EVENT PLANNING SYSTEM™

*Room and Activities Scheduling,
Planning, and Calendar Software*

USER'S GUIDE

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The ZLC Events Planning System

The ZLC Events Planning System (EPS) is designed to assist communities and organizations with their planning and organizing of events, space, and equipment requirements.

The foundation of EPS is the Room Scheduler. Room Scheduler tracks all rooms allocated to functions and ensures that double-booking will not occur. This program is explained in more detail below.

The additional modules are various Event Planning functions, the GuestManager, and Today's Events. These programs are also explained in more detail below.

The ZLC Room Scheduler

The ZLC Room Scheduler is specifically designed to help busy communities and facilities schedule their many varied events in many rooms and locations. It automatically checks for scheduling conflicts and it easily handles creating, changing, and deleting entire series of recurring events. It instantly prints out calendars and many other schedule reports.

The booking screen has many pop-up views that assist with locating available times and coordinating various events and locations while creating or changing events. And it has many ways to categorize events for easy reporting and viewing of just a desired set of events.

This is a simple system to operate, yet it gives you unlimited capacity and flexibility in tracking your schedule. Every lookup list is user-defined, and every event can have notes, a speaker / presider, a staff assignment, and a Group / Title assignment.

The checking for scheduling conflicts is transparent to the user -- and that includes any overlap of the scheduled times at all. The recurring events functions include same-day-same-week functions as well as regular recurring events, and also includes full conflict-checking.

There are built-in categories that are appropriate for most common activities, plus a user-defined category list to handle any other desired categorizations. There is a list of special days that automatically notifies users and also labels events on those days. Any of the special days can also be designated as a reserved day. The special dates list can be edited by the user, so it can be as detailed as desired.

The Room Scheduler was developed using Microsoft ACCESS, the leading database system for this type of program. This means that the system links very tightly to other Microsoft programs such as Word and Excel. It also means that if you have your own copy of ACCESS, then you can use it as a report-writer to create your own reports, if desired, or to adjust the EPS reports.

You can run the Room Scheduler as a multi-user system very easily, so different people can set up different services, or even different parts of the same service. You can have read-only stations for displaying the schedule without allowing changes.

The ZLC Event Planner

The ZLC Events Planner adds specialized planning information to each Event, as appropriate for that type of Event. Every event has the Basic screen, plus separate "ADD-ON" detail-screens for additional details for each of the following purposes:

> Meetings
> Room Rentals
> Food Service
> Work Orders
> Workshops
> Equipment
> Event Activities and Functions

Each of these screens are optional -- any event can be scheduled simply with a Group / Title, Room, and Staff / Setup Notes. The system also has special functions built in for setting up recurring events, and optionally for scheduling Guestrooms.

Although this is a comprehensive and powerful system, the Windows interface allows us to keep it fairly simple. Most of the data screens only appear when you call them up, and all of the screens work in the same way.

EPS was developed using Microsoft ACCESS, the leading database system for this type of program. This means that the system links very tightly to other Microsoft programs such as Word and Excel. It also means that if you have your own copy of ACCESS, then you can use it as a report-writer to create your own reports, if desired, or to adjust the EPS reports.

You can run the EPS as a multi-user system very easily, so different people can set up different services, or even different parts of the same service. You can have read-only stations for displaying the schedule without allowing changes.

1   Installation and Registration

Installation

EPS is installed into your Windows system using an automatic Setup process. Once installed, you start EPS by clicking on the icon created by Setup.

The installation should only take a couple of minutes:

1. Insert the CD into the appropriate drive.

2. Go to Start, then Run and enter δ:\event_planner\Setup.exe, then press the <enter> key (where δ is the Drive letter).

3. Push <enter> for each question that appears to accept the default installation.

The Main Screen

The default installation will place the program on your Drive C hard disk. This is best for optimal performance. The installation also sets up EPS linked to the Demonstration Data File, which can be used to familiarize users with the system, if desired. See Chapter 2 for linking (setting up) a new data file.

Registration

EPS requires an unlock code before the software will run all operations. The first step in using EPS is to register and obtain the unlock your software. You will find a registration sheet in the front of this guide. Fill it out and fax it to ZLC at the number shown on the registration sheet. We will fax back an unlock code complete with instructions.

