

AES

Adaptive Enterprise Solutions

...unlocking the dawn of better results for your organization

RESOURCE MANAGER GUIDE



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Overview

The purpose of Resource Manager is to manage workers' time; it is meant to help schedule workers so that project work, appointments with clients, meetings with other staff members, and out of office time can be managed and coordinated. Resources are created in Security Manager on the Tab Group page; one or more Tab Groups must be created, and each one must have one or more members. Each member of the Tab Group will appear here as a Resource.

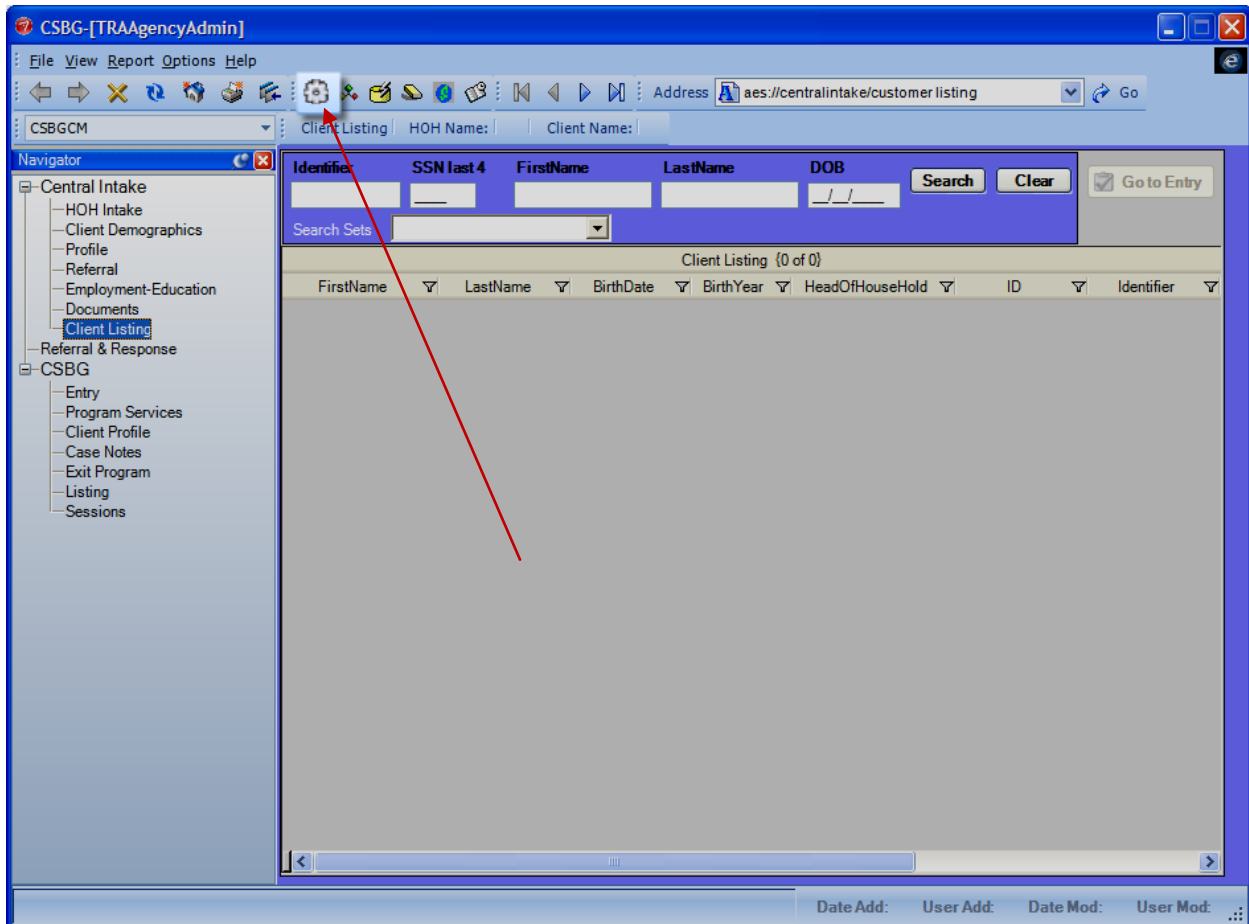
Four types of Activities can be scheduled in Resource Manager:

- **Appointments** are activities scheduled with a Client from the system. Activities created from Encounter will be placed on the appropriate resource, date and time and will not include Client name; Activities from Services page will be placed in a Queue to be scheduled, but will include Client name.
- **Placeholders** are activities set up in Resource Manager for a Person or Group, i.e. a meeting or away from the office; these may be set up to repeat automatically; a Client name can be included.
- **Tasks** are activities that a Person or group of people needs to do; they may also be set up to repeat; they usually do not involve a Client and so there are no Client name fields.
- **Events** are activities that do not have a scheduled time.

Accessing Resource Manager

The Resource Manager icon is located in the toolbar at the top of every page.

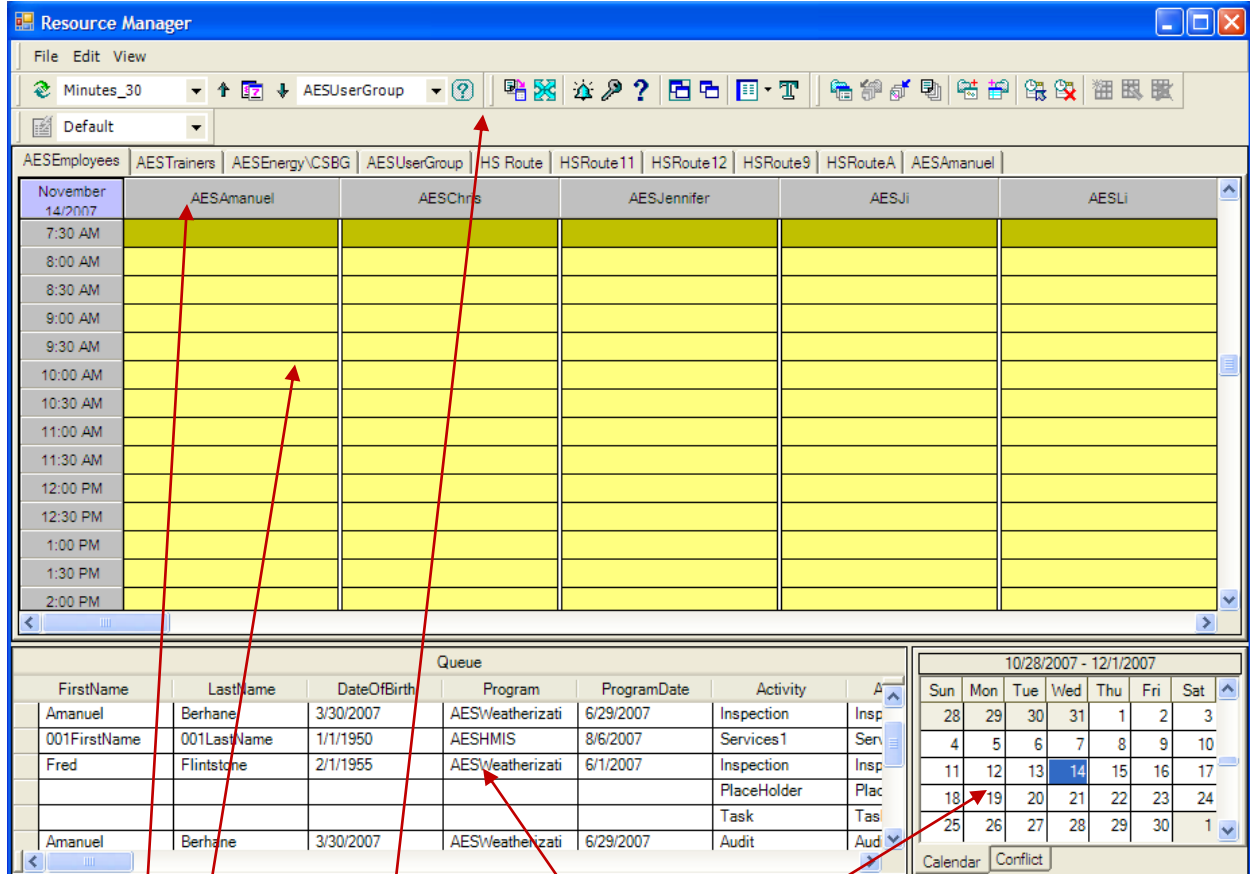
Click on this button once to access the main Resource Manager page.



