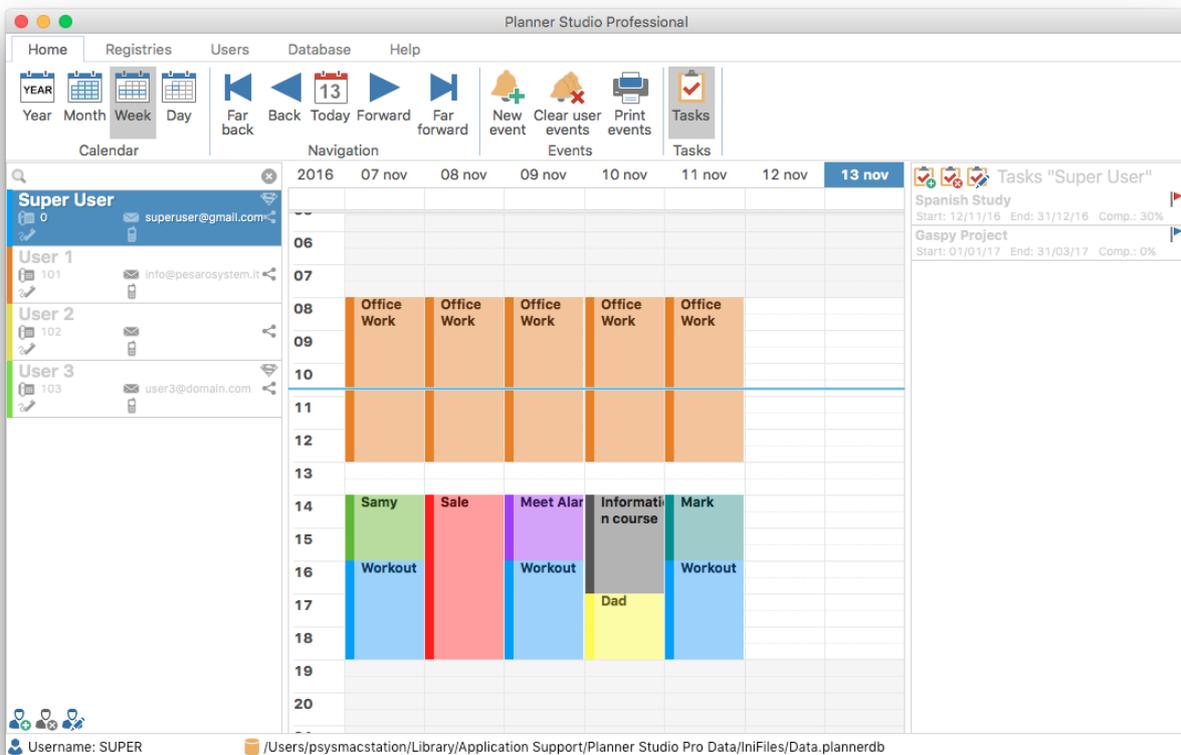


Planner Studio Guide

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Summary

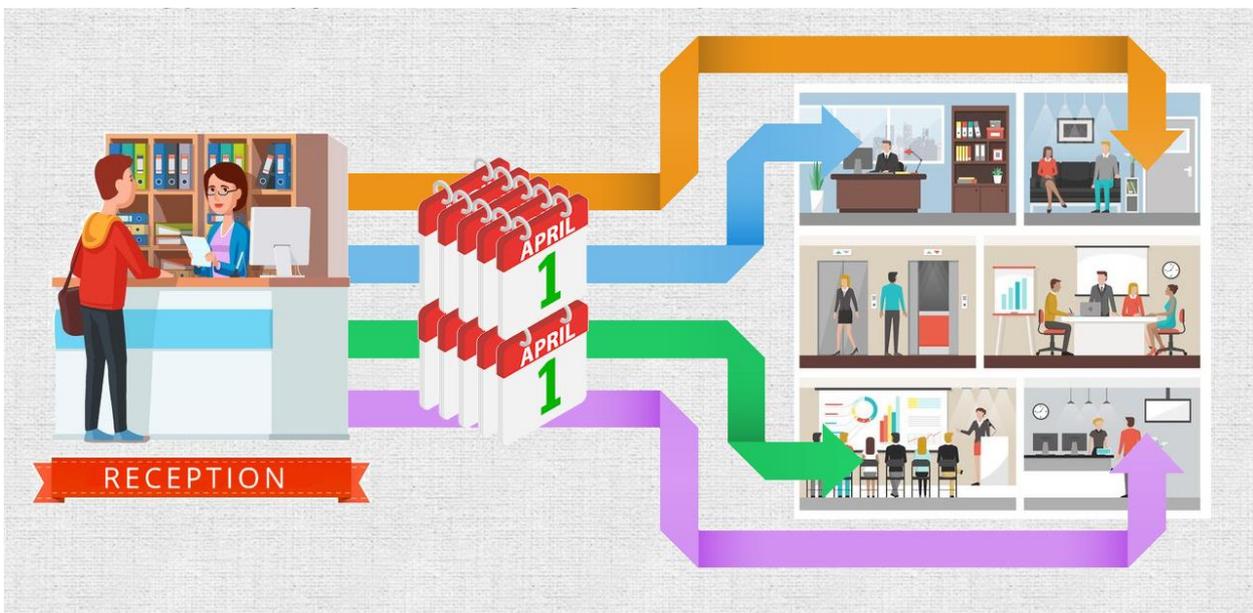
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Introduction

Planner Studio is a calendar management software for multi-user platform. You can connect more than Planner Studio workstations on the same database so you can share calendars.



