

DRIVE Diary



SUPPORT SERVICES

Relate is committed to strong customer services and satisfaction. At all times you will be able to make contact with our company and technical services teams.

You can make contact with our support department in the following ways:

Telephone: (IRL) +353 (0)1 4597800 (UK) +44 8712843446

Email: support@relate-software.com

Opening Times for Support: 09:00 – 13.00 and 14.00 - 17.30

This document is protected under copyright law and may not be reproduced in any format whatsoever without the prior written consent of Mabruk Limited T/A Relate Software. Failure with this condition may result in prosecution. The program and documentation are protected under copyright law and the program is licensed for use by the user who has completed the Software Registration agreement and the program is licensed under the conditions referred to in the Software Licence Agreement.

Relate Software does not warrant that the software package will function properly in every hardware/software environment. The software may encounter problems working in combination with modified versions of the operating system, with certain print-spooling or file facility programs, or with certain printers supplied by independent manufacturers.

Rigorous testing of the software is carried out by Relate Software and all documentation and help files are reviewed, however Relate makes no warranty or representation, either express or implied, with respect to this software or documentation, their quality, performance, merchantability, or fitness for a particular purpose.

The software and documentation are licensed 'as is', and the licensee, by making use of the system assumes the entire risk as to their quality and performance.

Relate will not be liable for direct, indirect, special, incidental, or consequential damages arising out of the use or inability to use the software or documentation, even if advised of the possibility of such damages. In particular, and without prejudice to the generality of the foregoing, Relate will not incur any liability for any programs or data stored. Relate will not incur any costs of recovering such programs or lost data for whatever reason.

We reserve the right to alter, modify, correct and upgrade our software and documentation without notice.

© 2012 Relate Software

South City Business Park, Tallaght,

Dublin 24, Ireland

All Worldwide Rights Reserved



- Overview** 5
 - Diary Views and Filters 5
 - Diary Views 6
 - Diary Show 9
 - Diary Settings 10
 - Viewing Multiple Staff Diaries 11
 - Synchronise Diary Appointments with Outlook 12

- Creating a Diary entry** 13

- Advanced Options** 15
 - Generate Timesheet 15
 - Recurrence 16
 - Assigning Diary Entries 17
 - Adding Attachments 19

- Navigating Diary Entries** 20
 - Next / Previous Appointment 20
 - Search Option 21

- Defining Diary Staff Hours** 22

- Diary FAQs** 23
 - Can I set entries in My Diary to private? 23
 - How do I assign multiple staff to a diary entry? 24
 - I cannot see entries in My Diary! 25

OVERVIEW

The Diary is used to record Tasks, Events, Meetings, Holiday, Study Leave and Examination Leave. A staff member can record these entries in DRIVE under their own Staff name or under another Staff members name provided they have the required access rights. The default screen when you load DRIVE is the Diary in Week View (see Figure 1).

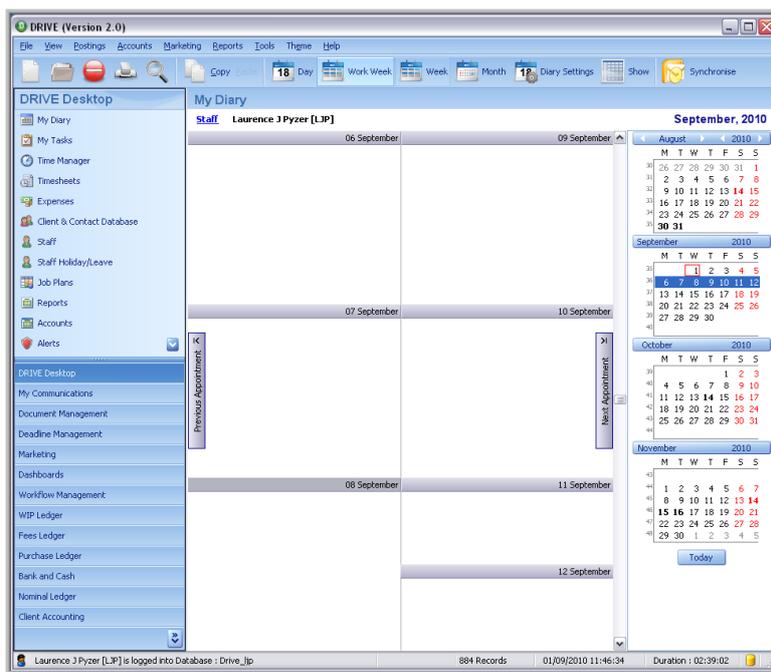


Figure 1

DIARY VIEWS AND FILTERS

The Diary can be viewed in a number of formats depending on the users preference. The Views available to select include Day, Work Week, Week and Month. The filters available to select include Tasks, Events, Meetings, Holiday, TOIL, Study Leave, Examination Leave, Deadlines, Job Plan and Workflow. These options are found in the toolbar at the top of the Diary under the Show icon (see Figure 2).

