

Schedule Board

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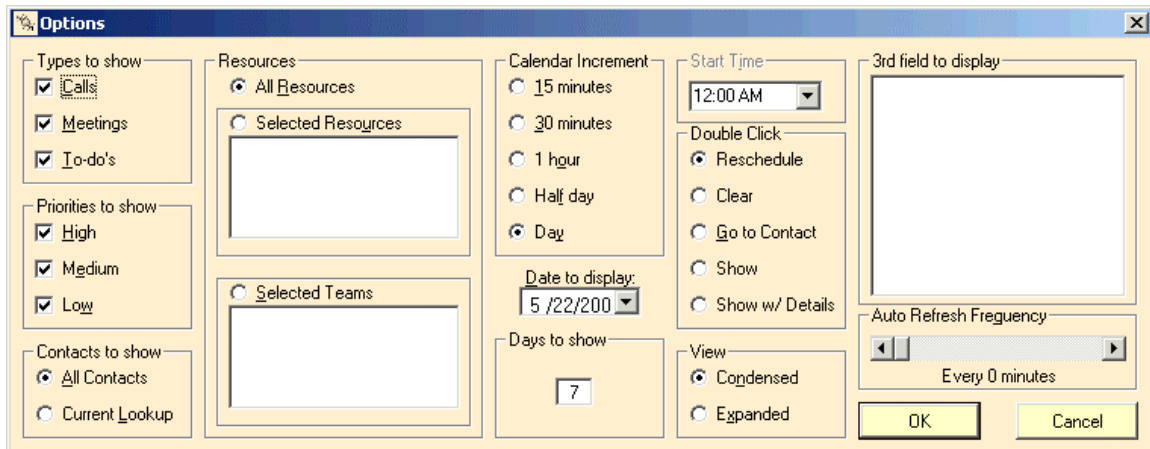
Installation and Usage

ACT!® offers excellent scheduling capabilities for the individual user. However, many organizations need a facility that displays scheduled activities for multiple users at one time, while clearly identifying which user is associated with each activity.

Schedule Board for ACT!® offers the ability to show a “grid”, with each column representing a user (or resource), and each row representing a time-slot. You can quickly see identify who is busy, when.

You have complete control over the display, including options for:

- Type of activities to display (Calls, Meetings, ToDos)
- Priorities of activities to display (High, Medium, Low)
- Activities for all contacts, or only the current lookup
- Time intervals (15-min, 30-min, hour, half-day, full-day)
- Resources to display (all uses, selected users, or users belonging to selected “teams”)
- Condensed Mode (showing icons corresponding to the activity “Regarding”) or Expanded Mode (showing text descriptions)
- More



Installation

1. Shut down all running programs
2. Run **Install_ScheduleBoard.exe**

3. Follow the instructions on the screen. Restart your computer if prompted to do so.

This will install **c:\program files\tnhg\ScheduleBoard.exe** on your hard-drive, and add Schedule Board as an ACT! “custom command”. Icons will be added to your ACT! Contact View and TaskList View toolbars, and to the “View” menu on these views.


Usage

ACT! Activities and Databases

Schedule Board for ACT!® displays activities from the currently open ACT! database. All updating of activity data takes place within ACT!. However, you can access these update facilities – to add a new activity, reschedule an existing activity, or clear an activity – from within Schedule Board (see below for more information). Therefore, you will need to have ACT! running with a database open before Schedule Board will operate properly.

Basic Usage

To use schedule board:

1. Start ACT!
2. Open a database
3. Click the Schedule Board icon  on the Contact view toolbar or on the TaskList view toolbar or select the View menu then select the Schedule Board option

Setting Options


The first time you run Schedule Board, default values are used for all options. Select the Tools menu, then select the Options menu option to open the Options window, and make the selections of your choice, to control how Schedule Board will display.

The Expanded Mode display shows 3 fields from the contact record of the ACT! contact with whom each activity is scheduled. Schedule Board always displays the Company field and the Contact field, and allow you to select the 3rd field to display (the default 3rd field is the Phone field). You can select a different 3rd field to display by selecting that field from the “3rd field to display” option. This also controls the third field to show when you select the “Show” or “Show with Details”

option from the 'context sensitive dropdown menu' which appears when you right-click on an activity in the Schedule Board display.


Condensed Mode display - Display Icons

Schedule Board, when in Condensed Mode, displays an icon in each time slot where a resource has an activity scheduled. If multiple activities are scheduled in that time slot for that resource, then the "Conflict" icon is displayed. The

default "conflict icon" is . However, you can change this by placing any 32x32 pixel .gif file into the `c:\program files\tnhg` folder, and naming it "ASBConflict.asb". A file with this name MUST exist in this folder, or Schedule Board will not operate properly.