Resource Manager Display

This section of the manual introduces each component of the main screen; their uses will be described later in the Guide. Most functions can be accessed through either a toolbar button or a right-click menu selection.

The Resource Manager window may be resized both vertically and horizontally; the Calendar and Queue sections can also be resized within the window. After closing Resource Manager, it will revert to its default size when reopened.



Navigating the Resource Manager

- Appointments waiting to be scheduled appear in the Queue
- Click on date(s) in the Calendar to change the that date in the display
- The middle section shows items that have been scheduled for the selected Dates and/or Users
- Buttons and dropdowns in the Toolbar access different capabilities
- Tab Groups are shown in the tabs below the toolbar and Members of the selected Tab Group are displayed as the grey Column Headings

Toolbars

The toolbars contain Icon Buttons and Dropdown fields. Many of the Icon Button functions are also accessible through right-click menus.

Icon buttons

The icon buttons are shown below with their Tool Tip name; these descriptions appear when the cursor is floated over each icon.



Refresh – shows any changes (i.e. selecting multiple days for the Calendar)



Bar Text – change the descriptive name of all Activities



Move Previous – shows the previous day on the Calendar



Resource Available & Unavailable – shows Resources that are/are not available and times



Return Today – shows the current day on the Calendar



Resource Listing – lists all Resources



Move Next – shows the next day on the Calendar



Schedule Listing – lists all Activities scheduled



Help – not available yet



Main Listing – lists all Activities scheduled or in the Queue



Unschedule – removes the Appointment from the Calendar, returns it to the Queue



Task – brings up window to schedule a Task



Shift – shift an activity to a new Resource, Date or Time



Linked Task – brings up window to schedule a Task linked to more than one Resource



Remind – sets a reminder for an Activity



Placeholder – brings up window to schedule a Placeholder for a Resource or Resource group



Private – keep an Activity Private so others cannot view it



Remove Expired Placeholders – removes all Placeholders scheduled before today



Tentative – marks an Activity tentative, colors it gray



Add Event – brings up window to schedule an Event



Group – group several Activities so they may all be shifted



Edit Event – brings up window to edit the selected Event



Ungroup – ungroup the set of Activities



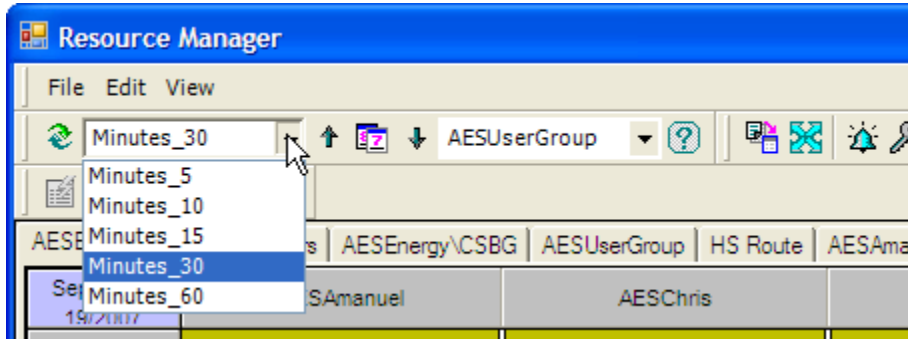
Delete Event – deletes the selected Event



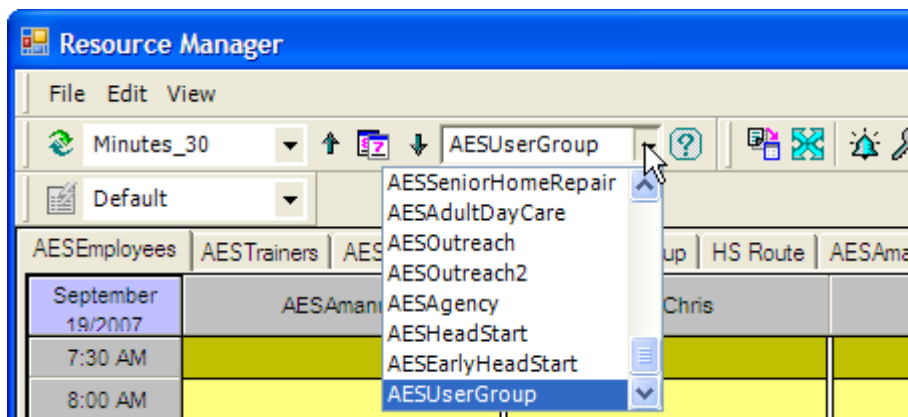
Bar Color – change the left Bar of any Activity

Dropdowns

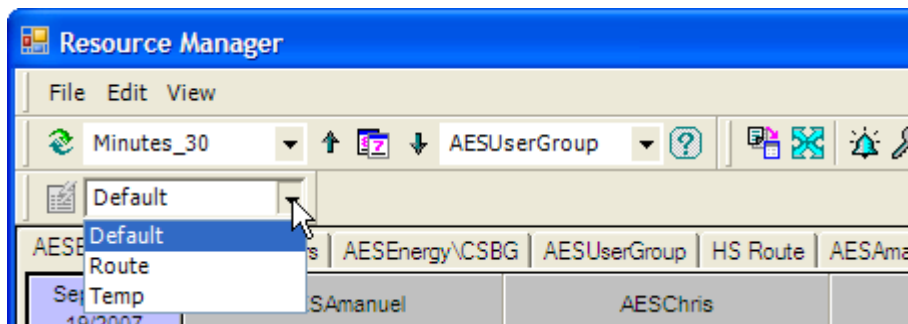
- There are three dropdowns located in the toolbars.
- The first is used to set the allocated time blocks showing in the screen from five minutes to sixty minutes; the default is 30 minutes



- The second is used to select the Resource Group. The dropdown contains all the Program Groups and User Groups available in the Agency; they are created in Security Manager.