Unlock EPS:

Registration Screen

1. To register the software go the Setup screen from the Main Menu.
2. Click on the Register with ZLC Software button.
3. Follow the instructions on the registration sheet.
   Be sure to enter the Registration Name exactly as it is shown on the registration sheet.
   Also enter the unlock code exactly as it is shown on the registration sheet.
4. You must specify at the upper right whether you are registering the Room Scheduler or the Event Planner.
5. Once you have filled in all the appropriate information click on the large Register the System button. If you get a message saying the package is not registered, go back over steps one through four to ensure the information is entered **exactly** as shown on the unlock code sheet. If the result of clicking the Register the System button is that you are returned to the Main Menu, then you are properly registered.
6. Once you have unlocked EPS proceed to Setup.

Multi-User Installation

All of ZLC's programs should be set up the same way for multi-user situations. They work the same way on Windows-for-Workgroups (3.11) networks, Windows 95 or 98 networks, Windows NT networks, or on Novell networks. There are no special requirements for the file server, because all that happens there is that a single shared data file resides there (No ZLC programs are running on the server).

For multi-user operation in a network situation, you must install the program onto each user's station in the normal way, then link each station's program to the single shared data file on the file server. This arrangement allows each user to maintain his/her own selections and other temporary tables -- necessary for proper multi-user operations. The station requirements are the same as if it were being used to run the program stand-alone (single-user). These station requirements are the same as for running Microsoft ACCESS, since the ZLC programs all run using ACCESS.

Here are the actual steps needed to accomplish the multi-user installation. First, install the ZLC program onto each desired station from the CD-ROM or diskette set. Then copy from one of the stations to the shared hard disk (network file server) the data file to be shared (usually EPDATAxx.MDB). On each station start up the ZLC program, go into the SETUP screen, and use the "Change Company" button to tell the program where to find this shared data file (the path specification must always include a Drive Letter) and click on REATTACH. After you get the "Successfully Reattached" message, you should exit the program. The next time you start it, you will be working in multi-user mode on that station. You can verify this by making a change on one station (and saving it) then going to another station to see the change reflected.

Finally, you may need to re-register the ZLC program, if the shared data file has not previously been registered. The registration information is stored in the data file, so each time you reattach to a new unregistered data file you must use the REGISTRATION-BY-FAX information sheet on that data file. If you reattach to a data file which was previously registered, then it will have that information already and will run appropriately.

Multi-Company and Multi Site Operation

ZLC programs let you set up any number of separate data files, and switch between them using the "Change Company" button in SETUP. You are asked for the name of the .MDB file and its location (as a DOS path, including the drive letter), then the program will shift over to that specified data file. You can set up as many of these data files as you wish, as long as they are all at the same site geographically. Using a ZLC program for multiple sites requires the appropriate multi-site license from ZLC Software Corporation.

Installation Guide for Display-Only Stations

This CD contains two different ways to set up Display-Only stations for the ZLC EVENT PLANNER systems. You can set up as many of each type as you need (on a single local-area-network). For each such station you must install, from this CD, one or the other type of Display-Only program, then link that station into the single shared data file (which you must have previously registered to ZLC Software).

The first type of DO station will only run the Today's Events display. It will automatically keep the display updated to be current, in case you wish to leave it on all the time (unattended), such as a lobby display.

The second type of DO station will run all of the selecting and reporting parts of the ZLC Event Planner system, but not allow any changes to the information. Thus, this is for your users who need to look up activities more interactively, to see more levels of details, even print out Calendars for their focused needs, but who should not be setting up or changing the schedule. They will need appropriate training and support, unlike the first type of DO station.

To install the first type, use Windows Explorer and go on our CD to the folder entitled: DISPLAYONLY. Locate the file in it entitled SETUP.EXE and double-click on it, then step through the installation process. Be sure to locate the program on a local hard disk, and do not try to run it over the network – only the shared data should be out on the network. After the installation, you can copy the startup icon onto the station's Desktop (use START-SETTINGS-MENUS-ADVANCED or call for assistance).

To install the second type, you do the same but use the folder entitled DISPLAYONLY-SELECT on our CD. Locate that folders SETUP.EXE and run it instead.

Finally, the first time you run either type of DO station, click on SETUP and you will see that it just brings up the Change Datafile and Reattach screen (If you set up the password on the SETUP function on your own station, the DO stations will require that password to get to this screen). Use this screen to attach to your shared data, and the DO station is ready to go.

