Important Information

Schedula is scheduling software for FileMaker Pro.

The login name and password are "admin" and "admin" (without the quote marks), *i.e., if you have marked the "Startup password" checkbox in settings.*

If you received the program on a CD, copy the folder onto your hard disk. If using Windows, select the FileMaker Pro file, right click your mouse, choose Properties, and uncheck the Read-only attribute checkbox. If you downloaded the program, open the zipped file and extract the contents.

WARNING: If you are a Windows user, do NOT open the program file while it is still zipped. Make sure you extract it first. Also, do not rename any of the files, and do not rename or move any of the folders. If you do so, the program may no longer function correctly.

It is recommended that with large networks you use FileMaker Server. While FileMaker Pro and FileMaker Server may both reside on the same computer, to avoid potential conflicts they should not be open at the same time. If you are NOT using a network, turn off Network Sharing using the Sharing command in the FileMaker menu.

For optimum performance, high-speed dual-core Intel Mac or Windows computers are suggested. Also, each computer using the program must have the WebDings font installed.

To open from a client workstation, choose Open from the file menu. Click the Remote button and navigate to the server or host computer. File sharing for the operating system (not to be confused with network sharing in FileMaker Pro) should NOT be turned on as this can degrade network performance.

If you use non-U.S. dates, you should create a clone of the program so that it properly recognizes your local date format. Click the "Create empty clone" button in settings to make a copy of the program with zero records. This resets the internal date format to that of your current operating system. Rename the clone the same as the original file and use it in place of that file.

If you are using a Macintosh and some of the fonts look ragged, use the Appearance control panel in System Settings to set "Font smoothing style" to match your screen type. "Turn off text smoothing for font sizes 'xx' and smaller" to the minimum acceptable size.

Various key-combination shortcuts are used throughout the program. When using a shortcut, make sure you hold down the specified key combination until the desired result has been obtained.

This program was designed to be easy-to-use such that a new person can sit down and in a few minutes be entering data. However, there is a lot of depth to it. Reading this document is the only way to take advantage of the many features this program has to offer.

Getting Started
The Menu and Extend buttons each contain a variety of buttons. Select the items to access the buttons.

When you access the program, it goes to the grid, i.e., unless you've chosen another destination in settings. To go to the day view, click the Day button.

The grid and agenda layouts display multiple schedules for a given day, or multiple days for one schedule. Regular appointments always have a start and end time. To view agenda entries, click the down arrow (click the up arrow to return to the grid). Agenda entries may OPTIONALLY have a start time and end time.

To make a new entry, click an open time slot. When viewing agenda entries, click the NEW button. A new listing is made for that schedule and start date.

If a banner, you must enter an end date to show entries that span *multi-days*. You may edit any individual multi-day entry, but once you have selected multi-days, the end date is LOCKED. If you wish to reduce or increase multi-day entries created in this manner, you will have to delete them first, then recreate them. *Note that banner times don't exist*. Banner entries show as white text against a black background, except in the list, where they show as *dates*. In the day view, the *duration* is shown as white text against a black background.

When you enter an appointment, a start time is automatically entered for you. The end time is initially set equal to the start time plus the interval times the multiplier assigned to that schedule in settings. You may edit these times as you wish.

If you are viewing agenda entries, you may enter start dates, and end dates and times. When making agenda entries, you may enter an entry with start or end times that lie outside the preferred start and end times for that schedule. This lets you add early or late appointments without having to change the start or end times of the schedule. View the list to see these entries in their entirety.

Entries are shown side-by-side with other entries, either for different schedules or for different chosen dates. Clicking any item opens it for editing. If you hold down the shift key and click on a time corresponding to a filled time slot, you can make same-time entries or *double bookings*. If you click a *displayed time* (without holding down the shift key), you can move that entry to a different day and schedule by clicking the Move button.

To indicate that an agenda item is an action item, mark the "Action item" checkbox in the edit window. To display action items early, enter a number of days into the "Days early" field. This serves as a daily reminder. Until an action item has been marked done, it is automatically forwarded to the next day. *Once an action item has been marked done, it remains attached to its completion date*.

If a start time for an agenda entry in the list has been assigned, the time is displayed normally. A black "A" appears next to the entry to indicate that it is an agenda. A red "A" appears next to the entry if it is an action item.. Hyphens "-----" are substituted in place of the times for *agenda* entries where no times are assigned. However, right-pointing red carets ">>>" are used in place of a start time if an entry with no times assigned is assigned as an *action* item. These combinations allow you to easily distinguish agenda entries and action items from regular appointments.

While viewing all schedules, to see entries for a single schedule or a group of schedules, click the Select button and choose a title from the list. Click the Reset button to again view all schedules. To view sequential dates for a schedule (when viewing multiple schedules), click the column header for that schedule. Click the Reset button to again view the schedules.

Grid start and end times and intervals may vary from schedule to schedule (as configured in settings).

When viewing a *single* schedule, clicking the left-right arrow buttons scrolls a day at a time. To scroll a week at a time, click the left-right bracketed arrow buttons.

When viewing *multiple* schedules with *more schedules than columns*, clicking the left-right arrow buttons scrolls a *schedule* at a time. Clicking the left-right bracketed arrow buttons jumps to the first or last schedule (in this instance, to change dates, use the small navigation calendar).

When viewing *weekly* dates for ANY schedule, clicking the regular arrow buttons scrolls a day at a time. Clicking the bracketed arrow buttons then scrolls a week at a time.

To view information about an arrow button, pause your mouse over the upper part of the button.

To view weekly dates for a single schedule, click a column header date while viewing that schedule. The grid and agenda columns rearrange themselves to show weekly entries starting on the selected day. The title header indicates the new date range and the start dates are highlighted in the small navigation calendar. Click a header date again to view *each week* dates starting on that that day.

When viewing *each week* dates for ANY schedule, clicking the regular arrow buttons scrolls a week at a time. Clicking the bracketed arrow buttons then scrolls either five (5) or seven (7) weeks at a time, depending on which grid in settings you select to display (small, large, combination, or expanded).

To change schedules while viewing dates, click the Select button.

To view mixed start dates for ANY single or weekly schedule, press the option[Alt] key and click a header. Click anywhere in the calendar to assign a new date to that column. This allows you to view noncontiguous days side-by-side. The subsequent use of any date-setting feature restores the normal sequence of dates.