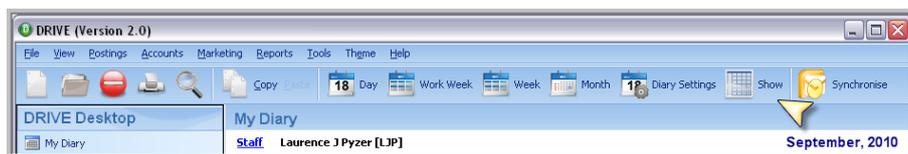
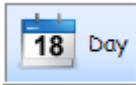


Figure 2

DIARY VIEWS



Day: The Day View allows you to view a single day in the diary (see Figure 3).

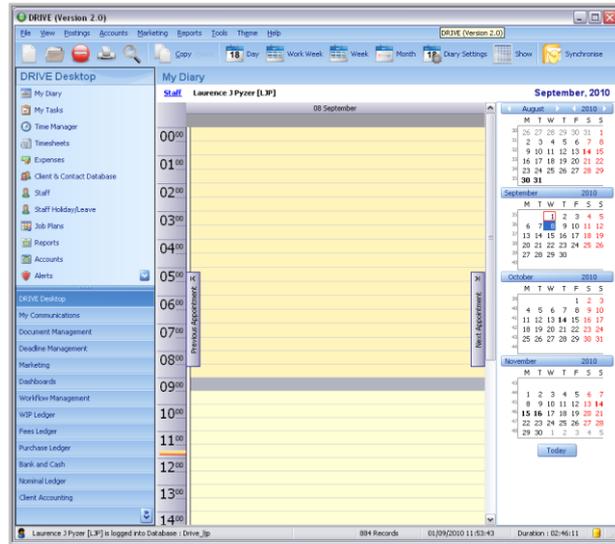


Figure 3



Work Week: The Work Week View allows you to view a single working week in the diary, Monday to Friday (see Figure 4).

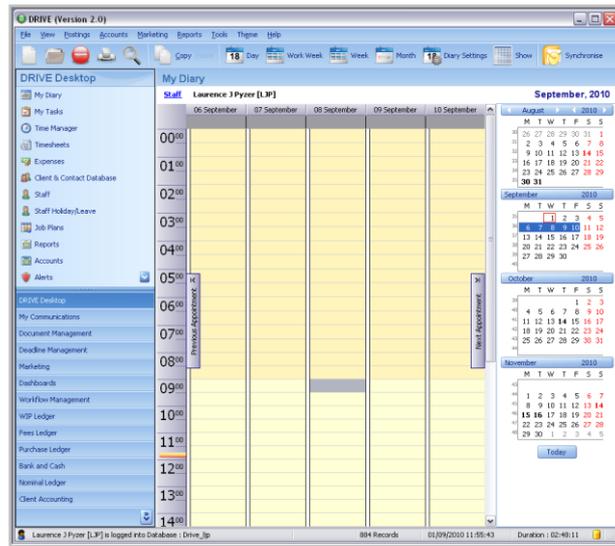


Figure 4



Week: The Week View allows you to view a single week in the diary, Monday to Sunday (see Figure 5).

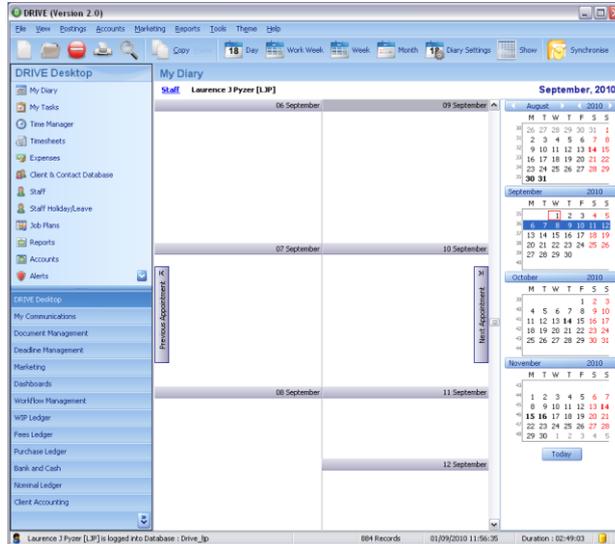
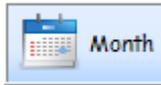


Figure 5



Month: The Month View allows you to view a single month in the diary (see Figure 6).

