened the sample planner - now what do I do?

There's a lot going on, so you may well be wondering where to start. Here are some things to try; if you make a mistake, click the Undo button , but don't worry, the sample planners are there for you to practise with :

- **Add some symbols to the planner** - select an empty cell on the planner by clicking it with the mouse. It will now be highlighted in a different colour. On the menu bar, select **Symbols** and click on one of the symbols in the list. It will appear on the cell you highlighted. The symbols are also on a toolbar, either docked above the planner or floating seperately. If you don't see it, click **Planner icons** on the **Toolbars** menu.
- **Add a text note to a cell** - double click any cell, type a note and click **OK**. The cell now has a coloured triangle on one corner. Hover the mouse over the cell to read the note you wrote.
- **Add a resource to the planner** - right click a name in the resource list at the left, and select **Add a new resource**. Type in your own name and click **OK** (you can leave the other fields blank for now). Your name or initials will appear below the name you clicked. Press **Alt+Up** a few times to move yourself to the top of the list.
- **Give yourself a holiday** - select several cells on the planner beside your name (click a cell with the mouse, hold the button and drag to highlight an area). Now click the symbol from the **Symbols** list or toolbar.
- **Search and view** - click the button on the search and view toolbar (if you don't see it, click **Search and view** on the **Toolbars** menu). The search window opens. You can select by name (click a name to select it), or you can search by category - experiment by selecting some category values, then clicking the **Search** button. The planner changes to show only the resources which meet your search criteria (there may be none). Press **F5** to see all resources again. The search window stays open for further searches.
- **Edit the symbols toolbar** - select **Edit planner icons list** from the **Edit** menu. Browse though the list of available symbols (click the + button to open a section), and select an icon by clicking it. Drag it across to the list of icons already on the toolbar (the **New symbols toolbar** box) and drop it into position. Click the description to edit it (you may need to click more than once). Darg and drop it to a different position. Or drag it off the toolbar altogether (drop it in an empty part of the window - or you can use the arrow buttons). Click **Save** when you are finished.

That should give you an idea of how Master Planner works. You can carry on experimenting with the sample planner, but if you are ready to create a planner of your own, select **File** then **New**, or select **Open** to browse to an existing planner.

1.3 The planner screen



A view of the sample property planner, showing all toolbars docked

This is the main screen of the program. All functions are available from the menu bar at the top of the screen, or from the four toolbars (which can be docked, as shown, or can float independently, or can be closed). At the left is a list of resources, with the selected resource highlighted in red. At the right is the planner, showing some icons assigned; dates are shown above the planner. This planner has only one row of cells for each resource, but you can have up to 12. A coloured triangle indicates a text note attached to that cell. A grey cell indicates that the resource is not available on that date - such as an employee not yet started working for the company, or a property no longer on the market. At the bottom of the screen, a status bar gives information about current selections on the resource list and planner.

1.4 Creating your first planner

To start a new planner, select **File** then **New** on the menu bar, or click the button on the main toolbar. You will be given the opportunity to save any changes to your existing planner. A wizard will guide you through the process. For a quick start, accept all the default settings to create a standard planner - you will be able to make changes later.

Planner titles: select one or two names to describe your planner.

Planner style: select from three planner styles:

- **Standard** - specify the number of weeks (from 4 to 150), starting from the current week.
- **Calendar year** - 1st January to 31st December only for your chosen year (this does not have to be the current year).
- **Fixed date -** you specify the exact start and finish dates, so you can use financial, academic,

fiscal or company dates. A pop-up calendar makes selection easy.

Planner settings: set the start day (eg Monday), working days and total days (eg 5 working days in a 7-day week) for each week of your planner, and specify the daily time periods (eg AM and PM). Non-working days (weekends) can be displayed in a different colour (see the **Personalisation** section, below).

Icon set: a new planner will normally be created with a default set of toolbar icons, but if you have used Master Planner before, you can also copy a previously saved standard set, or copy from an existing planner or use a previously saved toolbar icon file.

Resources: if you have used Master Planner before, you can copy a list of resources from an existing planner to the new planner. Otherwise, you will be able to add them after the new planner has been created. Resources may be employees or items such as cars, rooms, property, office equipment, etc.