The grid and agenda layouts both include a small navigation calendar that highlights active dates. Clicking a day in this calendar while viewing *multiple* schedules assigns that date. Clicking a day in the navigation calendar while viewing a single or weekly schedule places the clicked on date in the first column. Click the month buttons on either side of the navigation calendar to show that month. Click the left-right arrows to show different months. Hold down the shift key while clicking the arrows to jump three months at a time. Hold down the control key while clicking the arrows to jump a year at a time. Click the month-year text between the arrows to return to the current month and year.

As an alternative to the navigation calendar, use the year-at-a-glance date selector (click the Year button). Today's date is shown in bold red and underlined. The assigned date (if not today's date) is shown in bold blue and underlined. A small blue square marks the month containing that date. Clicking the arrow buttons scrolls the year display a year at a time. Shift-clicking jumps five years at a time. To restore the current year, click the "This Year" button. Click any day to assign that date.

In the grid, to view the Calendar click the Month button (click "Menu" first). The calendar shows start times for all entries for that month. When you move the mouse over an entry, a pop-up appears that shows the assigned schedule, duration, and code. If you move your mouse over a color, a color *definition* appears. To open the edit window, click on the calendar entry. To simply select an entry, click on it's time. Red, italic "week of the year" numbers appear on the left side of the calendar.

Clicking a calendar day *number* displays the list for that date. Control- clicking a calendar day *number* displays grid for that. To view a list of all entries for the *month*, click the List button.

To change the calendar a month at a time, click the left-right arrow buttons. Shift-click to jump three months. Control-click to jump a full year. To restore the current month, click on the month/year button.

In the grid, to view a list of entries for a specific column, click the small List button at the top of the column. To view a list of ALL entries, click the general List button (click "Menu" first).

When you click "Done" or "Return" either in settings or in "Entries", you return to where you started.

When you display a list, you may sort entries by clicking the various header buttons (enabled for most columns). Clicking a second time reverses the sort. Shift-click to unsort. Choosing the Past, Today's, or Future Records commands from the Records menu lets you view just those dates.

To display and print the entry list highlighted and sorted by descending start dates, titles, and times, click the Start Date header while holding down the option[Alt] key.

Some lists include gray or "boxed" buttons, e.g., for dates and colors. Clicking a boxed button isolates the list to just those entries. To filter a list, type the desired text into the "Filter list by" field (control-clicking certain headers puts that name i.e., *Schedule, Description, or Code,* into the "Filter list by" field). Clicking a "circle-x" button *temporarily* remove an item from the list. Option[Alt]-clicking *isolates* the item and displays only that item. Clicking the Restore button restores the list.

To view a date range, choose the "Date Range" command from the Records menu.

Confirmations, cancellations, missed appointments, and completed entries are indicated by "F" for confirmations, "C" for cancellations, "M" for missed appointments and “D” for completed entries. These are shown in the histories of names and staff. They are also shown in the calendar, grid, and agenda.

If you delete one or more repeated entries, any remaining entries, i.e., if there is more than one, continue to show black bullets at the beginning of their descriptions. This indicates that there are more repeated entries linked to them (if there is only one entry, then the black bullet no longer shows).

Whenever an entry is marked as a cancellation, a number appears. You may wish to distribute this number, e.g., over the phone. If the "Cancellation reason" checkbox is marked in settings, a dialog also appears for entering a reason for the cancellation. To view a reason, pause your mouse momentarily over the cancellation checkbox or click the "C" in the list. Cancellation reasons may be edited at any time by clicking the "C" in the list or the small button to the left of the cancellation number.

Agenda entries and action items are indicated in the list by black "A's" for agenda entries and red "A's" for action items (the names history and staff history may also display those descriptions highlighted in yellow). Repeated entries are indicated by black dots. To sort agenda and action entries, choose the "Sort Agenda and Action Items" command from the Records menu or click the small button in the header (option[Alt]-click to sort repeated entries).

A green "P" in the list indicates that one or more contact phone numbers exist for linked names. You can sort those entries by choosing the "Sort Phone Numbers" command from the Records menu. To "*collect*" the "P's", choose the "Collect Phone Numbers" command or click the small button in the header. Click each entry to view the linked names and contact phone numbers. If there is ONLY *one linked name*, you may pause your mouse over the "P" to see the phone number. Otherwise, click on the linked name to see all the contact phone numbers.

Red “N’s” indicate entries with notes (these show in the list, names history, and staff history). In the list, to sort these entries choose the "Sort Entries with Notes" command from the Records menu or click the small button in the header). If you pause your mouse over an “N” in any layout, these notes appear.

You may also sort the durations in the list. You may also sort potential conflicts. Choose the "Sort Potential Conflicts" command from the Records menu or click the small button in the header.

In the entry, arrival times may be auto-entered by clicking the "Arrival time" field in the entry. Shift-click to clear the field, or click on the time itself to edit.

Various date fields in the program use a drop-down calendar for making selections. Click the left-right arrows in this calendar to navigate a month at a time, or click the month-year title to select a month from a drop-down list. Click the up-down arrows to navigate a year at a time. To quickly scroll multiple years, click the up or down arrow and continue to hold down the mouse. Click any day to enter that date. Click today's date at the bottom of the drop-down calendar to enter it.

While in the grid or agenda layouts, to increase or decrease the zoom level for better or for large-screen viewing, choose the "Zoom Display" or "Un-zoom Display" command from the FileMaker Pro menu. *If you want the program to open already zoomed, mark the "Startup zoom" checkbox in settings*. An indicator (a white dot) appears in the layouts to show that the display is zoomed or un-zoomed. Click the "Un-zoom display" to toggle backward, or click the "Restore Display" to return the setting to 100% (the white dot disappears when zoomed to 100%).

A "Code" button exists in the agenda layouts and in the layout. Clicking this button changes the text of the button and displays the entered codes (should they exist) in place of the entries. The "Entries" button text is highlighted so that you don't forget to click again to replace the codes with entries once you are finished (the button automatically resets and the codes are replaced with entries after only two (2) minutes).