Setup

EPS has been designed so that very little setup is needed in order to initially operate the system. The Setup screen contains the organization's basic information such as name and address, where you set up the location of data files, and where the software is registered.

Setup is also where you enter the names / descriptions for Groups, Individuals, Rooms, Special / Reserved Days, and for Activities details lists of Food, Beverages, Texts, Speakers, Topics, Entertainment, and Music. These names / descriptions are used on "Lookup Lists" in the various functions throughout EPS.

Basic Organization Information

The basic information is name and address. Please note that the name of the organization **must** be filled in **exactly** as it is shown on the registration sheet, or the registration unlock code will not work.

Setup Screen

Other information on the Setup screen

Field title	What it does
Auto Conflict Testing	Ensures two events and / or rooms are not booked at the same time.
Activate Security	Enables security password for SETUP functions.

How System Security Works

There are two security level to be understood in the ZLC Calendar system.

1. Administrator's Password.

    If you turn on the Activate Security? in SETUP, you can set up an administrator's password. That password will be required to get into the SETUP screen, once you set it up. Then you can designate one or more system administrators to be the only ones who can change the location of files, the Lookup Tables, etc. The only Lookup table the users can then access is the Groups / Titles List -- that table can be called up from the BOOK A ROOM and the EDIT A ROOM screens by double-clicking on the label of that data field.

2. ACCESS97 Groups and Users.

    If you have Microsoft ACCESS on your computer then you can activate additional levels of security, and you can get into the design of the Calendar's formats for certain screens and most reports. This is only recommended if you have some expertise in ACCESS screen and report layout. To enable your use of ACCESS design functions, first activate ACCESS's built-in security (by assigning a password to user ADMIN), then you create Groups and Users to coincide with the Groups and access levels built into the ZLC Calendar program.

    Here is how to do this:

    We have set up two Groups: CALUSERS and CALADMIN. If you set up these two Groups on your computer(s) then the members you set up in each group will have rights as follows.

CALUSERS – can run the Calendar program but not access any design view nor add new objects.

CALADMIN – can access the design views, and thus change as desired, all of the Reports, all of the Lookup List screens, and most of the ADDON-detail screens. This can be a very good way to get the system much closer to the way you like to see things, but you must limit your changes to cosmetic changes and avoid any structural changes. If you do render a screen or report inoperable, you may have to reload the original program to fix it, so we recommend that you limit your changes to only doing the following:

moving data elements around on the screen (without deleting any);
adding only Label-type elements and elements from the "Field-List";
changing the colors, sizes, and fonts;
if an element is not desired, just set its Visible property to NO – rather than deleting it. (it is useful sometimes to set all elements with Visible=NO to a strange color, so they stand out in design-view).

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Field title	**What it does**
Change Data Path	Tracks the location of the data file you are using. The data file has the extension .MDB and contains all of the shared data tables.
	Normally Change Data Path is used only when the system is installed.

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How to Create a New Data Set

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1. Click on the Change Data Path button.

2. Enter EPDATAxx at the Filename field - do not enter the .MDB extension (it will be attached to the file name automatically). The xx is the version of data structure appropriate for your Event Planner version. Usually the Room Scheduler Plus and Event Planner Plus versions use the data file named EPDATA14, and the Room Scheduler Deluxe and Event Planner Deluxe versions use the data file named EPDATA15.

Note: The EPDATA14 file name may change when an upgrade is installed, requiring a conversion from the old to the new.

3. Enter the data path on the second line in the format: δ:\directory, where δ is the hard disk drive where the data files reside, and directory is the name of the directory where the data files are stored.

    Note: EPS comes connected to Sample Data files. The filename is EPXMPL14.MDB. When ready to set up your own data connect to EPDATA14; do not use the SampleData for your live data files.

4. Click on the Re-Attach button to complete the change over to the new data path. The cancel button when clicked reverts to the old data path.

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Field title	What it does
Register with ZLC Software	See Chapter 1 Installation.
Batch Changes	This function lets you specify a complete set of events and change them all simultaneously. It can be accessed through Setup or the Find, Change screen from the Main Menu
	To use this function, you must specify a set of events with the same Start Time, same Room, and same Title/Group. You also specify the new values for those items it can change: Time, Room, Private?, Publish?, and Title/Group. You will see a list of events with both the before and after values, and must select Proceed to carry out the changes.