- The third is used to select the function –Default is the scheduling section. Route is for transportation routing.



Screen Sections

Large Calendar

- The majority of the screen is a large calendar divided into time intervals used for scheduling. The screen below shows half hour segments (the default value)
- There are one or more Tabs (like dividers) located just below the toolbar; they are determined by the choice in the Resource dropdown
 - Tab Groups are created in Security Manager on the Tab Group page
- Column Headers are the Resources (User IDs) who are members of that Tab Group
 - If viewing only one Resource, the Column Headers may reflect Dates instead of Resources

Queue

- Below the large calendar is the queue, it displays a list of clients and services that have yet to be scheduled in Resource Manager
- Schedule an appointment by double clicking the record and dragging it to the desired date and time

Small Calendar

- Click on days in this calendar to change what is displayed in the scheduling section
- In some cases the Refresh toolbar button needs to be pressed before the dates will change in the display

Working with the Display

The main Scheduling Section of the screen will change depending on what has been selected in the dropdowns. The **Rs Type dropdown** determines whether routes or Users (the default) are shown.

If the User Group selected in the **Resource Group dropdown** has multiple Tab Groups, those Tab Groups will be displayed in the tabs above the Scheduling Section (like the tabs on file folders), along with the ID of the first User shown. The members of the selected Tab Group will be displayed as column headings in the Scheduling Section. Clicking on the Tab of a member will cause that member's ID to appear above the time column and their schedule for the selected day will fill the Scheduling Section. Tab Groups are created initially in Security Manager.

Select a different User Group

- 1 Select that User Group in the Resource Group dropdown
This will cause different Tab Groups to appear in the Scheduling Section.

Select a different Tab Group

- 1 Click on the name of a Tab Group that is shown in the tabs directly above the Scheduling Section
This will cause different User IDs to appear as column headings in the Scheduling Section.




Select a different User (Resource)

- 1 Select the Tab Group tab that the User is a member of
- 2 Click the grey column heading for that User
This will cause that User's schedule to take up the entire Schedule Section space and the grey column heading will now display the date.

For example, if our User Group is All Users (this may also be the group used to log into Engenuity). Our User Group has two Tab Groups: AAA Appointments and BBB Appointments. AAA has 3 Users: Ann, Betty, Charlie. BBB has 6 Users: Charlie, David, Emily, Frank, Greta and Henry.

When All Users is selected in the Resource Group dropdown, three tabs will appear above the Scheduling Section: AAA Appointments, BBB Appointments and Ann. If AAA is the selected tab, then the column headings will say Ann, Betty and Charlie. If BBB is the selected tab, then the column headings will be Charlie, David, Emily, Frank and Greta. A scrollbar will appear since only five columns will fit and we can scroll across to see Henry.

Select a different Day

- 1 Click on a day on the Calendar in the lower right corner
 - a Scroll up or down to see other dates
 - 2 OR click the up or down arrows in the toolbar to move to the next or previous date  
 - 3 OR Click the RETURN TODAY toolbar button (between the arrows shown above) to return to today's date 
- The Date showing as the column header in the time column will reflect the new date and any appointments scheduled for that day will appear in the user columns.

Select Multiple Days

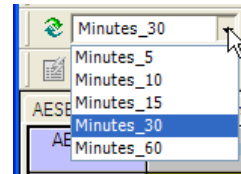
Multiple days are available only when viewing one Resource (user) in the Scheduling Section

- 1 Click on the column header showing the Resource (User) to view
 - a The display will change to one wide column showing one day
- 2 Click on the first day in the small calendar and drag to include the days to view
 - a Only three days will appear in the display
 - b If more than three are selected, a scrollbar will appear
- 3 Click the Refresh button in the toolbar

The screen will change to show the selected dates, Users name will appear above the times


Display a different Time Increment

- 1 Select the time increment in the first dropdown in the toolbar
 - a Choices are 5, 10, 15, 30 and 60 minutes




Change what is displayed in the Scheduled item box with Bar Text

The Appointment initially shows just the Activity Details Number, but the display may be changed to show information that is more helpful. This only needs to be done once and will be reflected for every type of item scheduled (Appointments, Placeholders, Events).

- 1 Right click anywhere in the Scheduling Section and select Bar Text OR click the Bar Text toolbar button 


In the Bar Text popup window:

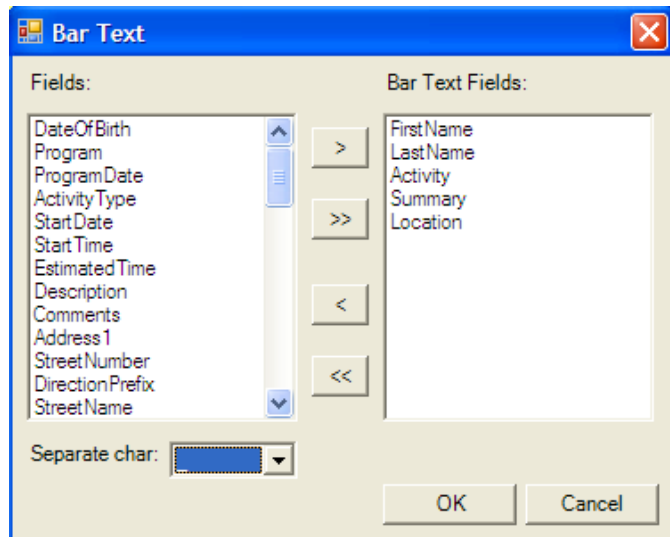
- available fields are displayed in the Fields box on the left
 - fields currently showing in the appointment are displayed in the Bar Text Fields box on the right
- 2 Select a field to add to the display in the Fields Box

- 3 Click the Right arrow button 

That field will then be displayed in the box on the right.

