**DRIVE Diary** 



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# **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).





### 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).

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	📄 📄 🖨 🕹 🍳	🔓 Gopy Esse 🚺 Day 🗰 Work Week 🗰 Week 📩 Month 🔞 Diary Settings 🏢	Show 🔀 Synchronise			
Γ	DRIVE Desktop	My Diary				
	My Diary	Staff Laurence J Pyzer [LJP]	September, 2010			

Figure 2

# DIARY VIEWS

Day: The Day View



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

O DRIVE (Version 2.0)					
Ele Yew Bostings Accounts Marke	ting Reports Tools Theme Help DRIV	VE (Version 2.0)			
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DRIVE Desktop	My Diary				
My Diary	Staff Laurence J Pyzer [LJP]	September, 2010			
🔁 My Tasks	08 September	August 2010			
(2) Time Manager	00	× 26 27 28 29 30 31 1			
i Timesheets	00~	<sup>31</sup> 2 3 4 5 6 7 8 <sup>32</sup> 9 10 11 12 13 14 15			
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💗 Alerts 🔛	0500 14	> October 2010			
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My Communications	00- 5	4 5 6 7 8 9 10 4 11 12 13 14 15 16 17			
Document Management	07.00	4 18 19 20 21 22 23 24 5 2 2 2 2 2 2 2 2			
Deadline Management		2			
Marketing	0800	November 2010			
Dashboards	0900				
Workflow Management		** 1 2 3 4 5 6 7 ** 8 9 10 11 12 13 14			
WIP Ledger	1000	* 15 16 17 18 19 20 21 * 22 23 24 25 26 27 28			
Fees Ledger	1100	4 29 30 1 2 3 4 5			
Purchase Ledger	11	Today			
Bank and Cash	1200				
Nominal Ledger	1200				
Client Accounting	1500				
\$	1400	<b>v</b>			
Laurence 3 Pyzer [L3P] is logged into Da	tabase : Drive lip BB4 Records 01/09/20	010 11:53:43 Duration : 02:46:11			

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).





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

🕒 DRIVE (Version 2.0)					
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DRIVE Desktop	My Diary				
🔚 My Diary	Staff Laurence J Pyzer [LJP]		September, 2010		
🔁 My Tasks	D6 September	09 September 🔨	August > < 2010 >		
O Time Manager			M T W T F S S		
i Timesheets			3 2 3 4 5 6 7 8		
3 Expenses			<sup>30</sup> 9 10 11 12 13 14 15 <sup>33</sup> 16 17 18 19 20 21 22		
🅵 Client & Contact Database			<sup>34</sup> 23 24 25 26 27 28 29 <sup>35</sup> 30 31		
2 Staff			September 2010		
Staff Holiday;Leave			MTWTFSS		
👿 Job Plans			<sup>20</sup> 6 7 8 9 10 11 12		
Reports			<sup>37</sup> 13 14 15 16 17 18 19 <sup>38</sup> 20 21 22 23 24 25 26		
Accounts	U/ September	10 September	33 27 28 29 30 40		
💗 Alerts 🖸	IC	24	October 2010		
	tue	10	MTWTFSS		
UKIVE DESKOP	- Hillion	onte	4 4 5 6 7 8 9 10		
My Communications	2	00 (m)	41 11 12 13 14 15 16 17 42 18 19 20 21 22 23 24		
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Deadine Management			November 2010		
Marketing			MTWTFSS		
Dashboards	08 September	11 September	4 1 2 2 4 5 4 7		
Workflow Management			15 8 9 10 11 12 13 14		
WIP Ledger			<sup>47</sup> <b>15 16</b> 17 18 19 20 21 <sup>47</sup> 22 23 24 25 26 27 28		
Fees Ledger			48 29 30 1 2 3 4 5		
Purchase Ledger		10 Feature and	Today		
Bank and Cash		12 september			
Nominal Ledger					
Client Accounting					
*		M			
I aurence 1 Puter (1 IP) is logged into Di	atabase : Drive lin	884 Records 01/09/2010 11:56-35	Desetion : 02:49:02		

Figure 5

Month: The Month View

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

DRIVE (Version 2.0) File New Postings Accounts Mark	etina	Reports Tools	Theme Help				90
📄 😑 😑 🔍		Copy Control	18 Day Work	Week	Month 📴 Diar	y Settings 🔛 Show	Synchronise
DRIVE Desktop	Μ	ly Diary					
My Diary	2	taff Laurence	J Pyzer [LJP]				September, 201
🔁 My Tasks		Monday	Tuesday	Wednesday	Thursday	Friday	Sat/Sun
(3) Time Manager		06 Septembe	r 7		9	10	11
Timesheets							
🙀 Expenses							12
🕵 Client & Contact Database							
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Staff Holday/Leave		1	3 14	15	16	17	16
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🛡 Alerts 🔛	K	2	0 21	22	23	24	э
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urchase Ledger			4 5		5 7	8	9
ank and Cash							
ominal Ledger							16
lient Accounting							10
5							