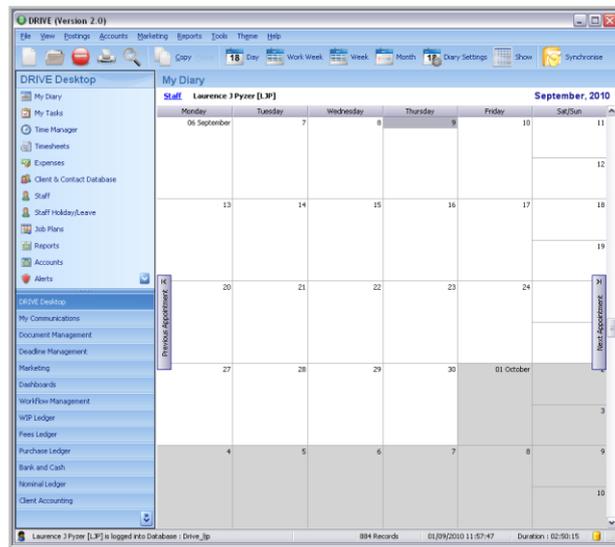


Figure 6

SHOW

The Show option allows you to filter what you see on your diary or other selected staff members diaries. You can select all or a specified type from list of options. The Show options available are; (see Figure 7);

- Tasks
- Events
- Meetings
- TOIL
- Holidays
- Study Leave
- Examination
- Deadlines
- Job Plan
- Workflow

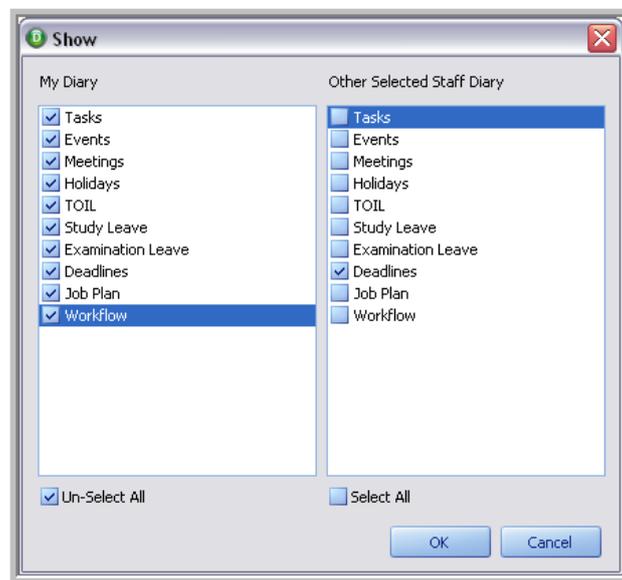


Figure 7

To select what entries you wish to view in your diary, simply click the check boxes of the appropriate types. Once you have made your selections, select the OK button to save your selections.

DIARY SETTINGS

In DRIVE diary there is a number of settings that can be applied. These settings allow you customise how the diary looks. The Diary settings are found in the toolbar above the diary (see figure 8).

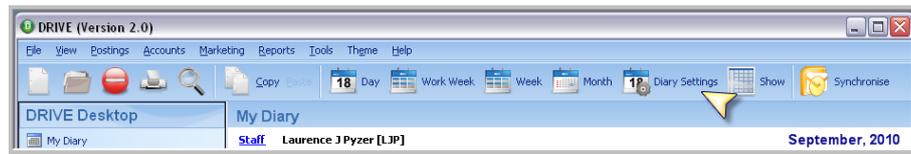


Figure 8

The Diary Settings window will be displayed. The Diary Settings window is divided into each of the Diary Views (see Figure 9).

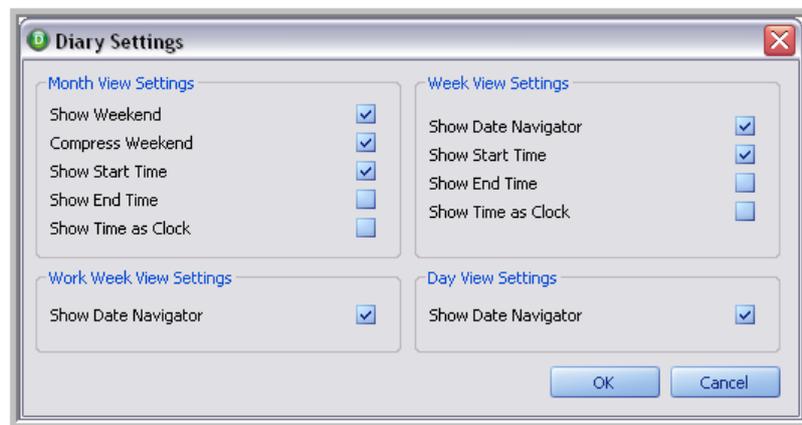


Figure 9

Select the settings of your choice to customise your DRIVE diary.

VIEWING MULTIPLE STAFF DIARIES

DRIVE Diary allows users to view one or multiple staff members diaries depending on the users level of access.

To view another staff members diary select the Staff hyperlink from the My Diary screen in DRIVE (see figure 10).

