

StaffCal Client

User guide

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StaffCal Client

StaffCal client overview

StaffCal is a software replacement for the whiteboard based 'Staff In/Staff Out' board. It is suitable for situations ranging from small business to multi national corporations. Users can show their activities during the working day and also view other co-workers activities.

StaffCal provides a visual calendar of what staff have been doing and what they will do. It allows staff to schedule and display appointments, holidays, activities etc.

Ease of use is a feature. All menus are straightforward and adding appointments (using templates) is a matter of a few mouse clicks. Time is no longer wasted checking the wall mounted office board in reception to see if someone is in or out.

Life for the receptionist(s) becomes a lot easier with StaffCal. All the information needed (in/ out, vacation and whereabouts) is presented on screen, in an easy to read format. No more callers on hold while someone tries to locate the requested person.

StaffCal will also ensure improved management of resource bookings such as vehicles, rooms, visitors etc, and activities such as meetings, by scheduling their use effectively.

There are three manuals for the StaffCal system.

Getting started - This covers the planning and installation of the Staffcal data store, and an overview of managing the StaffCal data stores.

StaffCal site manager - This shows how to configure and manage StaffCal sites.

StaffCal client - (this manual) Shows how to use the StaffCal client effectively.

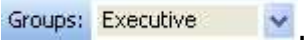
Getting Started with the StaffCal client

The first time you start StaffCal you **may** be prompted for a [connection string](#) for the home calendar server.

Your StaffCal administrator will be able to supply you with this the connection string. The connection string is structured similarly to this example -
Londonserver:2339:User:User

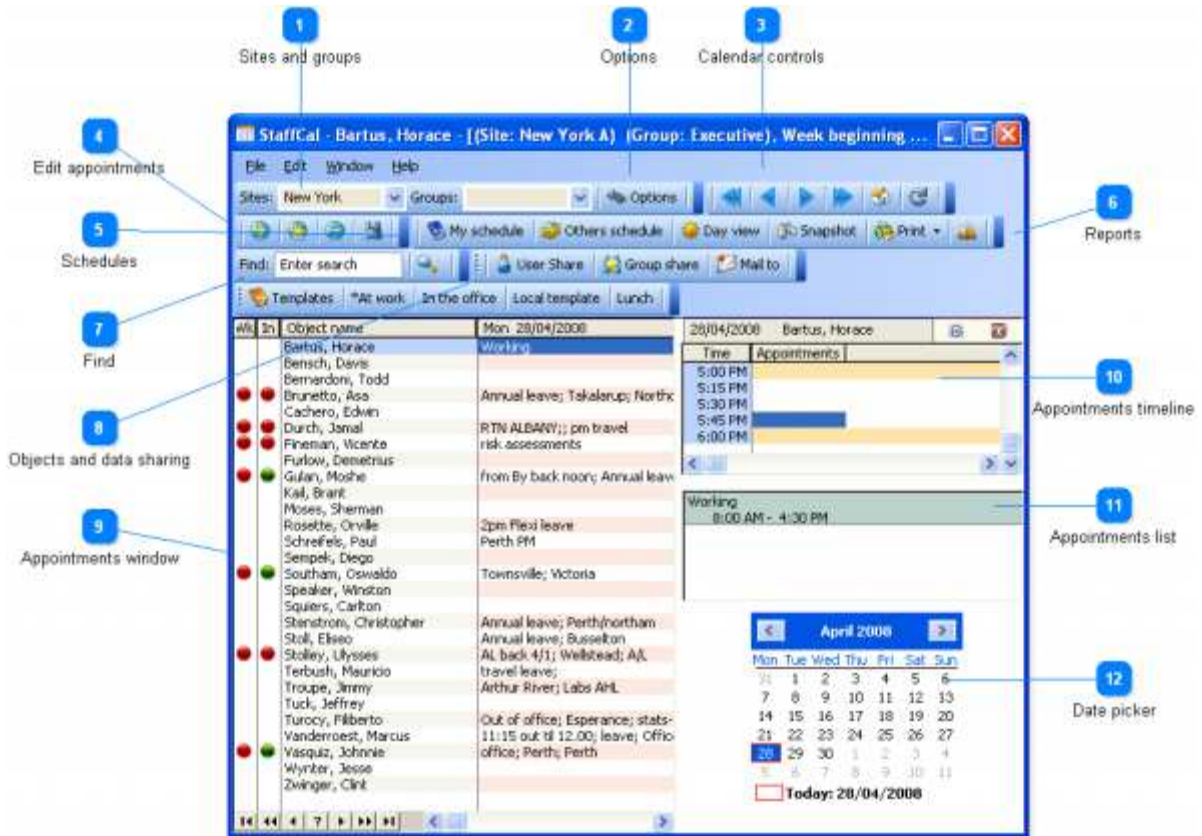
You will then be prompted to [login](#). Select your username from the dropdown list and enter the password (supplied by the StaffCal administrator) to login.

Next, you need to select the site and group you wish to view the calendar of. Select a site from the sites dropdown list.  then select the appropriate group

from the groups dropdown list.  .

The [group calendar](#) for that group should then open allowing you to view, add and edit appointments.

StaffCal group calendar



1 Sites and groups

New York Groups:

Sites: New York Your home site is displayed here by default. Click on the drop-down to select another site.

Groups: Executive Select group from this list to view - only groups from the currently selected site will be shown.

2 Options

Options

This opens the [options](#) window and allows you to set your work day lengths, display colours and language, and change your home server connection string of necessary.

3 Calendar controls



Moves the calendar back one week.



Moves the calendar back one day.



Moves the calendar forward one day.



Moves the calendar forward one week.



Moves to calendar to the current date.



Refreshes the appointment data of the currently active group. (Appointments are automatically normally refreshed every five minutes) .

4

Edit appointments



Adds a new appointment for the currently selected object. You must have edit permissions for this object to perform this operation.



Edits the currently selected appointment. You must have edit permissions for this object to perform this operation.



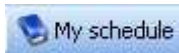
Deletes the currently selected appointment. You must have edit permissions for this object to perform this operation.



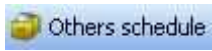
Opens a window to view the currently selected appointment

5

Schedules



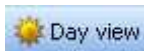
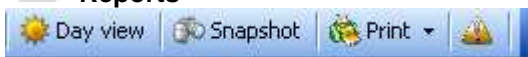
Opens the [schedule](#) (calendar) view for the currently logged in user.




Opens the [schedule](#) (calendar) view for the currently selected user.

