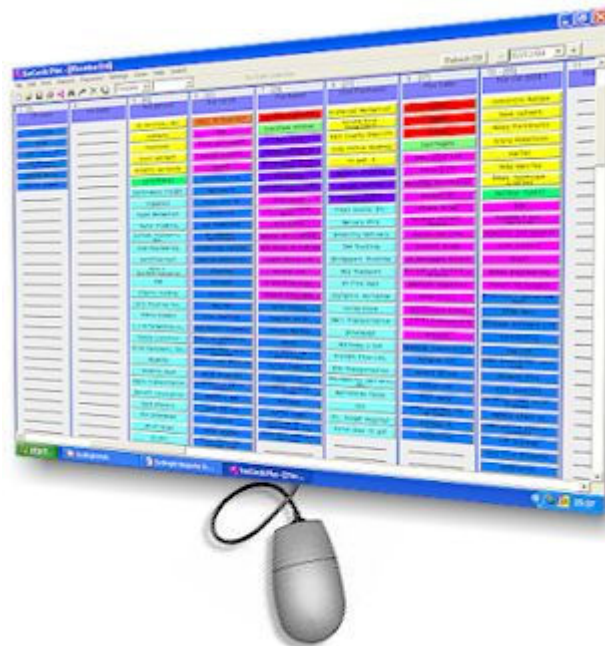




Using TeeCards Enterprise Edition

v1.4.6
Plus v1.3.7













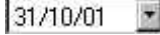

Last Updated Tuesday, 23 June 2009

This document also covers but does not fully explain the functionality in
ActiviTee, PrioriTee and ClariTee

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For up to date hints tips and help and examples see the website.

We want to help, if you need help tell us, if you think its great tell everybody else.

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Introduction

Using TeeCards really is as easy as 123, if it's not let us know why.

Step 1 create the project

Step 2 configure the Settings

Step 3 Populate the Project with TeeCards.

That's it that's all there is too it, the trick is getting your settings correct, don't worry if they aren't they can be changed at any time, but bear in mind that the settings that are changed via the Project Settings menu option affect all users not just you, these are fundamental settings which control the behaviour and appearance of the project. Note that I say project rather than application or system because, each project that you create can have different colours, different names or labels and may display TeeCards differently.

Bear mind that TeeCards is a tool, it does have some intelligence but it has not been specifically written for your business, to a degree it is reliant upon you just as a spreadsheet or a conventional T Card system would be.

However don't be daunted, either peruse the online help or this document before you start.

At this point it may be useful to introduce some terminology used throughout this document.
















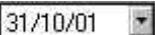

Glossary

Terminology	Description
Application	Software that has been designed to perform a task.
Board	In conventional terms a collection of panels, a conventional T card system. In TeeCard terms the project or what you can see on the screen
Button	A particular area on this screen which when clicked with the mouse has an effect.
Compact	When records are deleted the structure of the database becomes wasteful, compacting removes this unwanted space
CSV	Comma Separated Variable, a particular type of file that is understood by many Applications e.g. MS Excel a spreadsheet
Database	The File storage system that stores the data that supports the TeeCards
Directory	Same as a Folder
Drag and Drop	By depressing the Right Hand Button of the mouse whilst on top of a TeeCard in a slot and keeping it depressed, the TeeCard can be dragged to an area on any of the panels. The TeeCards can not be dropped on top of another TeeCard. Dropping is the effect that takes place when the right hand button is released
Field	An area on the TeeCard into which data can be typed
File	A collection of information, this may be data, or information necessary to make the application work
Flip	This terminology is sometimes used if the data

	has been reanalysed by a field other than that originally intended.
Folder	A named area on the PC in which files are stored
Icon	A very small picture that appears when the TeeCard is being dragged
Label	In this context a title.
Logon	The provision of an Identification and a password which enables you to use the system
Mdb	The default extension of the database
MS Access©	Software provided by Microsoft ©, more than a simple database, but not used in this way by TeeCards
Network	The connection of a number of PCs in order that data can be shared commonly.
NT©	New Technology it is an operating system like Windows 95, 98, 2000 or XP from Microsoft ©
Panel	The Vertical strip into which the TeeCards are positioned.
Pixel	The Screen comprises a number of pixels these are very small areas of the screen, typical no of pixels are 640 x 480 per inch, 800 x600 or 1024 x768
Project	This is analogous to a Board, it is the visual display of the TeeCards. A database underpins the Project.
Scrollbar	We use Horizontal and Vertical Scrollbars, they only appear if the board is bigger than the available window
Slot	A position on the panel that holds the TeeCard
Stacked	TeeCards simply stack in the panel occupying the next available slot
Sticky	TeeCards are positioned where they are dropped, this may or may not be in a slot, and thus with Sticky could straddle more than one slot
TeeCard	An Electronic representation of a conventional physical T Card
Time banding	An expression used to denote that the project uses time to determine the position of the TeeCard
Tool Tip Text	Text that appears to assist you in your work
Window	The area of the screen occupied by the application. Windows can be maximized or minimized or sized to a particular dimension

Finding you way around the screen

Icons and what they mean

Symbol	Used For
	Create a New Project
	Open an existing Project
	Save this Project as - useful for archiving
	A Snap Shot of the Screen
	Create A New TeeCard
	Find TeeCards
	Re Analyse the TeeCards
	Remove Old TeeCards
	Compact the database, useful once old cards have been removed and will improve efficiency
	Exit from the TeeCard no change
	Replicate the TeeCard
	Snap Shot of the screen with the TeeCard Open
	All Done - save the TeeCard.
	Refresh the screen, whilst refresh will take place if you move forward or backwards in date terms, you may want to refresh the screen without changing date. Click this button. This is particularly relevant to Users on networked systems, who may want to be visibly checking slot availability
	Back one day
	Select a date from the drop down calendar
	Forward one day

Overview

The TeeCards System is a versatile tool which enables you to take the benefits associated with a conventional T Card System and exploit the benefits and the power of Modern Technology.

The system is not prescriptive and consequently with the various combinations of date, time banding, colours, alias's and panels you should be able to create the ideal TeeCard system to suit your business needs, whether that be for a simple appointments system or a more sophisticated work management system.

The Menu Options comprise

File

- New**
- Open**
- Save As**
- Exit**

Edit

- Find and Replace**
- Transfer TeeCards**
- Delete**
- Compact**

Print

Reports

- TeeCards for the day**
- Listing for the day**
- Report Builder**

Password

Settings

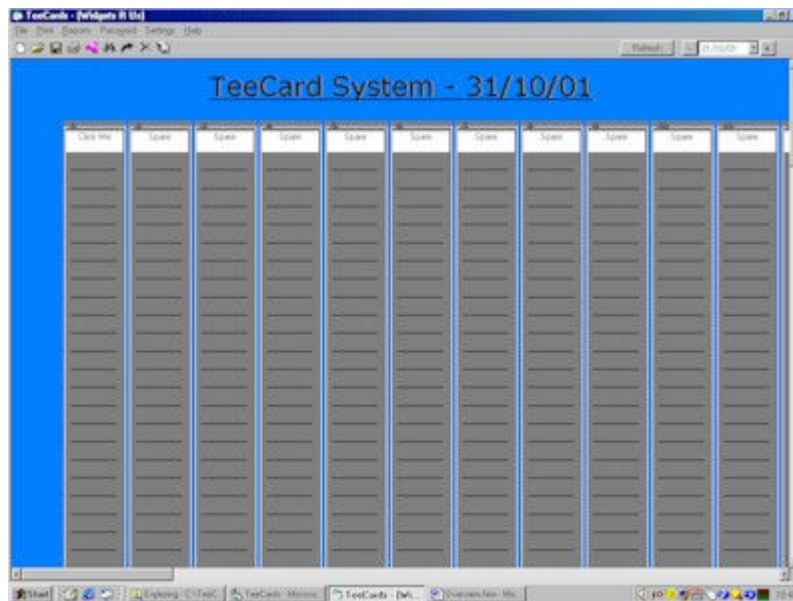
- Project Settings**
- Period View**
 - View by Week**
 - View by Month**
 - View by Quarter**
 - View by Year**
 - Rolling Days - a vertical view looking forward**
 - Scrolling Days - a horizontal view looking forward**
 - Scrolling Weeks - a horizontal view looking forward by week**
 - Don't Show Weekends - used in conjunction with Scrolling Days or Month**

view

- Clear View**
- Date View**
 - Date Only**
 - Date and Prior**
 - Date and Future**
 - Prior Only**
 - Future Only**
- Use Small Fonts**
- Use Bold Fonts**
- Block Time**
- Count Cards**
- Hide Lapsed Cards**
- Choose Move Icon**
- Refresh Interval**
- Remind Me**
- Ignore Panel 1**
- Deduce Date**

Show Queue Time
Show Days Vertically - used in conjunction with Week View. Month View or Rolling Days
Zoom
Help
TeeCards Help
Link to TeeCards.com
About
Switch
Default
By Week
By Month
Filter

The system comprises at least one Project.
 The Project is analogous to a wall mounted display of T Cards.
 You can create as many Projects as you like. Some organizations will only have one Project others will have many.
 Information is not shared between Projects each Project is unique (contact us if you need to do this). But note that if you create a New Project from an existing Project everything will initially be carried forward to the new Project, this provides a number of advantages where a number of similar Projects are required. Similarly cards can be transferred between Projects.



A Project comprises up to 50 panels, these are the vertical strips that will retain your TeeCards. Unfortunately physical limitations prevent us displaying more than 50 panels in one window. With TeeCards Plus by splitting the board you can double up the number of panels.

Each Panel can comprise up to 100 slots, each TeeCard occupies one slot.

The TeeCard itself comprises date and time fields plus 18 configurable fields to hold your data plus a memo field which can contain many pages of free text.

Other than the date and time fields there is no (delivered) validation on what you store in each of the respective fields. There are limitations on the amount of data, which can be stored in each field. This is based upon the average User's requirements and the physical ability to see the whole content given the design considerations.

Tee_Start	12/10/08	StartTime	12:00	Panel	Thursday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																
Tee_End	12/10/08	EndTime	12:00			Removed <input type="checkbox"/>	Complete <input type="checkbox"/>																		
Tee3				Tee8																					
Tee4				Tee9																					
Tee5				Tee10																					
Tee6				Tee11																					
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Tee13																									
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Tee20																									

Preselect

Preselect is available in certain variants contact us for further information. What it will do is effectively give a restricted view or filtered via of the board. This is advantageous when you wish to restrict what users can see, and a supervisor wants to see/report on the bigger picture. The objective being to utilise one board rather than many. A user can be locked into a restricted view.

Getting Started

There are two approaches that can be taken here, firstly you can modify the Project that has been supplied, or alternatively you can create a new Project from this one. If you are unsure about what you are doing create a new Project and then come back to these settings.

Before you start, just take a few minutes to consider exactly for what you want to utilize the System, this may save you many hours in the long run.