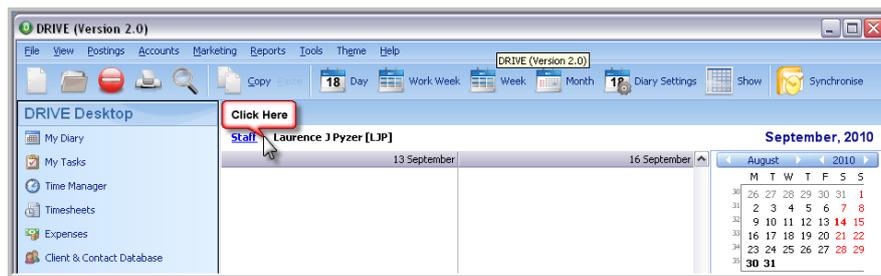


Figure 10

The Select Staff window will be displayed (see figure 11).

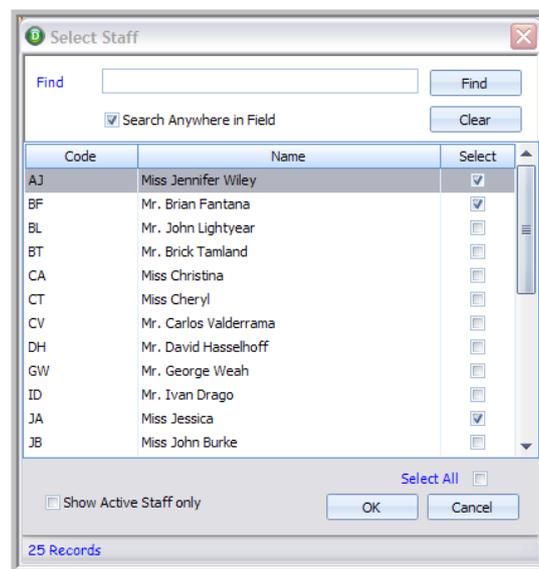


Figure 11

Select the Staff whose diary you would like to view by ticking the check box adjacent to the Staff members' name. Once you have selected the required staff members, select the OK button to complete. The selected staff members' diary entries will now be visible in your diary.

SYNCHRONISE DIARY APPOINTMENTS WITH OUTLOOK

DRIVE Diary allows you to synchronise Diary appointments with Microsoft Outlook. On the My Diary screen you will see the Synchronise button in the main toolbar (see figure 12).



Figure 12



Select the Synchronise button from the My Diary screen. The Synchronise window will be displayed (see figure 13).

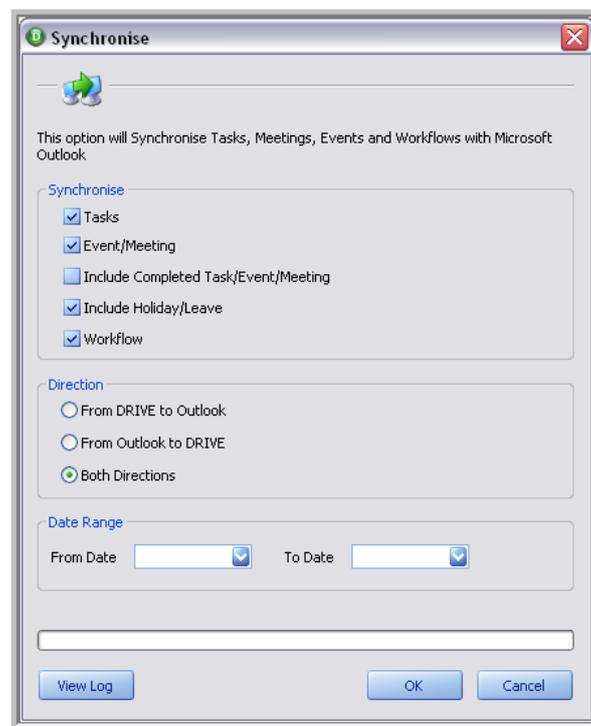


Figure 13

Here you can choose to synchronise your diary entries with Outlook. Select the entries you want to synchronise, the direction you want to synchronise and the From and To date.



You must select a From Date and To Date for the synchronisation to complete successfully.

CREATING A DIARY ENTRY

From the View menu, choose Diary or from the Navigation Bar, choose Drive Desktop and select My Diary. The My Diary browse will then be displayed (see Figure 14).