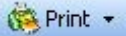
6

Reports




Shows a detailed list of all appointments for all users in the group for the *currently selected* day.

 **Snapshot** Shows a detailed list of all appointments for all users in the group for the *currently selected day and time*. If an appointment falls on the same day but not into the selected timeslot it is not shown.


 **Print** **Weekly calendar:** Prints a list of appointments for the group for the *current week*. If an object has too many appointments on a particular day to fit in the report cell they will not be displayed.

Daily calendar: Prints the a list of appointments for the group for the currently selected day

 **Emergency print:** Quick prints the list of appointments for the group at the *current date and time*. This is useful for getting a list of employee locations in the event of an emergency such as fire or earthquake.


7

Find

Find: 

This searches the **name** and **location** of appointments for a specified search criteria. For example: 'Head office' will supply all staff who have entered this data as the appointment for the selected week


Find: Enter the search criteria .

 Perform the search.


8


Objects and data sharing

 User Share  Group share  Mail to

 **Object** This allows you to edit (if you have edit permissions) or view the object.

 **Object Share** This opens the file share designated for the selected object in Windows Explorer.

 **Group share** This opens the file share designated for the current group in Windows Explorer.

 **Mail to** Creates a new e-mail message addressed to the selected object with the default e-mail client.

9

Appointments window

| | | | |
|--------------------------------------|------------------|---------------------------------|--|
| ● | Gulan, Moshe | from By back noon; Annual leave | |
| ● | Kail, Brant | | |
| | Moses, Sherman | | |
| | Rosette, Orville | 2pm Flexi leave | |
| | Schreifels, Paul | Perth PM | |

Working
 8:00 AM -

Shows the object and appointment details as well as the object's status for the currently selected calendar week. If this includes the current day, the current day column will be highlighted.

10 Appointments timeline

| 28/04/2008 | | Bartus, Horace |
|------------|--------------|----------------|
| Time | Appointments | |
| 5:00 PM | | |

Shows appointments in order.

11 Appointments list

| |
|-------------------|
| Working |
| 8:00 AM - 4:30 PM |

The overview of today's appointments in chronological order.

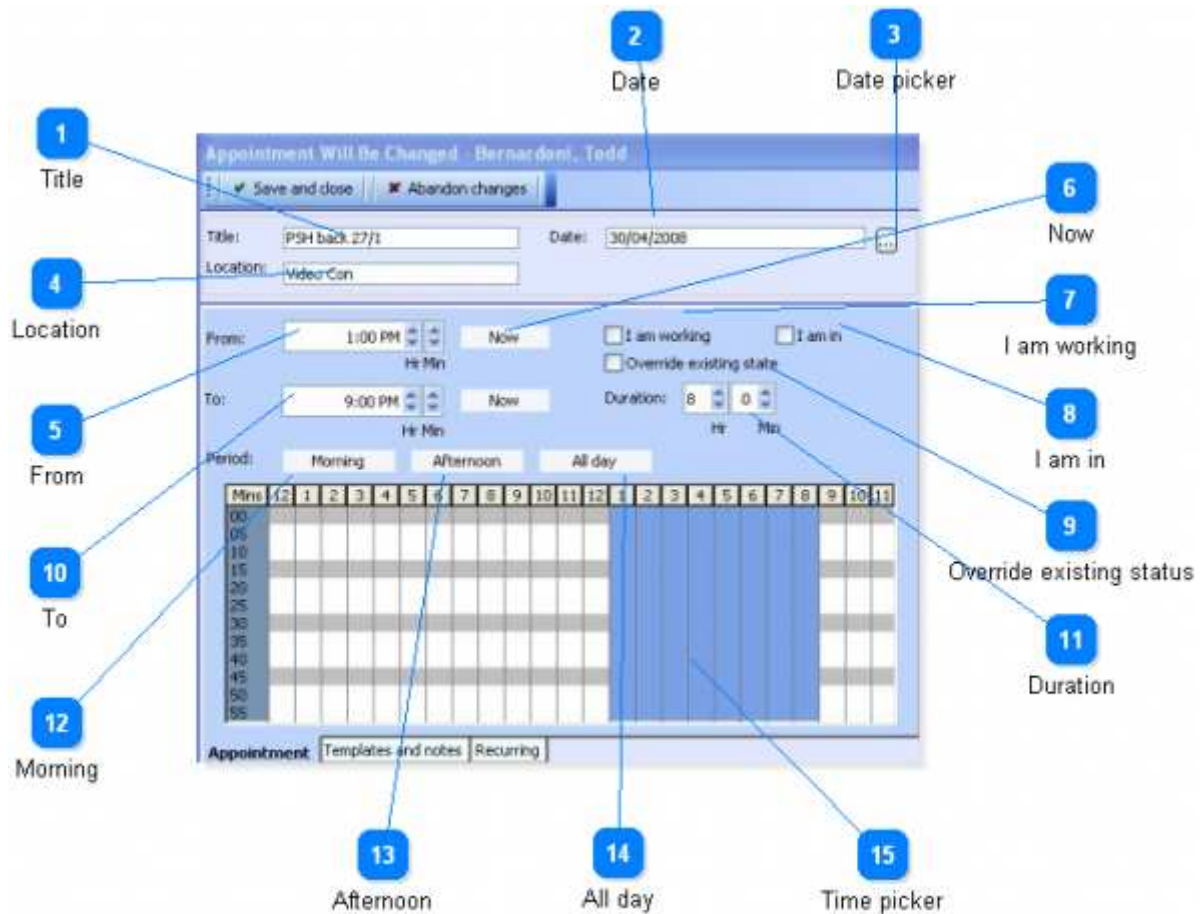
12 Date picker

< April 2008

| Mon | Tue | Wed | Thu | Fri |
|-----|-----|-----|-----|-----|
| 31 | 1 | 2 | 3 | 4 |
| 7 | 8 | 9 | 10 | 11 |
| 14 | 15 | 16 | 17 | 18 |

Allows you to pick a date to become the current focus.

Creating appointments in StaffCal



An appointment is simply an event for an object.

If the object is a person then the appointment might be a meeting, or whether they are in the office for the day.

If the object is a meeting room, then the appointment might be when the room is booked and by whom.

If the object is a vehicle or an asset like a projector, then the appointment might be when the asset is taken out and who has taken it.

The start time and duration of appointments can be set in three ways.

By using a combination of the **From**, **To**, **Now** and **Duration** buttons and spin boxes.
By using the **Morning**, **Afternoon** and **All day** buttons. Note: The times for the period

buttons are set in the [StaffCal options](#).

By clicking on a start time in the time picker and dragging to an end time.