- 4 Select additional fields to display
 - a Note: Fields will appear in the order shown in the Bar Text Fields box

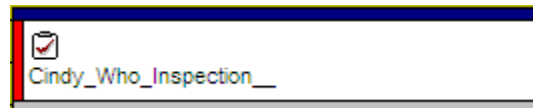
- 5 Remove a field from the display by selecting it in the Bar Text Fields box and click the left arrow button 



The item separator character can be changed – this separates each item in the Appointment Name and makes it easier to read.

- 6 Select a Separate char in the dropdown
 - a The five choices are / | _ * #
- 7 If too many fields are selected, a warning will appear stating the result is too long, please remove or change some fields
- 8 Click OK

A good choice is First Name, Last Name, and Activity, shown here with _ used for the separation character:



If you will be using Tasks and Placeholders, you may want to add in a Summary or Location. The Summary is also a good choice if you will be creating appointments from the Encounter module, you can place the Client name in the Summary field.

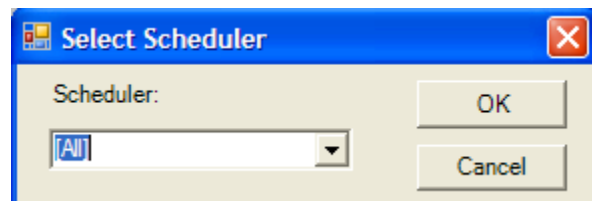
Working with the Queue

The Queue is located in the grid at the bottom left of the page and shows a list of Clients and Services that have yet to be scheduled in Resource Manager. By default, the Queue is set to show all of the items for all Staff in the Group selected. The items that appear in the Queue are pulled directly from the database. Any Client who has an Activity or Appointment will appear in the Queue to be scheduled if there was no date and staff member selected for that activity. If a date and staff member was selected, they will appear directly on the calendar instead and so do not have to be scheduled.


Queue						
FirstName	LastName	DateOfBirth	Program	ProgramDate	Activity	A
Amanuel	Berhane	3/30/2007	AESWeatherizati	6/29/2007	Inspection	Insp
Fred	Flintstone	2/1/1955	AESWeatherizati	6/1/2007	Inspection	Insp
Cindy	Who	2/2/2004	AESWeatherizati	7/2/2007	Inspection	Insp
Cindy	Who	2/2/2004	AESWeatherizati	7/2/2007	Inspection	Insp

View just one person's scheduling Queue

- 1 Right click in the Queue section
- 2 Select SCHEDULER
- 3 Select the Group or Resource in the dropdown
 - a To view all appointments to be scheduled, select ALL



View the entire scheduling Queue

- 1 Click the REFRESH toolbar button 
- 2 OR Right click in the Queue section and select SCHEDULER and select ALL

Schedule an item in the Queue

Make sure the correct Resource, Date and Time are visible in the Scheduling Section.

- 1 Double click on the item record in the Queue
- 2 Drag it to the desired Time and Resource


Find a record to schedule in the Queue

There are several ways to find a record in the Queue.

- 1 Click on a Column Heading in the Queue to sort the records
 - a Sort by Last Name to find a Client quickly
 - b Sort by Program to find all Clients in that Program
 - c Sort by Activity to find all Clients needing one specific Activity scheduled
- 2 Use Find to find all records matching the criteria
 - a Right click and select FIND
 - b In the popup window set up the search
 - c Fields are all the possible items to search for
 - d Operator is how to conduct the search
 - o = Equal to, will match exactly
 - o > Greater than
 - o < Less than

- o >= Greater than or equal to
 - o ,+ Less than or equal to
 - o Like will match similar items, and can use % as a wildcard character
 - o Is Null lists all records with no entry for that field
 - o Is Not Null lists all records that do have an entry for that field
- e Value is what to match (for example what name to find)
- f Click SET FILTER
- g For example, to find all Clients in the Queue for an Inspection Activity, Field – Activity, Operator =, Value - Inspection

Locate a Client Queue record using the Main Listing window

1 Click the Main Listing toolbar button  In the popup window, to find the Client record:

2 Right click and select FIND

In the FIND window:

3 Select what to search for

- a Last name or Activity

4 Operator is how to conduct the search, you will usually use =

5 Value is what to match

- a Enter Last Name or Activity name (spelling must be exact to match!)

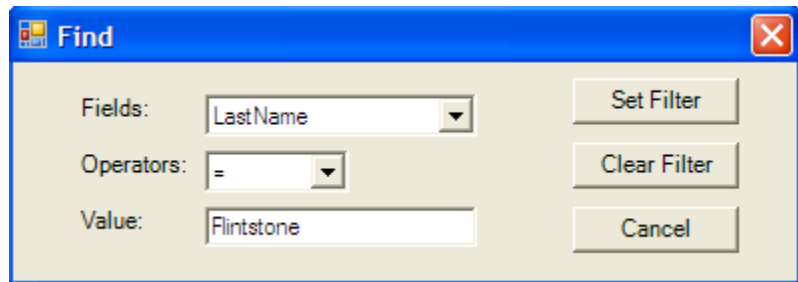
6 Click SET FILTER

Matching records will now appear in Grid.

7 Select the Client record to locate

8 Right click and select LOCATE

The Activity will open behind the popup window with the Activity highlighted.



Delete an item from the Queue

1 Select the record in the Queue

2 Right click and select DELETE

Jump to the Client's Demographic or Encounter record

1 Right click on the appointment in the Queue

2 Select either Jump to Demographics or Jump to Encounter

The database will open their record in the system

Schedule or Edit Appointments

If an Activity was created in the Encounter module, it will be placed in the schedule for the appropriate resource, date and time; it will not include the Client name. If an Activity was created on a Services page, it will be placed in the Queue, it will include the Client name when scheduled.

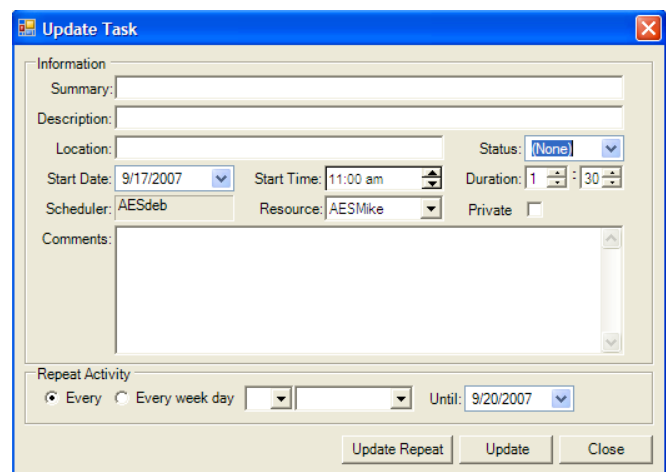
Appointments may be edited after scheduling.

