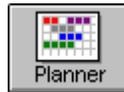
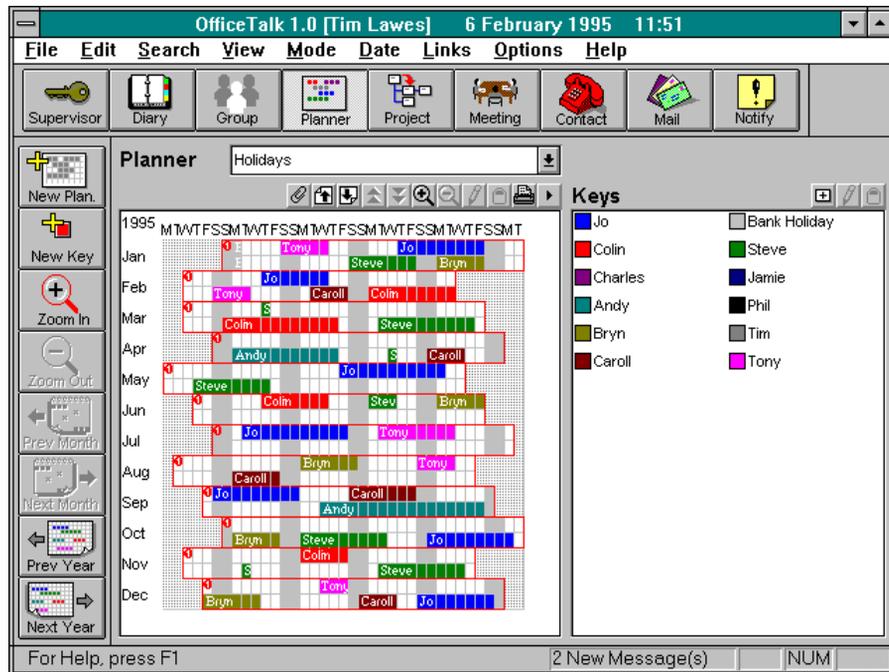


# Planner Mode



There are two main windows in this view; the Planner Window and the Key Window.



Planners are a way of planning and sharing long term activity information. Planners contain *planner* bookings which are one or more days in duration. A good example of the typical usage of a planner would be a *Holiday* planner. You could create a planner which kept the holiday commitments of the entire workgroup. This information would then be available to all OfficeTalk users for use in their own planning and scheduling.

A *public* planner is a planner that is available to all OfficeTalk users. A supervisor can create a *public* planner by adding to the Planner List from within Supervisor Mode (see **Planner List** in the **Supervisor Mode** chapter). Alternatively these can be created from within the Planner Mode

## Creating a New Personal Planner

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You can create a *personal* planner by pressing the  button in the sub toolbar. A Planner dialog box will appear. The fields of the Planner dialog box are described in the table below:

Field	Description
<i>Name</i>	This is the <i>name</i> of the planner, for example, <i>Holidays</i> , or <i>Product Exhibitions</i> .
<i>Owner</i>	This is the <i>owner</i> of the planner. When you create a <i>personal</i> planner, OfficeTalk automatically makes you the owner of the planner. This means that only you (and any supervisors) are able to delete the planner or edit its name. Supervisors may only edit or delete <i>your</i> personal planners from within Supervisor Mode. It also means that you have full access rights to the <i>planner</i> bookings within the planner. You may specify another user as the owner of the planner. If you specify no owner it becomes a public planner.

When you create a *personal* planner (with you as the owner), it is hidden from all other users unless you grant access to other users via the  button.



*Planner dialog box*

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## Creating a New Public Planner

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A *public* planner is one to which all users have access, unless specifically restricted through the setting of the access rights.

Public planners may be created by a supervisor from within Supervisor Mode. They may also be created from within Planner Mode in the following way.

- Ⓔ Press the  button in order to create a new planner. Alternatively, edit an existing *personal* planner by selecting **Edit Planner** from the **Edit** menu. In both cases the Planner dialog box will appear.
- Select **--No Owner--** from the **Owner** pull down list. Press OK on the Planner dialog box.