1**Title**

The title of the appointment is typically the activity, (eg: fire training) or in the case of a booking, who is booking the object.

2**Date**

The date of the appointment

3**Date picker**

Opens a calendar to select the date of the appointment.

4**Location**

Where the appointment will be (eg: Conference Room A), or in the case of an asset (eg: a projector) where the asset will be used.

5**From**

The time that the appointment starts. This is set in five-minute increments. You can enter the time manually or use the hour and minute selectors to set the time.

6**Now**

Sets the appointment start time to the nearest five minute block of the current time.

7**I am working** I am working

This is commonly used to denote that the person is 'working' but not necessarily in the office. However this can be used to show other information. For example: if the object is a meeting room rather than a person it might be used to denote whether the meeting room is in use.

8**I am in** I am in

This is commonly used to denote that the person is In the office. However this can be used to show other information, for example: if the object is a asset rather than a person it might be used to denote whether the asset is in use.

9**Override existing status** Override existing state

This overrides the in/out and working status of any pre-existing appointment who's timing is overlapped by the new appointment.

An example of this would be that you might make an appointment for 'In the office all day', 8am to 5pm with the status of 'working' and 'in' (ie 2 green dots on the group calendar). Then you might make an appointment for 'Lunch meeting' from 12 - 1pm which overrides the status of 'in' with the status of 'out'.

Between 12 - 1pm your status will show as 'out' (ie: a red 'out' dot on the group calendar) as the 'Lunch meeting' appointment has overridden the 'In the office all day' appointment. The rest of the day your status will show as 'In'.

10 To

The time that the appointment ends. This is set in five-minute increments. You can enter the time manually or use the hour and minute selectors to set the time.

11 Duration

The duration of the appointment. This determines and is determined by the **To** spinbox. You can use the hour and minute selectors to set the duration.

12 Morning

Sets the appointment duration to all morning (the morning duration is set in the options window).

13 Afternoon

Sets the appointment duration to all afternoon (the afternoon duration is set in the options window).

14 All day

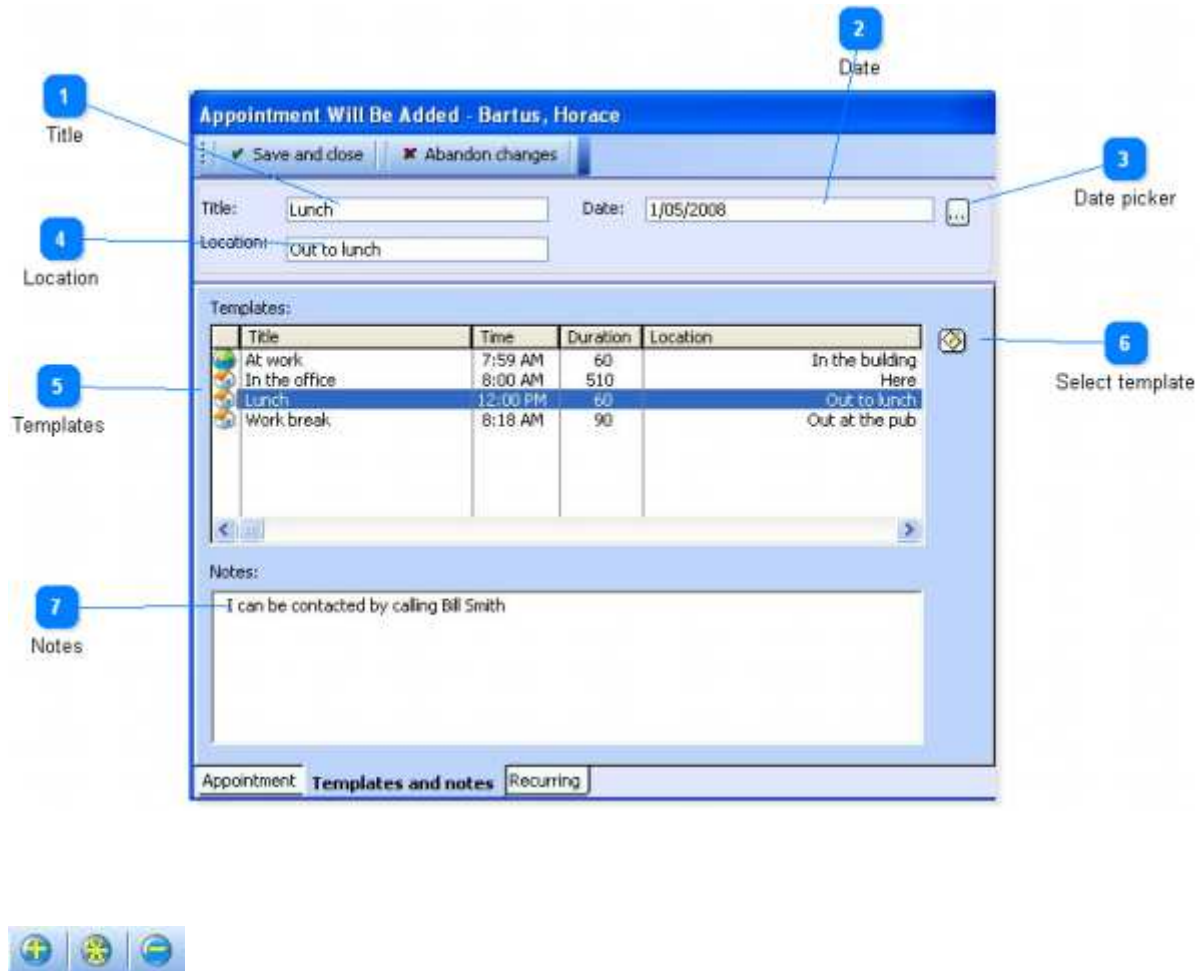
Sets the appointment duration to all day (the all day duration is set in the options window).

15 Time picker

| Mins | 12 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|------|----|---|---|---|---|---|---|---|---|---|
| 00 | | | | | | | | | | |
| 05 | | | | | | | | | | |
| 10 | | | | | | | | | | |

Shows the appointment duration in a graphical form. You can drag and drop with the mouse here to set appointment start times and durations.

Using appointment templates and notes



Templates are pre-defined appointment/ bookings used to enter information into StaffCal quickly.

Templates are the key to getting the most out of StaffCal, they make entry of commonly used appointments / bookings quick and easy.

For example: If a user wishes to enter that they are in for the day (probably the most common appointment), all they need to do is click on the 'In' template on the toolbar, then click on the 'accept' button on the appointment form. All fields are filled automatically from the template and no extra information needs to be entered.