Lookup List Maintenance   These lists contain the names / descriptions for Groups, Individuals, Rooms, Special / Reserved Days, and for Activities details lists of Food, Beverages, Texts, Speakers, Topics, Entertainment, and Music.

The descriptions entered here are used on "Lookup Lists" in the various functions throughout EPS.

There is no limit to the number of records that may be entered on each Lookup List.

List titles may not be changed, but list content is changeable at any time – and the change will be reflected in all Events in the history file.

Order of Lookup List Set Up

1. Groups.
2. Individuals.
3. Rooms.
4. Special / Reserved Days.
5. The remaining lists can be done later.

How to Add, Change or Delete Lookup List information

1. Place the cursor / arrow in the list you want to work on and double click on the mouse.

2. To **add** to the list click on the blank line at the bottom of the list and enter the appropriate information Click or tab to the next field and enter the appropriate information.   When you exit that line, it will be saved automatically.

Note: If you leave a "key" field blank or enter a duplicate value, you will get an error upon the Save. Use the Esc key to undo the error and thus proceed.

3   To **change** the list click on the Title field you wish to change and type over the old information. Click or tab to the next field and change that information if it changed when the Title field data changed.

4. To **delete** from list click on the box to the far left of the line which contains the item to be deleted (an arrow should appear in that box, and the entire record will be highlighted). Press the delete key, when the OK message appears press the Enter key.

5. **Multiple deletes**. You can delete a group from a list if the items are consecutively listed, that is, one follows the other.

Click on the "record selector" box at the far left end of the first item to be deleted.

Click on the last item to be deleted while simultaneously depressing the Shift key. All of the items will be highlighted.

Press the Delete key, and click on OK.

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3   Room Scheduling and Event Planning

The Book a Room / Event section of the ZLC Event Planning System is the area where information as to time, date, and type of activity, for a specific room / event is set up. This is the function which initially books the room / event.

The Book a Room Screen

This is the Book a Room screen for both the Room Scheduler and the Event Planner systems. With the Event Planner, you will see a series of *Details* buttons appear next to the *Activity* boxes; these lead to additional screens on which very specific information regarding the event and its activities is maintained. The *Activity* boxes may still be used with Room Scheduler to categorize the event; but the additional details screens will not be available.

Overview

Use the ADD function on the Main Menu to call up the BOOK-A-ROOM screen, on which you specify the Basic event information. The absolute minimum required for a new event is the Date / Times, and a Title / Group. Assigning a Location is optional. Other options are the Speaker, Staff and Setup Notes, the Location, and the Activity categorization / details.

Throughout the system, when you leave a screen it automatically saves new records and / or changes. So once you start filling in a new event, it will exist unless you use the DELETE button before leaving the screen.

The SAVE button saves the event without leaving the screen (until you save it, you can instantly lose all changes if you hit the ESCAPE key). Also, when you SAVE or RETURN, the system will check for any conflicts with other events that are scheduled to use the same room during the same time period (It will show you all such conflicting events in a pop-up window). Note that when you SAVE you are still on the same Event. To create a new Event, you should use the NEXT button.

Another feature of the ADD function is to track Special Dates and Reserved Dates. Events on Special Dates will show the Title of that day just below the date-buttons area. If you try to schedule an event on a Reserved Date, the system will tell you that it is a Reserved Date.

Getting Around on the Screen

There are a few basic mouse clicks and keystrokes you should know in order to move around easily on any screen in EPS. Mastery of these keystrokes will help significantly in the operations of the program. For an expanded explanation see Appendix A.

1. **Exiting screens**. In the upper left hand corner of each screen (excepts reports) is an icon of an open door. Click on this icon to exit. Some screens will have the word Return on them; in that case click on the word to exit.

2. **Save.** Use this button to save new information or information on a room and event that has been added or changed.

3. **Next.** Takes you to a blank screen to add a new booking.

4. **Cancel.** Click on Cancel to clear the screen.

5. **Print.** This function will print the screen contents directly to the printer.

6. **Record buttons and arrows.** Some screens have these items located on the bottom left side of the screen (the BOOK A ROOM does not). The first number shown indicates the record number (i.e, entry) the cursor is resting on.