An example of use could be an associated studio where the reception is the super user that controls and manages events (in this case, appointments) of all offices, and where each office is a normal user who can only manage their calendar. In this way every call the reception may occur and insert new appointments without having to ask for confirmation to the offices. And so even the offices will meet appointments preset from the reception.



Other examples could be:

- Medical studies, where the reception (super user) inserts appointments for different doctors (normal users).
- Offices, where the office manager (super user) inserts the activities of their employees (normal users).

- Schools, where users become the classes and events the courses, and then you can set the various courses for each class.
- Hotel, where users become the rooms and events would indicate whether rooms are occupied or not.

Planner Studio is really very flexible and can be applied to an infinite number of types of work, adaptable to every need.

Calendar and User Management

As mentioned Planner Studio manages the calendar in multi-user platform.

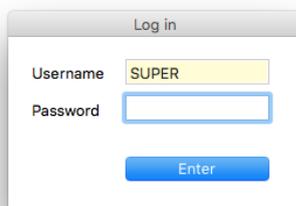
There are two types of users: Super Users, and Normal Users.

The Super User (who may also be more than one) can manage calendars of all users, more himself. A Super User can monitor all other users inputting, editing, and deleting events from calendars. A Super User can also add new users.

The Normal User can only hear your own calendar and your own data.

First Login

To make the first login insert SUPER as username and leave the password blank.



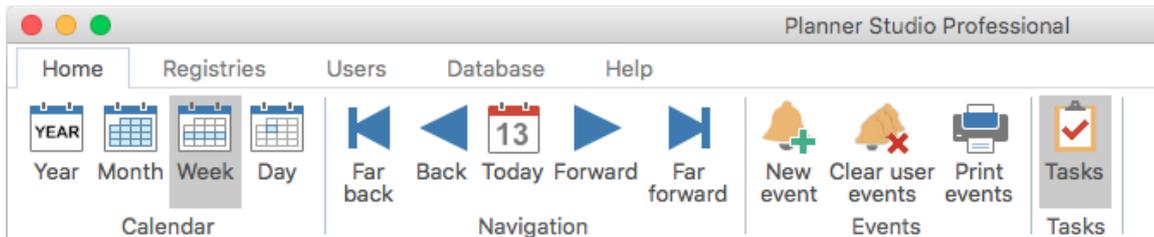
The image shows a 'Log in' dialog box with a white background and a grey title bar. It contains two input fields: 'Username' with the text 'SUPER' and 'Password' which is empty. Below the fields is a blue button labeled 'Enter'.

Main Screen

Before you start working with Planner Studio, the program will require a username and password. The default is **SUPER** without password. It will then be possible by the "Current User" screen to change the password.

The main screen is divided into three zones: to the right the Ribbon Bar with all the functions of the program; on the left the list of users; in the center the calendar.

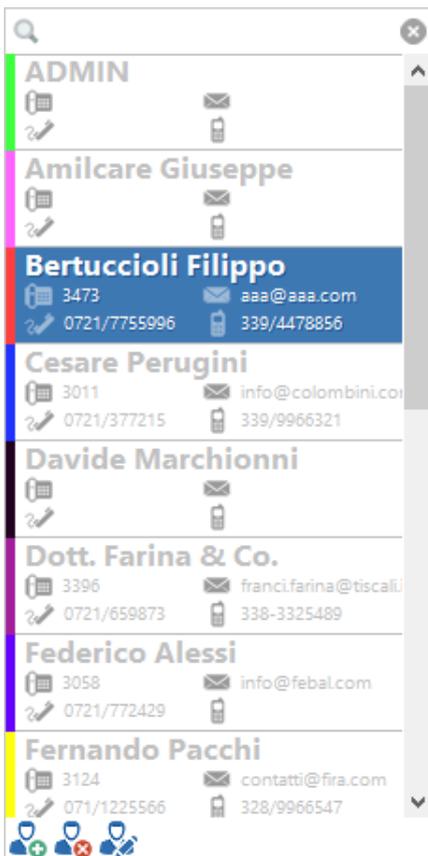
The first four buttons on the Ribbon Bar under the "Home" tab allow you to view your calendar in four different ways: Year, Month, Week, Day.



Then we find the navigation buttons that let you move backward and forward in time.

Finally the button to insert an event.

On the left there is the list of users:



If available, the list display addition to the name also the internal number, email, phone, cell phone, and the default color.

High above list you can use the search function to filter users.

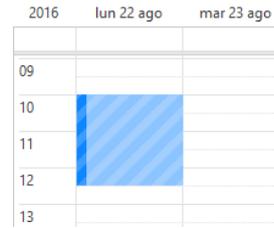
The selection of a user's calendar displays the user's selected appointments.

With a double click on the user opens the mask for the user change.

If it was done in as a normal user login, the user list will not be visible and the user can only manage their calendar and their data.