Categories and values: specify the categories you want to assign resources to. Categories can be anything you wish (eg department, salary level, make of car, number of bedrooms in a property, etc). Categories are used to select resources for view, statistics and reports. You can allow the program to maintain the list of values for each category, or you may define category values here.

Columns to show: select up to 8 columns of data to display for each reasource, selecting from a range of resource data and categories.

Options: choose what to display on the title bar when Master Planner runs, your choice of startup messages and whether email is permitted from this planner.

Click **OK** to create your planner. If you did not copy any resources, the planner will be empty and you will be asked if you want to add some (you will not be able to add icons to an empty planner).

It is a good idea to make any changes to the toolbar icons now, before adding icons to the planner - select **Edit toolbar icons** from the **Edit** menu.

2 Using Master Planner

2.1 Summary

Moving around the planner: scroll bars are provided where needed to enable you to move around. You can also move to the top, bottom, far left, far right and home position (top with current date) using the ↑ ← □ → ↓ buttons on the main toolbar. In addition, the **Navigate** option on the menu bar allows a range of movements, or use the keyboard shortcuts (see the help file for full details).

Opening a shared planner for editing: click the button to begin editing; when the button shows, editing functions are enabled and you can make changes. When you have finished editing, click the button again to return to viewing mode and allow other users to edit.

Adding or changing the list of resources: select **Edit** from the menu bar, or click the button on the main toolbar to open the edit toolbar. You can now use the buttons to add a new resource , delete a resource , change resource details or move a resource up or down the list . Double-click a resource to open the changes dialog immediately or right-click to open a popup menu of options.

Adding or changing icons on the planner: first use the mouse to select an area of the planner. Open the planner toolbar by clicking the button on the main toolbar and click the required icon. You can also blank out the selected area. The planner icons may also be accessed from the menu bar: click **Symbols** from the menu. Click a planner cell to see the icon description displayed in the status bar. When the planner is active, the description will be displayed in a tooltip (click any cell to make the planner active).

Adding a text note to a planner cell: double click a planner cell, and you will be able to write a note about it. Cells with notes are flagged with a contrasting colour in the top right corner. Any cell, with or without an icon, may have a note. Click a cell to see the note displayed in the status bar. When the planner is active, the note will be displayed in a tooltip (click any cell to make the planner active). To read all notes for this planner sequentially, or to print the notes, click **File** on the menu bar.

Printing a planner: select **File** then **Print** from the menu bar to set up print options and print. If the QuickPrint option is enabled, you can print either the currently selected part of the planner directly from the main toolbar, using default printer settings, or a selected memorised report. Otherwise the toolbar button opens the print options wizard, allowing a print of any part of the planner for selected resources or categories.

Customising the planner icons: select **Edit toolbar icons** from the **Edit** menu. Icons can be dragged onto the toolbar to add, or dragged off it to remove. You can change the icon description and (for icons not already in use) change whether it applies to an entire column or not. Network version users can add their own icons.

Changing settings for the planner: select **Options** then **File settings** from the menu bar. You can change the planner titles, style, dates, daily time periods, categories, columns and options. You will have the opportunity to backup before making changes.

Creating a new planner: select **File** then **New** on the menu bar, or click the button on the main toolbar. You will be given the opportunity to save any changes to your existing planner.

Opening a different planner: select **File** then **Open** on the menu bar, or click the button on the main toolbar or select from the recent files shown on the **File** menu. You will be given the opportunity to save any changes to your existing planner.

Saving, backing up and restoring a planner: these options are all available from the **File** option on the menu bar. You may, of course, choose to use your own backup procedures.

2.2 Main toolbar

The main toolbar contains buttons for the main planner functions: exit, file operations, printing, backup, options and movement around the planner. It also has buttons to show the symbols and editing toolbars. It may be docked to the main screen or float. If you do not see it, click **Main** on the **Toolbar** menu.

Exit program
Start a new planner
Open an existing planner
Save this planner
Select backup options and backup
Backup to floppy disk now
Backup to local/network hard drive now
Select report options and print
Print planner now using current settings
Move to the first week of the planner
Move to the top of the planner
Move to the home position
Move to the bottom of the planner
Move to the last week of the planner
Open/close the symbols toolbar
Open/close the editing toolbar
Open/close the search and views toolbar
Undo the last action

For shared planner files, you will also see:

The current planner may be viewed, but it cannot be edited. Click to open the planner for editing.
The planner you are viewing has been changed by another user since you opened it. Click to refresh the planner.
The planner is open for you to make and save changes. When you have finished making changes, click to release the file to other users.