Modifying Entries
Clicking an entry in the calendar, the grid, the agenda layout, or the list, opens the edit window for that entry. The title bar shows the schedule to which the entry has been assigned. A generic code field may be used for initials, abbreviations, or other key information. Also, information entered into data fields is displayed in grid time slots when scheduled entries are of sufficient length.

To assign a background color, click a color button. Click the white button to remove the color. Click the multi-color button to assign a color from the library. If you forget the meaning of a color, move your mouse over the button and pause. If a description has been assigned, it appears automatically.

Presets allow for quick data entry when scheduling and must include both a title and a number of intervals. To *create* a new preset, edit an existing one, or delete a preset, Go to settings, click the Presets button, then choose either on the "New Preset" command or an item in the list. To *assign* an existing preset, click the presets list in the entry edit window.

Entries may be repeated, with each repeat becoming a separate entry linked to the original. Repeats are indicated by black dots in the calendar, grid, agenda layout, and the list. You may delete one or more future linked entries. Any repeated entry may be edited in its entirety.

To repeat an entry, click the Repeat(s) button. To determine how many repeats may be needed, observe the number of existing repeats shown in parenthesis. This number is calculated starting from the entry start date. Clicking lets you view a list of all future repeats and go to the last repeat in the sequence (useful if you need to repeat from that date forward).

In the setup window mark the appropriate checkbox for the type of repeat you wish to perform. For the first three types of repeats, you must also enter the number of repeats or a date beyond which not to repeat. If both are indicated, the process terminates at whichever comes first.

You may also make any number of noncontiguous date selections from the year-at-a-glance date selector on which to repeat. Dates may be chosen in any order, but must be later than the entry date, which is bold blue and underlined. Selected dates are black. To deselect a date, click on it a second time in the calendar. Clicking the clear button clears all selections.

If in settings you mark the “Skip holiday repeats” checkbox, entered holidays will be skipped.

Clicking the Conflicts button lets you check for potential conflicts *before* repeating. However, once you click the Repeat button, the conflict dialog is disabled. "X's" indicate potential conflicts are indicated by "X's" on the edit window's "Done" or "List" button, and by vertical red bars in the grid, the agenda layout, and the list (provided that the "Show entry conflicts" checkbox is marked in settings). Check the start times in the list to see which entries actually conflict.

To duplicate an entry, choose the "Duplicate Record" command (from the Records menu in the entry window). This lets you copy the entry to the same schedule or to a completely different schedule. However, repeat the entry if you need to link it to the original.

Clicking "Remove from Calendar" deletes the entry from the calendar, but NOT from the grid. You must either navigate to the grid on the appropriate date, or execute a find to locate it.

If you select a calendar entry. or click a list button, clicking the blue left and right arrows in the entry jumps by one (the bracketed arrows jump immediately to the first or last record). Clicking a specific item in the grid, or an agenda or banner item shows just that item (the buttons have no effect).

To lengthen an appointment in the grid without opening the edit window, click in an open time slot below the entry while holding down the option[Alt] key. To shorten an entry, click in the last time slot that you wish to clear, again while holding down the option[Alt] key. *Note that this does NOT apply to banners. If you wish to extend or reduce the END DATE for an EXISTING banner, you must first delete the banner, then reinstall it using the NEW button.*

To move an appointment in the grid or agenda layouts, select the entry by clicking a *time*, then click the Move button. When you move an appointment in the grid, the original entry is deleted, i.e., unless you hold down the option[Alt] key while clicking the Move button. If that is the case, a copy of the appointment remains behind in its original position. When you navigate to a desired schedule and date and click in an open time slot, a copy of the entry appears in the new position. Should you wish to place the moved entry into a filled time slot, hold down the option[Alt] key while clicking that time slot.

Moved items do NOT include marked checkboxes for confirmations, cancellations, missed appointments, or completed entries. Any of these that might be marked are automatically reset to unmarked.

If you are moving an agenda entry, the original entry is permanently deleted only when you complete the move. Click on the new entry to revise the date and times as appropriate. With agenda entries, holding down the option[Alt] key has no effect. Also, *Banners* cannot be moved.

If a name is not already entered as a description, you may do so by clicking the Assign button in the "Link Names" list. If the description field is blank, the name is automatically assigned. You also may copy to the Clipboard any name in the "Link Names" or 'Link Staff" list by clicking the small clipboard in the list.

If the "Link phone" checkbox is marked in settings, the primary means of contact for that individual is inserted into the first of the four (4) *open* custom fields.

If the "Link code" checkbox is also marked in settings, the code for that individual is inserted into the Code field (if another code already exist in the Code field, you may override this entry).

Whenever a name is auto-entered or added to the description field via the Assign button (or by making an appointment from the name itself), a red arrow appears next to the entry in the grid and agenda layouts. Clicking this arrow takes you directly to the name.

To convert an entry into a private listing, click the Private checkbox and specify a password. When entries are marked private, they read PRIVATE in all except the edit window. The privacy password is required to access the information. *If you forget the privacy password, you can still access the listing using the " Override" password from settings. All passwords used in the program are case sensitive.*

You may instantly DELETE entries in the grid (except private entries) by option[Alt]-shift-clicking them.

To show that an entry has been completed, mark the Done checkbox. The current date and time are entered into the field at the right (this field may be edited). Completed entries are highlighted using a strikethrough (except on the iPad), i.e., if the "Strikethrough completed" checkbox is marked in settings.

Notes may be stored for individual schedule entries Notes may also be searched by clicking the Find button, or entering data into the "Notes Highlight Text" field (such text is highlighted in bold red, plus these kinds of finds are case sensitive).

Signatures may be obtained by clicking the Signature field itself and then pasting from the Clipboard or inserting a file containing the signature. You may also copy an existing signature.

Managing Schedules

When viewing multiple schedules, clicking a column title displays just the one schedule. Clicking the Reset button restores the original schedules. To view other schedules, click the Select button. The selection list gives access to individual schedules and designated groups.

Selecting a group from the list displays the entries for all schedules in the group. Selecting an individual schedule displays the entries for just that one schedule.

When viewing multiple schedules, press the control key and click a column header to "select" that schedule (as indicated by a black asterisk that appears in the header). Control-clicking a second time deselects the schedule. Then clicking the Select button collects these schedules. This allows you to view non-contiguous schedules side-by-side.