Scheduling Appointments from the Queue

- 1 Make sure the correct Resource is showing in the Schedule section first (see *Working with the Display* section)
- 2 Double click to select the appointment record in the queue
- 3 Drag it to the correct time
 - a The time, date and length of the appointment may be edited later

OR

- 1 Right click the appointment record in the queue and select EDIT
- 2 Enter Summary, Description and Location if needed
- 3 Select Start Date, Start Time and Duration
- 4 Select Resource
- 5 Enter Comments
- 6 For Repeating activities, select Every or Every weekday
 - a The fields will change depending on the selection
 - b Click UPDATE REPEAT
- 7 Click UPDATE
- 8 Click CLOSE



Edit the Appointment

There are several ways to change the appointment information: the appointment can be dragged to a different spot, or more than one change can be made with the Shift or Edit command. When dragging an appointment to make the change, make sure the column to drag it TO is visible in the display.

- 1 To change the Date or Resource or Time
 - a Click on the dark blue bar at the top of the appointment and drag it to a different time, date column, or User column

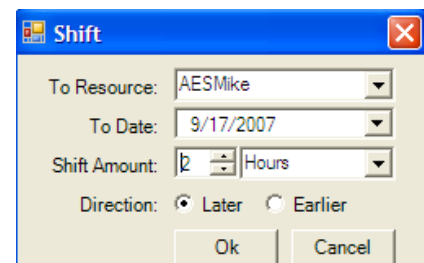
OR

- 1 To change the length of the appointment
 - a Click on the grey border on the bottom of the appointment and drag it up or down

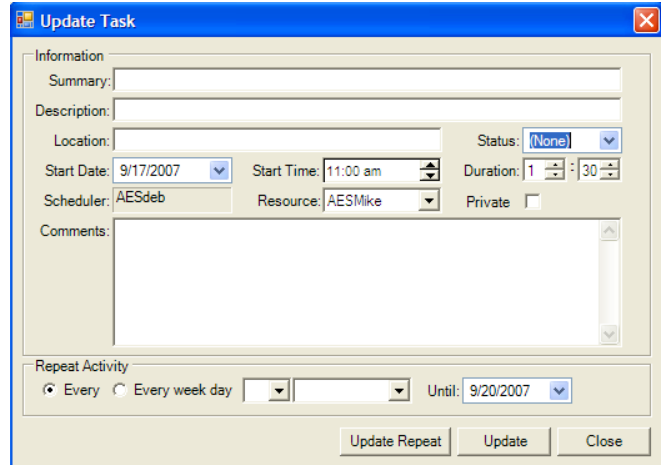
OR

- 1 To make multiple changes
 - a Right click on the appointment and select SHIFT
 - b Select a new Resource to change who the appt is scheduled for
 - c Select a new Date to move the appt to that date
 - d Select a Shift amount and type of time increment and click to indicate earlier or later (i.e. 30 minutes later)
 - e Click OK

OR



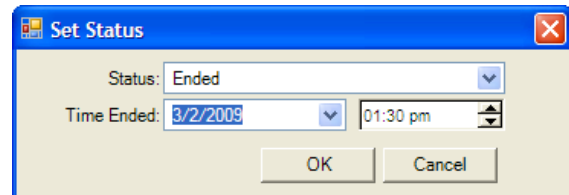
- 1 To edit other information about the appointment
 - a Right click on the appointment and select EDIT
 - b Select a different Start Date, Start time, Duration, Resource here
 - c Additional information may be added, including Summary, Description, Location, comments and Repeat details
 - d For Repeats, select Every or Every weekday
 - i) The fields will change depending on the selection
 - ii) Click UPDATE REPEAT
 - e Click UPDATE when finished
 - f Click CLOSE



Change the Status of an Appointment

After an appointment has been scheduled, the status can be changed to show that it has started and/or ended.

- 1 Select the appointment in the Scheduling section
- 2 Right click on the appointment in the Scheduling section and select Status
- 3 Select Started or Ended in the dropdown
- 4 Enter or select the Date and time the appointment started or ended
- 5 Click OK



The left border of the appointment will turn green when it has started and red when it has ended.

Jump to the Client's Demographic or Encounter record

- 1 Right click on the appointment in the Scheduling section
 - 2 Select either Jump to Demographics or Jump to Encounter
- The database will open their record in the system

Create and Edit Placeholders

Placeholders are items that are not necessarily created for a Client. They can be used to indicate that a particular resource is unavailable or to reserve time slots for regularly scheduled events, such as staff meetings, for an entire group. Placeholders can also schedule vacation time or out-of-office appointments for a particular individual.

The correct Resource and Date do not need to be selected in advance as for Appointments as they will be determined in the popup window. The Placeholder item box will contain the word Placeholder if Activity is one of the items selected in the Bar Text window.

Add Placeholder

Information

Summary: HEAP payment

Description: winter

Location: office

Status: (None)

Start Date: 3/2/2009 Start Time: 02:00 pm Duration: 1 : 30

Expiration Date: 3/2/2009 Expiration Time: 03:30 pm

First Name: Joe Last Name: Client

Resource: TRAdverla

Resource Group:

Comments: also has questions about Housing

Repeat Activity

Every Every week day Until: 3/17/2009

Add Repeat Add Close

Create a Placeholder

1 Click PLACEHOLDER toolbar button 

OR

1 Right click in the Scheduling Section and select PLACEHOLDER

Resource and Expiration Time are required to create a Placeholder item.

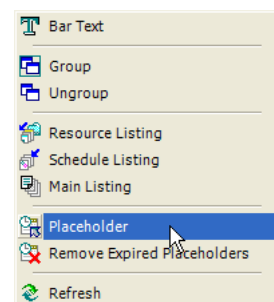
2 Enter Summary, Description, Location

- a These items will appear in the Placeholder item only if they have been added to the Scheduled item box

3 Leave Status None unless it has Started or Ended

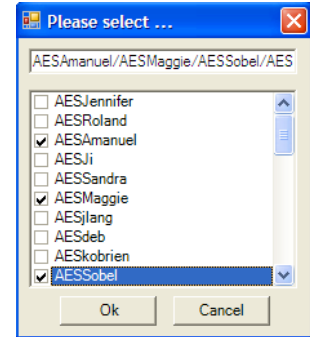
4 Select Start Date, Start Time, Duration, Expiration Date and Expiration Time

- a Start Date and Expiration Date default to today's date



If Resource, Date, Start Time and Expiration Time are selected the Placeholder will appear in the Scheduling Section. If only Resource and Expiration Time are selected, the Placeholder will appear in the Queue.