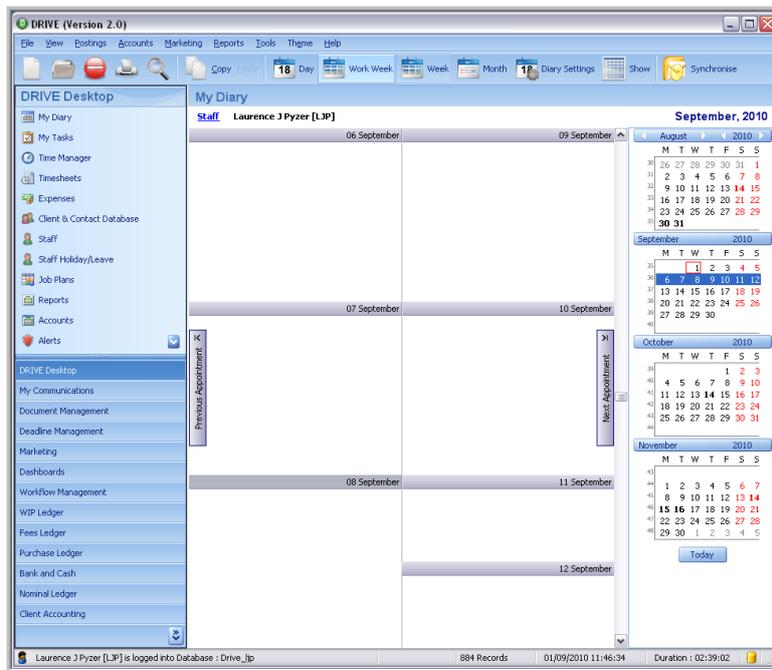


Figure 14

To create an entry in the diary you can right click on the My Diary window and select New or alternatively select File > New from the main DRIVE toolbar. The Add Diary/Task Entry window will be displayed (see Figure 15).

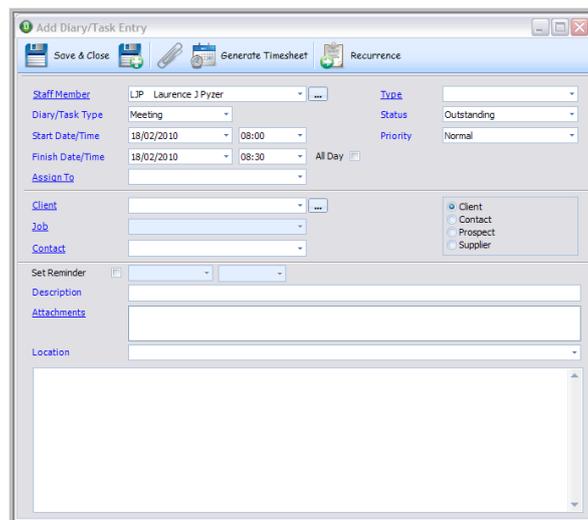


Figure 15

Entering the standing information is straight forward and self explanatory when creating a diary entry. Depending on the type you create there will be different options available. For example if you create a type Examination Leave, the client fields will become greyed out as they are not applicable to this type. For the types Event, Tasks and Meetings there is extra functionality available in the toolbar at top of the Add Diary/Task window (see figure 16). See the section in this document on Advanced Options.



Figure 16

Once you are happy you have entered all the necessary information select the Save & Close button to add the entry to your diary. Depending on the type you selected the colour will vary. Holidays, Study Leave and Examination Leave will be displayed in orange. Tasks, Meetings and Events will be displayed in white (see figure 17).

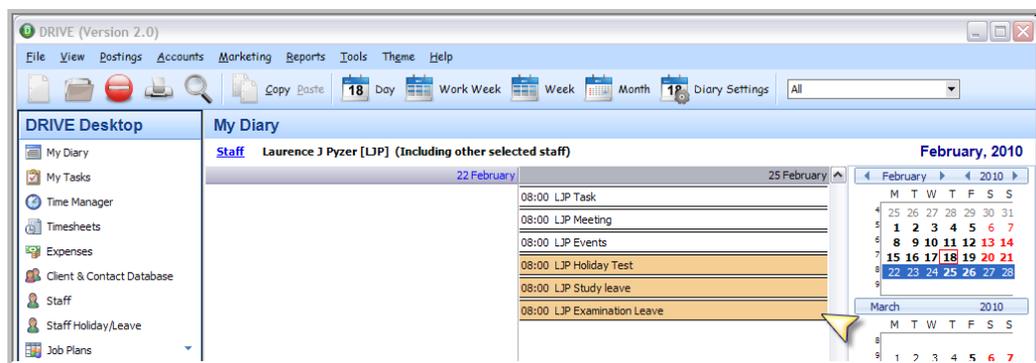
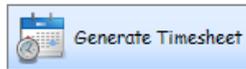


Figure 17

ADVANCED OPTIONS

When creating a Diary entry for a Task, Meeting or Event you can add these to your Timesheet and/or create them as a Recurrence. This option can be found in the Toolbar at the top of the Add Diary / Task window (see figure 14).

GENERATE TIMESHEET



The Generate Timesheet button allows you to associate time with this diary entry.

Select the Generate Timesheet button from the toolbar. The Generate Timesheet window will be displayed (see figure 18).