You can still edit data / change times etc after a template has been applied to an appointment.

StaffCal sites come pre-installed with a number of server templates.

In the office .
 Lunch.
 Annual leave
 Sick leave
 Out of the office

The StaffCal administrator can change these templates to suit your workplace.

1 Title

The title of the appointment is typically the activity, (eg: fire training) or in the case of a booking, who is booking the object.

2 Date

The date of the appointment

3 Date picker



Opens a calendar to select the date of the appointment.

4 Location

Where the appointment will be (eg: Conference Room A), or in the case of an asset (eg: a projector) where the asset will be used.

5 Templates

| | | | | |
|--|---------------|----------|-----|-----------------|
| | At work | 7:59 AM | 60 | In the building |
| | In the office | 8:00 AM | 510 | Here |
| | Lunch | 12:00 PM | 60 | Out to lunch |

This displays the available templates. The templates listed with a 'globe' icon next to them are server templates. Those with a 'home' icon have been created by you. Double-click with the mouse on a template to select or use the **Select template** button.

The appointment window will be opened and changes in status and times can be made.

6 Select template

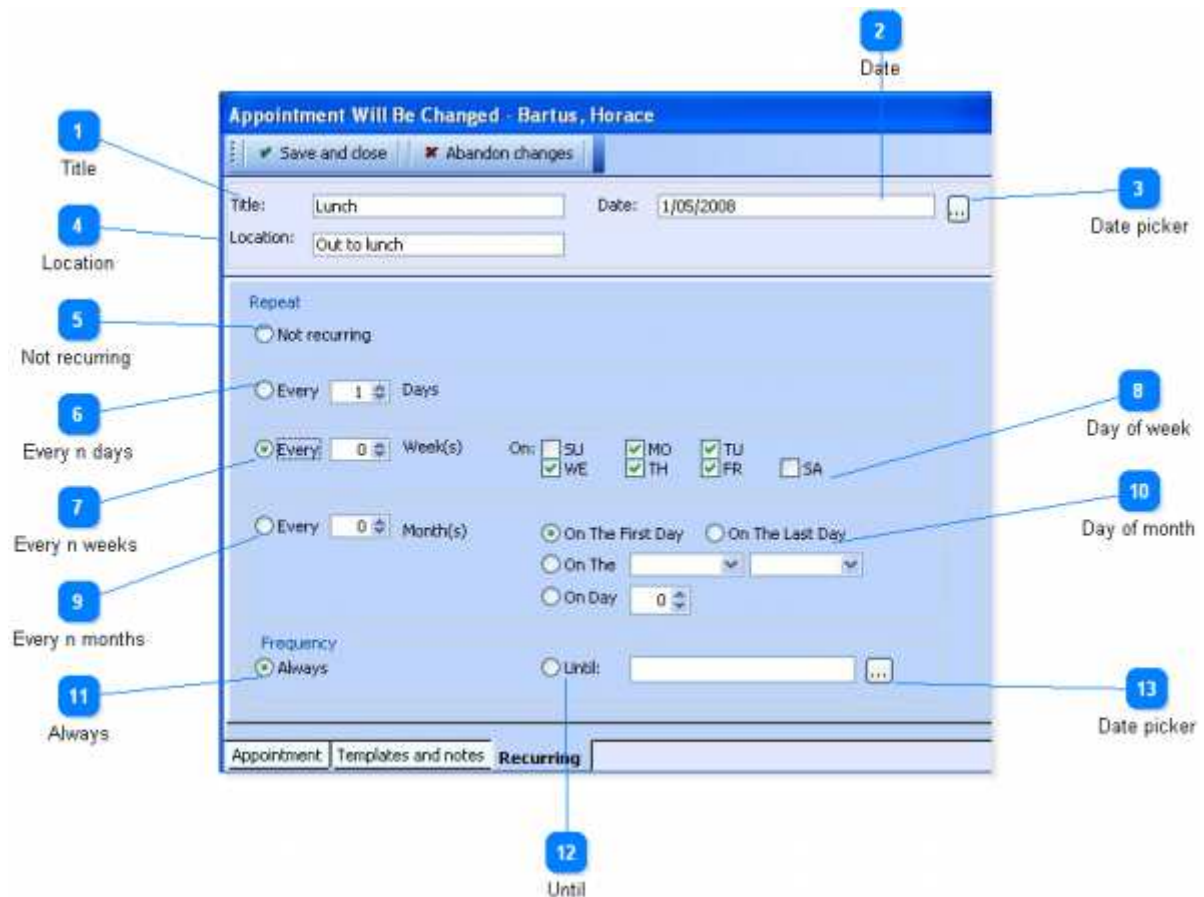


Invoke the selected template. You can also Double-click with the mouse on a template to invoke it.

The appointment window will be opened and changes in status and times can be made.

7 Notes

Creating and editing recurring appointments



Allows you to create recurring appointments.

1 Title

Title:

The title of the appointment is typically the activity, (eg: fire training) or in the case of a booking, who is booking the object.

2 Date

The date of the appointment

3 Date picker



Opens a calendar to select the date of the appointment.

4

LocationLocation:

Where the appointment will be (eg: Conference Room A), or in the case of an asset (eg: a projector) where the asset will be used.

5

Not recurring Not recurring

Sets this appointment not to recur.

6

Every n days Every Days

Sets this appointment to recur every n days.

7

Every n weeks Every Week(s)

Sets this appointment to recur every n weeks.

8

Day of weekOn: SU MO TU WE TH FR SA

The day(s) of the week to put the recurring appointment.

9

Every n months Every Month(s)

Sets this appointment to recur every n months.

10

Day of month On The First Day
 On The
 On Day

The day of the month to put the recurring appointment.

11

AlwaysFrequency
 Always

Sets this appointment to always recur according to the recur parameters.