- 5 Enter First and Last Name if using for Client scheduling
- 6 Select Resource or Resource Group
 - a In popup window, click to add checkmark in each Resource User or Group who should be scheduled
 - b Click OK button
- 7 Enter Comments
- 8 Enter Repeat information if needed
 - a Select Every or Every weekday
 - b Click ADD REPEAT
- 9 Click ADD when finished
- 10 Click CLOSE



If Resource, Date, Start Time and Expiration Time are selected the Placeholder will appear in the Scheduling Section. If only Resource and Expiration Time are selected, the Placeholder will appear in the Queue.

Edit a Placeholder

- 1 Select Placeholder item in the Scheduling Section
- 2 Right click on the item and select EDIT
- 3 Make changes in popup Update Placeholder window
- 4 Click UPDATE
- 5 Click CLOSE


Note that Placeholders can be edited only for individuals; if the Placeholder was assigned to an entire group, each Resource User will need to be edited individually. Linked Tasks may be a better choice for an item that will need to be edited.

Schedule a Placeholder

If the Placeholder is in the queue, it can be scheduled.

- 1 Make sure the correct Resource and Date are visible in the Scheduling Section
- 2 Double click the Placeholder record in the Queue and drag it to the desired time

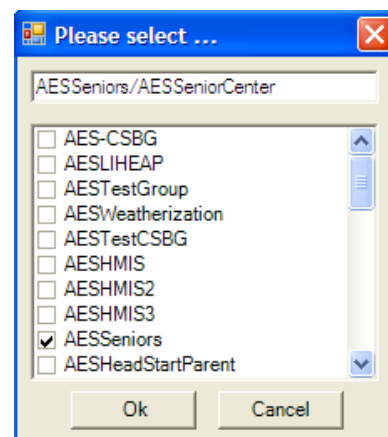
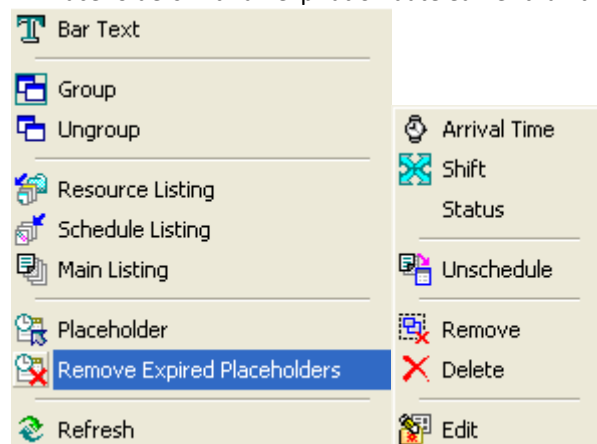
Remove expired Placeholder(s)

- 1 Click the REMOVE EXPIRED PLACEHOLDERS toolbar button 

OR

- 1 Right click in the Scheduling Section and select REMOVE EXPIRED PLACEHOLDERS

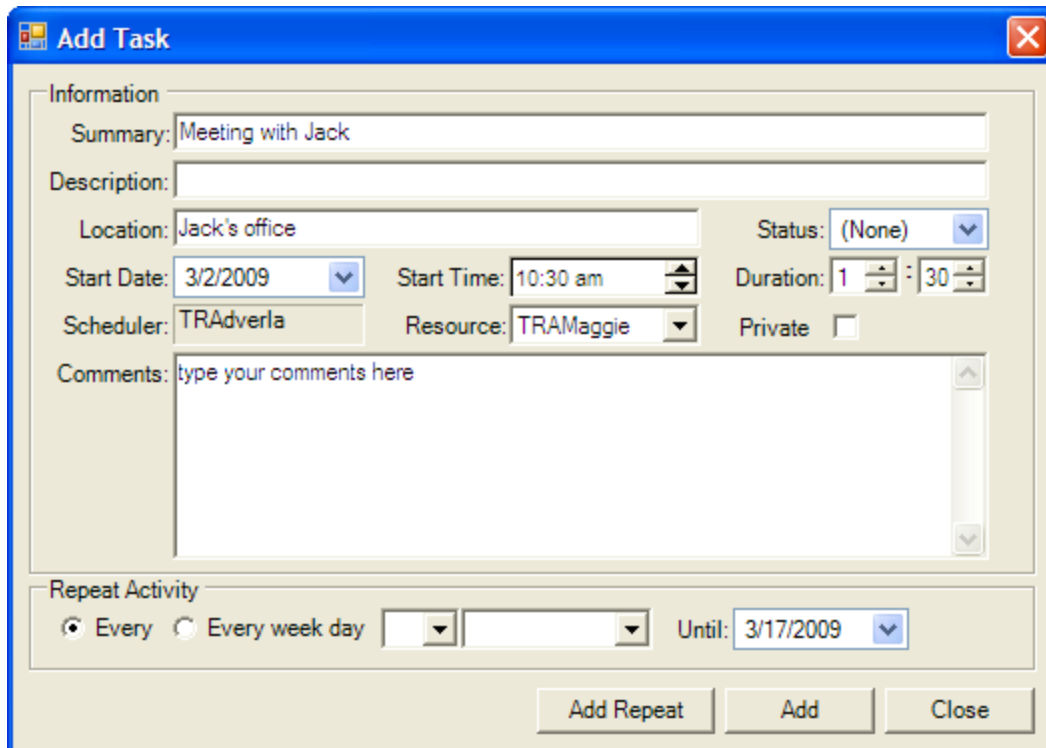
All Placeholders with an expiration date earlier than the current date and time will be removed.




Create and Edit Tasks & Linked Tasks

A Task may be added that will schedule an Activity for one Person on their calendar; the activity is usually not related to a Client, since there is no place to include a Client Name. Linked Tasks may be created for Groups and then edited together when needed. The Linked Tasks may be removed as a group by using the Remove feature on the right-click menu.

The correct Resource and Date do not need to be selected in advance as for Appointments as they will be determined in the popup window. The Task item box will contain the word Task if Activity is one of the items selected in the Bar Text window.



Create a Task for an Individual

- 1 Click the TASK toolbar button 
- 2 Enter Summary, Description and Location if needed
- 3 Select Start Date, Start time, and Duration
 - a If a Date, Resource and Time were active in the Scheduling Section, they will appear here
- 4 Select Resource
- 5 Enter Comments if desired
- 6 Enter Repeat information if needed
- 7 Click ADD button
- 8 Click CLOSE button

Create a Linked Task



- 1 Click the LINKED TASK toolbar button
- 2 Enter Summary, Description and Location if needed
- 3 Select Start Date, Start time, and Duration
- 4 Select Resource or Resource Group
 - a The Linked Task item will appear in each person's schedule column
- 5 Enter Comments if desired
- 6 Enter Repeat information if needed
- 7 Click ADD button
- 8 Click CLOSE button

Edit a Task

- 1 Select Task item in the Scheduling Section
- 2 Right click on the checkmark symbol and select EDIT
- 3 Change needed information
- 4 Resource information may not be changed for a Linked Task
- 5 Click UPDATE
- 6 Click CLOSE

Remove a Linked Task

- 1 Select Task item in the Scheduling Section
- 2 Right click on the checkmark symbol and select REMOVE

The Task will be removed from scheduling section, if it is a Linked Task, it will be removed from all Resource's scheduling section.