Then, once you have collected schedules, *hold down the shift key* and click ANY time, or click the New button in the agenda layout. This lets you make the same entry for ALL "selected" schedules. Each entry may be independently edited. These are known as *multi-entries*.

Multi-entries show a black asterisk in the edit window and such entries are linked to one another. Clicking an asterisk in the entry displays a list of linked entries. Clicking the Delete button of a linked entry lets you delete the other linked entries. *Changing the date or time for multi-entries lets you update dates and times for the other multi-entries.*

In the list, clicking on the third small button in the header collects ALL multi-entries (the buttons from left to right are “Notes”, “Agenda, Action and repeatable entries”, “Multi-entries”, “phone numbers”, “Confirmed, Cancellations, Missed Appointments”, and “Potential Conflicts”. Click Restore to return to the original set of records.

To initiate a search, click a Find button (or choose the "Find Records" command from the File menu). Enter the search criteria and press the enter key (fn-return on small Mac keyboards) or click the Find button to see the results. Hold down the option[Alt] key while clicking the Find button to add an additional search. Hold down the control key while clicking the Find button to display the status bar to omit records or insert operators. When doing a regular search on scheduled entries, you can easily enter a date range by typing "…" in a date field between two dates.

To search for entries by tag numbers, mark the "Tag find" checkbox in settings. When doing the search, click TAG and type the number or scan the bar code into the dialog field. If you configure your bar code reader to send an enter key immediately after the scan, you can immediately pull up an entry.

Changing Settings

The settings area may be password protected by entering an Admin Password. This is especially useful if you don't wish users to change settings you have specified. This password may be overridden by the "Override" password, which should be changed regularly if used or given out to others.

Click the Schedules button to create schedules and groups. Groups may contain any number of schedules. Each title must be unique and different groups may contain schedules from another group. Also, schedules in a group are displayed in the grid and agenda layouts in their original order of selection. *This allows you to display multiple schedules side-by-side in a pre-determined sequence*. If there are fewer schedules than columns, the extra columns are empty.

When you initially create a group, the schedules are displayed in selection order in the right-hand portal. Added schedules are appended to the end of an existing group. However, they revert to alphabetical-order the next time you access the group.

Schedules may be changed from Active to Inactive. Once a schedule has been designated as Inactive, you cannot access its existing entries or create new ones. Default start and end times, intervals, and multipliers in settings are automatically assigned to all NEWLY created schedules. *You may edit these values for any individual schedule*.

Intervals are the periods of time between schedule entries, while multipliers multiply those intervals for new entries. For example, let's say you typically schedule 20-minute interviews. For this you will likely set 10-minute intervals to display all appointments on the grid. But if you also set a multiplier of two, initially you will auto-enter two times the default 10-minute interval, or 20 minutes as the new appointment length.

In the grid or agenda layout, to block a day for regular appointments shift-click the column. Shift-click again to unblock. Such day-blocks show a block color in the header as a visual aid.

To block a time slot in the grid, shift-click within the time slot (this does not work with schedules that have been "selected" for multi-entries). Shift-click again to remove the block.

Clicking the "Time Blocks" button in Schedules (settings), displays a grid that let's you choose *repeatable* time blocks for that schedule. You may click to set a repeatable time block or click again to unset the repeatable time block. Clicking a day button in the time-blocks header in the repeatable time blocks grid blocks the entire day. Shift-click to unblock. Click the "minus" button to clear all blocks from all schedule days. Use the drop-down list to select other schedules and assign blocks to them without leaving the window. Repeatable time blocks always repeat on the same calendar days each week, i.e., Monday, Tuesday, Wednesday, etc.

If you occasionally schedule early or late appointments, configure the individual schedules to include those early or late times (not applicable to agenda entries). Then place blocks on them. That way normal entries may be made, but early or late entries require a dialog acknowledgement. You can also tell at a glance if someone has scheduled an early or late entry. For example, lets say you have blocked out a given schedule for Fridays from 3 pm onward. That block shows every Friday. But suppose the person who has responsibility for that schedule will be in next Friday and will be staying until 5 pm. In that case, simply click on the blocked times for that Friday in the grid. You will get a "not a normal scheduling time" dialog, and you may enter the appointment.

Changing a schedule's start or end time or interval automatically removes any assigned repeatable time blocks. The repeatable time blocks must then be reapplied.

Shift-clicking a *repeatable time block* in the *grid* changes the block color to a light green. This shows availability for that schedule FOR THAT START DATE AND TIME ONLY and overrides the time block (shift-click again to restore the original repeatable time block). You may also shift-click a *non-repeatable time slot* to assign a time block (shift-click again to eliminate the time block).

You may also block appointment times by marking the block checkbox (new entries ONLY). This lets you create blocked entries where the blocks can be duplicated, repeated, or moved. Such blocks may also be potential conflicts. By modifying the start and end times you can block any portion of the day (by marking the "All day" checkbox, you can block the entire day). While such entries appear in the grid, like other types of blocks they do NOT appear in the monthly calendar.

In the grid, you may check availability by choosing the Availability command from the FileMaker Pro menu. Set the schedule, dates, and times you wish to search and then click Continue. When a list of availability dates appears, click on any date to view the grid for that schedule starting on that date. This type of availability checking does NOT skip *repeatable* time-blocks.

Pressing the option[Alt] key while choosing the availability command from the FileMaker Pro menu returns you to the last availability search conducted during the current work session.

You may assign a default fill color to any schedule. When creating new entries, the entries take on the default color for that schedule. Default colors are universal to all schedules.

To customize a color, click on the color button in settings. To assign a description to a color, click the text block below the color. Colors are entered and displayed automatically

User passwords are encrypted and cannot by seen by the administrator. The administrator, however, may change a user's password. Users may also change their own passwords by choosing the Change Password command from the FileMaker Pro menu while in the grid, the agenda, or the names layouts.

To import backup data e.g., when upgrading to a new version of the program, first go to settings and then click the "Import backups" button. You'll be walked through the entire process. When importing backup data, it's a good idea to rename the original file, e.g., placing an "x" in front of the name. Import from the old file into the new one. Be sure to follow the dialog instructions. Previously entered information is deleted in preparation for the import, unless “Skip” is selected. In that cast, no importing for that table occurs.

To delete old entries, click the Delete button. Enter the number of days beyond which to delete the entries. To delete ALL entries, hold down the option[Alt] key and click Continue in the dialog.