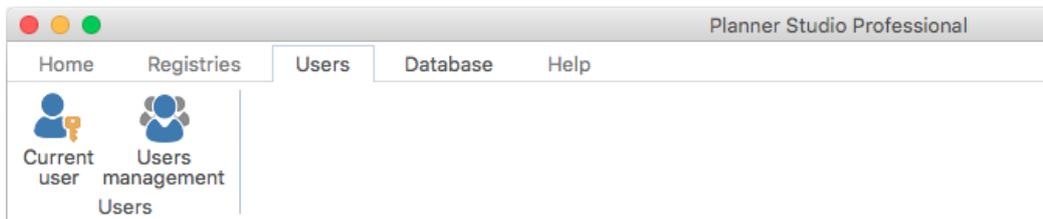
By moving the mouse over the calendar and holding the left button we could create an event by drawing it.

As soon as we leave the button will appear the window to complete the event information.



Screen "Current User"

From tab "Users", "Current User" button, will opens the screen that allows you to change the user data that has performed the initial access.



You can change all the data, the user and password, and the default color.

The default color will appear in the users list on the left and will be used as the base color to create new events for that user. Obviously then each event can be changed and then changed color.

Current User

Master data Additional data Account Email

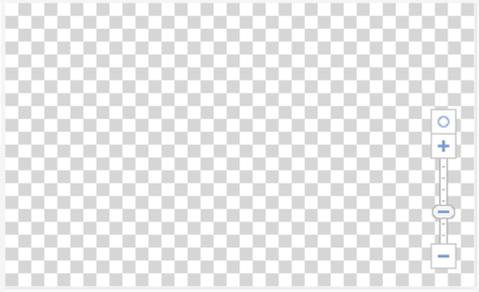
Additional data

Code

Tax code

Notes



Close Save

Current User

Master data Additional data Account Email

Account Email

Display name

Email

Use SMTP server

Server SMTP Port

Use an encrypted connection

Server requires authentication

Username

Password Show Password

Test Account



Close Save

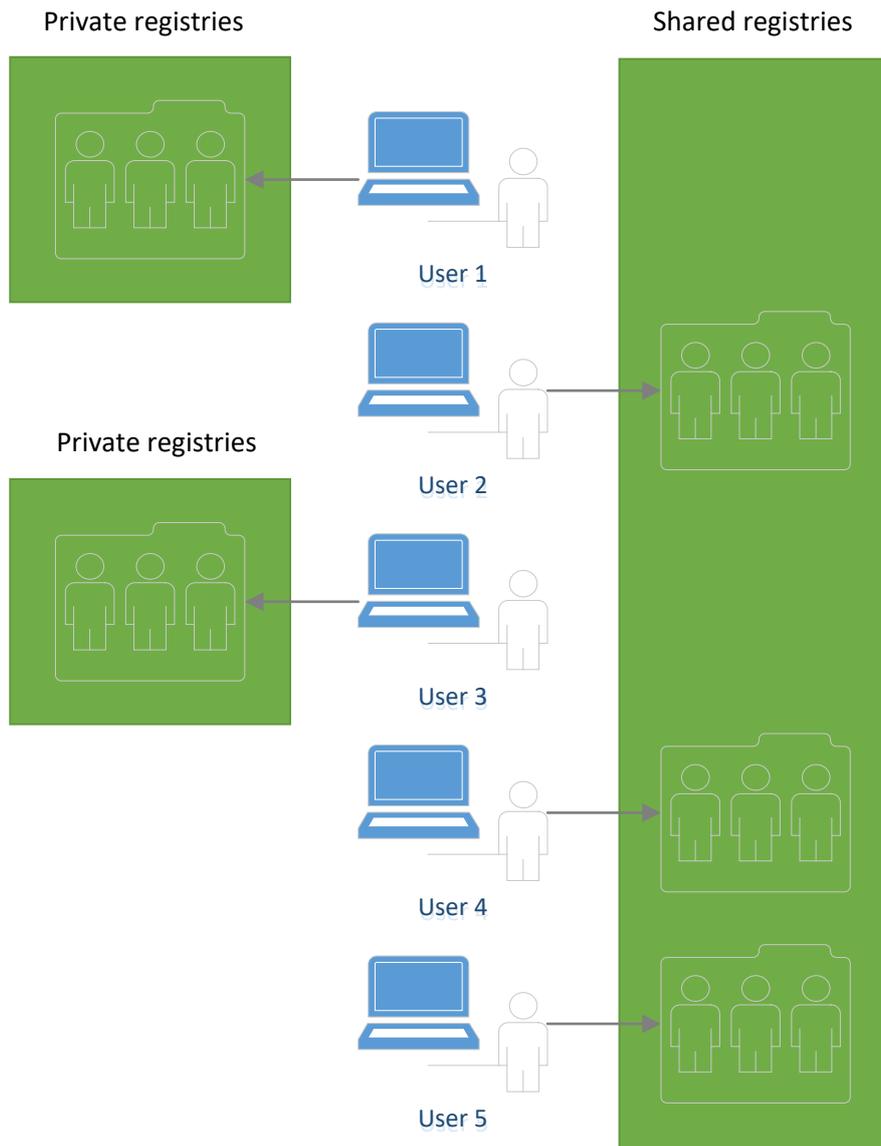
Manage registries Customer/Suppliers

Each user can decide whether to share registries customers/suppliers with other users.

In case of sharing all users with shared registries can see and edit the registries of other users who have decided to share them.