Common Functions to Activities

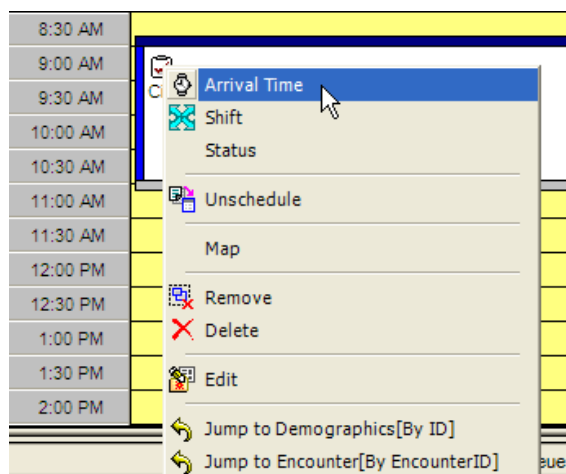
Edit by dragging an item

- Move an Activity item to a new Resource, Date or Time by clicking the top bar and dragging it to that location
 - Change the duration of an Activity item by clicking on the bottom bar and dragging it up or down
- In both cases, the cursor will change into a double arrow when ready to drag.

Right Click Menus

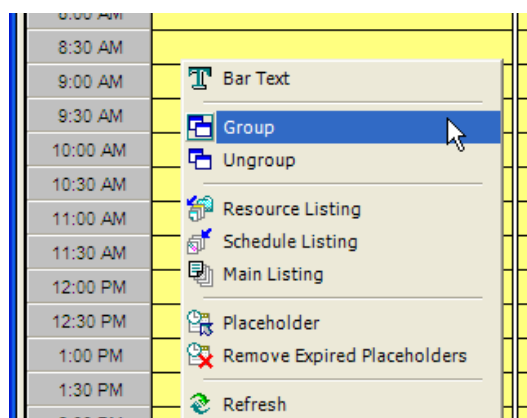
When right clicking on an Activity item, make sure to click on the icon on the left side

- Arrival Time allows changing the start time of an Activity; it will move the Activity in the Scheduling Section
- Shift allows changing any one or more of
 - Resource
 - Date
 - Time shift later or earlier
- Status changes to Activity to Started or Ended and changes the left bar to green for Started and Red for ended
- Unschedule moves the Activity to the Queue
- Map allows mapping the location using Microsoft Map Point software
- Remove deletes only Linked Task activities
- Delete removes all types of activities
- Edit allows editing each type of activity
- Jump to Demographics opens the Demographics page with the Client record active
- Jump to Encounter opens the Encounter section with the Client active



When right clicking on the Scheduling Section without an activity active

- Bar Text allows changing the Text that appears in the activity item box (see *Working with the Display* for more information)
- Group allows shifting an entire Group of activities to a different place at one time
- Ungroup removes the grouping
- Listing



Mark an Activity as Private

- 1 Select the desired Activity in the Scheduling Section
- 2 Click on the PRIVATE toolbar button



A key will appear on the Activity item, before the name

- 3 To remove the Private status, select the Activity and click the PRIVATE button again

Mark an Activity as Tentative

- 1 Select the desired Activity in the Scheduling Section
- 2 Click on the TENTATIVE toolbar button

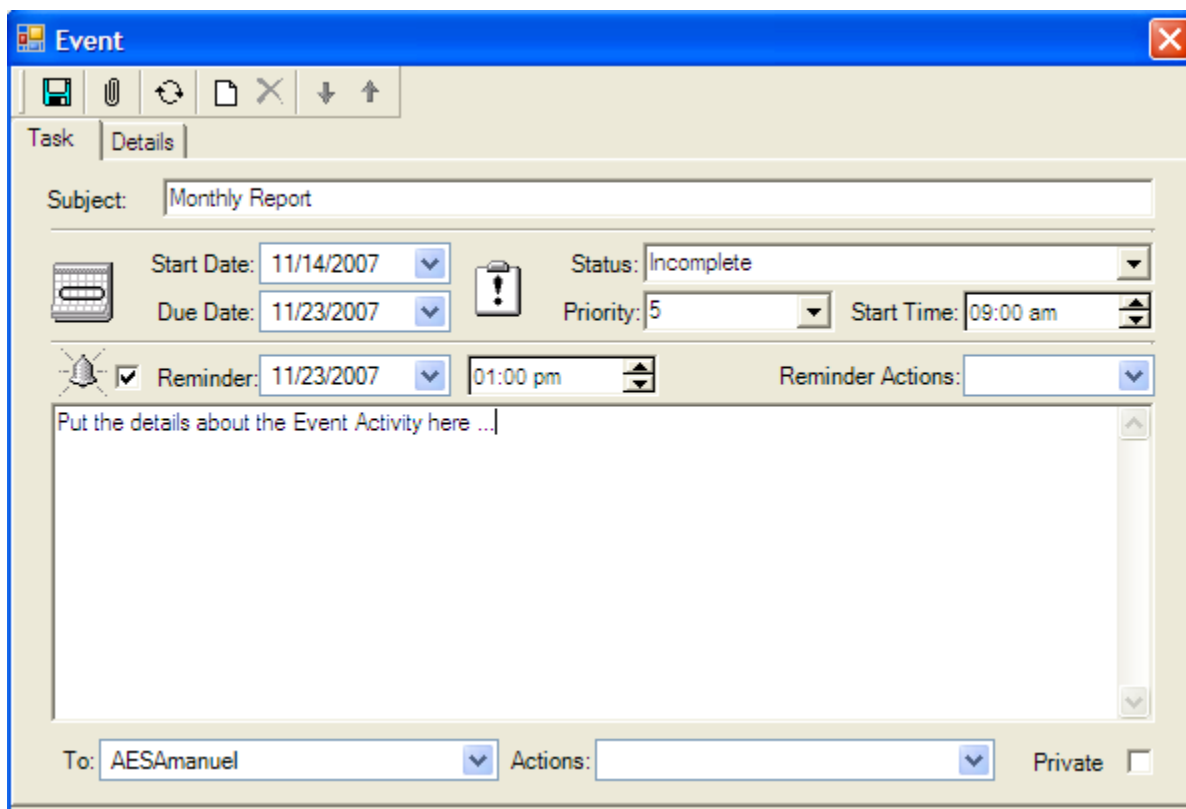


A Question mark will appear on the Activity item, before the name



- 3 To remove the Private status, select the Activity and click the TENTATIVE button again