You may be in a fortunate position where you are simply transferring your conventional system to a PC in which case the options may be simple, never the less consider your options this system may be able to provide you with much more.

This set up is carried out through the Settings Option and they apply to everybody that may have permissions to look at the Project.

The system is normally deployed occupying the maximum number of panels and slots, you may not require this facility. Don't worry if you get it wrong in the first instance it is easy to add or remove new panels, and add or remove slots.

The system is not delivered with Time Banding switched on. Time Banding will not suit every one, e.g. if your system simply records Work In Progress, however if your business is time critical then Time Banding will be of benefit, and will enable you to organize your workload more efficiently. So think about it first, how long is the working day, we will need to know the start and finish times, what time interval do you require 15 minutes, 1 hour 2 hours etc, and can more than one job be apportioned within the time interval i.e. It may be that a workman can do 4 jobs in one hour, that doesn't mean that his interval has to be 15 minutes as from past experience you know that in one hour he will get two 5 minute, one 20 minute and one 30 minute jobs. Thus it may be better to have 1 hour interval with 4 slots.

Consider the name you want to give to the Project, this appears at the top of the screen and appears on documentation, which may or may not leave your company premises.


Also consider the names that you want to give to the respective fields, typically this may be address, post or zip code, age, car registration, qualifications etc. etc. These are altered via the Alias's tab on the Settings screen

Before you begin to change the Settings ensure that the correct Project is open.


Settings should not be changed frequently, remember that the Settings are global for the project, i.e. if they change for you, they change for all other users of the project.

Creating a Project

For whatever reason at sometime you will want to create a new Project. This may be due to a new use for the TeeCard System, or that your old Project needs some revision or many many reasons.

To create a new project, click on the Create New Project icon . When you create a new Project you will be prompted for the new name. If the name you supply already exists then you will be asked to confirm that you wish to overwrite it. The name, including the full pathname, must not be the same as that Project that is already open. The Project must have an mdb extension e.g. *mynewproject.mdb*, *widgets.mdb*

Simplistically what happens is that the Project which is currently open, and all of it's associated detail is copied to a new Project. The new Project automatically loads but note at first it will look the same as the Project you have just closed. You will be prompted to clear the existing cards. Answer Yes or No. If you answer No, you will be prompted for restoring the default values. If you are happy with the old Project settings or feel that you can amend these Project Settings more satisfactorily yourself then answer No.

If you decide to delete  the existing cards it may be advisable to compact the database, this will give improvements in efficiency if there are a lot of deleted records. See Compacting the Database.

Settings

There are a number of entries under the Settings menu, Project Settings which are global and apply to everyone using the system, these should be changed with caution. In addition there are local settings which are applicable to a specific user. These are the period views: Week; Month; Quarter and Year, the Card Count and the Move Icon.

Period Views

If you are not using timebanding then these period views can be used, consequently it is possible, board size permitting, to view the entire contents of a panel by week, month, quarter or year e.g. on a Staff board you could easily see who had been off Sick within the month. Simply select the view of your choice. To return to your normal view i.e. today only, select Clear View or select from the Date View options. There is now the option in Scrolling Days and Month view to Don't Show Weekends, the corresponding panels are not shown and spaces exist where they would normally appear. Note that these views also reflect in the built in reports. See Deduce Date below. With the period views if you leave the panel headings blank it will assume that you wish to put the corresponding date in the field. In week and Month views this will be a date, in Year view combine the view with the choice of panel options, Year Monday etc.

Date Views

If you are not using timebanding but you are using date in your sort and selection criteria (see Sort Order tab), then you can choose to display by date in 5 different ways. Note that these are individual settings and do not apply to all users, so what you can see may not be what your colleague can see depending on this setting. The selected view is indicated in the menu bar. Options are today only. today and all prior data - useful if you want to see what is outstanding; today and future - what's coming up, prior only and future only. Note that these views also reflect in the built in reports.

Use Small Fonts

As from version 1.3.6 and Plus 1.2.7 you now choose if you want to use a small font. This was previously autosized by us. Lucon.ttf is used, as this was found to scale best in tests. On rare occasions Lucon.ttf may not be on your machine.

Use Bold Font

You can now specify bold font. This applies to all card as does small font.

Block Time

If you are using Timebanding you can use block time to make the card occupy all slots covered by the Start and End Time. In Plus this can also be used with the Show days Vertically setting.

Count Cards

In some circumstances it may be beneficial to quickly ascertain the number of TeeCards that you have within a panel, these can easily be determined by selecting the Card Count Option from the menu, the card Count is displayed in brackets e.g. [16] at the top of the panel. The Total number of cards displayed can always be determined by positioning the mouse pointer over the Refresh button, no need to click. From V129 if you wish to ignore a card in the counts type 'Dummy' (case is important, no quotes just Dummy) in Tee20. This will be useful if you have labels on the board.

Move Icon

A number of move icons are provided, and should you wish to do so you can provide your own move icon. New icons are added periodically and are available in the Help and Icons download, download from the web site, unzip and place in your appropriate folder. Then simply select the move icon of your choice.

Refresh Interval

As from version 1.2.3 There is auto refresh, the refresh interval between 0 and 9999 seconds can be set from this option. 0 (zero) has the effect of disabling Refresh. See Refresh for more details.

Remind Me

As from version 1.2.4 there is a simple reminder introduced, this can only be selected if you are using date in the selection and only reminds for today's date. Refresh must be switched on for this to work. Any records falling within the start time minus the refresh interval, and the start time plus 2 minutes will be flagged. A message is displayed and the T Cards symbol is imprinted on the T Card. In TeeCards Plus this is much more comprehensive you can choose Start or End Time and determine the number of minutes prior to the time you wished to be warned. Red, Amber, Green and Black Clocks appear.

Ignore Panel 1

As of version 1.2.7 there is the ability to 'ignore' the contents of panel 1 should you wish to do so. Whilst this may seem a strange thing to do, if Panel 1 is used as an identification panel, and the Cards basically used as labels, then you would not want to report on them, print them, or include them in Flip.

Deduce Date

Introduced in version 1.2.7 alongside the Ignore Panel 1 setting, this tries to be time saving. If you employ a week, month or year view, and the respective panels represent days or months then as you drag cards between panels i.e. alter the day/month on which the job is

to be done, then the date on the card will automatically be changed for you in order that any reports/analysis will be correct. The date differential between Start and End Date is maintained. In month view in theory it would be possible to drag into the next month e.g. February drag into a panel greater than 28, this has been disabled and a warning is given. Up to 8 panels are assumed for a week, panels numbered higher than 8 can be working storage areas. You can choose to use panel 1 as a label panel but if this is the case you must set the 'Ignore Panel 1' setting see above, for Deduce Date to work properly. Month view 'Deduces' up to panel 32 (the max) and year view 'Deduces' up to panel 13, anything greater than 13 can be treated as you wish but Deduce Date will not take effect in these panels. Deduce Date does not work with the Quarter view. Should you require further clarification then please contact us.

To make sense of the view the following configuration is suggested:

Week view label the panels with Day names: Monday to Sunday

Month view label the panels with Dates 1 through 31.

Year view label the panels with Months.

In all cases Panel 1 can be named as you choose.

Note in version 1.3.0 when deduce date is switched on and you replicate cards then the day corresponding to the date is calculated and the card assigned to the respective panel. Ignore panel 1 is incorporated into this calculation if set.

In 1.3.3 version of Plus Ignore Panels and Deduce Date become global.

Show Queue Time

In some circumstances e.g. a Help Desk or an Accident and Emergency Department of a Hospital you may wish to use this facility. Essentially it is trying to give an indication of waiting time. We therefore suggest it should be used accordingly but feel free to experiment. The following example assumes an average wait time of 15 minutes. Go to Project Settings, on the Timebanded + tab check Use Time Banding to enable entry in the fields, enter a start time of 00:00:00, enter an end time e.g. 08:00:00, now enter the slot interval 00:15:00 and slot spacing as 1 (but could be more). Now uncheck Use Time Banding, the values are greyed. Click OK. Now from the Settings menu choose Show Queue Time, the values supplied are shown in 15 minute increments down the left hand side of the screen, so a card in slot 4 would have 45 minutes to wait. You can not use Show Queue Time with Time Banded for obvious reasons. We suggest it is used with Stacked and not Sticky because as the people in the queue move onto other panels (departments) the remaining time you have to wait can thus be read off.

Show Days Vertically

In some circumstances work will be assigned to engineers or technicians, the normal approach is one of a dummy card for the engineer (see ignore panel 1 above) with the panel representing the day of the week or month, and a job represented by a card being positioned in line with the engineer in the appropriate day.

With Show days Vertically, you must be using week view, a band is created for each day of the week, the day and date are shown. In this way no dummy card would be created but the panel label would be assigned to an engineer or gang. Cards automatically position themselves for the appropriate day and engineer within the week. They are sorted by start time & end time. To assign the number of slots available in each day use Project Settings Time Banding + tab, adjust the Slot Spacing and save.

Zoom

In version 1.3.0 zoom of 75%, 66%, 50% and 33% was introduced to enable more detail to be viewed on the screen.

Switch

Switch

Switch is there to quickly change between default e.g timebanded low level control and a week/month view. Fundamentally its an overview.

Filter

Enables the selection of selected cards by field or colour. When Filter is switched on a blank card will be displayed, by making an entry in a field or by using the drop downs on the field the board will be filtered to only retrieve cards which satisfy the entered criteria. Entries can be made in more than one field this would result in only cards which satisfy X AND Y. You can alter filter by colour or by panel.

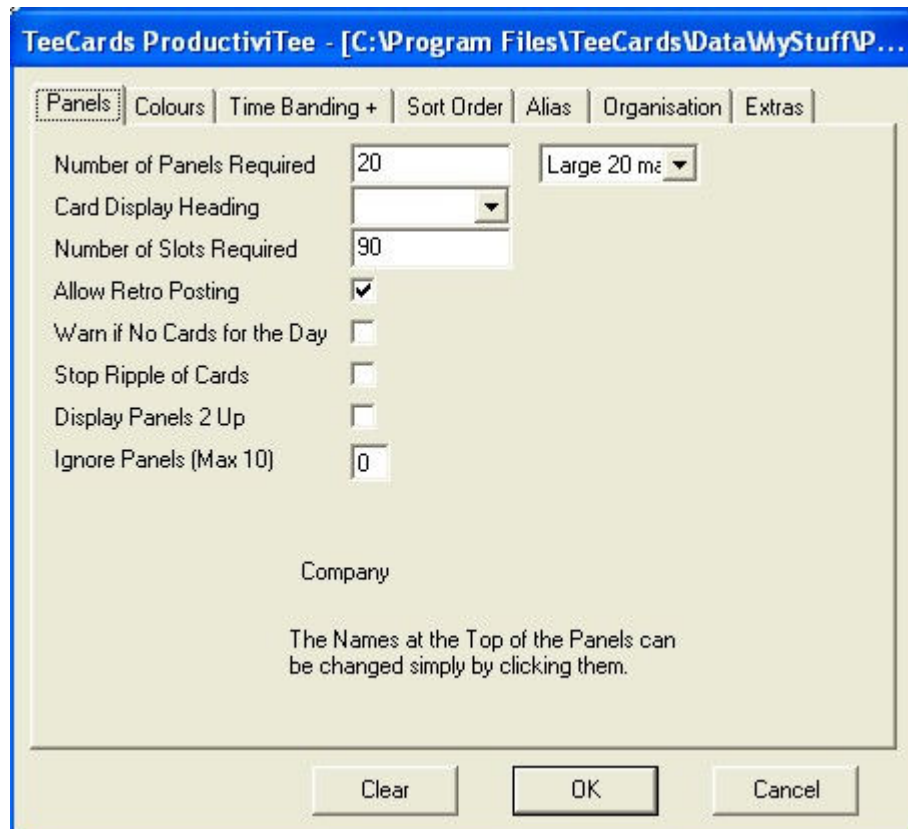
Project Settings

These settings are global for the board/project.