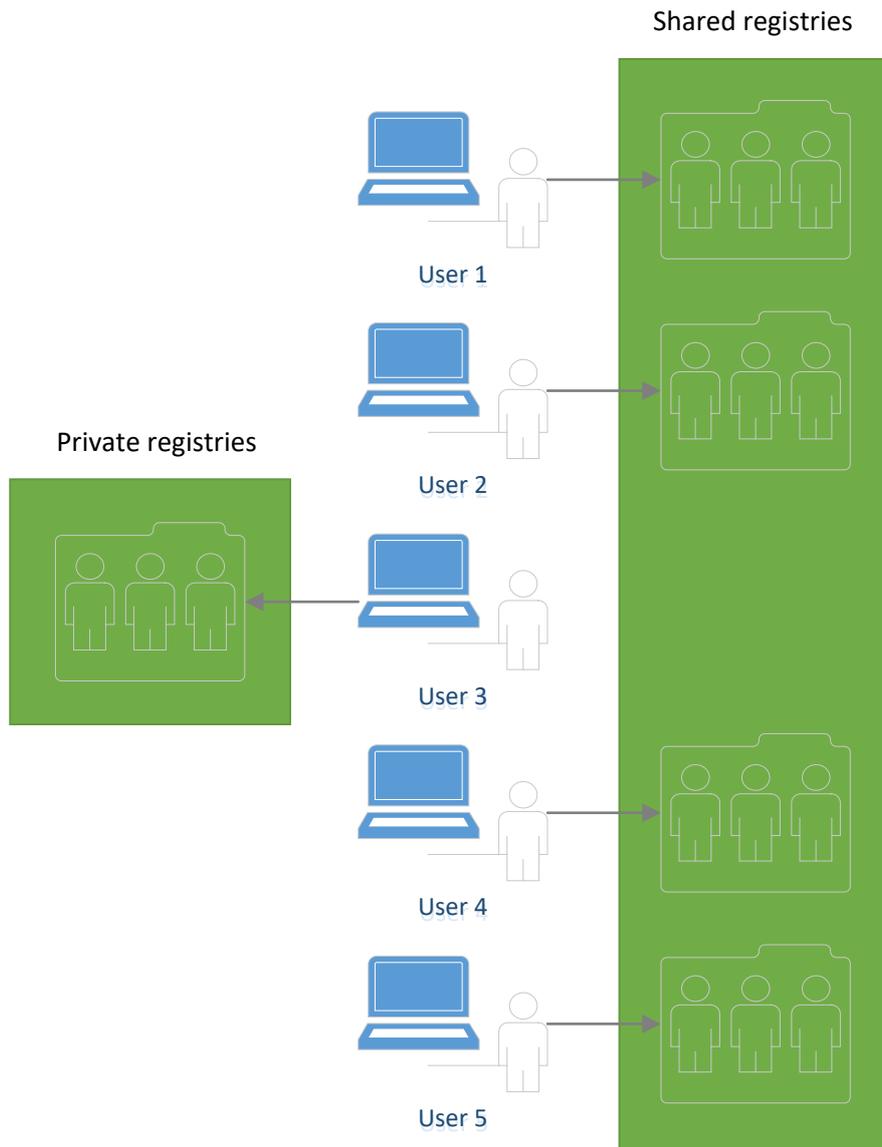
If the user does not share will work with their registries without seeing that of others and without sharing their.

In the example below we see 5 members of which 2 with private registries and 3 with shared registries:



Users 1 and 3 have the private registries and will work just seeing their registries. Users 2, 4 and 5 on the other hand have the shared registries and work seeing the registries of all users with shared registries except for those users with private registries.

If the user changed one type of registries and choose the shared, all other users with shared registries would see his registries and he that of others:



Screen "Customers"

You can manage a customers register, as simply as address book, or to connect it to a specific event. It's in fact possible during the management of the events specify whether that event is connected to a customer.

The screenshot shows a window titled "Customers" with a search bar and a table of customer records. Below the table is a form for editing a customer's details, divided into sections for Master data, Residence, Contacts, and Internet.

Name	Surname	Born city	Born pr...	Date of birth	Tax code	Address
Samuele	Alfano	Roma		31/03/1990		Via Don Ca
Michele	Figarella	Pesaro	PU	20/09/1987	MCLFGR87F20G4790	Via Monte
Maria	Fregeni	Milano	MI			Via Galli, 4
Steve	Polini	Madrid				88, Grand
Mark	Stured	London		03/02/1977		122 Oxford

Customers - Edit Form

Master data

Name: Michele
Surname: Figarella
Born (city/prov.): Pesaro PU
Date of birth: 20/09/1987 Sex: M F
Tax code: MCLFGR87F20G4790

Residence

Address: Via Monte Bianco, 10
Zip/City/Prov.: 61122 Pesaro PU

Contacts

Phone/Fax: 07212022980
Mobile phone:

Internet

Email: michele.figarella@maxoter.com URL:

In the additional information you can also insert an image for the customer.

Customer lists can be shared with those of other users by choosing the setting from the user management screen.

Screen "Suppliers"

You can manage a suppliers register, as simply as address book, or to connect it to a specific event. It's in fact possible during the management of the events specify whether that event is connected to a supplier.