2.3 Symbols toolbar

The symbols toolbar contains buttons to add planner symbols (icons) to a selected area of the planner grid, or to clear an area. It may be docked to the main screen or float. If you do not see it, click **Planner icons** on the **Toolbar** menu or click the button on the main toolbar.

To add more icons to the planner symbols toolbar, or remove them, or change descriptions, click **Edit toolbar icons** from the **Edit** menu.

The symbols toolbar can be specific to an individual planner, or can be saved as a separate file to be used with other planners.

2.4 Editing toolbar

The editing toolbar contains buttons to edit the resources list (add, change, delete or move resources - click to select a resource before editing), plus a button to edit the icons list. It may be docked to the main screen or float. If you do not see it, click **Editing** on the **Toolbar** menu or click the button on the main toolbar.

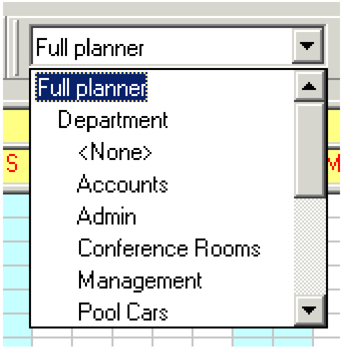
Add a resource or line after the selected resource
Delete the selected resource or line
Change the details for the selected resource
Move the selected resource or line up or down the list
Edit toolbar icons

2.5 Search and view toolbar

The search and view toolbar contains facilities to change the planner view (showing only some resources) or search the planner for resources meeting your choice of criteria. It may be docked to the main screen or float. If you do not see it, click **Search and view** on the **Toolbar** menu or click the button on the main toolbar.

Open the search dialog

Drop-down list: Select from the list a planner view: the full planner (all resources), a previously defined personal view or an instant view, selecting resources which are assigned to a particular category value (for example, the accounts department). See the **Views** section, below, for more information on planner views.



2.6 Editing a shared planner

Your own local planner files may be edited at any time. However, shared planner files (those held on the network server) cannot be edited immediately; when you open the planner, you can view the data but all editing functions are disabled (the toolbar buttons and menu items will appear greyed out). This is to protect the integrity of the planner data, and ensure that only one user can edit the file at a time.

The traffic signal button on the main planner toolbar controls access to shared files. There are three settings:

The current planner may be viewed, but it cannot be edited. Editing functions on the toolbar and menu are disabled. Click to request editing capabilities - this may be refused if another user has already opened the file for editing (the message will show you the user's network login name, if available), or if you do not have authority to make changes to this file. If the request is successful, the light changes to green.

The planner you are viewing has been changed by another user since you opened it. Click to refresh the planner. The light will change back to red.

The planner is open for you to make and save changes. The planner file is locked to other users (no one else may edit the file), and all the editing functions on the toolbar and menu are enabled. Make the required changes; to undo a change, click the Undo button on the main toolbar, or select **Undo** on the **Edit** menu. When you have finished making changes, click to release the file to other users. You will be prompted to save any unsaved changes. The light will change back to red.

You will need to open the planner for editing whenever you want to:

- Add icons or notes to the planner
- Add, change or remove resources
- Change the planner style, date range or categories
- Memorise a report, or change or delete an existing report
- Change an icon tracking specification

Some functions are available while only viewing a planner:

- View existing planner data
- View details about a resource
- View and print statistics
- View and print existing reports
- Send email to colleagues listed on the planner (if this function is enabled; see Sending email)

2.7 Resources

Resources are employees, or any non-human resources you want to plan for - cars, rooms, property, equipment, etc. Click a resource to select it, then use the **Edit resource** options on the **Edit** menu to make changes, or right-click a resource, or use the edit toolbar (this shows all the resource editing functions; add resource , edit resource , delete resource and move resource - if you don't see it, select **Editing** from the **Toolbars** menu).

Adding a new resource:

To add a new resource to the planner, right-click the resource list and select **Add new resource**.