Hopefully the entries on the Settings screen are self explanatory however:

There are 6 tabs on the Settings screen

Panels



Panels, the number of vertical panels to appear in your Project. The maximum is 50

Card Display Heading, each Organization will have its own requirement here, some may want to see time other may want to see a car registration and others a name. It is best to choose this value on a second visit after you have decided upon the names for your fields in Alias. From version 1.3.0 you can have up to 5 fields shown on a closed card, simply keep picking from the drop down list, the card size adjusts to accommodate this and may restrict the number of cards you can have on the board. Note that in addition to the Value displayed on each card, by placing the mouse pointer over the card up to 4 values will be displayed, the values depend on whether Time Banding is switched on or off.

Number of Slots Required, in a non Time banded system you can choose the number of slots that you want to appear. In a Time Banded system clearly there is a minimum number of slots that are required. If you supply a value and then choose Time Banding if the minimum requirement and the value you have supplied disagree you will be informed

Allow Retro Posting. If your system is time or date critical you may not want to allow the creation of a TeeCard prior to Today's date. Tick this box to allow Retro Posting.

Warn if No cards for the Day. When you start each day the most recently used Project will be displayed, if there are no cards for the day a warning will be produced, similarly if you move to any date where there are no TeeCards.

Stop Ripple of Cards. On Big boards the refresh can be lengthy as cards ripple back onto the screen. By checking this box, cards will not ripple. It may be marginally quicker

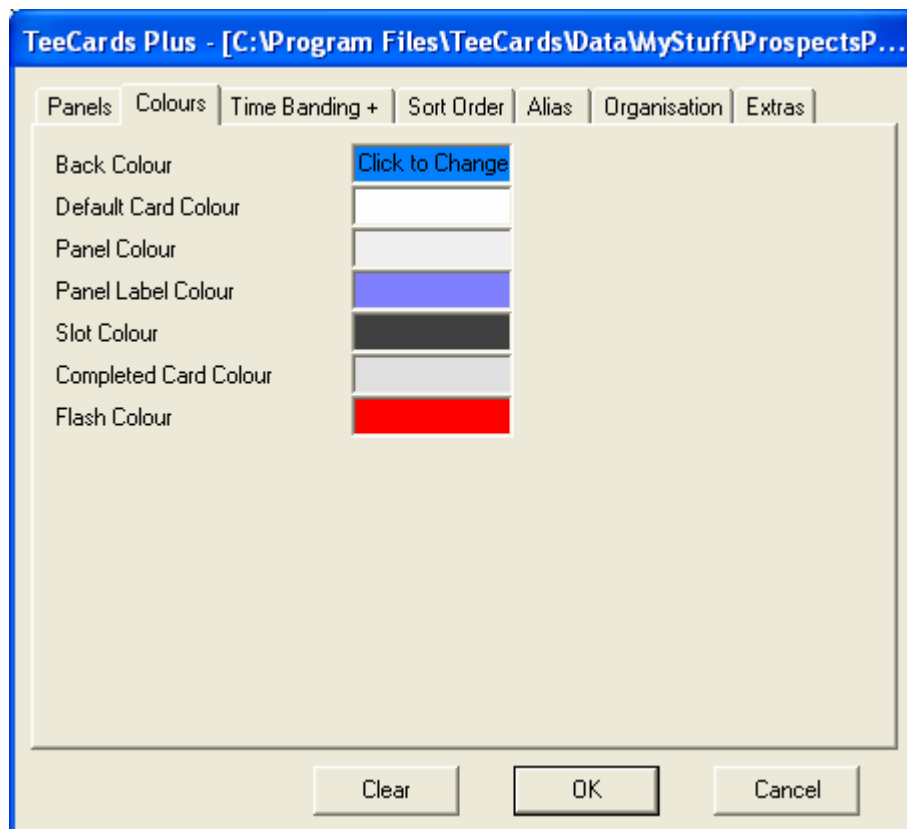
Display Panels 2 up. On Plus boards you can split the board 50% of the panels at the top and 50% at the bottom, this allows for up to 100 panels.

Ignore Panels. This has been centralised on the Plus system and allows for up to 10 ignore panels.

Note that the names that appear at the top of each panel can be altered simply by clicking them, a maximum of 24 characters are allowed for the label.

Colours

The system colours are configurable to change a colour click on the respective box and select a colour scheme which suits your needs. Bear in mind that if dark colours are chosen the text is always black, and specifically if dark colours are chosen for panel labels or for the back colour of the Project that the panel name of the Time Banding may not be clearly visible.



Back Colour. the Project Back Colour

Default Card Colour. The system is designed such that each card can have its own colour. The beauty of a T Card system is that the colour coding generally means something. However rather than having to select a Card Colour every time you create a TeeCard the card adopts this colour that you establish as default. As with all of these settings they can be changed to fit your requirements, the only comment would be consider other Users of the system.

Panel Colour, the default colour of the panel. All panels adopt the same colour.

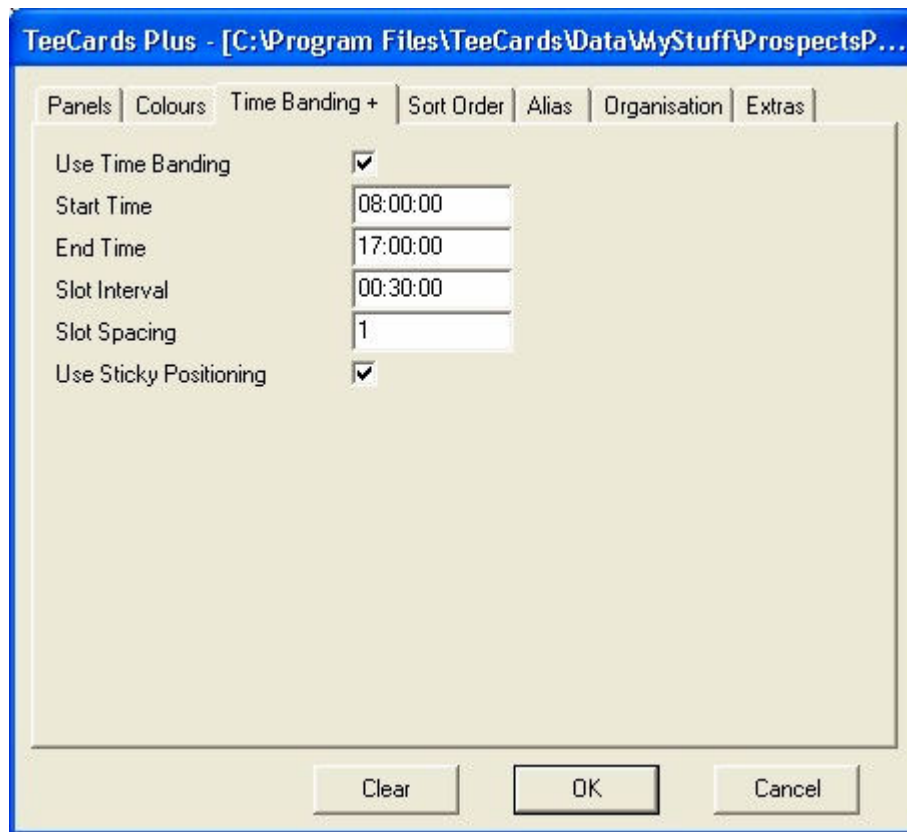
Panel label Colour, the colour of the label which appears at the top of each Panel.

Slot Colour, the colour of each of the slots in the Panel.

Completed Card Colour. Some organizations will want to know when the work on the card has been carried out. A check box on the card is ticked to show it is complete. If this box is checked then the Completed card Colour is adopted.

Flash Colour, it is now possible to make the closed card flash. You can choose the flash colour here. The card alternates between self and the colour chosen

Time Banding +



Use Time Banding check box, this advises the system that you want your TeeCards to be positioned according to the Start Time on each of the TeeCards.

The remaining entries are only true if Time Banding has been selected.

Start Time, the start of your working day this should be entered in a 24hour format as 13:59:00. The seconds are unimportant to the system.

End Time, the end of your working day, same rules as Start Time.

Slot Interval this can range from 1 minute to 24 hours. In reality a value of 01:00:00 representing 60 minutes or 1 hour or 00:30:00 representing 30 minutes is realistic.

Slot Spacing, this indicates the number of cards that can fit in one time interval, in one panel e.g. 4 jobs can be done in one hour but may not be at strict 15 minutes intervals. In the majority of cases this value will be set to 1. This value is also used in daybanded boards.

Use Sticky Positioning. The time banding screen also includes the check box to indicate whether to Use Sticky Positioning.