Company	Address	Zip	City	Province	VAT number	Internal ...	Phor
Apple	1 Infinite Loop	95014	Cupertino	CA			
Fox							
Google inc	Mountain View	94043	1600 Amphit...	CA			
HP							
Mediaset							
Microsoft	One Microsoft Way		Redmond	Washington			
Sky							
Xerox	Coyote Hill Road	94304	Palo Alto	CA			
Yahoo! Inc.	701 First Avenue	94089	Sunnyvale	CA			

Registries Additional data

Master data

Company:

Address:

Zip/City/Prov.:

VAT number:

Contacts

Internal Phone:

Phone:

Fax:

Mobile phone:

Internet

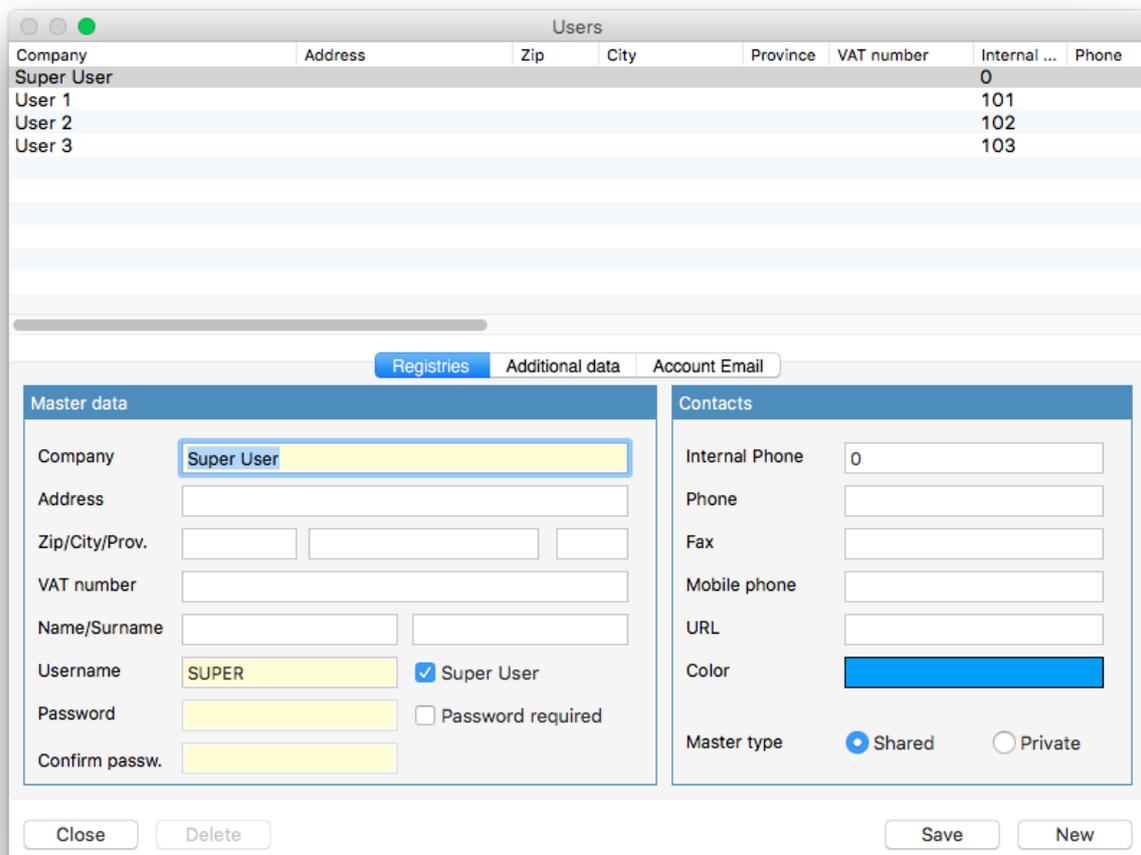
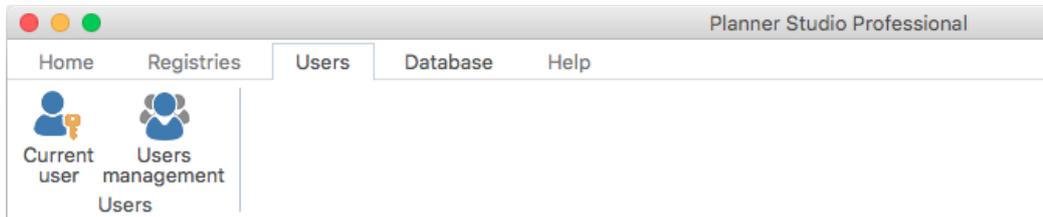
Email: URL:

The managed data is more or less the same of the customers.

Suppliers lists can be shared with those of other users by choosing the setting from the user management screen.

Screen "User Management"

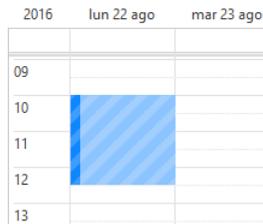
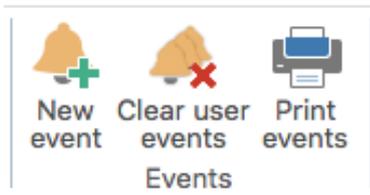
If it was done on as Super User you will open the screen that allows you to edit the data of all users. (From the "Users" tab, "User Management" button)



The screen contents, besides the list of users, contains the same fields as the "Current User" screen.

Insert an event

You can insert an event by clicking the event button or by dragging the mouse on the calendar.