When only one activity is scheduled for a resource in a time slot, the icon that is displayed is controlled by the first word in the "Regarding" field of that activity. A .bmp or .gif file in the `c:\program files\tnhg` folder with the same name as that first word will be displayed. So, for example, if the "Regarding" field for the scheduled activity is "Deliver green widget", then the `c:\program files\tnhg\Deliver.asb` file will be displayed.

If no matching icon file can be found for the activity being displayed, then the

default Schedule Board icon  (c:\program files\tnhg\ASBScheduled.asb) is displayed. (If you rename or add new icons, be sure that a file with this name exists in that folder, or Schedule Board will not operate properly.)

A few sample .asb files were made available during installation, but you can add as many as you want, and rename the ones already there, to customize the Schedule Board display for your own use. Any 32x32 pixel .gif file can be used, after renaming it to have an extension of ".asb".

Expanded Mode

When in Expanded Mode, Schedule Board displays 4 lines of text for each activity scheduled for the resource during that time slot. The first line will indicate whether the event is a Call, Meeting or Todo. The next two lines will present the contact's "Contact" and "Company" fields. The fourth line will show the activity's "Regarding" field.

Cell options

When a single activity is scheduled for a resource during a time slot, you can right-click in that resource/time-slot “cell” to display a popup menu. This menu allows you to:

- New Call – which opens the ACT! “Schedule Activity” window
- New Meeting – which opens the ACT! “Schedule Activity” window
- New ToDo – which opens the ACT! “Schedule Activity” window
- Reschedule activity – which opens the ACT! “Reschedule Activity” window for that activity
- Clear activity – which opens the ACT! “Clear Activity” window for that activity
- Go to Contact – which opens the ACT! Contact View displaying the contact with whom the activity is scheduled
- Show – which opens a small window displaying the contact’s Name, company and 3rd field of your choice (see above), along with the activity’s priority, type, date, time, duration and regarding fields
- Show with details – which opens a small window with all the information from the Show option, plus the Details field for that activity.

When multiple activities are scheduled for a resource during a time slot, you can right-click in the “cell” to display a popup menu. This menu allows you to:

- New Call – which opens the ACT! “Schedule Activity” window
- New Meeting – which opens the ACT! “Schedule Activity” window
- New ToDo – which opens the ACT! “Schedule Activity” window
- List – which opens a small list window showing the activities scheduled for that resource during that time slot. When this list is displayed, you can click on any of the listed activities to display the popup menu described above.

Resources and Teams

Schedule Board displays the activities from an ACT! database. Therefore, each activity must be scheduled FOR an ACT! “user”. These “users” become the Resources for which Schedule Board displays columns.

Most organizations are familiar with creating an ACT! “user” for each individual who opens and uses the ACT! database. However, it is also possible to create an ACT! “user” (and corresponding “My Record”) for something other than a user of the database. For example, you could create an ACT! “user” for a conference room, or a delivery truck, or an employee who never opens ACT!. By doing this, you allow ACT! to schedule an activity for that “user” or resource; a meeting in that conference room, a delivery by that truck, or an event for that employee. (See the ACT! documentation for instructions on adding new users to your ACT! database.)

Once you have added the “resource” as an ACT! “user” and created their corresponding “My Record”, you can select that resource to be displayed on the Schedule Board, using the “Select Resources” frame on the Options window, or the View menu, Current View option, Selected Resources option. (When the “All Resources” option is selected, there will be a column displayed for each “user”/resource that has a “My Record” in your ACT! database, regardless of whether there are any activities schedule for them.)

You can also create TEAMS of resources, so simplify the selection of multiple resources for display. For example, you may have a set of people who make up a repair crew, and who are (almost) always scheduled together for repair calls – but still could be scheduled individually for vacations, meetings, etc. The team might also include a truck, and/or other equipment. You could then select to display this Team of resources, and an individual column would be displayed for each user/resource on the team.

Schedule Board will treat any ACT! Group, for which the first word in the Group Name is “Team”, as a team. So, expanding on the example above, you could create a Group named “Team – Fred’s Repair Team”, and make Fred, Mary, Chris and Truck 4 members of that group. Now when you select Team – Fred’s Repair Team as one of the teams to be displayed, you will see a column for Fred, a column for May, a column for Chris and a column for Truck 4.