Add resource after: select where in the list you want to add this resource.
Name: type a name for the resource, for example, John D Smith, John David Smith, J D Smith, John Smith, as preferred, or a suitable description (such as Conference Room 1).
Initials/short name: the program will try to create the initials from the name, but you can modify them or insert a short name or nickname (up to 30 characters).
Icon (optional): select an icon to represent this resource, if required. This can be useful in, for example, project planning.
Phone and **Email (optional)**: enter contact details for this resource, if applicable. If an email address is entered, you can send mail from within Master Planner.
Categories: this box shows all categories for this planner. For each category, choose the value appropriate to this resource. Any category may be unassigned (left blank), or you can type new values.
Add/Delete/Change: categories may be added, deleted or changed here; these changes apply to the entire planner.
Start date, **Finish date** and **Birthdate (optional):** type in dates in any format valid on your computer: 3 Mar 1998, 3/3/1998, etc, or click the arrow to show a pop-up calendar for easier selection. Dates when a resource is not available will be shown greyed out on the planner. These dates may also be used to show a reminder message whenever users start Master Planner.
Comments: add any additional comments here.

When adding a new name, click **Another** to save these details and retain this dialog box to enter more details immediately.

Changing a resource:

Double-click a resource to change any details.

Deleting a resource:

Right-click a resource and select **Delete a resource**.

Rearranging the list of resources:

Select a resource and press **Alt+Up** or **Alt+Down** to move a resource up or down the list.

2.8 Planner icons

Icons (or symbols) are small pictures which are added to cells on the planner to indicate activities planned for a resource. For example, the symbol can be used to indicate that an employee is scheduled to be on leave. The program is supplied with a wide range of icons; when you create a new planner, you will start with the basic (default) set, but you can add more from the built-in range, remove any you don't want and change the text descriptions. Each planner can have its own set of icons, shown on the symbols toolbar and on the **Symbols** menu.

To change the list of icons for a planner, click the button in the edit toolbar or select the **Edit planner icons list** option in the **Edit** menu. The **New symbols toolbar** box shows the details of your current choice of icons. You will also see a range of available alternatives grouped by type.

You can:
- Add new symbols to the list (drag it from the list of available icons or browse for a previously created custom icon - see the help file or full manual for further information).
- Remove unwanted symbols from the list (drag each one to an empty area of the window).
- Rearrange the symbols on the list and change their properties (drag and drop).
- Replace one symbol with another throughout the planner (select one symbol from each list and click the **Replace with selected symbol** button).
- Save the toolbar, either as part of the planner or as a separate file (browse for a file path and click the **Save** button).
- Import a previously saved toolbar, either to modify it or to replace the toolbar on the current planner.

2.9 Text notes

A text note may be added to any cell on the planner, whether it has an icon or not. Cells with notes attached are flagged with a small coloured triangle in the top right corner. When the planner is active, hovering the mouse over a cell with a note will display the contents of the note as a tooltip (click any cell to make the planner active). Alternatively, a single click on a cell will display details of that cell, including any note, in the right portion of the status bar below the planner.

To add a text note: double-click the cell, type your message and click **OK.**

To delete a text note: double-click the cell and click **Delete**.

To read or edit all notes in date sequence: select **Edit/read notes** on the **Edit** menu; any note can be changed or deleted.

To print notes: select **Print instant reports** from the **File** menu, then click **Print notes**. You can print all notes on the planner, or just those for certain dates. To choose dates more precisely, press **Ctrl+P** to open the print wizard and create a new notes report.

2.10 Categories

Categories may be any identifying aspect of the resources on a planner. You can define any number of categories. For example, for employees, you may want to add an ID code, salary grade, experience, gender and membership of the chess club. For meeting rooms, you might want number of seats, size of projector screen and whether it has equipment for video-conferencing. Resources need not be assigned to a category that does not apply, so it is easy to mix types of resources on a single planner.

Each category can have any number of category values. For example, the gender category would have just 2 values, male and female (plus unassigned for non-human resources), while the employee ID code category would have a different category value for each employee.

Categories and category values are used to select resources for viewing, printing or creating statistics. Categories allow powerful searching capabilities; to see this in action, have a look at the sample property planner and try searching for all properties with 3 bedrooms and a garage.