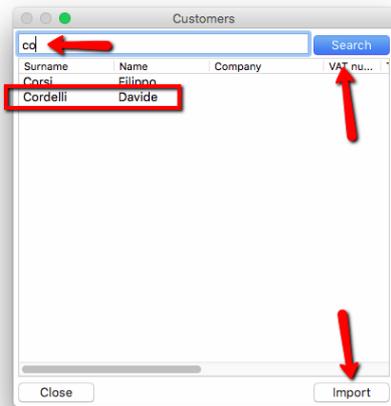
Will see a screen like this where you can set the event characteristics:

Suppose that this is a meeting for analysis of a software development. We expect an hour and a half, by 11.30 am to 01.00 pm, August 22. We entered the notes, and connected the event to a client.

Link a customer or supplier

You can link an event to a customer or supplier in order to have the main contacts always in evidence and also for additional functionality. To connect a client or supplier at the event before select the type using the appropriate checkbox and then clicking on the "select".

A search window will appear where you can select the customer.



Enter a value in the text field, for example the beginning of the customer's name, and then click on the "search" button. Appear to customers corresponding to the search text. Select a customer by double-clicking or by pressing the "import."

Now the customer or supplier is saved to event.

Customer/Provider

Select Customers Suppliers

Surname/Name: Cordelli Davide Tax code:

Company: VAT number:

Email: cordelli.davide@gmail.com Phone:

URL: Mobile phone: 3397786543

Send an email to the user

If the user has a valid email account, you can send an email to remember the event.



Send an email to customer or supplier

If the customer has a valid email, you can send the email to the customer also to remember the event.

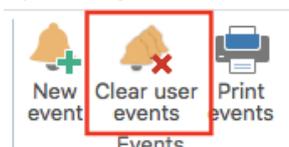
Company:

Email: cordelli.davide@gmail.com

URL:

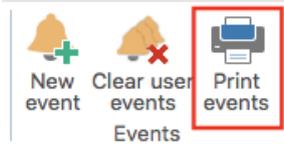
Delete all events

By clicking the button below you can delete all events from user selected.



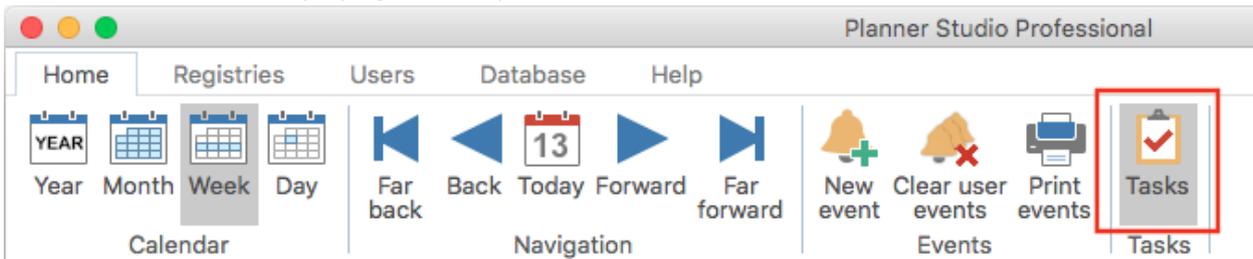
Print Events

You can also print the events for a range of dates.

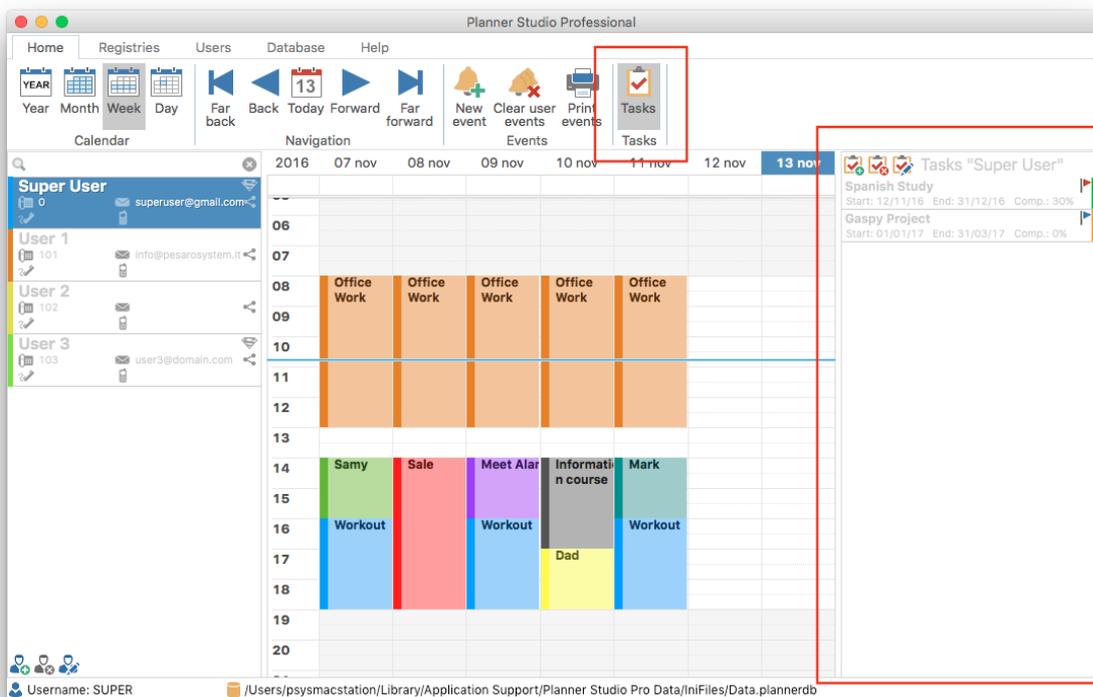


Insert a task

You can insert a tasks displaying the task pane.