Selecting **--No Owner--** from the **Owner** pull down list turns the Planner into a *public* planner. Whenever a *public* or *personal* planner is created from within Planner Mode, all users except the owner of the planner are given *no* access to the planner. If you wish other users to have access to a planner that you have created from within Planner Mode then you must individually set the access rights of those users to the planner.

Planners which are created from within Supervisor Mode are created such that the owner has *full* access to the planner and all other users have *read* access.

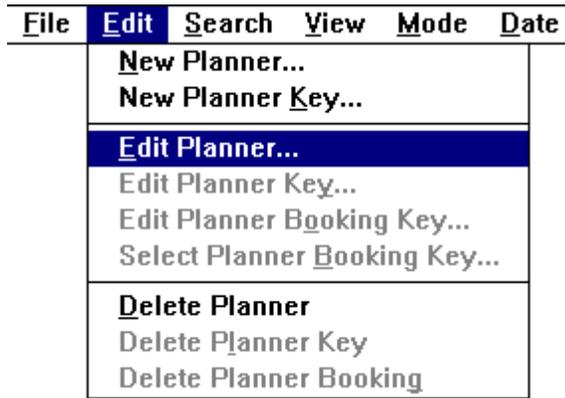
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## Editing a Planner

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If you want to change the name of a planner or change its owner or users' access rights to the planner then you will need to edit the planner. There are two ways to edit a planner: A planner may be edited by a supervisor from within Supervisor Mode. For more information, see the **Planner List** section in the **Supervisor Mode** chapter.

You may edit your own *personal* planner from Planner Mode, by selecting the **Edit Planner** from the **Edit** menu.



*Editing a personal planner*

The Planner dialog box will appear. Make the necessary changes and press OK.



*Planner dialog box*

## Deleting a Planner

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There are two ways to delete a planner. Firstly, a planner may be deleted by a supervisor from within Supervisor Mode. For more information, see the **Planner List** section in the **Supervisor Mode** chapter.

You may delete your own *personal* planner from Planner Mode, by selecting the **Delete Planner** from the **Edit** menu.

File	Edit	Search	View	Mode	Date
	<b>N</b> ew Planner...				
	<b>N</b> ew Planner <b>K</b> ey...				
	<b>E</b> dit Planner...				
	Edit Planner Key...				
	Edit Planner <b>B</b> ooking Key...				
	Select Planner <b>B</b> ooking Key...				
	<b>D</b> elete Planner				
	Delete P_lanner Key				
	Delete Planner Booking				

*Deleting a personal planner*

OfficeTalk will prompt you to confirm that you wish to delete the planner. If you press **Yes**, the planner will be deleted.

## The Planner Key

All planners may have a set of *keys*. A key contains a colour and a description. A key has two purposes. Firstly, it acts as a *template* for creating *planner bookings*. If you select a key, you can then add planner bookings into the planner. These bookings will be given the same colour and description as the key. Secondly, the key may be used as a colour index. Every planner booking *contains* its description, however, sometimes the planner booking is not long enough, in duration, to display this description. The key may be used to colour-match any booking in the planner to find its description.

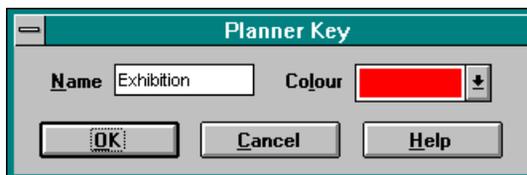
## Adding a Key

You can add a key to the Key Window in several ways:

Action	Description
Pressing the  button.	Press the  button above the Key Window. A Key dialog box will appear.
Pressing the  button.	Press the  button above the Key Window. A Key dialog box will appear.
Pressing the INSERT key.	The Key Window must have <i>focus</i> . You can give a window focus by

	clicking anywhere inside the window. Pressing the INSERT key brings up the Key dialog box. Enter the relevant details and press <b>OK</b> .
Double Clicking.	Double clicking in the Key Window will bring up the Key dialog box. Enter the relevant details and press <b>OK</b> .