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

0 Show	$\overline{\mathbf{X}}$
My Diary	Other Selected Staff Diary
<ul> <li>Tasks</li> <li>Events</li> <li>Meetings</li> <li>Holidays</li> <li>TOIL</li> <li>Study Leave</li> <li>Examination Leave</li> <li>Deadlines</li> <li>Job Plan</li> <li>Workflow</li> </ul>	Tasks Events Meetings Holidays TOIL Study Leave Examination Leave Deadlines Job Plan Workflow
☑ Un-Select All	Select All OK Cancel

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).

Diary Settings     Month View Settings     Show Weekend     Compress Weekend     Show Start Time     Show End Time     Show Time as Clock	<b>X</b> <b>X</b> <b>X</b>	Week View Settings Show Date Navigator Show Start Time Show End Time Show Time as Clock	
Work Week View Settings		Day View Settings Show Date Navigator	

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).

ORIVE (Version 2.0)		
Eile View Postings Accounts Mark	eting <u>R</u> eports <u>T</u> ools Th <u>e</u> me <u>H</u> elp	DRIVE (Version 2.0)
	Copy Baste 18 Day 💼 Work Week	Week Month To Diary Settings Show Synchronise
DRIVE Desktop	Click Here	
My Diary	Staff Laurence J Pyzer [LJP]	September, 2010
😰 My Tasks	13 September	16 September \land 💽 August 🔪 🔍 2010 🕨
(2) Time Manager		M T W T F S S
Timesheets		<sup>31</sup> 2 3 4 5 6 7 8
Sector Expenses		<sup>32</sup> 9 10 11 12 13 14 15 <sup>33</sup> 16 17 18 19 20 21 22
🕵 Client & Contact Database		<sup>34</sup> 23 24 25 26 27 28 29 <sup>35</sup> <b>30 31</b>



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

Find			Find		
	Clear				
Code	Name		Select		
AJ	Miss Jennifer Wiley		V		
BF	Mr. Brian Fantana		V		
BL	Mr. John Lightyear				
вт	Mr. Brick Tamland				
CA	Miss Christina				
СТ	Miss Cheryl			-	
CV	Mr. Carlos Valderrama				
DH	Mr. David Hasselhoff				
GW	Mr. George Weah				
ID	Mr. Ivan Drago				
JA	Miss Jessica		V		
JB	Miss John Burke			-	
Select All Cancel					



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).

	DRIVE (Version 2.0)		- 0 🛛
I	Elle View Postings Accounts Marke	sting <u>R</u> eports <u>I</u> ools Th <u>e</u> me <u>H</u> elp	
I	🗋 🗀 🤤 📥 🍳	🔓 Copy Easter 🚺 Day 🏥 Work Week 🟥 Week 📩 Month 🏥 Diary Settings 🧾 Show	v 😿 Synchronise
I	DRIVE Desktop	My Diary	$\checkmark$
I	My Diary	Staff Laurence J Pyzer [LJP]	September, 2010



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

💿 Synchronise	
- 🚵	
33	
This option will Synchronise Tasks, Meetings, E Outlook	vents and Workflows with Microsoft
Synchronise	
✓ Tasks	
Vent/Meeting	
Include Completed Task/Event/Meeting	J
🗹 Include Holiday/Leave	
Workflow	
Direction	
From DRIVE to Outlook	
From Outlook to DRIVE	
<ul> <li>Both Directions</li> </ul>	
Date Range	
From Date 🔽 To Dat	e 🔽
ι	]
View Log	OK Cancel