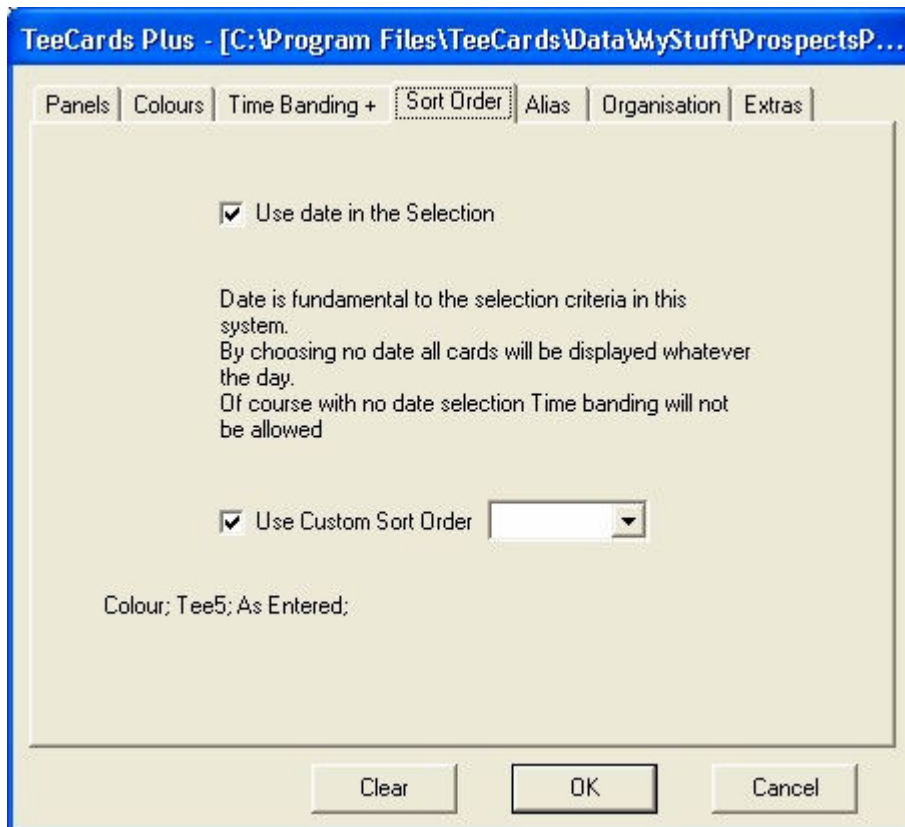
Sticky positioning was introduced as a result of Users requests, it uses a co-ordinate. In all other instances whether time banding is used or not the card is placed in the appropriate slot, and "hangs" in the slot. With sticky, the card will be positioned within the panel wherever it has been placed. Placement can be the result of 3 things.

1. Where the panel was originally clicked when creating a new TeeCard, note if the time is subsequently altered before save then the co-ordinate does not change. In theory this would not give a problem but see below.

2. If the TeeCard was created from the create new TeeCard button then a default value will place the card at the top of the panel.
3. If the Card has been dragged and dropped then the co-ordinate will adopt the dropped position.

If time banding is also checked then time banding takes precedence.

Sort Order



Sort Order is a relatively advanced concept for most Users, under most circumstances particularly if you are using Time Banding you will definitely want the TeeCards sorted by date, and by time this is fundamental to the Time Banding principle. However certain organizations may want to introduce their own sort order e.g. No date and sort each card by surname alphabetically. Or by date, profession, alphabetically, the possibilities are endless, but conflicts can be caused. There is no ability to sort the TeeCards in descending order.

To use your own Sort Order check the Use Custom Sort Order check box and select the fields on which you wish to Sort.

You may need to apply some thought to this choosing your primary, then secondary then subsequent fields on which the sort will be performed.

To reset the sort order and start again, press the Clear Button which appears at the foot of the screen. Note that this button only appears if you are using Custom Sort Order.

Alias

The screenshot shows the 'Alias' tab in the TeeCards Plus software. The window title is 'TeeCards Plus - [C:\Program Files\TeeCards\Data\MyStuff\ProspectsP...'. The 'Alias' tab is selected, and the window contains a table of fields for configuration. Each field has a text input box, a checked checkbox, and a second unchecked checkbox. The fields are arranged in two columns. At the bottom of the window are 'Clear', 'OK', and 'Cancel' buttons.

Field Name	Value	Checked	Second Checked
Tee_Start	Start	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tee_End	End	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Start_Time	StartTime	<input checked="" type="checkbox"/>	<input type="checkbox"/>
End_Time	EndTime	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Owning Panel	Loctn	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Removed		<input type="checkbox"/>	<input type="checkbox"/>
Completed		<input type="checkbox"/>	<input type="checkbox"/>
Tee3	Company	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tee4	Contact	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tee5	yymmdd	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tee6	Telno	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tee7	Mob	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tee8	Address1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tee9	Address2	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tee10	Address3	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tee11	Address4	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tee12	PostCode	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tee13	Supplier	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tee14	email	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tee15	Reason	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tee16	Source	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Tee17	Guess £	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Tee18	Users	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tee19	Invoices	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tee20	lastemail	<input checked="" type="checkbox"/>	<input type="checkbox"/>

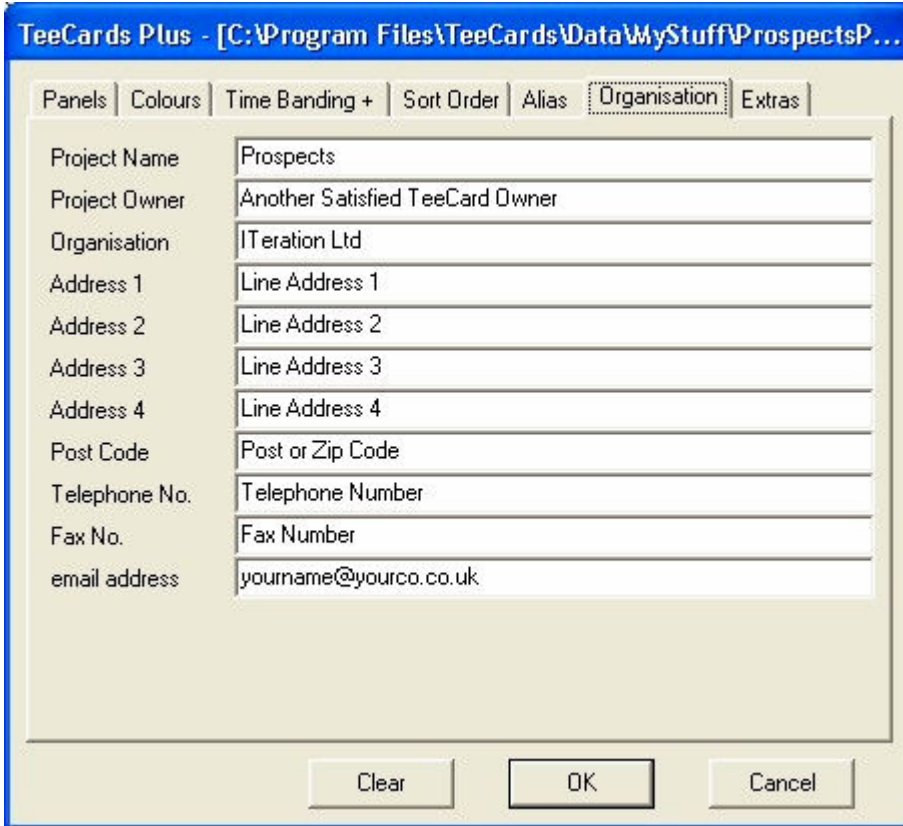
The Alias tab allows you to modify the names which will appear on your TeeCard thus personalizing the entries for your respective Project. Note that these values are used by the TeeCard, the Reports and any selection lists that rely upon them e.g. Sort Order, Report Composition etc. The check box corresponding to each entry must be ticked for you to make an alternative entry and for it to be used, if the entry is not checked it will be greyed and not enabled. If no entries are made in these fields then the default values e.g. Tee3 will be used. A maximum of 10 characters are allowed in this entry. It is best not to use all UPPER case as this takes up much of the room available for display.

Note that these alias's are used to build the list from which you select the Card Display Heading of your TeeCard, the list is created when you open the Settings screen. If you change the Alias's subsequent to choosing the Card Display Heading then for this reason a second visit may be required, change your alias's Save Settings, reopen the Project, Open Settings, select your Card Display Heading and Save Settings. The next time you reopen the Project the Card Display Heading will be used on each TeeCard.

The second check box when checked will cause a dropdown list to build on the respective field, this is indicated by an arrow on the right of the box. If the entry is not there it can be typed in, consequently over a period of time entries will build up for the respective field and you will be able to select the appropriate entry from the dropdown. Note that the list is built dynamically and is not stored in a separate table, the top 100 most common entries are retrieved and displayed in alphabetical order.

With TeeCards Plus you can also assign a level to each field, depending on the users level he/she will then be unable to access the field but he/she will be able to view the field.

Organisation



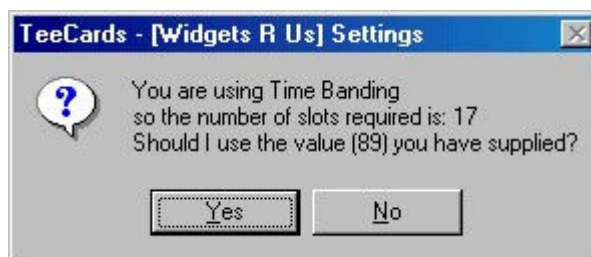
The screenshot shows the 'Organisation' tab in the TeeCards Plus software. The dialog box has a title bar with the path 'C:\Program Files\TeeCards\Data\MyStuff\ProspectsP...'. Below the title bar are several tabs: 'Panels', 'Colours', 'Time Banding +', 'Sort Order', 'Alias', 'Organisation' (which is selected and highlighted), and 'Extras'. The main area contains several text input fields with labels on the left and placeholder text on the right:

Project Name	Prospects
Project Owner	Another Satisfied TeeCard Owner
Organisation	ITeration Ltd
Address 1	Line Address 1
Address 2	Line Address 2
Address 3	Line Address 3
Address 4	Line Address 4
Post Code	Post or Zip Code
Telephone No.	Telephone Number
Fax No.	Fax Number
email address	yourname@yourco.co.uk

At the bottom of the dialog box are three buttons: 'Clear', 'OK', and 'Cancel'.

This tab holds details about your organisation. The fields of supreme importance are the Project Name, which forms a label at the top of the Project so you know which Project you are using and the applicable date, and the Organization which appears in the TeeCards window

Once you are happy with your Settings press the OK button. Depending on your entries you may get warnings, if you are warned about the number of slots then it may be advisable to change them.