12

Until Until:

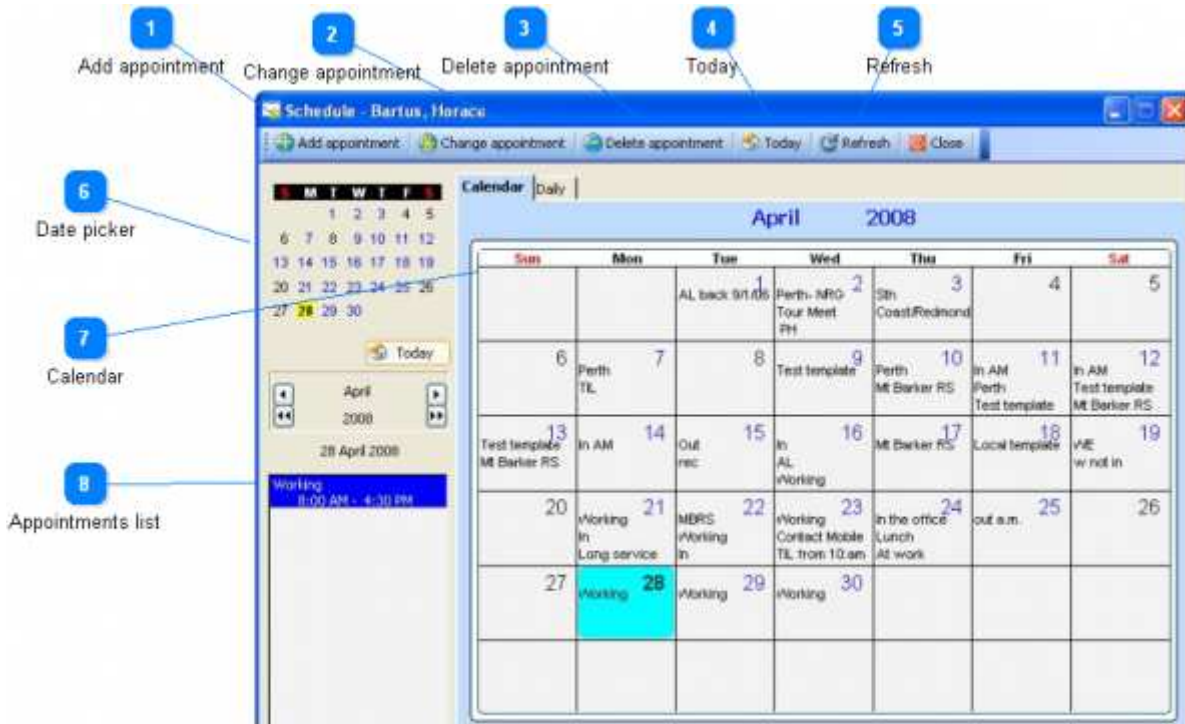
Sets this appointment to recur according to the recur parameters until the specified date.

13

Date picker

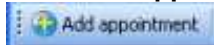
Opens a calendar to select the recurring end date of the appointment.

Monthly schedules



This shows a monthly schedule of appointments for you (**My schedule**) or the selected object (**Others schedule**).

1 Add appointment



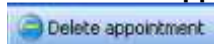
Adds a new appointment for the currently selected object. You must have edit permissions for this object to perform this operation.

2 Change appointment



Edits the currently selected appointment. You must have edit permissions for this object to perform this operation.

3 Delete appointment



Deletes the currently selected appointment. You must have edit permissions for this object to perform this operation.

4 Today



Moves the date window to the current date.

5 Refresh



Refreshes the appointment data of the currently active group.

6 Date picker



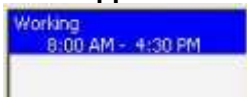
Allows you to pick a date to become the current focus.

7 Calendar



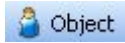
An overview of all the appointments for the calendar month.

8 Appointments list



An overview of today's appointments in chronological order.

Working with objects



An object is simply something that needs a schedule. Examples of objects are people, assets that people need to use, rooms or meeting rooms, and vehicle bookings.

There are four parts to an object -

[General \(click for more detail\)](#)

[Files \(click for more detail\)](#)

[Notes \(click for more detail\)](#)

[Permissions \(click for more detail\)](#)

1. General

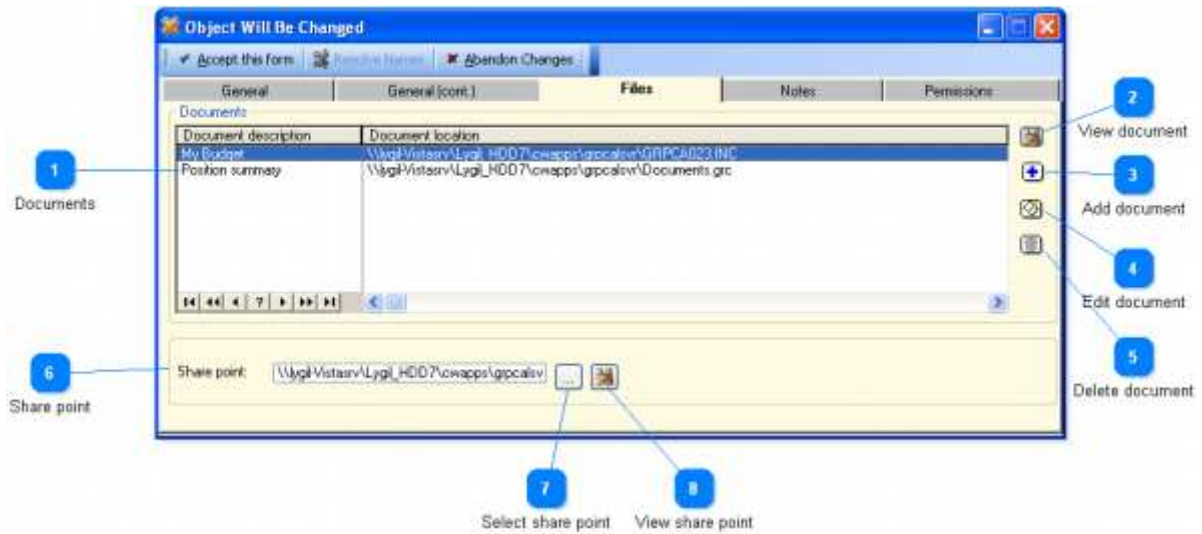
| General | General (cont.) | Files | Notes | Permissions |
|------------------------|-----------------|--------------------------------------------------|-------|-------------|
| Name | | | | |
| Title: | Mr | | | |
| First Name: | Trent | | | |
| Initials: | R | | | |
| Surname: | Bormet | | | |
| Employee ID: | 138744 | | | |
| Account | | | | |
| User Name: | TRBormet | | | |
| Display Name: | Bormet, Trent | | | |
| Password: | •••••••• | <input checked="" type="checkbox"/> Enable login | | |
| Contact details | | | | |
| Business: | [526]27530931 | | | |
| Business other: | | | | |
| Business fax: | | | | |
| Mobile: | | | | |
| Mobile other: | | | | |
| Pager: | | | | |
| Phone IP: | | | | |
| Home: | | | | |
| Home other: | | | | |

Object

These are the general (name phone location etc) details for the object. You can also you can change the password for access to the object.