### 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).

O DRIVE (Version 2.0)			
Eile View Postings Accounts Marks	ting <u>R</u> eports <u>T</u> ools Theme <u>H</u> elp		
📄 📄 🖨 🕹 🔍 🗌	Copy Baste 18 Day 1 Work Week	Week Month B Diary Settings	Show 🚫 Synchronise
DRIVE Desktop	My Diary		
🔠 My Diary	Staff Laurence J Pyzer [LJP]		September, 2010
🔁 My Tasks	06 September	09 September	August → < 2010 →
(2) Time Manager			M T W T F S S <sup>30</sup> 26 27 28 29 30 31 1
Imesheets			<sup>31</sup> 2 3 4 5 6 7 8
3 Expenses			<sup>33</sup> 16 17 18 19 20 21 22
🎒 Client & Contact Database			<sup>27</sup> 23 24 25 26 27 28 29 <sup>36</sup> 30 31
🤱 Staff			September 2010
Staff Holiday/Leave			
🔢 Job Plans			36 7 8 9 10 11 12
Reports	07 Sectorcher	10 Centember	<sup>30</sup> 13 14 15 16 17 18 19 <sup>30</sup> 20 21 22 23 24 25 26
Accounts	or September	To September	39 27 28 29 30 40
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Doculierk Hanagenierk	Previ	Ne.	<sup>43</sup> 25 26 27 28 29 <b>30 31</b>
Madatina Madatina			November 2010
Daahbaaada			MTWTFSS
Workflow Management	08 September	11 September	4 1 2 3 4 5 6 7
WID Lerber			<sup>45</sup> 8 9 10 11 12 13 14 <sup>46</sup> 15 16 17 18 19 20 21
Feer Ledger			17 22 23 24 25 26 27 28 17 29 30 1 2 3 4 5
Durchase Leriner			LEY 00 1 2 0 7 0
Bank and Cash		12 September	roday
Naminal Ledner			
Client Accounting			
»			
Laurence J Pyzer [LJP] is logged into Da	tabase : Drive_lip	884 Records 01/09/2010 11:46:34	Duration : 02:39:02

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).

D Add Diary/Task E	ntry					
💾 Save & Close	3 🥒 5	Generate Tin	nesheet 🧾 Rea	currence		
Staff Member	LJP Laurence J F	Pyzer	×	Type		×
Diary/Task Type	Meeting	*		Status	Outstanding	*
Start Date/Time	18/02/2010	· 08:00	<b>*</b>	Priority	Normal	*
Finish Date/Time	18/02/2010	▼ 08:30	- All Day 🔳			
Assign To			*			
Client			·		<ul> <li>Client</li> </ul>	
Job			~		Contact Prospect	
Contact			*		O Supplier	
Set Reminder		•	-			
Description						
<u>Attachments</u>						
Location						+
						-
						*



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).

DRIVE (Version 2.0)		_ = ×
<u>File ⊻iew Postings A</u> ccounts	: <u>M</u> arketing <u>R</u> eports <u>T</u> ools Th <u>e</u> me <u>H</u> elp	
	Copy Paste 18 Day 🗰 Work Week 🗰 Week in Month 18 Diary Settings	•
DRIVE Desktop	My Diary	
My Diary	Staff Laurence J Pyzer [LJP] (Including other selected staff)	February, 2010
🖄 My Tasks	22 February 25 February 🔨	
(3) Time Manager	08:00 LJP Task	MTWTFSS
Imesheets	08:00 LJP Meeting	<sup>1</sup> 25 26 27 28 29 30 31 <sup>5</sup> 1 2 3 4 5 6 7
Evnancar	08:00 LJP Events	<sup>6</sup> 8 9 10 <u>11</u> 12 <u>13</u> 14
Chochada Chada and Database	08:00 LJP Holiday Test	<sup>1</sup> 15 16 17 18 19 20 21 <sup>8</sup> 22 23 24 25 26 27 28
S Client & Contact Database	08:00 LJP Study leave	9
Staff	08:00 LJP Examination Leave	March 2010
Staff Holiday/Leave		MTWTFSS
🔢 Job Plans 🔹 💌		9 1 2 3 4 <b>5 6 7</b>

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).

Generate Times	heet 🔀
WIP Analysis	•
Cost Centre	•
Activity	•
Units	2.00
Rate	0 User defined Rate  v 0.00
Amount	0.00
	OK Cancel



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

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).

O Appointment Recurrence
Appointment time
Start: 30 minutes Tend: 08:30:00 Curation: 30 minutes
Recurrence pattern
<ul> <li>O Daily</li> <li>O Weekly</li> <li>● Every</li> <li>1 → day(s)</li> </ul>
O Monthly Every weekday
○ Yearly
Range of recurrence
Start: 19/02/2010 💌 💿 No end date
◯ End after: 10 😴 occurrences
◯ End by: 28/02/2010 ▼
OK Cancel Remove Recurrence

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 **level** 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.

itanding nal
nal
nal
lient
Contact
Supplier
rospect Jupplier

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).





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).





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 that 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.

O Add Diary/Task	Entry				
Save & Close	🕂 🥢 👼 Generate Ti	mesheet Re	currence		
Staff Member	LJP Laurence J Pyzer		<u>Type</u>		•
Diary/Task Type	Meeting -	20	Status	Outstanding	-

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.