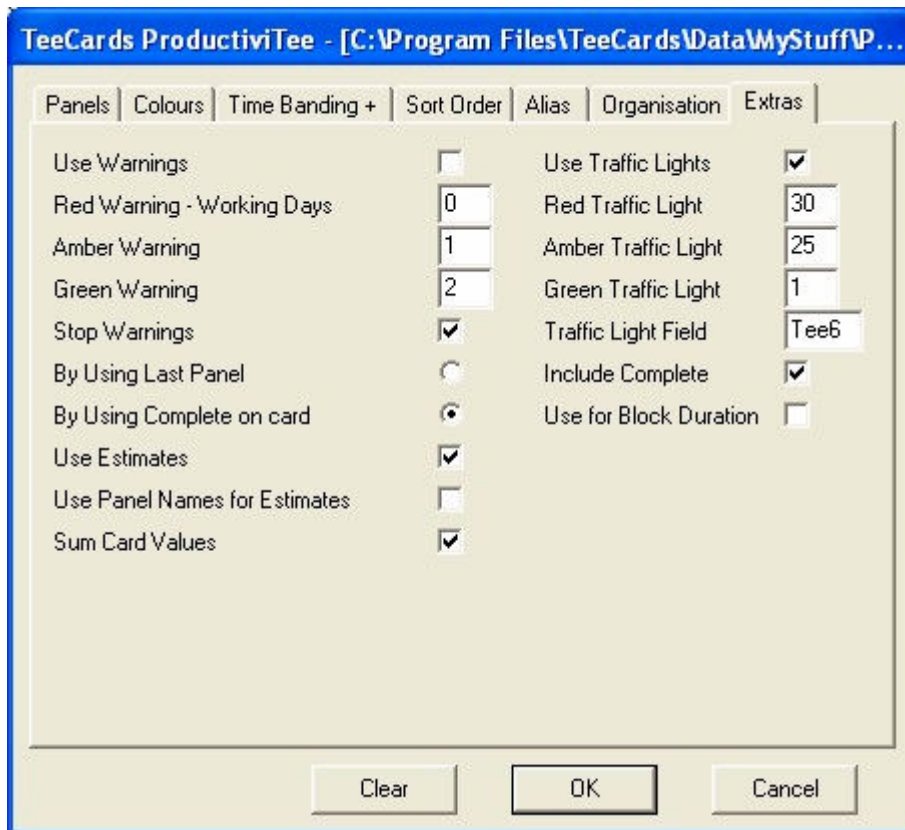


Note because of the complexity of the settings they will not take affect until you reopen the Project, so simply reopen the Project. This should be born in mind when making changes on a multi user system, particularly if your counterpart is unaware of changes that you may have made.

Click on File, select and Open your Project.

You are now ready to start using your TeeCard System.

Extras - TeeCards Plus



In TeeCards Plus there are a number of useful facilities, these are encapsulated on the extras tab which is not visible in TeeCards. This enables warnings to be displayed on the cards, and check boxes appear to indicate whether warnings should be used and the period when each of the respective warnings should be invoked. Warnings can be stopped by either positioning the card in the last panel i.e. the assumption being it has travelled though the works process or by checking what is initially known as the complete indicator on the card.

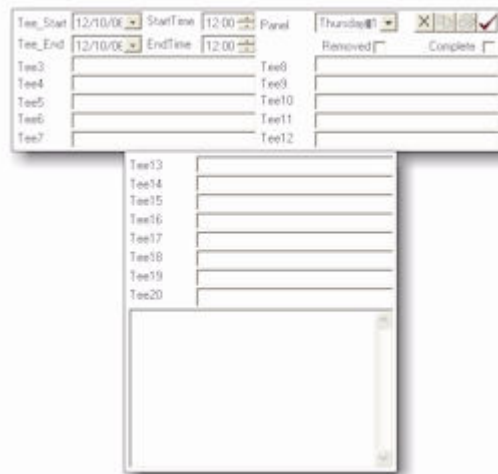
Similarly the 'reverse' of the card can be used to capture estimates or values. When a new card is created you are automatically presented with the reverse of the card if this is active. To access the reverse to do an update use Right Click on the tick.


TeeCards Plus/ProductiviTee (v1.3.3) now offers traffic lighting, this causes the label at the top of the panel to display a value and change colour (Red Amber or Green depending on the values entered) This is useful for capacity planning. The value entered can also be used to stretch a timebanded card rather than the (normal) start and end times. If you require further information please contact us.

TeeCards Plus now offers 10 levels of security including the ability to bar a user from a Project. If you would like to know more about TeeCards Plus please contact us. Proof of identity may be requested before instructions are provided on the extra level of control. By using these 10 levels you can control who is able to do what with a card etc, and enable or disable fields on the card. TeeCards Plus also incorporates an audit trail of where the card has been and when.

Creating a TeeCard

There are basically three ways to create a TeeCard. There is a fourth, which we will cover under Replicate.



The TeeCard can be created by clicking the New TeeCard button , or simply click the appropriate position on the panel. If Time Banding is selected the card will adopt the time where you clicked. With some very little practice you will become quite accurate. Clicking toward the lower side of a slot will cause the card to open with that start time this can then be adjusted if required. The TeeCard will be positioned in the slot below where you clicked i.e. within the time band you have selected. Note you are not actually clicking a slot, the slot is a useful reference point for a time band which effectively passes through the slot. You can also use **Fast Card Find** combined with **Fast Card Create**, they appear on the menu bar, these are creation not search facilities. Use FFF to find the card by a selected field, use FFC to pick the card. The card will be a replication of the last card that satisfied this criteria, but with the date picker date. In this way Master cards can be created as templates.

The Start Date: becomes the date displayed on which you created a New Card, so if you have moved to a day in January one year hence, then that will be the Start Date, alternatively change it with the mouse or by typing. The End Date is always assumed to be the same day and will change as soon as you leave the Start Date, if this is not the required date then adjust accordingly, bear in mind that this will mean that a job runs over several days, and probably is not what you require.

End Date: see Start date. This is for reference purposes in Standard but is used in Plus.

Start Time: If you are unhappy about Start Time of the card then it can be incremented or decremented, by highlighting the hours or minutes and clicking the up and down arrows. Alternatively type the new value. Providing you have set your time intervals correctly the End Time will automatically adopt the Start Time plus the interval.

End Time: See Start Time

Owning Panel This drop down list is created from the Panel labels which appear at the top of each panel so it is personal to your Project. If you clicked a panel to create a card it will adopt the panel that you clicked, if this is incorrect select an entry from the drop down list. Note that the owning panel is critical to the system but it does not store the name that you select, the number of the panel is stored consequently you can change the panel labels at anytime. This may be appropriate if you quickly want to reapportion work etc. Keep in mind that the panel label applies "forever" not just for that day. See period views on this.


Removed TeeCards

If you no longer wish to display a TeeCard then the Removed button can be checked. The Card is not actually deleted it is simply removed from display. There are ways of finding removed cards and un checking the Removed box so that they reappear. You can also report on them

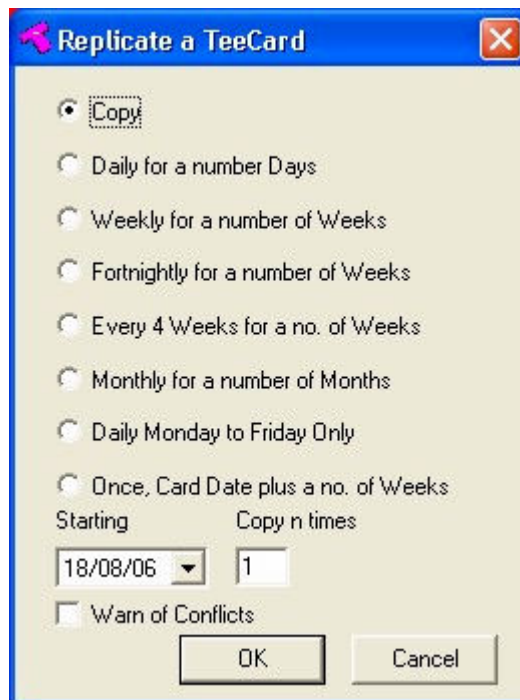
Completed TeeCards

Some organizations want to reflect that a job is complete the Completed Check Box enables this and the card will be displayed with the appropriate colour chosen in Settings, to indicate that it is Complete.

Whilst there is no reason why you should not do it, replication of a complete card would appear to be superfluous.

Exit  Close the TeeCard without any changes. The board will not refresh.


Replicate  the TeeCard



In order to save you time and effort a Replication facility is included. This enables you to create the same card up to 999 times in one shot. If you intend to do this ensure that the data you wish to replicate is correct before you commit yourself, however TeeCards can be deleted in bulk see Remove Old TeeCards.

Thus you can quickly schedule a new appointment with the same details n number of times on a number of days, weeks or one specific day. Clearly this is advantageous for repetitious events e.g. a School Timetable.

Note that right click of the replicate button enables single card transfer.

Print  the TeeCard To quickly print a TeeCard then hit the print button that appears on the TeeCard, a form is produced looking like a large TeeCard. Right Click of this button gives information in a txt format, a small txt file is created. This can be copied and included in an email or even attached to an email.

All Done  save the TeeCard.

This commits any changes that you have made whether the card be new or being updated to the database. If you have amended any of the Dates and Times and these conflict with TeeCards that are already in existence then you will be advised. In which case you should either reschedule your job or increase the slot availability within each time interval if you allow more than one job within the time interval. On the other hand this may be a one off situation when you allow the jobs to stack on top of one another. In this instance if 2 jobs have the same slot time and the occupancy only allows for one TeeCard, then the TeeCard stacks on top of the original but slightly below. If there is a third occurrence this stacks on top of the second, and may not be immediately apparent although warnings will have been given. This scenario may occur if for whatever reason you adjust your time banding.

Each time the Card is saved the screen will refresh to reflect your changes.

Colour the colour of the card can be changed by clicking on any part of the Top part of the TeeCard. We favour the spot in between the right of the End Time field and the Remove

d label. A colour selection picker opens from which you can select the colour of your choice. Select it click OK and the TeeCard will change colour. This colour will be adopted by the TeeCard when you click done. The clarity of the colours will depend on your system set up, and is independent of this system.

All other fields can be changed as you wish.

Note that with the introduction of v1.1.2 dropdown boxes can be put on any of the remaining fields, this enables a value to be chosen from a dropdown list or typed in if it is not present. The list is built dynamically, rather than being populated from a separate table, consequently over a period of time the list will grow. The top 2,500 most common entries for that field are displayed in alphabetical order. If a field has a dropdown list this is indicated by an arrow when you enter the field.

You can launch applications from the base of the T by clicking the labels. TeeCards will use you settings to e.g. launch an email, open a picture, document or spreadsheet.

Field Length the useable fields which appear as Tee3 onwards can contain up to 30 characters. As previously mentioned the memo field can contain up to 65,000 characters. 30 characters were chosen as this is basically the extent of the viewable area, this can be changed to 50 easily and more by experienced users.

Edit/Copy/Paste while no specific Edit facilities are available on the menu Replicate has been included in order that a card can easily be copied. However when the card is open by selecting text and using the right hand button of the mouse the text can be manipulated in the usual ways i.e. Undo, Cut, Copy, Paste, Delete and Select All. This enables text to be copied rapidly between cards or fields if necessary.

Attachments/Links while no specific provision is made for attachments per se if you click on any of the labels on the base of the card an attempt will be made to launch the document in the field adjacent to the label, so you can launch a web site (www.teecard.co.uk), an email (e.g use info@teecard.com) a picture or a document (e.g. S:\Specs\Abigspec.doc), providing the format is supported by your PC. You can now use multimap and postcode e.g. multimap DY9 0PT, streetmap and mapquest and zip code e.g. mapquest 60559. Note that if Tee12 is names as PostCode and a valid postcode provided then Tee12 will fire off to multimap. If it is named as Zip it will fire off to mapquest. Apologies to Other nationalities please contact us if this facility would be of use. Note that if you are post code reliant we do provide a chargeable look up service to the award winning Postcodeanywhere facility

Flashing cards can be made to flash in their closed state thus drawing attention to them, they alternate between self-colour and a chosen colour (default is black). The check box that enables this is located in the top right hand corner of the memo field on the card.