Custom field labels may be assigned (in settings) to data entry fields and (in names settings) to names and staff fields. These field labels may be further modified for any individual record.

Throughout the program, choosing the Delete command or clicking the Delete button deletes a record. Where it makes sense, option[Alt]-shift-choosing the command or clicking the Delete button deletes the record instantly without a dialog.

To create backups as you close the program (when you are the last person using the database), mark the "Create backups" checkbox. You will have an opportunity to name your backup file and save it to disk.

From time to time it's a good idea to compact the file and use the *compacted copy* in place of the original (rename the copy so it is the same as the original.). This reduces the overall file size. Click the "Create empty clone" button in settings *while holding down the option[Alt] key* to execute a compacted save.

You may mark the "Large screens" checkbox in settings (for 1280 dpi x 1024 dpi or larger displays). If you mark the "Combination grid" checkbox, the grid and agenda layouts are combined into one layout. If you unmark the "Large screens" checkbox, the program opens to small screens.

Click the More button or the "Names Settings" button to see additional choices.

Displaying Reminders

To display a list of reminders, click the Reminders button. Yellow text indicates there are reminders for today that have not yet been completed. Otherwise, the text is white. Completed reminders are deleted at startup whenever the completion date exceeds the number of days *specified in settings*.

To view reminders for a range of dates, set different From and To dates. Clicking the left-right date arrows lets you set a date range . You can also click on the dates themselves to enter new ones from a small drop-down calendar. To filter the list by name, choose an entry from the dropdown list. To prepare a new reminder, click the New button. In the edit window enter a reminder date, specify for whom the reminder has been created, and enter the reminder itself. To review an existing reminder, click on it in the list.

Uncompleted reminders are automatically forwarded to the next day. The date of the reminder is changed to red and italicized to indicate that it is past due. Once a reminder has been completed (by marking the checkbox in the list), it is linked to its completion date. The reminder date is also grayed out and the completed reminder is highlighted using a strikethrough. You may delete any reminder by clicking the trashcan icon in the list. Option[Alt]-shift-click to delete the item without a dialog.

To make a reminder private, click the Private checkbox in the edit window and specify a password. When reminders are marked private, they read PRIVATE in the list. The privacy password is then required to access the information, change the completion status, or delete the reminder. If you forget the privacy password, you can still access the listing using the override password from settings.

If a red dot appears next to the reminder in the list, the reminder was made directly from a contact and the "Reminder for" text appears in yellow. Otherwise the "Reminder for" text uses the name in the Name field and appears in white.

If you enter a notification time, a reminder dialog appears at that time. Such dialogs may appear for ANY user who is currently logged into the program. If the "Not Mine" button is clicked, that dialog is dismissed for that user's entire work session without affecting other users. Reminders appear only when viewing the grid, the agenda layout, the monthly calendar, a list of schedule entries, or a list of names. If you click the Later button, the reminder dialog reappears after a 10-minute interval. Otherwise, clicking OK acknowledges the prompt and resets the reminder so that it redisplays at the same time on the next day, i.e., provided that it has not been marked as completed.

Adding Holidays

You can enter holidays or special dates to appear universally on all schedules. Only one holiday can viewed for a given calendar date. To enter a holiday, go to settings and click the Holidays button. Choose the "New Record" command from the Records menu and enter a date and description.

To batch import holidays, choose the "Import Records" command from the file menu. The import source file must be tab-delimited text formatted as follows:

<date><tab><description><tab><comments><CR>

where the date includes a 4-digit year, <tab> is a tab character, <description> and <comments> are text, and "CR" is a carriage return (do not include the left-right "< >" brackets). Import directly into the DATE, DESCRIPTION, and COMMENTS fields (for easy identification, these fields are in all caps). Make sure the "Perform auto-options" checkbox is marked in the second of the two import dialogs.

Choose the "Find Records" command from the file menu or click the Find button to search for specific holidays. Once in the find mode, clicking the Find button executes the find.

Clicking a "trashcan" in the list deletes the corresponding holiday. Option[Alt]-shift clicking deletes the holiday without a dialog. To delete all holidays in the current list, choose the "Delete ALL Holidays" command from the File menu.

In the full-view monthly calendar, holidays are show next to the day number. Move your mouse over the holiday and pause to see assigned comments.

In the grid or agenda layouts, when viewing a single schedule, column dates that are holidays are shown in green text. When viewing multiple schedules, holidays are indicated in yellow in the main header. Move your mouse over the date and pause to see the holiday name and any comments.

Printing and Exporting

If you manually assign colors or styles to entries, they print using those attributes (this is not the case for labels). If you print a sorted list, it retains its sort order.

If you have enabled the "Suppress print dialog" option in settings (click the More button) the print setup dialog does not appear as you choose the Print command from the File menu or you click the Print button and acknowledge the dialog as you hold down the shift key. End dates greater that start dates are indicated by a dot next to the start date, and the start date is in red italic type.

To print the list, a summary of the list (that shows the number of entries per schedule for a date or preset), or the total hours, choose the appropriate command from the File menu or click the Print button. To print from the grid, agenda, or calendar, choose Print from the file menu or click the Print button.

To print tags with bar codes, click the "tag" button in the edit window. While any 300 dpi printer may be used, the output is formatted for standard 1-1/8 x 3-1/2 inch (28 mm x 89 mm) address labels using a one-up label printer such as the Dymo LabelWriter. Tag labels can be affixed to cards and scanned to locate the corresponding entries.

To print the data displayed, click the Continue button. You may also Cancel printing by choosing the Cancel command after choosing to print.

Once you have purchased the program, when printing a print layout, holding down the command key while clicking "*Cancel*" in the print dialog allows you to halt on that layout. If you then enter layout mode (choose "Layout Mode" from the FileMaker Pro menu), you can change the layout, e.g., adjusting for label creep or some other function such as adding a logo.

When exporting data from the entries *LIST*, hold down the option[Alt] key as you choose Export from the File menu. Provided that you have purchased the program you'll see a "Specify Field Order for

Export" dialog after assigning an export name. There you may change the field assignments, order of export, and so on. When exporting data from the *names* list, choose Contacts (table) from the top of the leftmost List. You may then export your selected names data.