Note: You can only change details for objects that you have edit permissions to.

2. Files



Object

1 Documents

| Document description | Document location |
|----------------------|------------------------------------------------------------|
| My Budget | \\lygil-Vistasrv\Lygil_HDD7\cwapps\grpcalsvr\GRPCA023.INC |
| Position summary | \\lygil-Vistasrv\Lygil_HDD7\cwapps\grpcalsvr\Documents.grc |

A list of documents belonging to, or referenced by this object eg; your photo, your CV, your training records, its operation manual. NB These documents will be available for public access.

2 View document



This will allow you to view the currently selected document.

3 Add document



Adds a new document to the document list box.

4 Edit document



Edits an existing document in the list box.

5

Delete document

Deletes a document from the list box.

6

Share point

Share point: `\\lygil-Vistasrv\Lygil_HDD7\cwapps\grpcalsv`

This is a pointer to an object's shared directory that clients can transfer files to and from. It is a handy method for quickly transferring files between people.

7

Select share point

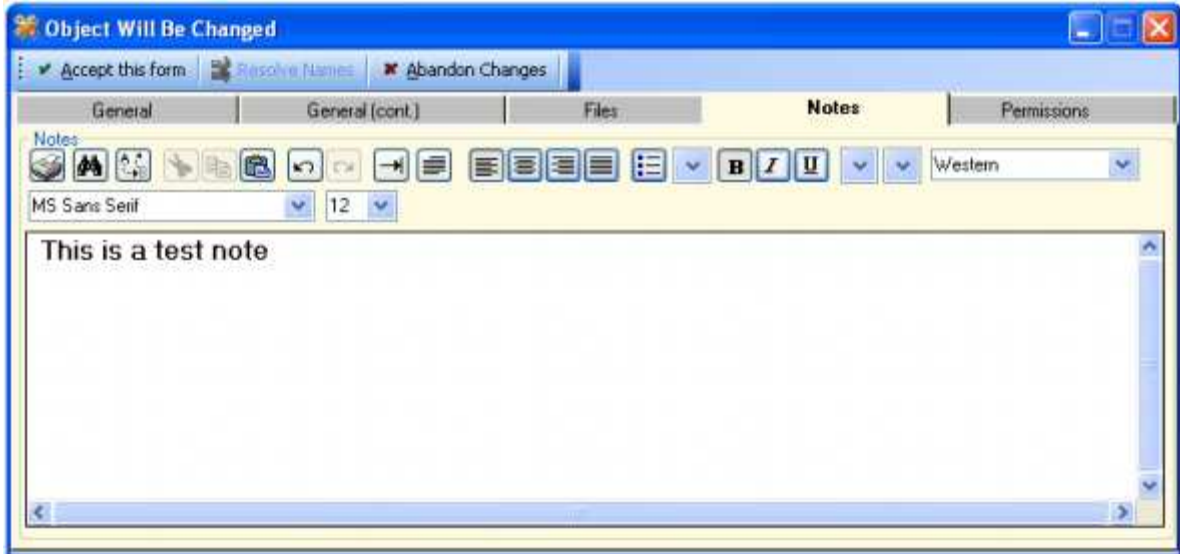
This allows you to select the folder to use as a share point.
(All objects in the group must have access via the share to be able to view them).

8

View share point

This will open up Windows Explorer to view the contents of the share point that you have selected. (All objects in the group must have access via the share to be able to view them).

3. Notes



Object

This field contains any general notes about the object.

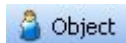
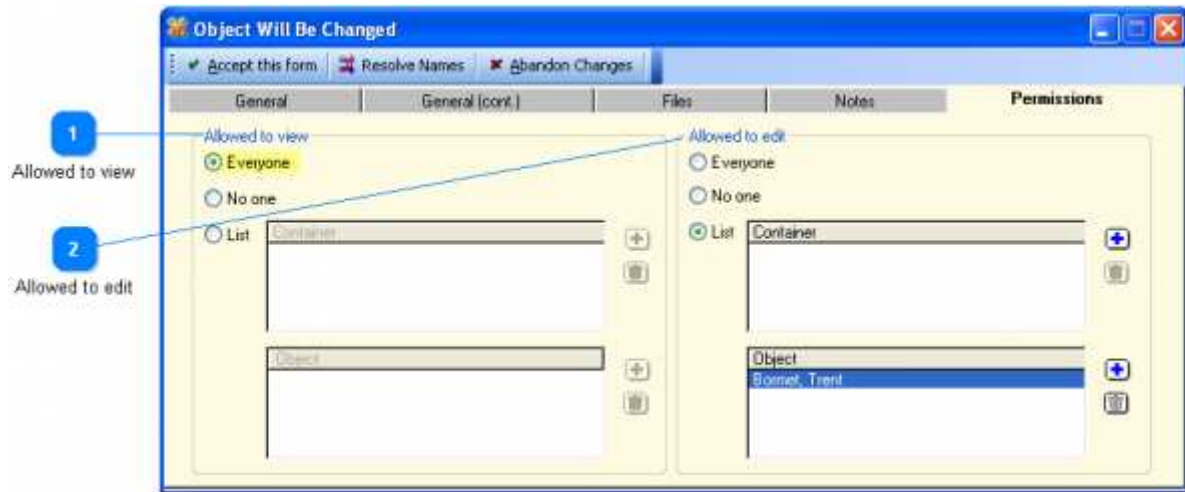
Some examples:

I work monday, tuesday and friday.

I am based in our city office.

This vehicle is a 4WD manual shift.

4. Permissions



Sets **view** and **edit** permissions for an object.

1

Allowed to view

Allowed to view

This sets who is allowed to view the object.

Everyone - all objects from all sites can view this object.

No one - no objects from any sites can view this object ie; they are hidden. You can hide objects that are no longer used but you are not prepared to delete at this stage.

List - defines groups and/or objects that can view this object.

Only **groups** that are *local to the site* can have view permissions, however **objects** from *any site* can have view permissions.

If the object in the 'allowed to view' list is from another site, a number appears in the list rather than a name. This is the object identifier. To convert this to a name click on **Resolve Names** from the menu bar.

2

Allowed to edit

Allowed to edit

This sets who is allowed to edit the object. Edit permissions are automatically granted to the object itself, however, if you are creating a new object you will not see the granted **edit**

permissions until you have saved the object and then view the edit permissions again.

Everyone - all objects from all sites can edit this object.

No one - no objects from any sites can edit this object.

List - defines groups and/or objects that can edit this object.