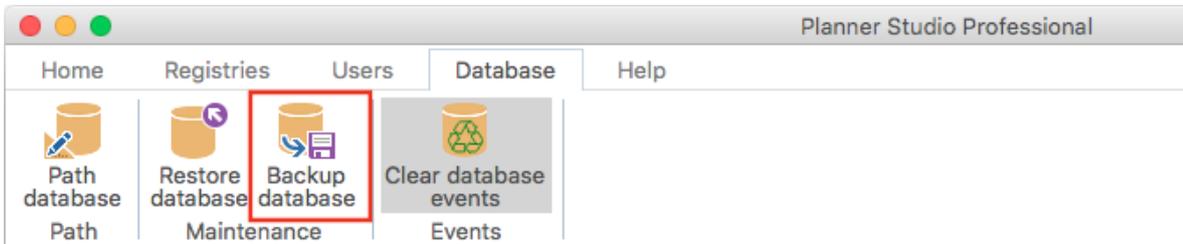
The activities in contrast to events are not on the calendar but they are long-term projects where you can set a beginning, an end, the percentage of progress, completion, priority, etc.



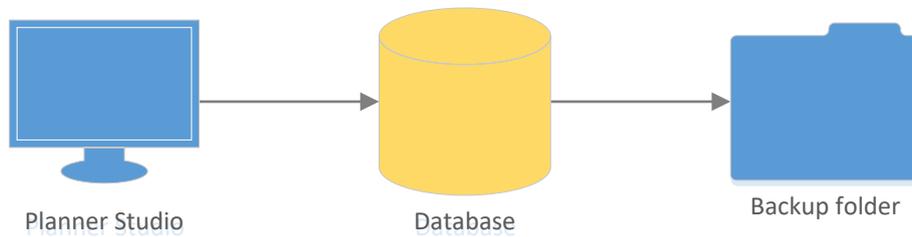
Database management

Backup Database

To create a backup of the Planner Studio database, simply click on the button below and choose where to save the file.

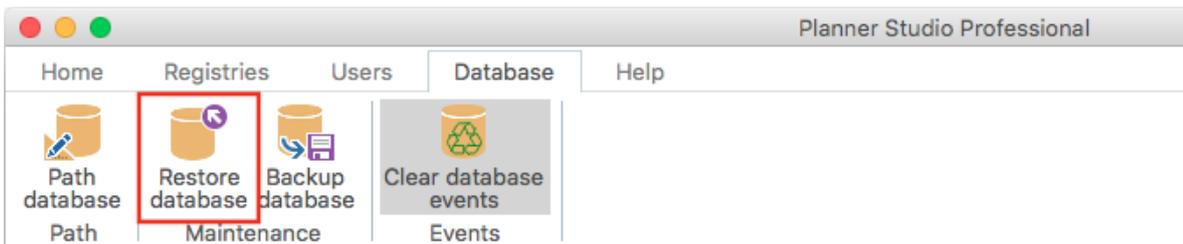


After selecting where to save the file will be create a copy of the database in use on the chosen path.

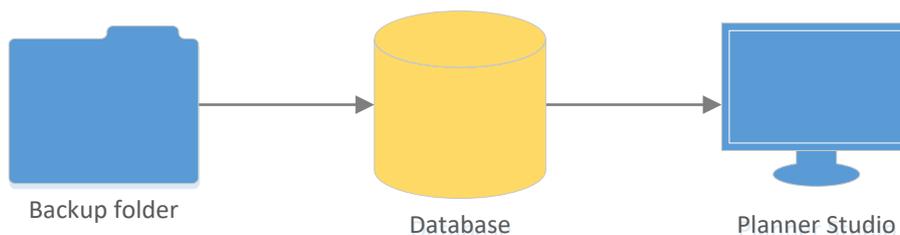


Restore Database

To restore a backup of the database Planner Studio you have to choose the archive by clicking on the button below.

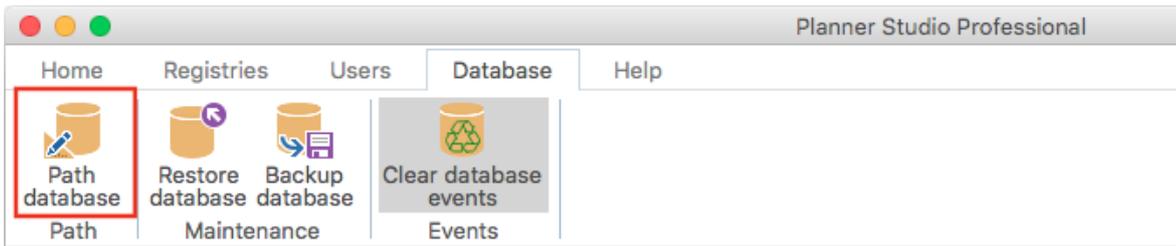


After the database is selected to restore, your database will be replaced with one chosen, while the original file selected will not change.