A dialog box titled "Generate Timesheet" with a close button (X) in the top right corner. The dialog contains several fields for data entry:

- WIP Analysis**: A dropdown menu.
- Cost Centre**: A dropdown menu.
- Activity**: A dropdown menu.
- Units**: A text input field containing the value "2.00".
- Rate**: A dropdown menu showing "0 User defined Rate" and a text input field containing "0.00".
- Amount**: A text input field containing "0.00".

At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

Figure 18

You will need to fill in the appropriate information in specified fields. Once you have completed this select the OK button. If you have not already selected a Client in the Diary entry creation you will only see Non-Chargeable WIP codes in the WIP Analysis. If it is Chargeable time you must first select the client in the Diary Add Diary / Task window.

The time entry will now be displayed in your timesheets based on the Start date you selected when creating the Diary entry.

RECURRENCE



The Recurrence button allows you to create recurring entries in the diary.

Select the Recurrence button from the toolbar. The Appointment Recurrence window will be displayed (see figure 18).

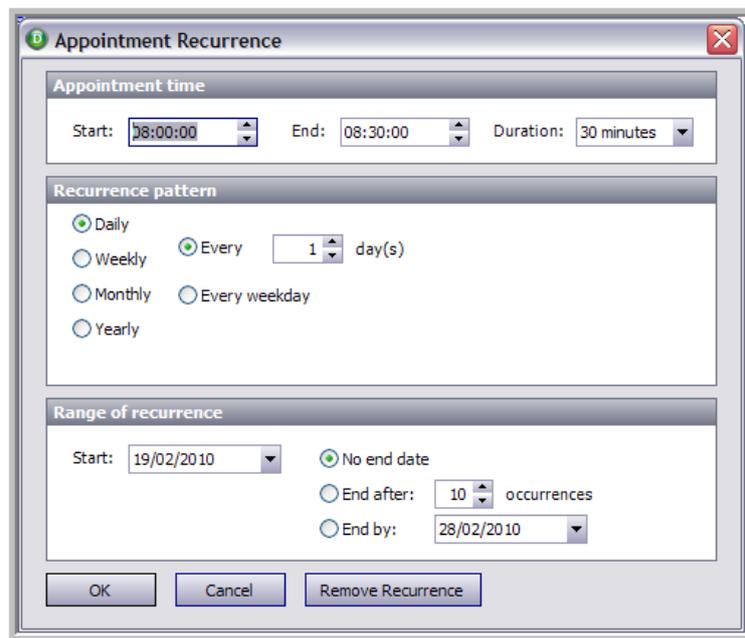


Figure 18

Creating the Recurrence is straight forward. Follow the Appointment Screen through choosing your preferred settings. Once completed, select the OK button. Complete the Diary entry to create the Recurrence in the Diary. The Recurrence will be displayed in the diary by two arrows (see Figure 19).

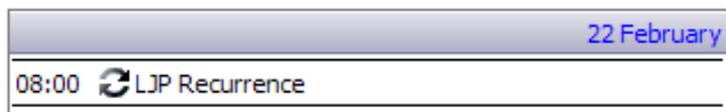


Figure 19

ASSIGNING DIARY ENTRIES

DRIVE Diary entries can be assigned to one or multiple staff members. To do this you need to select the  button in the Add Diary / Task Entry window beside the Staff Member selection (see Figure 20).

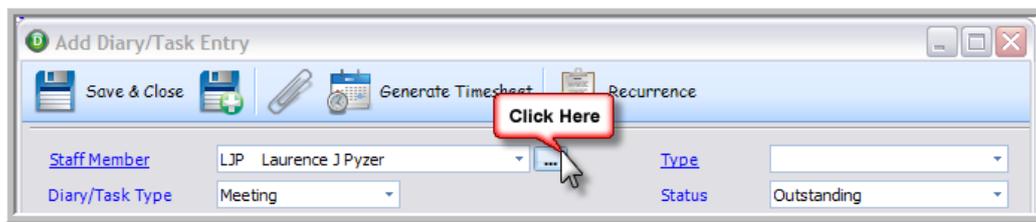


Figure 20

This will display the Select Staff window (see Figure 21).

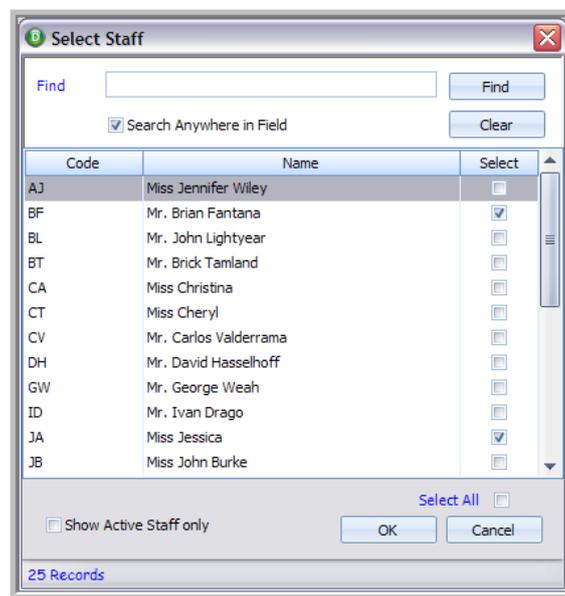


Figure 21

Select the Staff you want to assign this Diary entry to by ticking the check box adjacent to the Staff members' name. Once you have selected the required staff members, select the OK button to complete. On saving the diary entry it will now be displayed in the assigned staff members diaries also.