Only **groups** that are *local to the site* can have edit permissions, however **objects** from *any site* can have edit permissions.

If an object has administrator permissions to the group that this object is present in, then this overrides the edit permissions presented here and the object with administrator permissions automatically has the right to edit this object.

If the object in the 'allowed to edit' list is from another site, a number appears in the list rather than a name. This is the object identifier. To convert this to a name click on **Resolve Names** from the menu bar.

Making local appointment templates



Templates

Templates are pre-defined appointment/ bookings used to quickly enter information into StaffCal.

Templates are the key to getting the most out of StaffCal, they make entry of commonly used appointments / bookings simple.

For example: If a user wishes to enter that they are in for the day (probably the most common appointment), all they need to do is click on the 'In' template on the toolbar, then click on the 'accept' button on the appointment form. All fields are filled automatically from the template and no extra information needs to be entered .

You can still edit data / change times etc after a template has been applied to an appointment.

There are two types of templates:

Server based: -These templates are pushed out to the StaffCal clients when they login to the server. If they are set to appear on the toolbar of the client, they can be distinguished by an asterisk (*) in front of their title on the client toolbar.

Client based: These are templates made by you - see below.

These templates are created by the user on each individual StaffCal client and are visible only to that client.

It is advisable that the StaffCal administrator creates server based templates for common appointments. This reduces the need for each user to create their own template, and gives a level of standardization to appointments.

1

Working / In



Shows the **Working** and **In** statuses that the template is set to apply.

2

Other statuses



Shows other statuses that the template will apply.

N = **Now** - Appointment start time will be from when the appointment is invoked.

T = **Toolbar** - The template will be placed on the StaffCal client toolbar.

O = **Override** - The Working and In statuses applied will override those of any appointments occurring at the same time.

Creating and editing templates



Templates

This form allows you to set template details.

1 Appointment

Appointment:

The title of the appointment is typically the activity, (eg: fire training) or in the case of a booking, who is booking the object.

2 Location

Location:

Where the appointment will be (eg: Conference Room A), or in the case of an asset (eg: a projector) where the asset will be used.

3 Start time

The time that the appointment starts.

This can be a fixed time, or if the **From now** checkbox is checked, the appointment starts from when the template is invoked.

4 Duration

(1:00 PM)

The **duration** of the appointment in minutes.

5

I am working I am working

This is commonly used to denote that the person is 'working' but not necessarily in the office. However this can be used to show other information. For example: if the object is a meeting room rather than a person it might be used to denote whether the meeting room is in use.

6

I am in I am in

This is commonly used to denote that the person is In the office. However this can be used to show other information, for example: if the object is a asset rather than a person it might be used to denote whether the asset is in use.

7

From now From now

If the **From now** checkbox is checked, the appointment starts from when the template is invoked.

8

Place on toolbar Place on toolbar

If this is checked the template will appear on the StaffCal clients toolbar. A maximum of ten templates (server and client based) can appear on the toolbar.

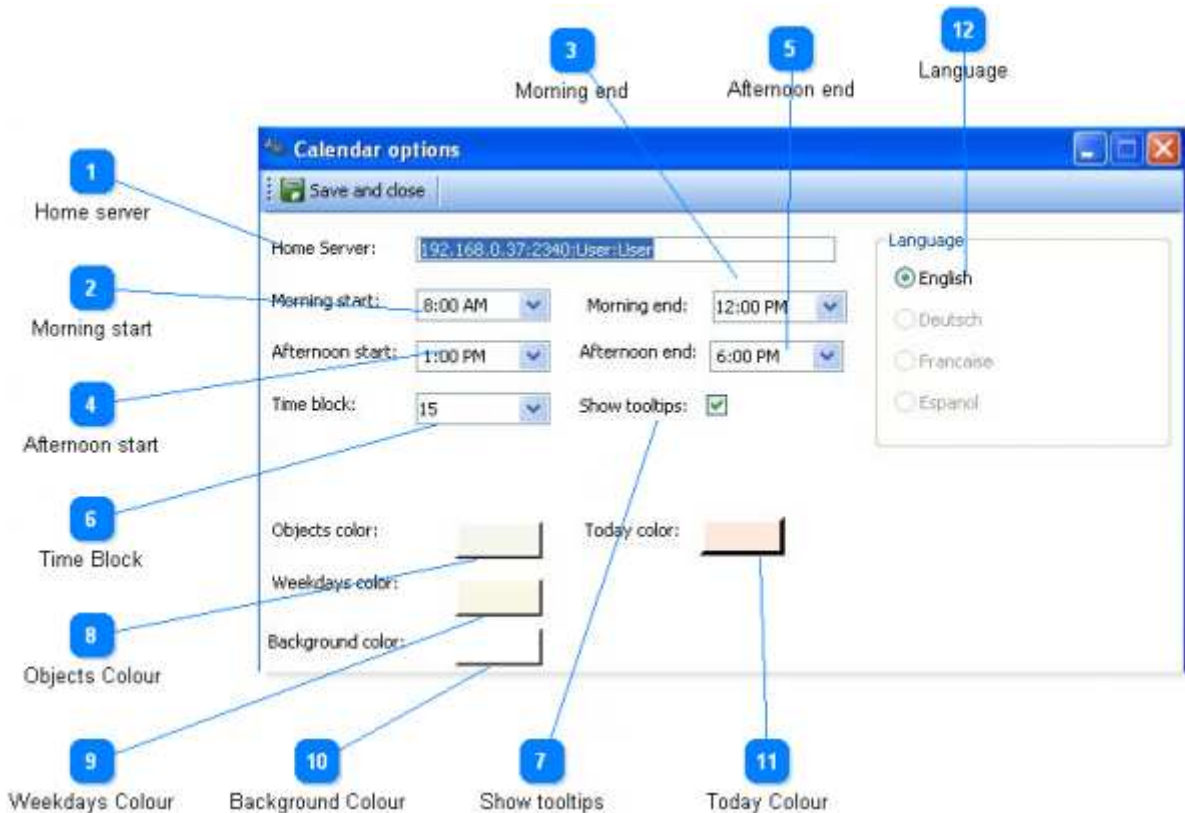
9

Override existing status Override existing status

This overrides the in/out and working status of any pre-existing appointment who's timing is overlapped by the new appointment.

An example of this would be that you might make an appointment for 'In the office all day', 8am to 5pm with the status of 'working' and 'in' (ie 2 green dots on the group calendar). Then you might make an appointment for 'Lunch meeting' from 12 - 1pm which overrides the status of 'in' with the status of 'out'. Between 12 - 1pm your status will show as 'out' (ie: a red 'out' dot on the group calendar) as the 'Lunch meeting' appointment has overridden the 'In the office all day' appointment. The rest of the day your status will show as 'In'.