7. **Scrolling.**

   PgUp and PgDn. To move quickly through a list use the PgUp and PgDn keys. Use of these keys located on the computer's keyboard moves the cursor through the information on the list one screen at a time.

Ctrl + Home. Simultaneously depressing these keys moves the cursor to th first data record for information shown on the screen.

Ctrl + End. Simultaneously depressing these keys moves the cursor to the last data record of the current list.

8. **Arrows**. Use of the directional arrows (up, down, left, right) located on the computer's keyboard moves the cursor from field to field, one field at a time.

9. **Tab.** Moves the cursor forward from field to field, one field at a time.

10. **Ctrl + Tab.** Moves the cursor back one field.

11. **Data fill.** Many fields have look-up lists which have been defined in Setup. Also, there are many search functions in Event Planner System. Data fill is a method for entering this information using a shortcut. Simply enter the first letter(s) of the item and the Event Planner system will fill in the remainder as it identifies the letter(s). When the name or item you want appears press the Enter or tab key.

How to Book a New Event

From the Main Menu click on the **Add** button.

Time / Date

1. Dates may be entered using the buttons to the right of the date field, or by just typing the date. The plus and minus buttons under the *Mo, Wk, Day, Wk Mo* labels are for one unit at a time. That is plus / minus one day, one week, one month. Using these buttons simplifies data entry.

2. Time (from beginning to end) may be entered in the same fashion as the date. See step 1 above. Do not include setup time here, that is done a little later; only include the starting and ending time of the actual event.

3. The *Avail* button will produce a screen listing of everything scheduled for the specified date. Room Scheduler automatically searches for availability and will not double book a room. However, this screen is useful to view what else is happening that day.

4. Private and Publish. Check either on or both of these boxes if useful for later selection and selection options.

5. Setup Time. Click on the plus button to enter the amount of time allowed to get the room ready before the event begins. Conversely, use the minus button to reduce the setup time if you need to modify it.

6. Set up recurring. Select the frequency of the recurring event from the lookup list. See separate section below for a detailed explanation of how the recurring function works.

People

1. Title / Participants. Click on the arrow to the right and select a participant (or double click on the *Title / Participants* shaded title area). If the participant is not on the list, enter the name manually. (See Chapter 2 to permanently set up a new name on the Lookup List.) **This field must be have an entry.**

2. Speaker and Staff. These are optional fields. To select a Speaker or staff member either select a name from the Lookup List, or enter in the name. (See Chapter 2 to permanently set up a new name on the Lookup List.)

3. Avail. This button appears by each of Title / Participants, Speaker and Staff fields. When used a list appears on the screen that shows what that person is already booked for on that day.

4. Event Setup. This area is available for any notes you may wish to enter concerning the event.

Location

1. Select the room in which the event is to take place from the list shown on the screen. (If the room is not listed, go to Setup and enter it through Lookup List Maintenance. See Chapter 2.)

2. Avail. Shows the times for which the specified room has already been booked.

## Recurring Room and Event Scheduling

There are two types of Recurring Event entries which may be set up in EPS, those determined by Frequency and those determined by Day-of-Month. The Frequency type is based upon the number of times an event occurs ,and the starting date that it begins. For instance, if an organization will be holding a Spaghetti Feed on the tenth of each month, and you would like to schedule a room for an entire year for this purpose you would use the *Set Up Recurring Activity* screen.

The Day of Month function is for an event that occurs on the same day of every month. Using the Spaghetti Feed example from above, let us say that the event falls on the third Wednesday of each month. For this type of entry you would use the *Day-of-Month Recurring Activity* screen.

EPS will check to see if the room is available for all the recurring dates requested. It will also check to see that none of the dates are *Reserved Special Dates*.

You will be notified when there is a conflict in dates you will notified and have the opportunity to make the appropriate adjustment.