You can create categories and category values when creating your planner file, as part of file maintenance or as you need them while updating your list of resources. Master Planner can automatically maintain the lists of category values for you, by removing unused category values periodically, but you can maintain the lists yourself if you prefer, for example, if some categories represents consecutive values, such as salary or price ranges. Select **File settings** from the **Options** menu, and click the **Categories** tab to view and edit all your categories and category values at once, or a quick way is as follows:

Creating a new category: double-click any resource and click the **Add** button. The new category will be added to the list. You will need to set values for each resource individually - so if you add the category 'Gender', you will need to set each employee's Gender to 'Male' or 'Female' (use the navigation arrows to move through the list of resources). Of course, you can leave category values blank if a category does not apply to a resource.

Changing a category: double-click any resource and click the **Change** button.

Deleting a category: double-click any resource and click the **Delete** button.

2.11 Reminders

Reminders are memos which are displayed in a popup window when Master Planner or a particular planner first open. They show important events occurring on that day, and any following non-working days. Some are broadcast to all users, while personal reminders display only to the user who creates them. Reminders are optional, and each type can be switched off; select **File settings** from the **Options** menu, and click the **Options** tab to switch reminders on and off.

There are four types of reminders:

- **Start or finish date reminders**: indicate any resources whose availability starts or ends on that date (double-click a resource to change the dates).
- **Birthdate reminders**: indicate any resources celebrating a birthday (double-click a resource to change this).
- **General reminders**: add important messages for a date, to be shown to all users (right-click a future date to add a reminder).
- **Personal reminders**: add your own reminders for a date, which will be shown only to you (select **User preferences** from the **Options** tab, and click the **Reminders** tab).

2.12 Personalisation

Master Planner can be customised to reflect your personal preferences in both appearance and functionality. There are many ways of changing the way a planner looks:

Resource columns: add or remove columns of data in the list of resources, or adjust the column widths.
Colours: add vertical or horizontal bands of colour to the planner grid, to make it easier to distinguish between adjacent resources, or change the resource list background and highlight colours, or the grid highlight colour.
Date: change the way the dates are displayed above the planner.
Zoom in or out: increase the size of the planner cells to better distinguish between adjacent icons, or decrease the size to see more resources and weeks on the planner (**F3** to zoom in, **F2** to zoom out).
Toolbar style: choose to have toolbar buttons in classic Windows 3D style, or flat Internet Explorer style.
Planner icons: change the planner icons to those most appropriate to your company (select **Edit toolbar icons** from the **Edit** menu).

Options for changing the way Master Planner works include:

Startup file: choose which planner opens by default when Master Planner opens from the Start menu.
Show icon in system tray: the program or any planner individually may be set to start minimised to the system tray.
Personal views: you can define personal views (subsets of the planner, defined by category - for example, all female staff in the Accounts and Management departments) for any planner, and can specify one of them to open by default whenever you open that planner (select **Edit personal views** from the **Views** menu).
AutoSave: save planner changes automatically.
Shortcut key system: navigate and select areas on the grid using either the classic Master Planner keyboard shortcuts, or spreadsheet style.
Warning when overwriting icons: Master Planner can warn you when you are about to add icons to the planner which would overwrite existing icons.
Undo levels: set the number of undo levels.

Personal reminders: use Master Planner as a to do list, or to remind you of family and social events.

Unless otherwise stated, these options are all available from either **File settings** or **User preferences** in the **Options** menu.

2.13 Planner views

A planner view is a way of seeing just a part of a planner, that is, only some resources. If you have a large number of resources on the planner, moving up and down the list can be time-consuming. A view allows you to see just the part of the planner you need. Your current view is shown on the search and view toolbar.

You can switch between views using the drop-down list in the search and view toolbar or from the **View** menu. You can select an instant view selected from your current category values, for example all resources in the Accounts department, or you can define and save personal views, which select resources more precisely, for example all resources in the Accounts department belonging to the chess club (select **Edit personal views** from the **Views** menu or click the search button).

2.14 Icon usage statistics

Icon usage statistics allow you to find out how much an icon (symbol) or a group of icons has been used on the planner. For one or more icons, you can select resources by name or by category, set a date range and specify how you want to view and print the results. Select **Statistics** from the **Options** menu to create and view statistics.