In the United Kingdom, the country name (e.g., United Kingdom or UK) should NOT be included when posting letters within the UK for delivery to the UK. Only mail addressed to the United Kingdom from overseas should include the country name. To keep this from happening, do not enter the country in the person's record. Otherwise, it will be included on the labels.

Batch Importing
You may batch import new schedule entries or update existing ones by choosing the Batch Import command from the FileMaker Pro menu while in the grid or agenda layouts. For new entries, locate the file from which to import the data and line up the target field names in the "Import Field Mapping" dialog. Make sure that the "Perform auto-enter options while importing" checkbox is marked in the "Import Options" dialog. Fields that are essential for new entries are indicated below in bold:

SkedTitle1 (text) - the name of the schedule into which you wish to import the data
Text (text) - the entry description
Code (text) - the entry code
Date (date) - the entry date
Start (time) - the entry start time
Stop (time) - the entry end time
Detail1 through Detail4 (text) - the 1st through 4th lines
Custom01 through Custom17 (text) - the 5th through 21st lines
Notes (text) - the entry notes
NamesMatch (text) - the record number of the imported entry
ColorRed (text) - the red color component of the imported entry
ColorGreen (text) - the green color component of the imported entry
ColorBlue (text) - the blue color component of the imported entry

If the schedule name, entry description, date, start time, or end time is missing from an imported record, or the schedule name does not exactly match a schedule in the program, or the start time of the record is greater than or equal to the end time, the affected entries are automatically deleted and you are given an opportunity to cancel the import.

When updating *existing* records with modified data, as you line up the target field names with the incoming data click repeatedly between the record number (the last item exported from the list) and the field called RcdNo until an equal sign appears instead of the left-right import arrow. This links the incoming data to the proper record for updating.

Certain types of imports, e.g., importing from a spreadsheet that includes column headers, may create at least one bogus record that is automatically deleted. If this is the case, there may be no reason to cancel the import. Also, the time it takes to do an import greatly depends on the number of records to be imported and the speed of your computer. For a large number of records, please be prepared to wait.

Using Names
Click the Names (or whatever you call names) button to go to names. To view more information about a name, move your mouse over the name in the list and pause momentarily. To edit any name, click on it.

In the list, choose the "Print Labels" command from the File menu to print address labels. If the A-4 Printing checkbox is marked in settings, addresses are automatically formatted for A-4 label printing, i.e., 21 labels per sheet. Otherwise, they are printed 30 labels to a sheet (on standard sized paper). In an info window, choosing the "Print Label" command lets you print either a quantity of identical address labels, or a 1-up address label, e.g., a Dymo LabelWriter label, for that name.

In the list, to check for potential duplicates, choose the "Check Duplicates" command from the Records menu. The algorithm used is a match between the first three (3) letters of the last name, the first three (3) letters of the city or town, the first letter of the state or province, and the first three (3) numbers of the zip or postal code. Click the results to easily determine whether or not they are actual duplicates.

You can enter names one at a time by choosing the New command or by importing multiple names from other sources. Fields that you can safely import into are in all caps. Several of these along the top and right side are custom fields that may be used to store special information. These do NOT correspond to the custom fields for schedule entries.

In the info window, to copy the address to the Clipboard click the Address field label. To copy it with tabs instead of carriage returns, e.g., for pasting into a spreadsheet such as Excel, hold down the option[Alt] key. To copy the email address, click the Email field label. To copy the URL, click the URL field label. If you click the button, you can *send* an email or *open* the web site. If the "No Emails" checkbox is marked, you will be given a choice to send the email.

You may store, view, and assign any number of alternate addresses, phone numbers, email addresses, or URL's by clicking the "Alternate address" button (a vertical red line on the button indicates that alternate addresses exist for that name). You may also copy them directly to the Clipboard.

Birth dates show the corresponding age. *If you use the drop-down calendar to assign a birth date, continuously pressing the down arrow lets you quickly scroll to an earlier year.*

The next sequential ID is automatically entered when you create a new record. Clicking on an empty ID field updates the record.

Clicking a phone label lets you specify the type of phone number entered. A marked checkbox at the right of the phone numbers indicates the primary means of contact. If the "Auto-format phone numbers" checkbox is marked in settings, and the number of digits in the phone number equals the number of "#'s" in the configuration box, the new number will be auto-formatted, e.g., "5551234567" becomes "(555) 123-4567". To append an extension, type it into the field next to the phone number.

The comments field is for storing confidential data. Click the small lock to encrypt the information. Click the small lock again to decrypt. When decrypted, the color of both the field and the text changes. This serves as a reminder to encrypt the data before leaving the record. *Each time encryption is applied, it produces entirely different results. NO KEYS ARE REQUIRED.*

If the "Encryption Dialogs" checkbox is marked in settings and the comments field contains information but is not encrypted, when you go elsewhere a dialog appears indicating that the field is not encrypted and giving you the chance to encrypt it. If the "Encryption Dialogs" checkbox is unmarked in settings and the confidential field is NOT encrypted, when you go elsewhere a dialog INITIALLY lets you encrypt the field, but also allows you to skip future dialogs for that record *(this NOT recommended)*.

To make a new entry from a name, click on the "New Appointment" button or choose the "New Appointment" command from the Records menu. The grid or agenda layouts are displayed so that you can select a date, time, and schedule for entry. The name is auto-entered into the description field (the title of this field may be changed in settings) and, if the "Link code" and "Link phone" checkboxes are marked in settings, data from the names code field is entered into the code field and data from the primary means of contact is inserted into the *first* Detail field.

If the "Multiple name entries" checkbox is marked in settings, or the control key is held down as you click Done, additional entries for the same name may be made by clicking new time slots in the grid or the New button in the agenda layout. To stop making entries for a particular name if the "Multiple name entries" checkbox has been marked in settings, choose the Refresh command from the FileMaker Pro menu *while in the grid or agenda layouts*.

If the "Always enter names" checkbox is marked in settings, then initially clicking any time slot brings up a dialog for selecting or creating a name. Selecting a name forces one to choose a name for entry.

In names settings, the history date fields initially range from 400 days into the past to 90 days into the future. If you UNMARK the "Auto-assign" checkbox, dates used are specified in the "From" and "To" date fields. If you RE-MARK the "Auto-assign" checkbox, each date is incremented by the number of days between the last time the program was opened and today's date minus or plus the numbers you have entered into the minus and plus fields. These dates are automatically set in names history. By clicking the unmarked button to the right of "From", you can show ALL entries.