StaffCal options



Options

Sets the general options for the StaffCal client. You will be prompted to restart the StaffCal client when you have made changes.

1 Home server

Home Server:

This is the connection string (text) for your 'home' StaffCal server. The home Staffcal server is the server where your account (object) is present.

Your StaffCal administrator will be able to supply you with the connection string.

2 Morning start

Morning start: 8:00 AM

This sets the start time of your normal working day. The appointment timeline will start from here.

Also the **morning** button on the appointments form will insert this value as the start time for the day.

3

Morning endMorning end:

The morning end of your working day. The **morning** button on the appointments form will insert this value as the end of the morning.

4

Afternoon startAfternoon start:

The afternoon start of your working day. This sets the start time for your **afternoon** appointments.

Also the **afternoon** button on the appointments form will insert this value as the start of the afternoon.

5

Afternoon endAfternoon end:

The normal end of your working day. This ends the appointment timeline of your **all day** and **afternoon** appointments.

6

Time BlockTime block:

The blocks (or chunks) of time to display the appointment timeline in. For instance selecting 15 minute blocks will display a division on the timeline every quarter of an hour.

7

Show tooltipsShow tooltips:

Show tooltips for StaffCal controls and lists.

8

Objects ColourObjects color:

The colour to display objects on the calendar lists

9

Weekdays ColourWeekdays color:

The colour to display appointments on the calendar lists

10

Background ColourBackground color:

The background colour for the calendar list.

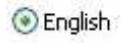
11

Today ColourToday color:

The colour to display today's appointments.

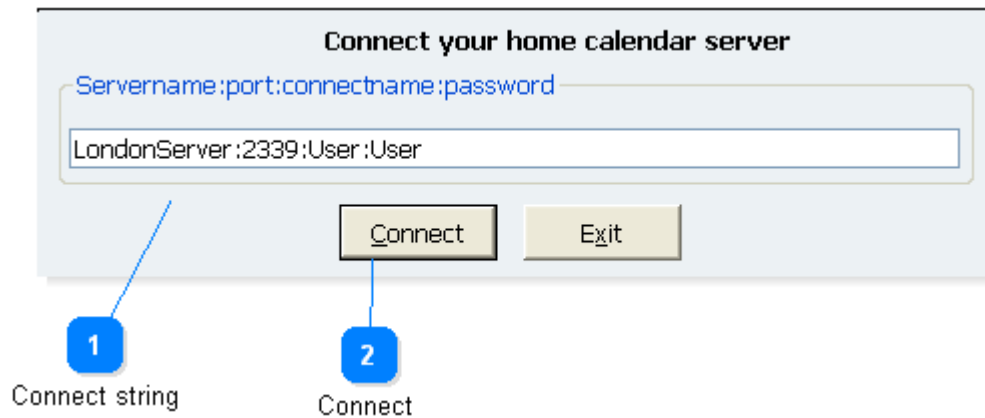
12

Language



Sets the language display for StaffCal. Currently only English is available.

Connecting to your home server

**1**

Connect string

LondonServer:2339:User:User

This is the connection string (text) for your 'home' StaffCal server. The home Staffcal server is the server that your account (object) is present on.

Your StaffCal administrator will be able to supply you with the connection string. an example connection string is: Londonserver:2339:User:User

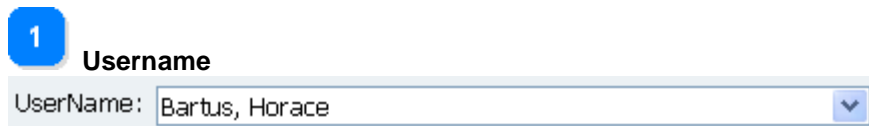
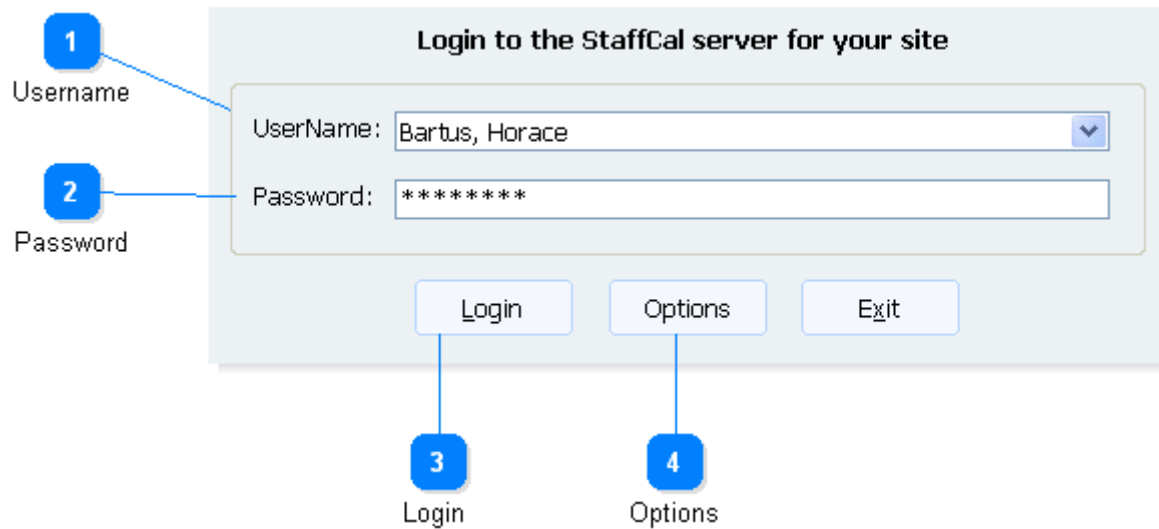
2

Connect

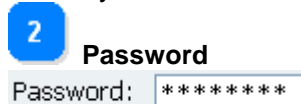
Connect

Connects you to the server designated by the connection string.

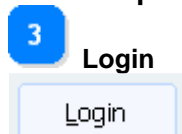
Logging in to StaffCal client



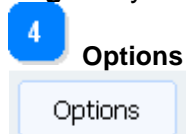
Select your **username** from the dropdown list to login as.



Enter the **password** (supplied by the StaffCal administrator) for your username.



Login to your 'home' StaffCal server using the selected Username and password.



This opens the [options](#) window and allows you to configure your workday length, display colours, language and change your home server connection string if necessary.