Statistics can be viewed in three ways:
- **By icons**: select one or more icons, and the report will show all uses. You can restrict the report to a range of dates, or to certain resources. You can also see how many cells have no icons in them, by selecting [None]. You can create this report instantly by highlighting an icon on the planner, right-clicking and selecting **Statistics for icon**.
- **By resources**: select all icons (except [None]) and one or more resources, and the report will show all activities. You can also restrict the report to a certain date range. You can create this report instantly by highlighting a resource on the planner, right-clicking and selecting **Statistics for resource**.
- **By date range**: select all icons (except [None]) and all resources, and set a date range. The report will show all activities within those dates. You can create this report instantly by highlighting those dates on the planner, right-clicking and selecting **Statistics for dates**.

For example, you can find out the amount of sick leave taken by staff in the Accounts department during July, or the amount of time spent on a specific project by all staff during the year. You can also find out how much time has not been assigned to any icon. The results can be printed or saved as a memorised report.

2.15 Icon tracking

Icon (or symbol) tracking is a way of setting limits to the use of some icons on the planner. For example, you may designate an icon for a specific project, and want to ensure that only the project team is assigned that icon, and that no more than 6 weeks of work is allocated. Or you may want to control the number of days leave or training that employees take each year. Select **Icon tracking** from the **Options** menu to start tracking icons.

An icon tracking specification sets contraints for one or more icons: which resources may be allocated the icons, a date range within which it is to be used and the number of uses allowed, which may be per time period (year, quarter, month or week) or an overall total. In addition, the allowance may be the total for all selected resources, or the total for each resource, or the default for each resource, in which case you can set individual allowances for each selected resource (for example, annual leave entitlement may vary according to employee position, years with the company or contract terms). Amounts from a previous time period may be brought forward (for example, unused leave from earlier years).

When you add a tracked icon to the planner, Master Planner checks the constraints you have set.

Occasionally, you may try to add a tracked icon illegally - for example, for a resource not permitted to use it, because it is outside the permitted date range or because the addition would exceed the specified allowances. In such cases, you can either have Master Planner reject the addition or ask you whether to add it anyway.

Note that an icon can only be assigned to one icon tracking specification. Any icons on the planner which are illegal (outside the specified constraints as calculated on that day) are marked with an asterisk (*) on the popup tooltip shown when you hover the mouse over a cell.

2.16 Printing

A number of printed reports are available. Select **Print** from the **File** menu, press **Ctrl+P**, or click the button on the main toolbar, and click **Create** to create reports with the print wizard (which allows easy creation of reports by prompting you for the required options at every stage), or click **Print instant reports** for a selection of pre-defined reports which can be printed immediately (see the section **Instant reports** below for more details).

- **Planner reports**: prints a section of the planner, showing resource names and the planner grid, with all icons.
- **Notes**: prints the text notes attached to the planner, showing the icon, resource and date for each.
- **Individual schedules**: prints separate reports for specified resources, showing their scheduling information (icons and notes) for complete weeks.
- **Summary schedules**: prints the scheduling information for all specified resources in a single report.
- **Statistics reports**: shows information about the number of times icons have been used on the planner.
- **Tracked icon reports**: shows the status of tracked icons (legal and illegal uses) at a specified date (only available as an instant report).

Creating a report: open the print wizard (as shown above) and follow the prompts to create a basic report with some default settings. For most reports, you can select the resources to include and the date range to use. Some reports have additional selection options. To access the full range of options, select **None of these** at any prompt, or select **Continue to work with this report** at the final wizard screen.

Memorising (saving) a report: the last report you printed is retained temporarily, but to keep a report permanently you must memorise it. You can do this from the print wizard when prompted, or from the report editing screen (click the **Memorise** button). See the section **Memorised reports** below for more details.

Editing a report: press **Ctrl+P** and select an existing memorised report or the last report printed, and click **Edit** to change any settings. Click **Memorise** to save your changes. Your report may be set as a QuickPrint report, which will be printed automatically when the Print button is clicked on the main toolbar (check the **Enable QuickPrint using this report** option and select the report from the dropdown list).

Deleting a report: open a memorised report for editing (as above) and click the **Options** tab, then click the **Delete** button.

2.17 Instant reports

A number of reports can be produced instantly, that is by a single click on the main toolbar or by a couple of clicks on the **File** menu or by a right-click on the planner.