If you modify these dates for any individual name, your choice is remembered for ALL names *for the duration of the current work session, or until the dates are changed again*.

If you click the "Show as list" button in names, the history for that name is shown in list form. *You may then sort, filter, search, review, print, or export the records*. If a red "N" appears next to the entry, notes exist for that entry. Pausing your mouse momentarily over the "N" displays those notes.

Names may be related to one another, e.g., family members, consultants, supervisors, etc. To make new associations, click the "Link" button in names and click to select individuals from the list (click a second time to deselect). Selected names, including those that have already been assigned, are highlighted.

When done, click the Link button. *If two-way or bi-directional relationships have been specified in settings, the additional relationships are processed automatically*. To unlink a related name, click the "minus sign" button at the right of the listed name. You may also deselect it in the link selection list.

To add one or more names to an existing *entry*, click the "Link Names" button in the entry window. The linking process is the same as when relating names as described above. To remove a name, click the Remove button at the right of the listed name in the entry window. To create a new name from the *entry* window, choose the "New Record" command from the Records menu.

To make a reminder for a name, click the Reminders tab and then click the New button. To review an existing reminder for that individual, click the reminder in the list.

To view maps, click the "View Maps" command in the Records menu (an active Internet connection is required) or the view maps button. Click the left-right arrows in the maps display to view maps for different names. *Regardless of which map you view, you are returned to where you started when you click the Done button*.

Choosing the "Duplicate Record" command lets you duplicate a name to create a related names while not having to retype the common data (the last name, address, phone numbers, email, URL, and custom fields are initially identical in both records). An indicator and a Cancel button also appear. Clicking the

Cancel button deletes the duplicate name and returns you to where you started. *Vertical red lines on the tabs (if the tabs are not selected) indicate that entries exist for that name.*

Clicking the "Birthday Notification" button marks the notification checkbox (provided that a birth date exists) and lets you enter a number of days early for being notified. If a birth date (*minus the number of days early, or any fraction thereof*) FALLS ON TODAY'S DATE, you may show those individuals having birthdays by choosing the "Show Birthdays" command from the Records menu. If you also mark the "Show birthdays at startup" checkbox in settings, if there are birthdays (*minus the number of days early, or any fraction thereof*) that fall on today's date, those records are shown either upon startup, or when restarting the program. This lets you send birthday greetings in advance of the actual dates.

Stored notes for names appear in a Notes list (click the Notes tab) sorted by the date and time each note was created. The most recent note is at the top of the list. To view a note, click on it in the list. Click the New button to make a new note and add it to the list. Notes in the current record may be searched by entering data into the "Notes Highlight Text" field (click the "Search button). The found text is highlighted in bold red *(notes finds performed in this way are case sensitive)*.

To view pictures, click the "Pictures " command in the Records menu or the Pictures button. Click in the center of the screen to past an image. Click the left-right arrows in the maps display to view pictures for different names. *Regardless of which picture you view, you are returned to where you started when you click the Return button.*

Merge Letters and The File Vault

When creating letters for an individual, place your cursor in the text where you want the data to appear and then click the buttons in the list at the right. Boilerplate may also be created and assigned by clicking the "Custom Text" button.

To shorten the *list*, option[Alt]-shift click any button to remove it. Any removed field buttons may be added back to the list by clicking the "Rebuild List" button. Custom fields that you have assigned a label to are included, but are automatically omitted if no label has been assigned.

When editing letters, the ruler may be used to set indents and tabs. Clicking the Print or Email buttons may preview the results. Duplicating a letter lets you quickly copy it while preserving entered text (you don't have to re-enter the letter text from scratch).

Stored File Vault files appear in a file vault list sorted by the date and time of entry with the most recent item at the top. To view an item, click on the item in the list. Click the "New Record" command from the Records menu to add an item to the vault. Above the storage field in the vault is place for a title used to identify the item.

If you wish to add a picture or an item that you have copied to the Clipboard, choose the "Paste Image" command from the edit menu. If you click in the field and shift-select the "File" command from the Insert menu, you insert the file with the "Store only a reference to the file" checkbox marked. This allows you to double-click the item to open it in it's own application. *Do not move or rename such a referenced file or the program will no longer be able to find it.*

If you choose the File command *without holding down the shift key*, unmark the "Store only a reference to the file" checkbox, or paste from the Clipboard by choosing the Paste command from the edit menu, the item is still stored within the program. But you will not be able to open it in directly without first exporting it to some other location.

Time Slips
To create a new time slip, click the "Time Slips" tab. Then click the New button. To view a listing of ALL time slips, click the "Time Slips list" button in *settings* (first click the "Names" button).

In the time slip window, click the Start button to start time tracking. Click the Stop button to pause the clock. Click the Start button once again to resume time tracking. Each time one of these buttons is clicked, the total time is displayed. The total time can be easily edited by clicking into the field.

If an hourly rate is specified in settings (first click the "Names" button), that rate is automatically entered into a new time slip when first created. If taxes are also entered in settings, the time slip is also taxable and the “Taxable?” checkbox is marked.

The rate for a time slip can be changed at any time. The total is calculated using the assigned rate and the accumulated time. Clicking in the Charges field can also modify the total. If a billing total is overridden in this way, a red dot appears next to the charge label.

When you click the "List" or "Stop" buttons, time-tracking stops and the time is automatically rounded up or down to the nearest minute, i.e., if rounding is turned on in settings. Otherwise, the exact elapsed time is added and the overall time is NOT rounded. To reset the time to zero, click the Reset button.

Products and Purchases
Products are created directly from settings. When you click the Products button in settings, you are taken to a list of products. Clicking any item in the list lets you revise the product. Custom field labels may be edited with the edited result getting used for each product.

If you click the Invoices button in settings, you may review ALL old invoices, including those made from entries. When you first review invoices, those up to a year old are included in the list. Clicking the "From" and "To" dates buttons, and the Names, lets you zero in on a selection. A "red dot" in the Names *field* tells you that invoice was generated from an *entry*. If there is a Balance Due, the Balance Due field is shown filled with a light red color.