In all three cases, a Key dialog box will appear. Fill out the *Name* field and choose a colour for the key from the *Colour* pull down list. Press OK on the Key dialog box. The new key will be added to the Key Window.



*Planner Key dialog box*

## Editing a Key

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You can edit a Planner Key in the following way:

- ⌘ Select the key from the Key Window and press the  button above the window.
- The Planner Key dialog box will appear. Modify the description of the key and select the key colour and then press OK.

Any bookings which are associated with the modified key will reflect the changes. Note, it is also possible to edit a key by holding down the CTRL key on the keyboard and double clicking on a booking that is associated with the required key.

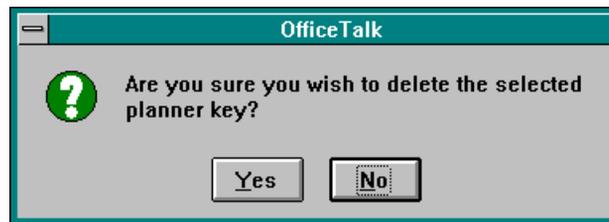
## Deleting a Key

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You can delete a key in several ways.

Action	Description
Pressing the  button.	Select the key that you wish to delete and press the  button above the Key Window.
Pressing the DELETE key.	Select the key that you wish to delete and press the DELETE key on the keyboard.

When you attempt to delete a planner key, OfficeTalk will confirm that you wish to go ahead.



*OfficeTalk Confirmation*

OfficeTalk does not let you *bin* planner keys. Any of the actions described in the table above will always delete the keys completely.

## Planner Bookings

A *planner booking* is an entry in the Planner Window. A *planner booking* may have an associated key and is always one or more days in duration.

## Adding a Planner Booking

You must have at least *create* access to a planner in order to be able to add a planner booking. You will always have *full* access to any *personal* planners that you create. For more information on planner access rights, see the **Planner List** in the **Supervisor Mode** section.

To add a *planner* booking to the planner, you must firstly select a key to represent the booking. Do this by single clicking on the relevant key in the Key Window. Next create the booking in the Planner Window by pressing the left mouse button when the cursor is over the required starting date. While keeping the left mouse button pressed, drag the cursor over to the required end date. Finally release the left mouse button. The booking will be added to the Planner Window.

## Changing the Key of a Planner Booking

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You can change the key of a planner booking by double clicking on the planner booking using the left mouse button. This will bring up the Select Key dialog box. Select a key to associate with the booking and press OK. The key of the planner booking will be changed.

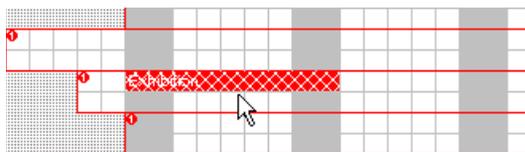


*Select Key dialog box*

## Selecting a Planner Booking

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You can select a planner booking by clicking on it using the left mouse button. The booking will highlight to indicate that it has been selected. Once a planner booking is selected, you may use the cursor keys to move the booking and the DELETE key to delete the booking. You can also use the TAB key on the keyboard to select the next nearest planner booking. If you keep the SHIFT key pressed when you press the TAB key, the previous nearest booking will be selected.



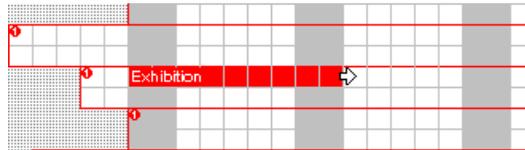
*Selecting a planner booking*

## Moving and Stretching Planner Bookings

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Once you have created a planner booking, you may move the booking to an empty slot in the planner by dragging the booking from its original position to the new position. When moving a booking, you must drag the booking from its centre. Another way of moving a planner booking is by selecting the booking (using the mouse or the TAB key) and pressing one of the cursor keys. This will move the planner booking one square at a time.