ADDING ATTACHMENTS

DRIVE Diary allows you to put attachments against the entry (see figure 22). These can be used for agendas, memo, holiday's forms etc.

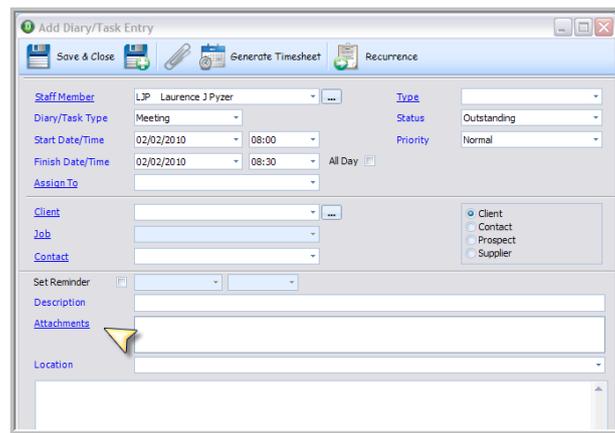


Figure 22

Once you click the Attachment hyperlink, you will see the familiar windows browse. Located your file and select Ok to attach.



NAVIGATING DIARY ENTRIES

In DRIVE Diary there is a number of ways to navigate through the Diary entries.

NEXT / PREVIOUS APPOINTMENT

The Next / Previous Appointment buttons now make it quicker to go to next and previous entries in your diary. This buttons are located on the left and the right of the diary screen (see figure 23).

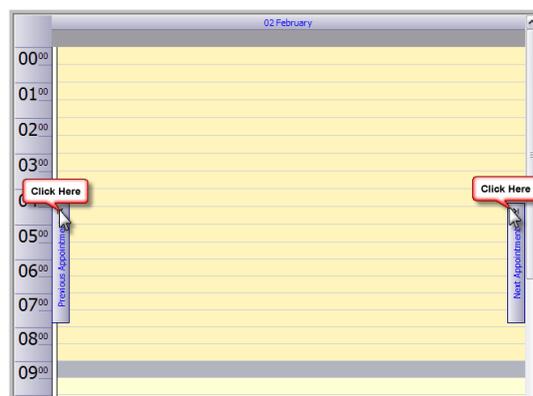


Figure 23

Simply select the Next or Previous button to move between entries.

SEARCH OPTION

You can search for a specific entry in DRIVE diary by using the Search option. To enable the Search option you need to

select the search  button from the toolbar above your diary. The Search option will now be displayed above your diary (see figure 24).

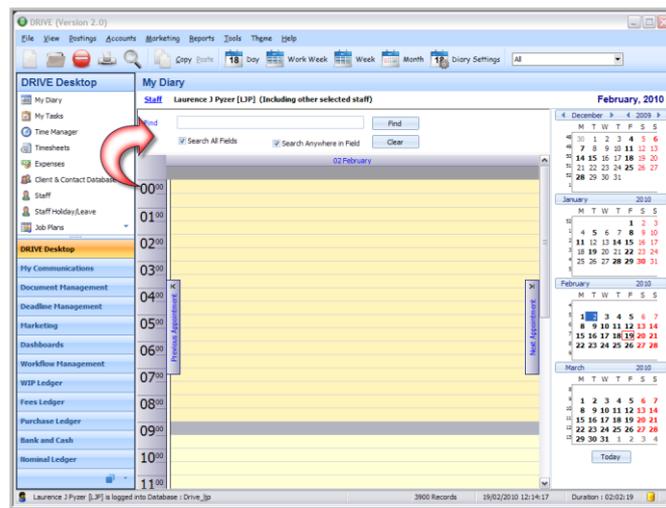
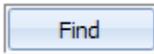


Figure 24

Simply type in the Find field what you are searching for and select the Find  button to start the search.

You can refine your search to Search All Fields or Search Anywhere in Field. Selecting these fields will slow down the speed of the search as you will now be searching in more detail.

DEFINING DIARY STAFF HOURS

In DRIVE you can define your Diary working hours. You need to select Tools > Settings from the top DRIVE toolbar (see figure 25).