Figure 5The Recurring Activity Screen
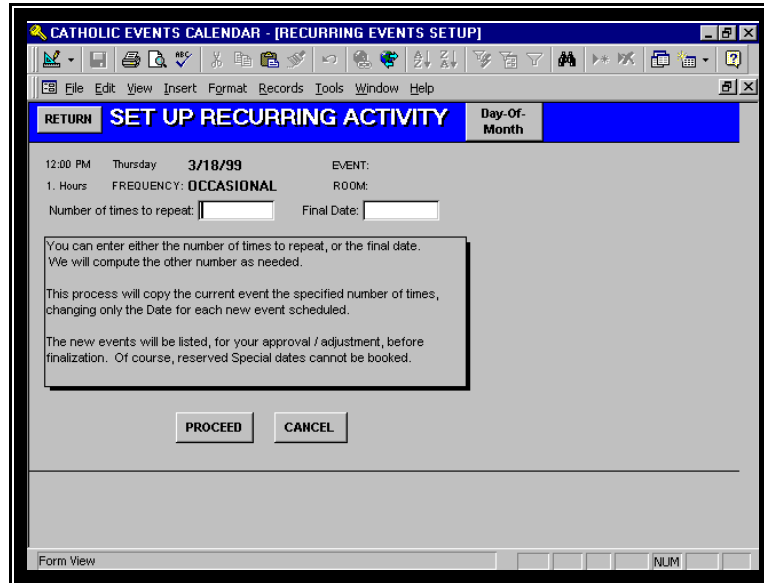
Frequency Method of Recurring Activity

From the Main Menu select and click on the **Book a Room** button.

1. Fill in the appropriate information in the *Time / Date, People, Activity, and Location* areas.

    This is an important step, if the information is left blank EPS will not know how to schedule the room / event

    Information such as the date, event and room number is automatically transferred to the next screen (discussed in step 2).

2. Click on the pull down menu next to the *Frequency* field of the Time / Date section. Select one of the following: annual, bimonthly, biweekly, daily, monthly, occasional, one-time, quarterly, semi annually, semi monthly, or weekly.

From the Book a Room screen, click on the **Set Up Recurring** button.

1. Enter the frequency of the event in the *number of times to repeat* box. Tab to the *Final Date* box. This date is automatically calculated when the frequency is entered. (Conversely, if you enter the ending date first and tab back to the number of times to repeat box the frequency will be calculated automatically.)

2. Click on the *Proceed* button.

**Day of Month Method
of Recurring Activity**

From the Main Menu select and click on the **Book a Room** button.

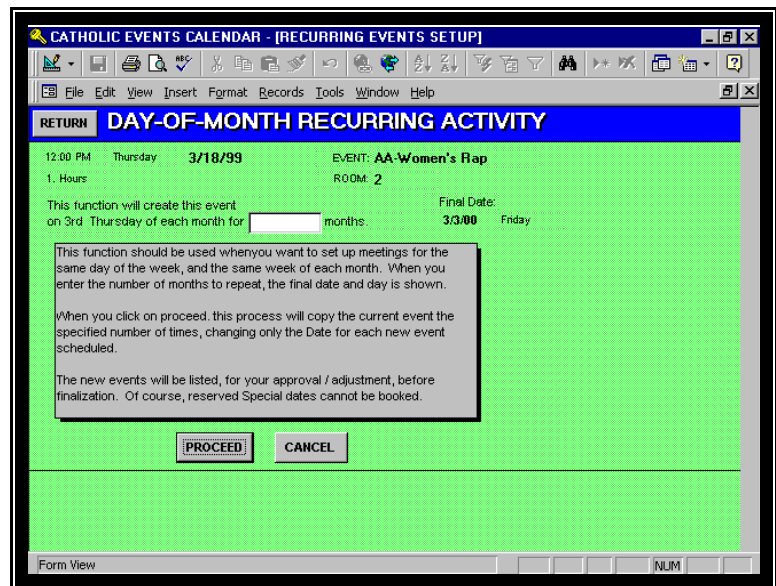1. Fill in the appropriate information in the *Time / Date, People, Activity, and Location* areas.

Figure 6 Day-of-Month Recurring Activity Screen

> **This is an important step, if the information is left blank EPS will schedule the incomplete room / event many times.**
>
> Information such as the date, event and room number is automatically transferred to the next screen (discussed in step 2).

2. Click on the pull down menu next to the *Frequency* field of the Time / Date section. Select monthly.

From the Book a Room screen, click on the **Set Up Recurring** button.

1. Click on the *Day of Month* button.

2. Enter the frequency of the event in the *This function will create ...* box. Tab to the *Final Date* box. This date is automatically calculated when the frequency is entered. (Conversely, if you enter the ending date first and tab back to *This function will create...* the number of months will be calculated automatically.)