To stretch a booking, you must drag the left or right edge of the booking, using the mouse. The cursor will change to a *stretch* cursor when you move over the edge of a booking.

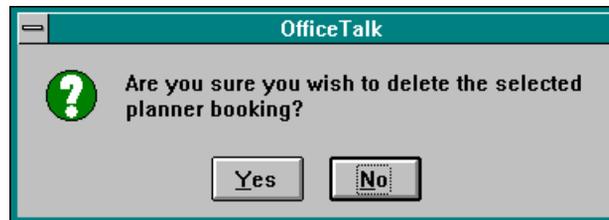


*Stretching a planner booking*

## Deleting a Planner Booking

You must have *delete* access to a planner in order to be able to delete its bookings. You will always have *delete* access to any *personal* planners that you create. For more information on planner access rights, see the **Planner List** in the **Supervisor Mode** chapter.

To delete a planner booking from the planner, select the booking and press the DELETE key on the keyboard. OfficeTalk will confirm that you wish to delete the booking.



*OfficeTalk Confirmation*

OfficeTalk does not let you *bin* planner bookings. The method described deletes the booking completely.

## Selecting a Planner

Any planners to which you have, *at least*, read access will appear in the **Planner** pull down list, in Planner Mode. To select a planner simply choose the required planner from the **Planner** list.

## Zooming In and Out

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By default, planners show twelve months at a time. This leaves you two *booking rows* for each month. In some cases, you may have more than two bookings overlapping at any time. In such a case, you will want to zoom in so that you can see more booking rows per month. The  and  buttons let you zoom in and out of a planner, letting you see more booking rows per month or more months, respectively. The maximum zoom lets you see just one month, showing twenty four booking rows.

## Changing Date

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When you are zoomed in, you may scroll up a month or down a month using the  and  buttons. You may change the year displayed by pressing the  and  buttons.

## Viewing Planners from your Diary

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Any planner that you can see in Planner Mode may be viewed from within Diary Mode in the Background Activities Window. For more information on how to view planners from within Diary Mode, see **Background Activities**, in the **Diary Mode** chapter.

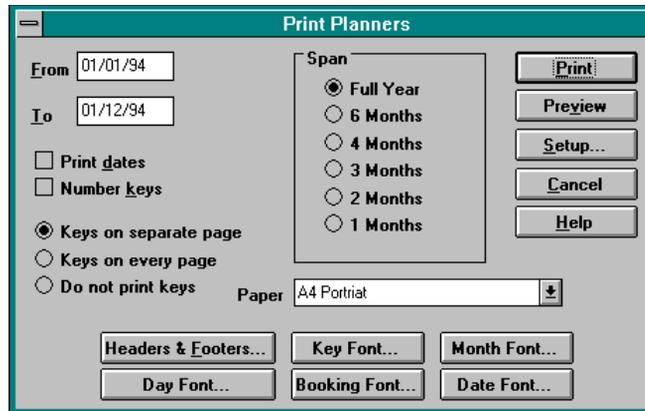
## Linking a Planner

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You can link a planner to any other OfficeTalk data item, making it easy to quickly move between certain linked items. You can link a planner to an item by selecting the planner that you want to link, pressing the  button above the Planner Window, selecting the other OfficeTalk data item and pressing the  button above that data item's window. The planner will now be linked to that data item. A  symbol will appear at the top of the Planner Window. For more information on *linking*, see the **Linking** section in the chapter named **General OfficeTalk Features**.

## Printing Planners

OfficeTalk lets you print out your planners by pressing the  button above the Planner Window. When you press this button, the Print Planner dialog box will appear.