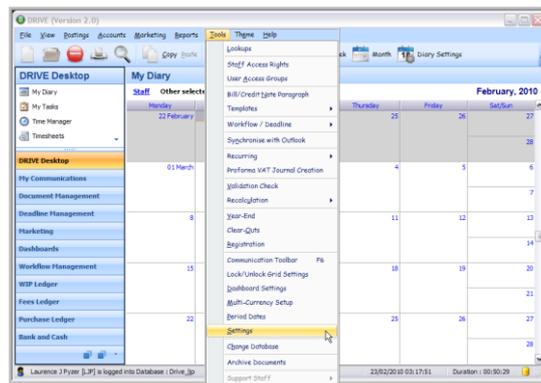


Figure 25

The Settings window will be displayed (see figure 26).

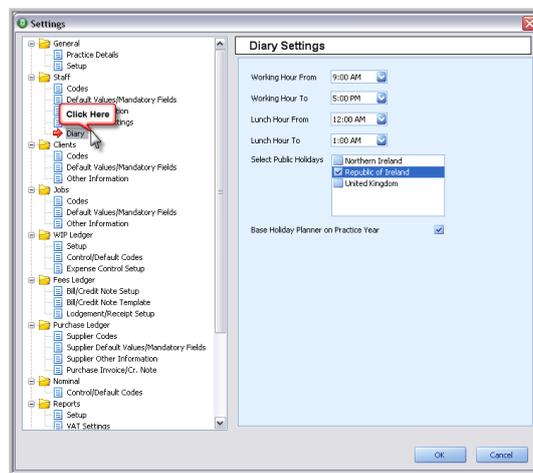


Figure 26

Select Staff > Diary to show the Diary hours. Here you can define the Working hours From and To as well as the Lunch hours From and To. Once you have defined these, select the Ok button to save the settings.



DIARY FAQs**DR00001****CAN I SET ENTRIES IN MY DIARY TO PRIVATE?**

Produced by COC on 18-02-10

*Note: This Information is also available as a PDF download***DRIVE: My Diary**

Section: FAQ

Issue:

There are entries in my diary that I only want visible to myself. Can I set these entries so only I can see them?

Resolution:

When you create your Diary entry, select the Type to be Private. The Type box is found on the far right of the Add Task/Meeting/Event screen. Select Private from the drop down list.

Any entries with Private as the type will only be viewable by the staff member who created it.

DR00001

HOW DO I ASSIGN MULTIPLE STAFF TO A DIARY ENTRY?

Produced by COC on 18-02-10

Note: This Information is also available as a PDF download

DRIVE: My Diary

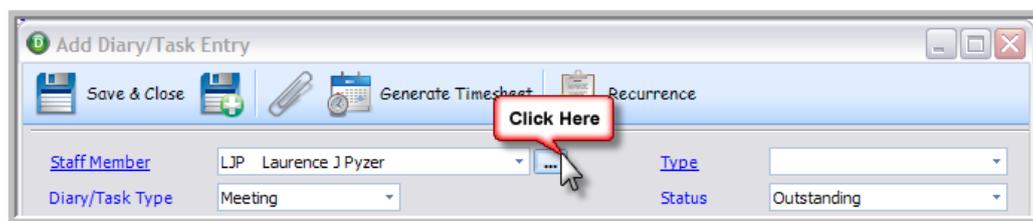
Section: FAQ

Issue:

I want to assign more than one staff member to a particular entry in my diary.

Resolution:

To do this you need to select the  button in the Add Diary / Task Entry window beside the Staff Member selection.



This will display the Select Staff window. From this you can select the staff member you want to assign this diary entry to by ticking the check box adjacent to the Staff member's name. Once you have selected the required staff members, select the OK button to complete. On saving the diary entry it will now be displayed in the assigned staff members diaries also.

DR00001**I CANNOT SEE ENTRIES IN MY DIARY!**

Produced by COC on 18-02-10

*Note: This Information is also available as a PDF download***DRIVE: My Diary**

Section: FAQ

Issue:

There are entries in my diary or a colleague's diary that I cannot see. Why is this?

Resolution:

The reason you cannot see an entry can be for a number of reasons.

1. The entry your colleague has entered has been set to Private and as such, only this staff member can see their own entry.
2. You do not have access rights to see diary entries of other staff. You will need to check the access rights of the User Access Group you are in to make sure you have access to another person's diary, or speak to whoever grants these access rights in your office.
3. You have the wrong staff member selected. In the top toolbar where it says My Diary, there is a Staff hyperlink, and beside that is the name of the person or persons whose diary you are currently looking at. Selecting this link will bring up the select staff screen. Select the Staff member whose diary you want to view by ticking the check box adjacent to the Staff members' name. Once you have selected the required staff members, select the OK button to complete. On saving you will now be able to see the diary entries for the selected staff members.

4. The Diary filter is incorrect for the entry you are trying to find. For example, you are looking for a Meeting and the filter has been set to show Tasks only. This filter is located in the top toolbar beside the Diary settings. Change this to All to see all entries.
- 