

**Changing how the planner is displayed** : select **Preferences** on the **Options** menu to select from a range of user preferences, including date headings, grid colours, startup options, automatic file saving and toolbar style. Use the + and – buttons above the employee list to make columns larger or smaller.

**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.

### NETWORK VERSION OPTIONS

**Accessing network files** : the traffic signal button on the main planner toolbar controls access to files held on the network server. The system enables any number of users to view a planner simultaneously, but, to preserve data integrity, only one may have editing access at a time. 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 (a message will show you the user's network login name, if available), or 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 update the screen display. The light will change back to red.



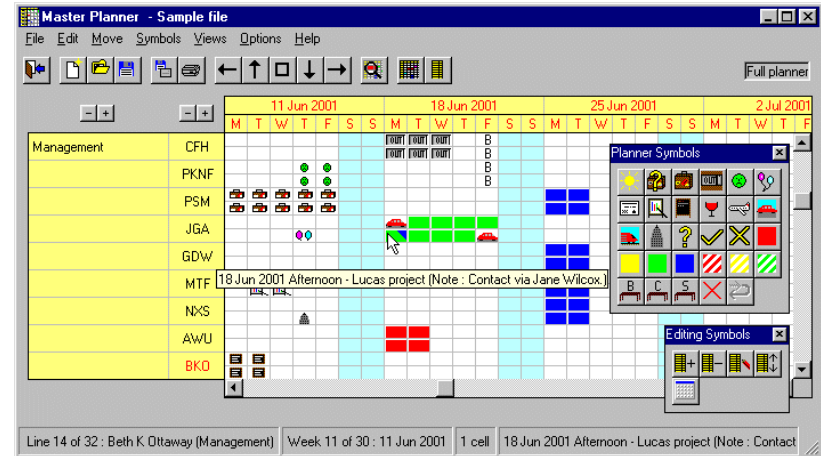
The planner is open for you to make and save changes. The planner file is locked to other users (no one else may edit the file), and all the editing functions on the toolbar and menu are enabled. When you have finished making changes, click to release the file to other users. You will be prompted to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

**Note** : you will only see the traffic light if you access a planner held on the network server. Files held on local drives are editable immediately.

**Custom icons** : you can create your own symbols for use in any planner. See the manual for the technical requirements for the images you need to create. The data about these images must then be compiled into a file using the **Custom icon management** option on the **Options** menu. This custom icon file can then be accessed by Master Planner user and the created symbols added to a planner toolbar.

## How to use Master Planner 3

Welcome to Master Planner, the graphical employee planner. This guide will help you quickly learn how to use the program. For more detail, you can open the Help file from any part of the program; just click the **Help** button, or select the menu option, or press F1.



**Figure 1 : planner showing the symbol and editing toolbars**

**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 buttons on the main toolbar. In addition, the **Move** option on the menu bar allows a range of movements, or use the keyboard shortcuts, as follows:

**Home** - move to the home position (top, current week)

**End** - move to the bottom of the planner

**Page up** - scroll up one screenful

**Page down** - scroll down one screenful

**Up arrow** - move the name selection up one line

**Down arrow** - move the name selection down one line

**Left arrow** - scroll back one week


**Right arrow** - scroll forward one week

**Shift + up arrow** - scroll up one line


**Shift + down arrow** - scroll down one line


**Shift + left arrow** - scroll back 4 weeks

**Shift + right arrow** - scroll forwards 4 weeks


**Adding or changing the list of employee names** : Select **Edit** from the menu bar, or click the  button on the main toolbar to open the edit toolbar. You can now add a new name, delete a name, change employee details or move a name up or down the list. A new name will be added after the selected name. Click a name to select it. Double-click a name to open the changes dialog immediately.

Start, finish and birth dates may be typed in, or entered using the pop-up calendar, or left blank. The department or group may be left blank, if required. The employee type is also optional. The group and type are used to select employees for reports, views and statistics.

**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. You will be given the opportunity to save any changes to your existing planner. You will be shown a list of recently-accessed files to select from, or you can browse for a file.

**Adding symbols to 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, or undo the last change. 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). You can use cut, copy and paste to move or copy larger areas of symbols; see the **Edit** menu options.

**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 coloured 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, click **File** on the menu, then **Read notes**.

**Printing a planner** : select **File** then **Print** from the menu bar to print a selected section of the planner in the same grid style as the screen display. You can choose which employees to include and the report style.

**QuickPrint** : allows an instant print of the current section of the planner using the default print settings, by clicking the  button on the main toolbar. Set QuickPrint by selecting **Print** from the **File** menu.

**Printing a personal schedule** : a personal schedule shows all planner symbols and notes for an employee. Highlight the employee in the names list by clicking, then select the option in the **File** menu. Select **Print** from the **File** menu to print schedules for more than one employee.

**Printing a weekly schedule** : a weekly schedule shows all planner symbols and notes for one or more weeks for selected employees. Select **Print** from the **File** menu to print a weekly schedules.

**Printing notes** : a range of options for printing notes is available from the **File** menu, or select the **Print** option from the **File** menu to refine your selection further.

**Printing a key to the symbols** : a one-page key to all symbols on the planner toolbar, and their current descriptions, is available from the **File** menu.

**Default print settings** : used for instant reports from the toolbar or menu, change these settings by selecting **Print** from the **File** menu.

**Viewing only part of the planner** : to see just a single department or employee type, use the **Views** menu. Press the **F5** key to return to the full planner. You can make changes to the symbols and notes while in a view, but you cannot add, remove or move names, or change the date range or style of the planner.

**Personal views** : you can specify a view even more precisely by creating personal views.

Switch between personal views using the  button on the main toolbar, or use the **F6** key. Create personal views by selecting **Edit personal views** on the **Views** menu.

**Changing the date range of the planner** : select **Options** then **Date range** from the menu bar, and choose the new style and start and finish dates for your planner. You will have the opportunity to backup and decide whether to keep any notes before making changes.

**Changing the number of days in the week** : to switch between 5 and 7 day weeks on your planner, select **Options** then **File details** from the menu.

**Changing the daily time periods** : To change the number of daily time periods per employee, select **Options** then **Daily time periods** from the menu.

**Icon usage statistics** : to view the number of times an icon has been used on the planner, select **Statistics** from the **Options** menu. You can select the employees and dates to include in the statistics, how the results are displayed and also print the results.

**Customising the planner toolbar** : select **Edit toolbar icons** from the **Edit** menu to add new icons to the planner toolbar, remove unused ones and change descriptions. Any symbol may be set to apply to an entire column (for example, bank holidays). You can save your toolbar to be available for use in other planners.