*Print Planner dialog box*

In most cases, all you will need to do in order to print out your planner is select the **Paper Style** and press the  button. OfficeTalk lets you customise your print out by providing several check boxes, radio buttons and fields. The functionality of the Print Planner dialog box is summarised below:

Field	Description
<i>From/To</i>	The <i>From</i> and <i>To</i> date fields specify the date range that you wish to print.
<b>Print Dates</b>	If you check the <b>Print Dates</b> check box, OfficeTalk will print the date in every square on the planner which is not occupied by a booking.
<b>Keys on Separate Page</b>	If you select the <b>Keys on Separate Page</b> radio button, OfficeTalk will print the planner keys on a separate page to the planner.
<b>Keys on Every Page</b>	If you select the <b>Keys on Every Page</b> radio button, OfficeTalk will print the planner keys at the bottom of each page printed.
<b>Do Not Print Keys</b>	If you select the <b>Do Not Print Keys</b> radio button, OfficeTalk will not print the keys.

<b>Span</b>	OfficeTalk will automatically select the span according to your current zoom. You may manually change this from 12 months down to 1 month.
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OfficeTalk gives you complete control over the fonts used to print out your planner. You may choose the following fonts:

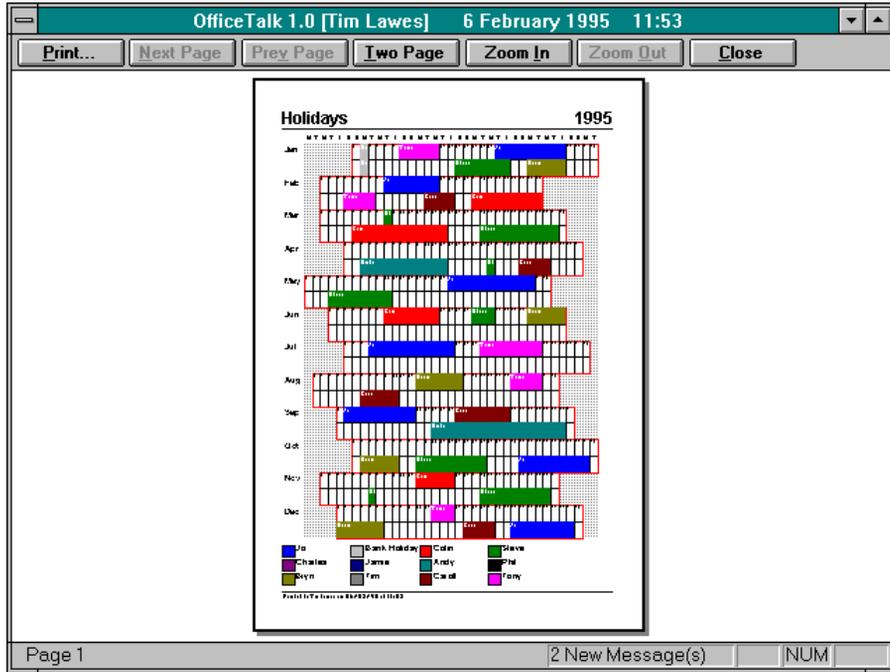
- **Day Font** This is the font of the abbreviated day names at the top of the planner e.g. M T W T F S S...etc.
- **Key Font** This is the font of the key descriptions (relevant only if you choose to print the keys).
- **Booking Font** This is the font of the booking descriptions. Note that, by default, this text is *white*, since it prints out more clearly. Also note that brightly coloured keys always have *black* text.
- **Month Font** This is the font of the abbreviated month names displayed down the left side of the planner.
- **Date Font** This is the font used to display the date drawn in each square. This is relevant only if the **Print dates** check box is checked.

OfficeTalk provides common *print* functionality in all Print dialog boxes. This functionality includes:

- Defining headers and footers
- Printer setup
- Preview capability

For more information on this common print functionality, see the **Printing** chapter in the **General OfficeTalk Features** section.

If you *preview* the planner print out, with careful selection of fonts, OfficeTalk will display a preview output similar to that shown below:



*Planners print preview*