Highlighting any of the fields Tee3 to tee20 and the memo field can be highlighted it was difficult to find a suitable method to do this because of drop downs but if the label next to the field is [Ctrl] and clicked then the colour picker appears and a colour can be assigned to the field in order to highlight the text.

Pictures can be shown on closed cards. If Tee12 is named as Picture in the Alias then a check box appears after the label Picture. If this is checked TeeCards will look for the contents of Tee12 and try to display them as a picture on the board when the card is closed. The picture is auto sized to scale for the width of the panel and the scaled depth. The prestring and posstring option mentioned below can be useful in this regard.

The 30 character restriction still applies so path names need to be kept short, but see Field Length above and the information below.

Note that an option is now available to enable launching and passing parameters to other programs. Using this methodology you can enter a prestring and a posstring so you could easily launch documents simply by typing their reference, as opposed to the full path name. This option works on all text fields and is available in the ProductiviTee and SQL versions. For further information contact us.

Open an existing Project

Depending upon the nature of your business you may find that you have the requirement for several Projects. Once a Project has been created you can switch between Projects at will. Similarly providing that your system has been configured correctly you can have several sessions open, each containing a different Project or giving different view of the same Project.

There is no need to save the Project either when you exit or when you open a new Project, TeeCards and settings are automatically saved when they are created or updated.

Projects can be opened from a desktop shortcut. The syntax will be similar to this.
"C:\Program Files\TeeCards\TeeCardsPlus.exe" /C:\Program Files\TeeCards\Data\MyStuff\RemindersPlus.mdb
There is a space between exe" and /C

Save this Project As

Saving the Project as *newname.mdb* is a simplistic way of archiving the data. More sophisticated methods could be employed and providing that you have good network security there may not be a good reason to do this. But if the system is of importance to you, saving it regularly could save a lot of heartache should anyone destroy or corrupt your data. Depending on the sophistication of your organization the method of archiving may be simple or complex. This option will simply save the underlying database with the name you provide and in the location you provide which may be a networked drive, a zip disk or a floppy disk or even locally on your PC. This saved copy can be either copied back or opened from its new location should the necessity arise to do so.

A Snap Shot of the Screen

We have recognized that in many instances a hard copy of the Project will be required. This option provides a screen dump of the Project. We recommend you dump to a bmp file modify as you see fit then print.

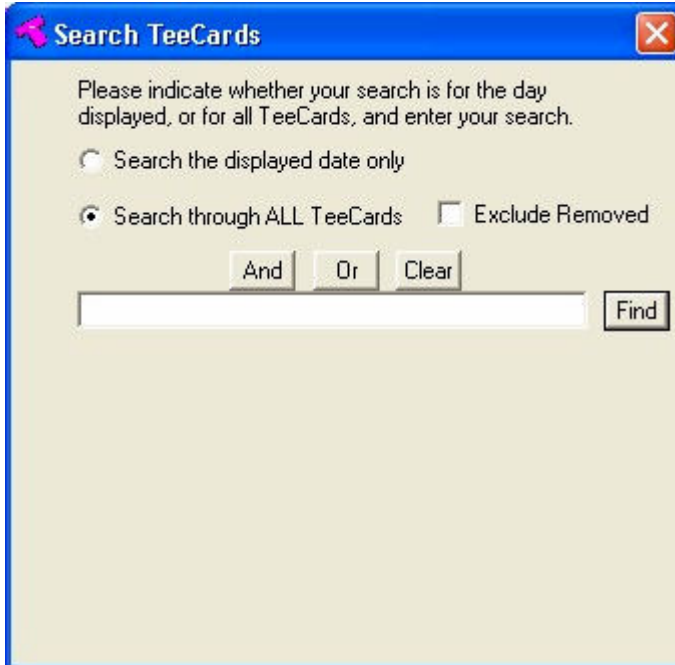
Create A New TeeCard

It is also advisable to read the TeeCard section in conjunction with this section.

This is one way to Create a New TeeCard. Using this method the Time will always default to Midday, and the Owning Panel will always default to the first panel.

Right Click of this button in Plus modules gives a legend. The legend can be modified using the superuser functionality.

Find TeeCards 



There will be occasions when you need to retrieve a TeeCard, and this is one of the fundamental benefits of the system, you don't have to pull out all of those physical cards and wade through them, we are going to do it for you. When you open Find, you are given the option to search by day or search through all the TeeCards. Depending on a number of factors; the Number of TeeCards in your system, the power of your PC and Server and the complexity of the Search this may take a few minutes. Most searches are quick, and certainly if you can narrow the search down to a specific day then it should be very fast.

You can construct searches involving "And" and "Or" and thus you should be able to return what you are looking for, if you are not experienced at writing simple queries it make take you a few tries. Try something simple first that you know exists and increase your confidence.

Your search criteria is displayed as you construct it. All fields on the TeeCard are searched.

If no TeeCards can be found you will be advised.

If TeeCards are found you will be advised of the number that have been found, the search criteria used and the location of the TeeCard i.e. Date Time and Panel. If you click on the Grid the TeeCard will open and you will be able to read the detail from it.

Don't forget to Clear your criteria before conducting another search.

In TeeCards Plus modules you can now Filter the board, so if you switch Filter on (normally under the Switch menu option), a TeeCard will appear.

By making entries in the respective fields only cards that satisfy that criteria will be displayed. So this may be a customer or something similar, multiple criteria can be applied BUT they must be exact. Similarly if you change the colour of the card, and it is not the default colour, only cards which are of that colour will be shown. By exiting the Filter card or unchecking the Filter option, the filter will be switched off.

Re Analyse the TeeCards

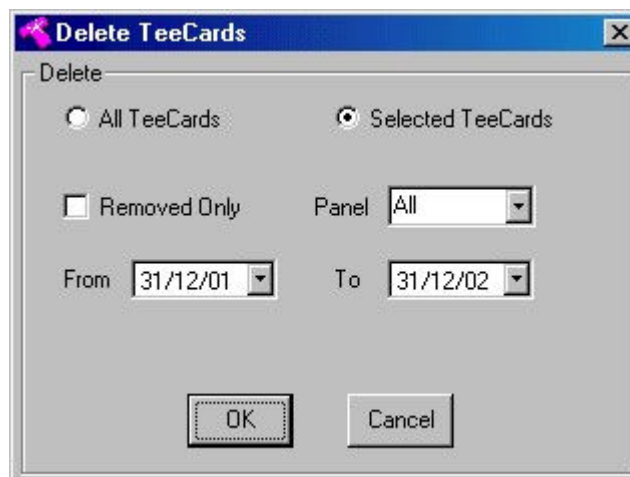
This should only be seen as a temporary display. The best analogy I can offer is where the Project is a School, the panels represent Classes or Forms and the TeeCards represent Lessons. Clearly each Lesson will have a Subject and a Teacher. We might choose Subject as our Card Display Heading, but we decide to Re analyse the data by Teacher to see where the Teacher is at any given time and what he is Teaching, rather than by which lesson the Class is taking. Select the "Teacher" from the drop down list and Click OK. The system then does a quick calculation to determine if your request is viable. If the field that you are trying to analyse is blank in any of the cards then sorry no can do. If the field you are trying to analyse by would result in more than 32 columns then sorry no can do. Also remember that analysis is over this Project only, other Project are not incorporated.

The Project may need to resize, The Panels may be increased/decreased, the slots may be increased/decreased but these measures are only temporary and should not affect other Users working normally. If another user is also trying to Re Analyse the data then you will experience problems. It is inadvisable to Drag and Drop or create new cards in this mode and any attempt to do so will be prevented. This is fundamentally because all of the owing panels are changed temporarily to accommodate your request creating a TeeCard in a Panel when the data is flipped will result in it appearing incorrectly when it reverts back to its normal state.

You may see references to Flip mode when this occurs, Flip and reanalyse are one and the same thing.

Note In view of the number of known users of this facility it may be removed at some time.

Remove Old TeeCards



In order to maintain the efficiency of your Project the number of records retained within the Project should be kept to a minimum where possible. Of course if the nature of your business is to constantly look back at old data then this is impractical. However this approach with the Save as approach mentioned earlier should keep most Users in good stead.

The form should be self explanatory but the two radio buttons enable removal of All TeeCards, or the ability to select TeeCards. Thus the selection enables, Removed TeeCards Only if required, by a specific panel or all panels, and between specific dates; choose from the drop down calendar.

Performance will depend on a number of factors, particularly the power of your PC and the power of your Server if you use one. In addition the size of your Project in terms of panels and slots is a mitigating factor. The maximum display of the Project is 5000 TeeCards i.e. 50 x 100. Depending upon the factors mentioned above this can take some time to refresh. If we take the analogy of a time banded display from midnight to 22:00 hours with 15 minutes slots i.e. all possible slots occupied, and we move forward to a specific day, there are in essence 3 main stages: Clear the existing TeeCards, Retrieve the New TeeCards from the database, Populate with the new TeeCards. In the instance operation 1 and 3 are largely dependent upon the power of the PC you are using, the retrieval is largely dependent upon the location and speed of the database host which may be a server or may be your PC. During testing on a 64mb 500mhz PC, with 1 million plus records in the database, and a 2848 TeeCard display this took approximately 30 seconds depending upon the selected date. We felt that this was unacceptable but realistically we could conceive of very few if any scenarios where this was likely to happen. Under normal circumstances the retrieval and population of an 8 panel, 20 slot, 25,000 record database was virtually instantaneous, and this more readily represents the average user. This coupled with ever increasing improvements in performance should lead to most Users being satisfied with the system performance. Please contact www.TeeCards.com for further assistance.

Compact the database

You are unlikely to see any benefits from this action unless you delete records.

Once Old TeeCards have been removed the database should be compacted, this will effectively remove any unwanted space from your database and make it run more efficiently.

Refresh the screen

As previously mentioned if you are a user in a multi user organization, then you may wish to refresh the screen before committing yourself to a decision based upon the viewable area. Thus since you displayed your Project your colleague may have added another TeeCard in the slot you wish to occupy. It doesn't actually matter to the system as it will advise you that the slot is occupied, but professionally you may want to do this before offering a response to a client or customer.

The Calendar

Back one day

The drop down date picker provides the ability to navigate quickly through the months and years, but this button will simply move you to the previous day. If your selection is by a period e.g. week or month then this will move a week or a month at a time.

Select a date from the drop down calendar

The drop down date picker provides the ability to navigate quickly through the months and years, Today is always shown at the foot of the calendar and today is circled in red. The selected date is shown by a grey circle. Arrows enable you to quickly move through the months and thus the years. The lower date is 1/1/1601 and the 31/12/9999. So you have a few years to choose from.



Forward one day

As for back one day, but forward to the next day.