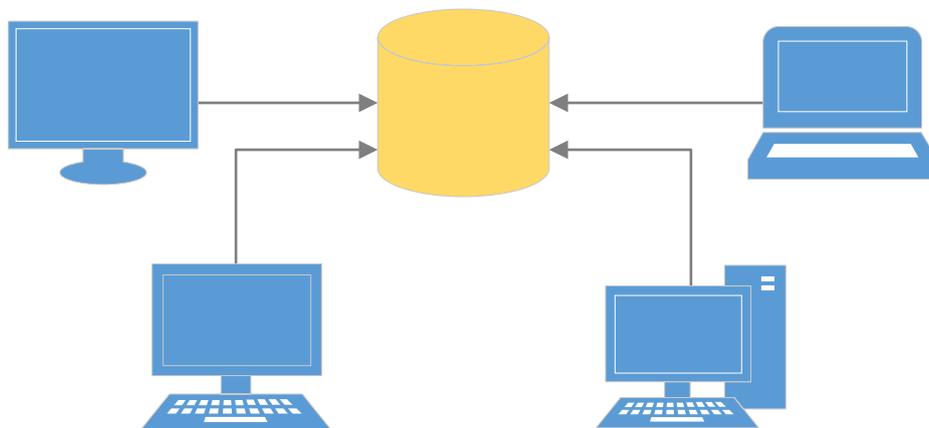


Path Selection Database

Selecting the database location allows you to choose a location other than that of the Planner Studio default.

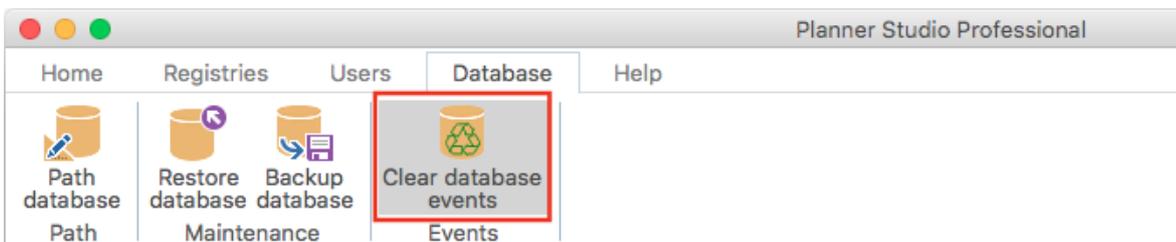


This also allows you to move the database to a server on a shared folder and connect all computers in the same Planner Studio database.



Elimination total events from the Database

You can delete all of the events for all users by clicking the button below. The database will be completely emptied.

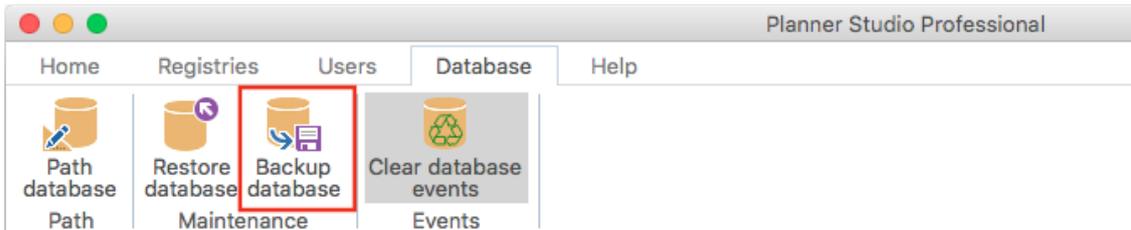


Database sharing with other computers on the network

You can share the database with other computers so that they are all synchronized. Follow these simple steps:

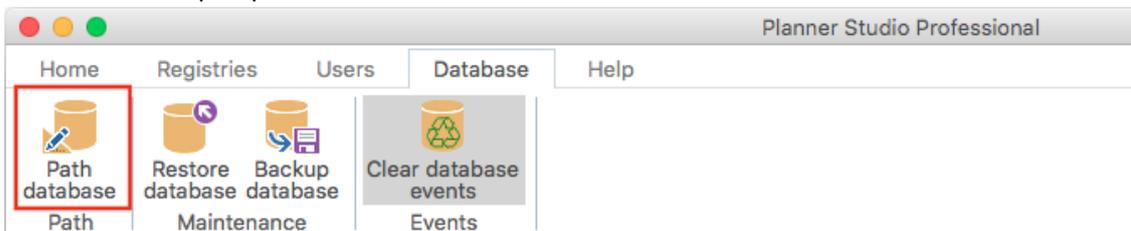
1. Choose a shared folder to save the database. What is a folder where you can access all computers with writable.
2. This operation must do it only once from the "main" computer which currently has the database to share.

From the tab "Database" select the "Backup Database" button. A window appears to choose where to save the backup. Choose the shared folder mentioned in point 1.



3. Now the database is saved in the shared folder.
4. This operation must do it for all computers where it wants to share the database and for all Planner Studio installed.

Must select the tab "Database" and "Database Path" button. A window appears where you can choose the new location to which the program will be referred. Select the shared path where you saved the backup at point 2.



5. From now on every connected computer will read the same shared database, then all operations will be instantaneous and made visible by everyone.