Instant reports:

- **QuickPrint report**: one memorised report can be set to be your QuickPrint report, which can be printed by clicking the button on the main toolbar.
- **Notes reports**: print the planner's text notes for a number of preset date ranges.

- **Individual schedule**: print a week's schedule for the currently selected resource.
- **Symbols key**: print a key to all the symbols on the current planner's symbols toolbar.
- **Memorised report**: print a previously memorised report, of any type.
- **Last report printed**: the last report sent to the printer can be reprinted.
- **Tracked icon report**: if you are tracking icons the report can be printed using the date of the currently selected planner cell.

2.18 Memorised reports

Any standard Master Planner reports (planner printout, personal or weekly schedules, notes or statistics) may be memorised. All the data required to print the report - selection criteria (names or departments, for example), date range, printer settings and so on - are stored with the planner data. This means that you can reprint the report in the future with just a few clicks from the menu, and the report will show the current data from the planner. You can even set the report date to stay in line with the current date (so it will always show the current month's data, for example); or you can set the report date to always use the dates currently visible on the planner (so you can scroll through the planner to find the month you want to print).

Each memorised report may have specified print settings or use the defaults, and may be set to use the full planner, the current planner view or a personal view.

You can create any number of memorised reports, which may be changed or deleted as required. Any memorised report may be specified as your QuickPrint report. See the section **Printing** above for full details.

Note that the first memorised report is built-in to the planner. It is always a planner printout based on the current position of the planner, and is the default QuickPrint report.

2.19 Sending email

Every resource may have an email address entered (of course, this is only meaningful for human resources). The email address may be displayed as a column of the resource list, if required. The email address may be used to send email from within Master Planner.

To add or change email address data: double-click the resource name in the list of resources to open the resource details dialog. Now you can add or modify the email address for this resource.

To show the email address as a column in the resource list: select **File settings** from the **Options** menu, and click the **Columns** tab. From the list on the left, double-click the 'Email address' item, and use the arrow buttons to move it to the required position in the columns list (the left-most column is at the top of the list).

To send email from within Master Planner: email can be sent to all resources in the current view with a known email address, or to an individual. This function will open your default email client ready for you to compose your message and send it in the usual way.

- **Sending email to all**: select **Send mail to all** from the **File** menu. The message will be sent to all resources in the current view with an email address (if this is 2 or more people, a message will ask you to confirm). To limit the number of recipients, use a planner view or select resources by category. Compose and send your mail as usual. This option will not be available if there are no resources on the planner with an email address, or if email functions have been switched off.
- **Sending email to an individual**: right click the resource on the list and select **Send mail to**, or select this option from the **File** menu. Compose and send your mail as usual. This option will be disabled if the currently selected resource does not have an email address. In addition, the option will not be available if there are no resources on the planner with an email address, or if email functions have been switched off.

To switch Master Planner email functions on or off for a planner: select **File settings** from the **Options** menu, and click the **Options** tab. Click the **Allow email** option to switch the email function on, or select **No email** to switch it off. You can also restrict email functionality to those with editing rights only - select the **Allow only when editing** option. Note that you must have editing rights to change this setting (for shared files, click the button to open the planner for editing).

Note: the Master Planner email function is not related to your normal email capability. It is merely a convenience for quick communication, and switching it off does not affect your ability to send email outside the program. It depends on you having a default email client set up, and may not work on all machines.

2.20 Getting help

If you encounter a problem while using Master Planner, or have a question, you should in the first instance check the help file or manual, which both have detailed instructions on using the program and suggestions for solving a number of common problems. Select from the **Help** menu on the main screen, or click the **Help** button on dialogs, or click **F1** on any screen to open the help file. You can also contact another user in your office or your Network Administrator. .

If an unexpected error occurs while running the program, a window will pop up with a bug report; please click the button to email it to Ross Software. The bug report is very helpful to us, and usually enables us to track down the problem and fix it straight away.

If you and your colleagues cannot find a solution to a problem, please contact us at **helpdesk@ross-software.co.uk**.Give as much detail as possible, for example, size and type of machine, operating system, any error messages encountered and size of planner.

Website:
For the latest information about Master Planner, check the Ross Software website at **www.ross-software.co.uk** Regular updates to the program are available for download; please ask your Network Administrator to ensure you are running the latest version. You can also download the full manual, which contains everything in the help file, plus screen shots of all parts of the program.