Moving the TeeCard

The TeeCard will be positioned depending upon a number of factors which were discussed in Settings, the prime positioning factor is the owning panel whether that be permanent or temporary in the case of re Analysed data. The next determining factor is the date, if the Use Date in the Sort Order box is checked (Settings, Sort Order) then only cards for that day will be selected. The next factor determining the position will be dependent on the Time banding Check box, if it is checked the system will put the TeeCards in the slot which corresponds to the Start Time. If Time Banding is unchecked the position of the TeeCard will be the order in which they were entered or if you have selected a particular field to sort on then they will be in that order.

If you have chosen Sticky Positioning this will precede sort order, but using Sticky and positioning more than one card in exactly the same place would be odd. A word of caution if you intend to use sticky don't use the TeeCard icon to create the card, unless you intend to drag and drop afterwards, as all the cards in the panel will stack on top of one another.

If you decide that you no longer want the card to appear in that position then it can be moved, the same rules will still apply, you can not determine the absolute position of a card by placing it there, but you do have some control. Just as when you created the card you can click the card and alter it's details, thus date, time and owning panel and any other relevant detail can be changed. Thus in this way a card can be moved from one panel to another. The Card can also be moved by using Drag and Drop.

Drag and Drop a TeeCard.

A TeeCard can be Dragged and Dropped to any visible Panel. To do this position the mouse over the TeeCard to be moved, right click the mouse button, and keep the button depressed a move icon will appear, with a little practice the horizontal bar of the icon sign can be used to accurately position the TeeCard within the panel and effectively at a specific time. When you are happy with the position simply release the button.

The icon can be changed to any valid icon, see the option on the Settings Menu, it is advisable to utilize one of the icons provided, and they are easier to use if there is a horizontal bar running through the icon.

But note when you Drag and Drop effectively you are editing the TeeCard, you will be probably be changing the Start and thus the End times and the Owing Panel.

In some circumstances this will not be allowed see Read Only Mode.

Once a card is created or edited the screen will refresh to reflect the new situation. Note that if you are editing a card you may get a message advising occupancy of the slot.

Read Only mode

You can tell if you are in read only mode in 2 ways:

The caption at the top of the form will say your Organization name and Read Only User.

If you click on password a greyed option box will indicate your authority level.

If you're in read only mode you are probably important. But sensibly someone has decided that we can't have you interfering with the TeeCards. So when you are in Read Only Mode there are a number of things you are not allowed to do:

You can't create a new TeeCard

You can't edit an existing TeeCard

You can't Replicate an existing TeeCard

You can't Drag and Drop a TeeCard as this is the equivalent of an edit.

You can't Delete TeeCards.

You can't alter the Settings

Other than that, the worlds your lobster.

You can see what everybody else can see.

You can reanalyse the data.

You can produce reports.

You can use find

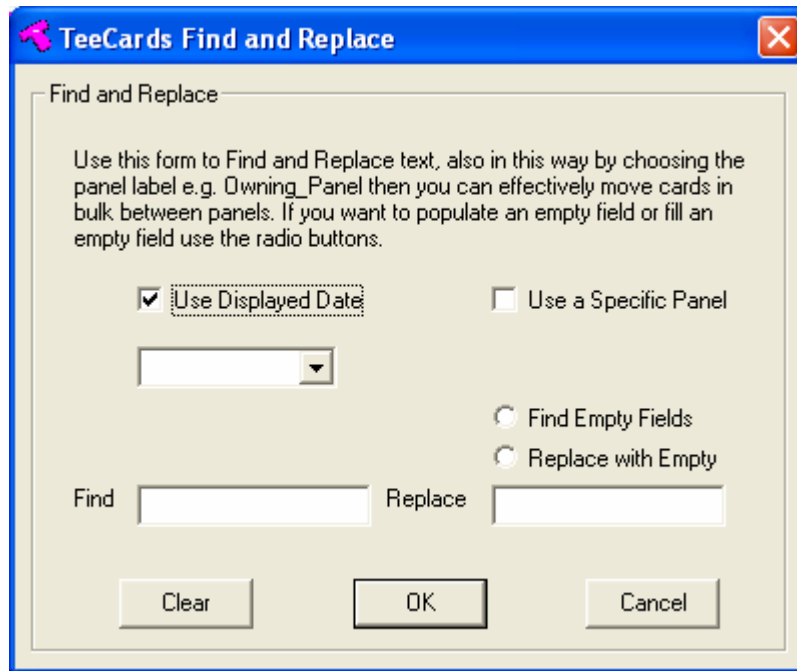
You can even save the Project as something else or create a new Project, but if you do your options are limited as above.

Administrators bear in mind that security is not the forte of this system it is trying to replace something that may have been or may still be displayed on a wall to all and sundry. If in doubt please contact www.TeeCards.com. See also the comment regarding passwords.

Find and Replace

Find and Replace is accessed from the Edit menu, there is no button for it. For safety reasons changes can only be made a field at a time. Depending on the following selection this may or may not affect all TeeCards within your project.

This is a powerful tool and much damage could be caused. For that reason it may be advisable to save the Project before you commence.



Use Displayed Date.

If this button is checked only TeeCards for the displayed date will be affected by any changes. If it is unchecked All records will be considered.

Use a Specific Panel.

By using this check box you can only affect changes in a specific panel as selected from the drop down list, this list will correspond to the labels you have positioned at the top of each panel.

First combo box.

Select the field that you want to replace from this list.

Second combo box.

Select the Panel you wish to change from this list, the list will not be displayed if the Use a Specific panel box is not checked.

Find empty fields

We have recognized that in some cases you may want to populate an empty field throughout the project or dependent upon other criteria i.e. date and panel, e.g. defaulting a specific value. If you wish to do this click the radio button, and this will enable a search for those labels which are empty. The value you enter into the Replace box will be used to populate these empty fields.

Replace with empty

We envisage that there will be occasions when you wish to make a particular field empty, to do this click the radio button. You must supply a value for us to search for, if that value is found then the whole field is set to empty. Of course you can not find empty and replace empty, there would be no point.

Find.

Enter in this field the value that you want to replace, Wildcards are used so for example if you have chosen to make changes in the memo field then e.g. the text in the memo field may say " all the best to you and yours"; replacing "you" with "my" will result in all the best to my and myrs" however if you had replaced "you " (note the trailing space) with my this would not have happened. Also see Wildcards below.

Replace.

Enter the value you wish to substitute. Dates should be entered in the short form applicable to your PC so UK = dd/mm/yy, US = mm/dd/yy.

Time should be entered as hh:mm:ss, note that a lot of damage can be caused by changing dates and times, it may be advisable to save your database before making these changes. If you are using time banding and you change either the start time or the end time the corresponding value will be incremented or decremented by the slot interval you have set in Settings. If you are not using time banding the value will be incremented or decremented by one hour.

Similarly if you are trying to set Cards to Removed or Cards to Complete, use N for cards which are Not set and Y to set. So to change all visible cards to Complete, selected the completed field from the drop down list, enter N in the Find text box, enter Y in the Replace text box. Any other values will not result in a satisfactory change.

Moving Cards from one panel to another in Bulk.

This is useful in a situation where panels are often shuffled from right to left e.g. at the end of the month. See also Panel Insert Delete and Move.

From the drop down list select the label that Correspond to the Owing_Panel, this is the 5th entry in the list, in find enter the number which corresponds to the panel e.g. 7 in Replace enter the panel number you want to move to e.g. 6. The numbers are clearly visible in the top left hand corner of each panel.

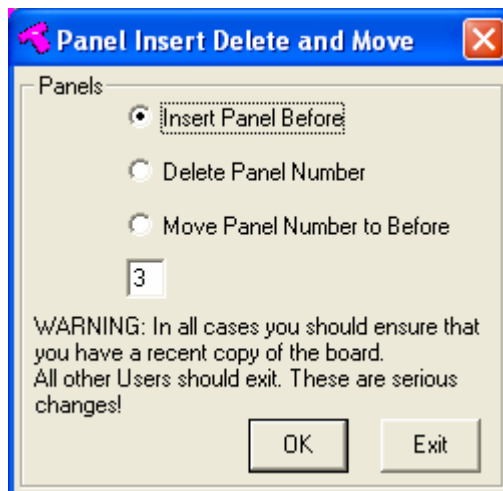
Once the Cards have been moved to the appropriate panel change the panel label if required, this can be done by clicking the label.

Wildcard

The percent symbol (%) can be used on it's own as a wildcard in the Find box, should you wish to completely replace the content of a field whatever the existing content. Consequently in this way all dates could be set the same, all colours could be set the same. To use this wildcard option a single % symbol must be entered in the first position of the Find box, otherwise the wildcard option will not be invoked.

Panel Insert Delete and Move

You can now Insert a new panel, Delete an existing panel and Move an existing panel. Simply right click the label at the top of each panel and a form will be displayed. This offers 3 options. You should make sure that you have a copy of the board before you undertake any of these amendments. The form will open with the panel number you have right clicked but this can be changed.

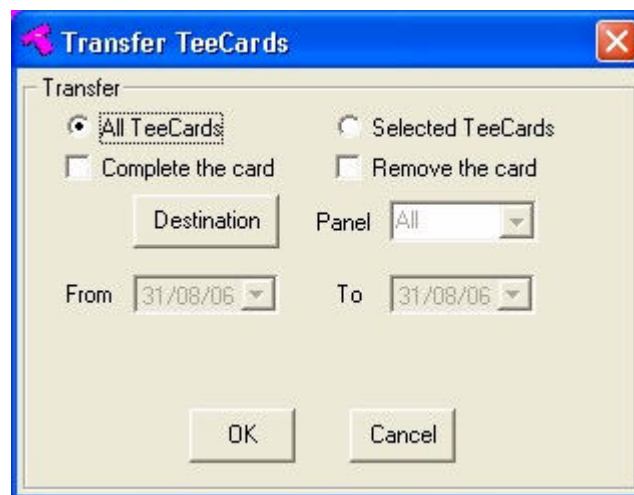


In the case of an Insert you must indicate the panel BEFORE which you want the panel to be inserted. Note you will be warned if the new number of panels would result in a greater number of panels than your chosen number. The Audit Trail will be amended to reflect this. So an insert Before 5 creates a new panel at 5 changes 5 to 6, 6 to 7 etc.

In the case of a Delete, you must indicate the panel you wish to be deleted. The panel will be deleted however the cards will not they will be indicated as removed, so you will not see them but they will still be in the database. As there is no all encompassing answer the audit trail will NOT be amended.

In the case of a Move, you must indicate both the panel that is being moved and the BEFORE position you wish to move it to. The From and Before panels should not have the same number, you can move either up or down. As with Delete the Audit trail will not be amended.

Transfer TeeCards



This facility is provided in order that TeeCards can be transferred with relative ease between boards/projects. You can not transfer TeeCards to the same database, if you wish to do this use Replicate instead. In all instances you must choose a destination project.