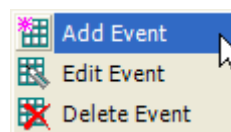
Create and Edit Events

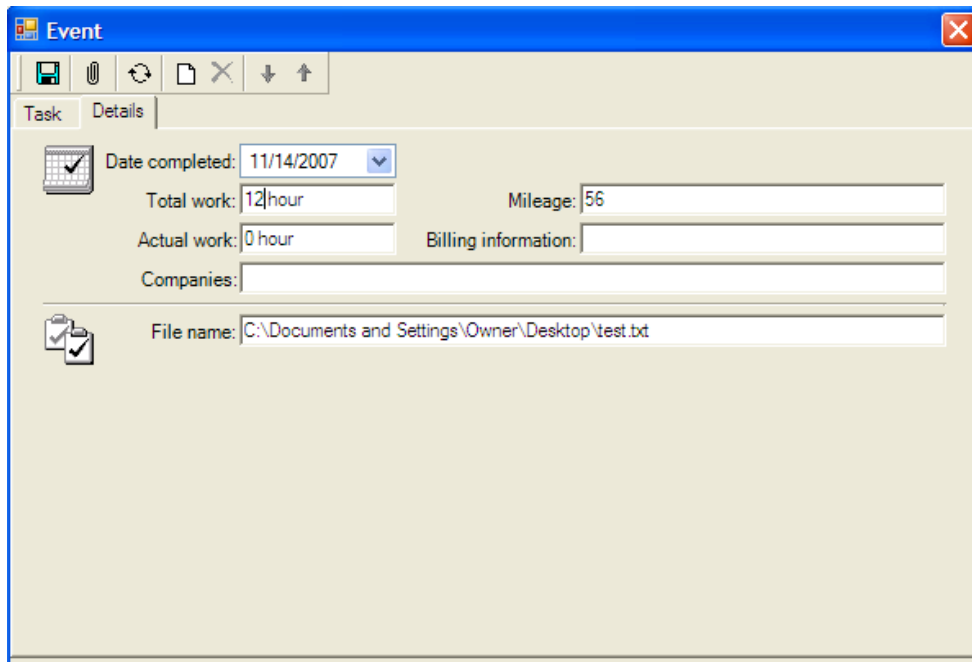
Events are Activities that must be completed within a certain time or due date, but do not have a scheduled time slot. They can be added to an individual's calendar. They will show in the Events grid, but not in the calendar itself.





Create an Event

- 1 Click on a Column Heading to select a Person
 - a The Calendar for that individual will display in the Scheduling Section
- 2 Click the ADD EVENT toolbar button 
- OR
- 3 Right click in the Event Grid section and select ADD EVENT
- 4 Enter Subject – this will show in the Event Grid
- 5 Select Start Date
- 6 Select Status – Complete, Incomplete, Missing
- 7 Select Due Date
- 8 Select Priority – 0-5 – this will show in the Event Grid
- 9 Select Start Time
- 10 Enter Details or comments in middle section
- 11 Add more people to Task with TO: field
 - a More users cannot be selected when using the Edit Event popup window – they may only be added here
- 12 Click SAVE toolbar button in top left of window 





Add other information to the Event

- 1 Click Details Tab
- 2 Enter desired information
- 3 Click SAVE button at top left of popup 
- 4 Attach a file by clicking INSERT FILE button
 - a In window, select file to attach 
 - b Click OPEN
 - c File name will appear on Details tab
- 5 Add Repeat information by clicking RECURRENCE button to open Recurrence window
 - a Add Repeat information
 - b Click OK
- 6 Click NEW toolbar button to create new Event
- 7 Use UP and DOWN arrows to pull up previous and next Events in Grid

Manage Resources and Activities

Three popup windows allow users to find Activities and Clients, both in the Calendar and in the Queue. They are available with toolbar buttons or right click menus.

Resource Listing

- First click on a Resource (User) column heading then right click and select RESOURCE LISTING or click the RESOURCE LISTING toolbar button

The popup window shows all Activities and clients linked to this resource.



Schedule Listing

It does not matter what is selected in the Calendar.

- Right click and select SCHEDULE LISTING or click the SCHEDULE LISTING toolbar button

The popup window will show all existing scheduled Activities.



Main Listing

It does not matter what is selected in the Calendar.

- Right click and select SCHEDULE LISTING or click the SCHEDULE LISTING toolbar button

The popup window will show all existing Activities whether they are scheduled or still in the Queue.



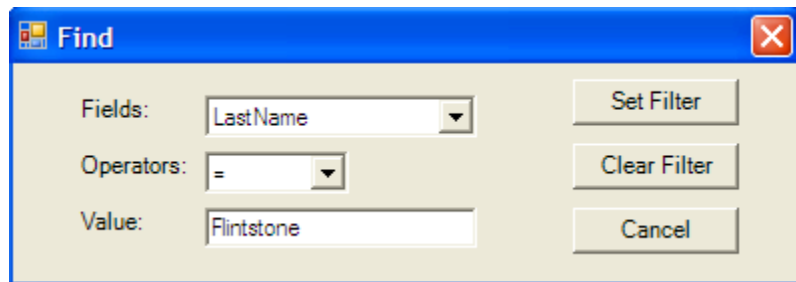
Find one Client or Activity

In the Main Listing or Schedule Listing popup window:

- 1 Right click and select FIND

In the popup window:

- 2 Select what to search for
 - a Last name or Activity
- 3 Operator is how to conduct the search, you will usually use =
- 4 Value is what to match
 - a Enter last name or Activity name (spelling must be exact to match!)
- 5 Click SET FILTER



The screenshot shows a 'Find' dialog box with a blue title bar and a close button (X) in the top right corner. The dialog contains three rows of input fields and three buttons on the right. The first row is labeled 'Fields:' and has a dropdown menu showing 'LastName'. The second row is labeled 'Operators:' and has a dropdown menu showing '='. The third row is labeled 'Value:' and has a text input field containing 'Flintstone'. The buttons on the right are 'Set Filter', 'Clear Filter', and 'Cancel'.

Matching records will appear in Grid.

The Schedule Listing window will show all scheduled Activities for the Client, scroll across to see the Date and Time of the appointment in question.

The Main Window will show all Activities, including those still in the Queue for the Client.

Locate a Client Appointment or Queue record

In the Main Listing or Schedule Listing popup window:

- 1 Select the Client in the Listing window
- 2 Right click and select LOCATE

If using Main Listing, the Queue will open behind the popup window with the Activity highlighted.

If using Schedule Listing, the Calendar or Queue will open behind the popup window showing the Activity, depending on whether the Activity has been scheduled or not.

Shift, Edit and Delete Activities from the Listing Windows using right click commands.