Clicking any invoice in the list lets you review details. Clicking "+ Amount" lets you pay down the invoice (shift-click to add back the previous amount or option-click to add back the TOTAL amount). While reviewing individual invoices, you may print or delete them. To create *new* invoices, click the Invoices button in Names, Staff, or Entries

Whenever you click the "Select Item" button in an new invoice and choose an item from the list, that item is entered into the next open invoice line. If a selected item is taxable, the tax information is automatically entered. You may even enter your own data into an invoice. A negative price changes the type to "Refund". Any invoice may be paid for in full or in part at any time by going to settings.

Clicking the "Done Transaction" button lets you print the invoice. The "In Stock" quantity in products is updated as you complete the transaction. If the in-stock quantity falls to or below the reorder level, the "In Stock" field and the item in the products list are both shown highlighted with a red background.

Using Staff
To create staff members, click the Staff button in settings. The staff members you enter may or may not be the same individuals who use the program. STAFF NAMES MUST BE UNIQUE. To link a staff member to an *entry*, click the "Link Staff" link within the entry. Clicking a phone label lets you specify the type of phone number entered. If the "Auto-format phone numbers" checkbox is marked in settings, and the number of digits in the phone number equals the number of "#'s" in the configuration box, the

new number will be auto-formatted, e.g., "5551234567" becomes "(555) 123-4567". To append an extension, type it into the field next to the phone number.

To view an entry while in staff, click on it in the History list. *In names settings (this also applies to staff history), the history date fields initially range from 400 days into the past to 90 days into the future. If you UNMARK the "Auto-assign" checkbox, dates used are specified in the "From" and "To" date fields. If you RE-MARK the "Auto-assign" checkbox, each date is incremented by the number of days between the last time the program was opened and today's date minus or plus the numbers you have entered into the minus and plus fields. These dates are automatically set in staff history. By clicking the unmarked button to the right of "From", you can show ALL entries.*

Once you have one or more staff members, you may use the Staff button in the grid or agenda layouts to view general staff information. If you have a large number of staff and wish to perform a find, choose the "Find Records" command from the File menu or click the Find button (click the Find button again to execute the find). Click the number of found records button to again show all records.

You may create log-in accounts for staff members by entering a name and password into the Account Information section. Users must log in with the log-in name and password. If no log-in names and passwords have been assigned to an account, the user must log in using the initial name and password ("admin" for both). *ACCOUNT LOG IN NAMES MUST BE UNIQUE (passwords do not have to be unique). Passwords are, however, case-sensitive.* If either the name or password fields are empty, they are shown highlighted in red. If the name field is NOT empty, but no log-in password has been created, then the names field is shown highlighted in orange.

You may also limit functionality. Click the Permissions button and unmark whatever checkboxes might be deemed NOT appropriate for a particular staff member. When that person logs in, unmarked checkboxes each represent a limitation. If that person has the override password, he or she may click "Override" in the dialog and bypass the limitation. *If you use the override password for any reason, you should immediately change it to avoid users having access to settings.*

Notes may be stored for individual staff members and the date and time may be auto-entered by clicking the "Date Time" button. Notes may also be searched by entering data into the "Notes Highlight Text" field. The found text is highlighted in bold red. *Such finds are case sensitive.*

To schedule employees for work hours, choose "Work Schedule" from the Records menu or click the "Work Schedule" button. When viewing the work schedule list, you may create a new record by choosing "New Record" from the Records menu. You may also add multiple records by clicking the "New Days" button. If NO days exist, records will be added starting from the current date. Otherwise, records will be added from the last record date.

If the "Show staff selection days" checkbox is marked in names settings (or the shift key is pressed as you click Enter on the "number of days" dialog), you get to choose which days to include. Otherwise, ALL dates are created for the number of days specified.

Navigation dates may be used to filter the list. By judiciously using navigation dates, you may delete old records. *By clicking the unmarked button to the right of "From", you can show ALL records.* You can return to today's date by clicking "Today:" in the "From" drop down calendar.

Records display the most recent date at the top of the list. You may Clear or Repeat the *TIMES* for all records at once by clicking the "check" button, you may select any record by clicking the arrow at the left, and you may edit the date of any record by clicking in the Date field (*note that it's possible to produce duplicate DATES in this way*).

When a staff member checks IN (by signing in with a password), a record is automatically created along with the date and time at which check IN occurred. An In/Out tab list gives this data and is sorted at the top by the most recent check-in date and time. When the staff member checks OUT (by signing out), the record is updated accordingly. This status is shown in red (checking OUT) or blue (checking IN). You may delete individual records and you may filter the list using the navigation dates. You may also edit the OUT times and dates.

Activating Slats™

Slats is a non-kiosk screen saver. To open slats, choose the "Activate Slats" command from the FileMaker Pro menu or type command-shift-K. Slats works with any size screen so long as the monitor has a display area of at least a 1024 x 768 dpi. If the "Assign passwords" checkbox has been marked in settings (click the "More" button), you may also assign a temporary password to Slats.

All passwords are case-sensitive.

If the "Assign passwords" checkbox is UNMARKED in settings, you may assign a temporary password ONLY by holding down he option[Alt] key while choosing "Activate Slats".

To exit Slats, click in the screen area on the slats itself, or press the control key.

Ensuring Security

1. Choose "Toggle Hide" from the FileMaker Pro menu or type command[control]-k to hide the current screen. Repeat this to again or click on the blue expanse to show the original screen. This allows you to conceal sensitive information from a casual observer.

To exit the program, click the blinking yellow dot in the upper left corner of the blank screen. If the "Assign temporary passwords" checkbox has been marked in settings (click the "More" button), you may also assign a temporary password. *All passwords are case-sensitive.*

To auto-hide the primary data screens after so many minutes, enter an "Automatically hide primary data screens after" the minutes value in settings (first click the More button). You may then log out from the blank screen by entering a value into the "Log out after" so many "additional minutes" field in settings.

2. Assign staff account information to limit access to the program. Staff accounts reside in settings, which is itself protected by an administrator password.

3. Close the program when leaving the computer unattended. Clicking "Log Out" (in the dialog that appears if you have passwords assigned in staff) lets you log in using another name and password.

4. Selectively mark Private checkboxes for entries that need to be protected. Only users with the proper password can access a private entry.

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