All TeeCards

If you select all TeeCards then as expected all TeeCards within the project will be transferred.

Selected TeeCards

In this mode you have the option to transfer TeeCards from a specific panel or from all panels, and by date. Note that the 'To date' must not be before the From date, this would result in no TeeCards being selected.

The From and To dates default to the date of the date picker on the main form.

There is now the option to transfer one card, this is available form the selected TeeCards drop down. You may be prompted for the card ref you wish to transfer. If you are here as a result of right click of replicate it knows the ref. You also have the option to remove and complete on transfer. Caution be careful, some chump could remove every card.

Reports

There are 4 types of reports:

All of the TeeCards for the day printed like a TeeCard.

All of the TeeCards for the day by panel showing the contents of the Owning Panel, the Start

A Report Builder

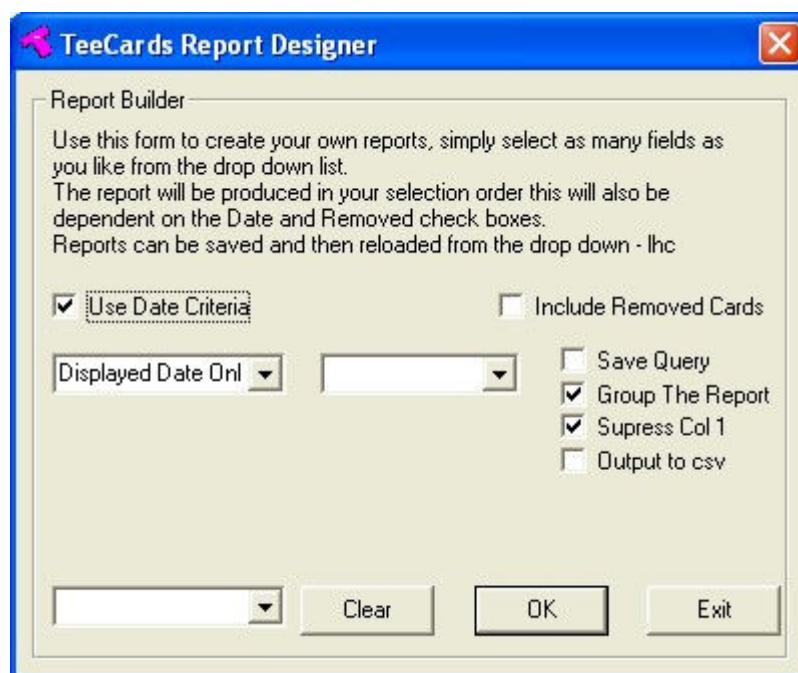
This enables the creation of user definable reports. If 5 or less fields are chosen then a Portrait report will be produced.

If 6 or 7 fields are chosen a landscape report will be produced.

If 8 or more fields are chosen then a csv file is created. CSV (comma separated variable) is a common format where each of the respective fields is separated by a comma. This format is readily understood by spreadsheets and databases and would thus enable you to take the data into another package and analyse it. The option now exists to output any number of fields to csv format, in addition it will try an automatically launch the csv handler, normally Excel

If Save Query is selected then those fields which have been chosen will be retained, by user, and displayed next time you use the Report Builder.

Group the Report will group the records by the first chosen field then in the sort order according to the chosen fields. Suppress Col 1 enables the chosen grouping field to be displayed on every line or not. Group does not work with CSV files.



The image shows a screenshot of the 'TeeCards Report Designer' dialog box. The title bar is blue with a red 'X' button on the right. The main area is light beige and contains the following elements:

- Report Builder** section with instructions: 'Use this form to create your own reports, simply select as many fields as you like from the drop down list. The report will be produced in your selection order this will also be dependent on the Date and Removed check boxes. Reports can be saved and then reloaded from the drop down - lhc'
- Checkboxes: Use Date Criteria, Include Removed Cards, Save Query, Group The Report, Supress Col 1, Output to csv
- Two dropdown menus: the first is set to 'Displayed Date Onl', the second is empty.
- Buttons: 'Clear', 'OK', and 'Exit'.
- A third dropdown menu at the bottom left.

Passwords

As previously indicated this system is not designed to be bomb proof, as a result of demonstrations two attempts at "security" have been included, firstly we have the Read Only user, but note it is up to the administrator at the time of installation to determine the Read Only ability of each user. There is also password protection. This is an encrypted password. If the user fails consecutively 3 times he/she is thrown out of the system but the password is not destroyed. There are now 10 levels of user in TeeCards Plus including barring.

The password can be reset on the Users machine. Please contact TeeCards.com to discover how to do this. Proof of identity/purchase will be requested.

Troubleshooting

Whilst all care and consideration has been taken in creating this system problems will occur.

We will endeavour to rectify them where we can and they should be reported to www.TeeCards.com

Performance is poor

As mentioned elsewhere this is dependent on a number of factors.

The capabilities of your PC; available memory, processor speed.

Consider upgrading the machine but check the other factors first.

The location of the supporting database, and the capabilities of the machine on which it resides. This may also be due to network traffic.

Consult your administrators or Technical Support Staff for further advice.

The number of records on the database. Consider having a number of smaller databases, do you need all of these records on one database. Could you effectively archive records by saving as, then deleting records from this database up to n number of days ago then compacting this database?

The number of deleted records on the database. As you probably know when records are deleted they are only marked as deleted by the software that handles the database, they do not actually get flushed from the system until the database is compacted. Thus you may possibly be reading far more records than you need to because of this fact.

One of the biggest factors affecting performance is the size of the Project, if you don't need panels reduce the number, likewise with slots. Consider reorganizing your Project into several smaller Projects if this is practical.

System requirements. A minimum of 64mb is recommended and a processor speed of at least 300mhz. A minimum screen resolution of 800 x 600 is required 1024 x 768 normally provides a better picture.

A common error is to reduce the number of slots or panels or delete a panel whilst cards still exist in the panel, we do try and overcome this issue but occasionally due to the ever growing complexity of options the situation can prove difficult to resolve, as a result at start up there is now an Assist Mode, this appears in the bottom left hand corner of the login screen. If this is checked you will be able to start TeeCards without showing any cards, thus you can go into Settings and make modifications or produce reports or conduct searches to try and identify offending cards.

Incorrect positioning of TeeCards.

This may be the result of sticky positioning check the Settings, Time banding tab.

Sticky positioning was introduced as a result of Users requests, it uses a coordinate. In all other instances whether time banding is used or not the card is placed in the appropriate slot, and "hangs" in the slot. With sticky the card will be positioned within the panel wherever it has been placed. Placement can be the result of 3 things.

1. Where the panel was originally clicked when creating a new TeeCard, note if the time is subsequently altered before save then the co-ordinate does not change. In theory this would not give a problem but see below.
2. If the TeeCard was created from the create new TeeCard button then a default value will place the card at the top of the panel.
3. If the Card has been dragged and dropped then the co-ordinate will adopt the dropped position.

Strange things could potentially happen if the user messes about e.g. start with time 1 slot create a 13:00 hr appointment, move to time 2 slot create a 13:00 hr appointment, abandon and use sticky. The determined Y co-ordinate would be different for the 2 slot example to the one slot example, essentially the scale is nearly twice the size therefore although both appointments are at the same time the co-ordinate is different. So now when the user uses Sticky time banding is irrelevant the Y co-ordinate is used but the two cards will not appear in the same horizontal plane. Its simple to correct simply Drag and Drop but on a big project this could be painful.

It would be illogical but not impossible to determine the co-ordinate from the time, but this is self defeating, the whole purpose of sticky being to allow the user to place the TeeCard exactly where he or she wants it to be.

The simple answer is try and decide from the outset whether you are using time or not and whether you are using sticky or not.

Reports

Whilst all attempts have been made to get the report sizing correct, there would appear to be a dependency on the default value set by your default printer which applies to your machine. The sizing for the reports uses Letter paper. The margins are taken into account by the application, thus if you have an unusually large margin or the paper is defaulting to something other than Letter you may experience a message advising that the paper width is insufficient for the report. If this is the case check your default printer settings and if possible change them.

TeeCard is not totally visible

The System was developed on a 1024 x 768 display, there should be no problems with viewing at this resolution. However on 800 x 600 the foot of the TeeCard may be clipped. If this is the case, maximize the size of the Project Window, re open the TeeCard it should now be fully visible.

Time Banding values in Settings

The format of the time values is set to long time and should display as 13:59:59, the seconds are not used in time banding. However the display is affected by Regional Settings which can be found in the Control Panel. Depending on this setting the value for the time slot interval may appear as 12:30:00 AM when you actually entered 00:30:00. Even though the appearance is not as expected the time banding still works on the relevant interval. If you have no preferences set the format in Regional Settings to HH:mm:ss.

MDAC 2.5 Configuration Dialog Appears After Every Restart

On some Windows 95, 98 and NT machines when you first start Windows you get a message e.g. "Windows is setting up the following items" this is a known Microsoft error. We have only had reports on 95 machines. see the following for the [resolution](#). Microsoft support (Q268062). A Microsoft fix is provided on the TeeCards CD in the Support folder, called rem_dlg.inf, right click and then choose install.

Known Errors

As at the time of distribution these were the known errors.

- The TeeCard is actually 4 Forms, Under certain circumstances if the TeeCard is left open and the user switches applications and then returns to the TeeCard system, but clicks the TeeCard System window icon in the taskbar rather than the TeeCard icon which appears as a blank, then when the user realizes the TeeCard is still open as the System window is disabled and clicks on the TeeCard icon then only the Top part of the TeeCard will appear. Efforts are being made to stop this happening. Simply close the TeeCard either using Exit or Done and if necessary reopen. Never Ever shoot off to another application again!
- When you choose to open an existing Project the directory or folder should default to the directory in which the current project resides. This works fine in 98 but problems were experienced in 95, the directory defaulting to the Desktop.
- During trials it was not unknown for the time bands to be out of alignment with the slots. This would appear to be as a result of where the application was compiled. If you consistently experience this problem please advise us at www.TeeCards.com
- Using the find option, this is not an error but is included here as such. When the database is searched ALL fields on the file are included, that encompasses fields that you do not consciously have access to e.g. the user id. So a search on e.g. a name might return the contents of the user id field which you won't be able to see when you open up the TeeCard.
- Whilst not an error if you are using week view or month view you want the respective date to appear at the top of each panel. However 1 or more panels consistently show the same date. This is because the panel heading is not empty, somehow you have clicked the panel and then clicked ok rather than cancel, consequently the date has been stored, the heading is not empty, and is therefore used every time. Open the panel press the space bar as indicated click ok. Roll forward to refresh the board correct dates should now be used.

We are here to help, if you need help or advice consult the website and if you still can't find what you want contact us. helpme@teecard.co.uk +44(0)1562 884297

Additional support is available from www.t-cardsystems.com in the USA. Similarly if TeeCards is not doing something you would like it to do let us know.