3. If you need to set up an event that falls on more than one day during a month, for example, the first and third Wednesdays of each month, create two Day of Month recurring entries. Changing the Spaghetti Feed to twice a month, the first Wednesday of each month, and the third Wednesday of each month would require a recurring entry for each day.

4. Click on the *Proceed* button.
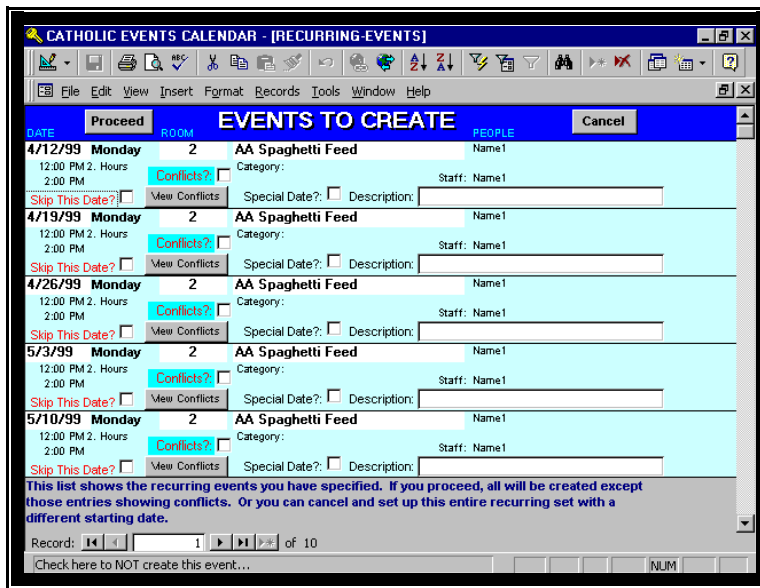
Reviewing Scheduled Recurring Events

Figure 7Events to Create Screen

After you have scheduled Recurring Events using either the Frequency or the Day of Month method, a report will appear on screen. This is a preliminary report showing how your request was handled.

There are several key fields on this screen. Here are their functions.

Skip this date? This is the only box on this screen that may be used as a manual override. When this box is checked the particular date shown above it will not be scheduled.

The following items also appear on this screen, however they may not be changed from this screen. To make changes that affect these items. You must change the original entry before running the recurring process.

Conflicts? An *X* in this box indicates a scheduling conflict, i.e., another event has already been scheduled for this date.

Special Date? If a holy day or any other special date that you've set up, this box will be checked.

View conflicts. Shows a list of the events already set up for the same date and time.

Proceed. Creates the events listed. You must go the individual events to make any changes. Once this function is run see Section 4.

Cancel. You can still cancel the entire set of recurring events at this point)except the original entry.

Corrections to Recurring Events

If a whole sequence of Recurring Events is setup incorrectly you can use the **Batch Change** function to adjust the events. This function may be accessed through *Setup* (see Chapter 2), or through *Find, Change or Delete Events* (see Chapter 4).

Deleting Recurring Events

Sometimes it is simpler to delete a whole sequence of entries and then set them up again. This is done by selecting the whole set of entries. To select a group of entries go the *Find, Change. Or Delete Events* screen and select By Group and / or By Room. Then delete the entries from the View List screen (this is explained in more depth in Chapter 4).

Batch Changes

This function lets you specify a complete set of events and change them all simultaneously. It can be accessed through two screens: *Find, Change or Delete Events* and *Setup*.

To use this function, you must specify a set of events with the same Start Time, same Room, and same Title/Group. You also specify the new values for those items it can change: Time, Room, Private?, Publish?, and Title/Group. You will see a list of events with both the before and after values, and must select Proceed to carry out the changes.

The Batch Changes is also explained in more depth in Chapter 4.

3.2 Event Planning

Overview

The Event Planning add-on information includes planning detail screens for Meetings, Outside Rentals, Food Service, Work Orders, Workshops, Equipment, and Activities.

Event Planning is done from the same screen as Room Scheduling. To access Event Planning first click on the type(s) of event, then click on the *Details* button(s) to go to the area where all the pertinent detail information is set up.

Additional Information Screens

Every Event in the Event Planning system will have additional detailed information screens for each of the following:

Sponsored Meeting
Outside Rental
Food Request
Work Order
Workshop
Equipment
Activities

3.4 Other Optional Add-Ons

The GuestMaster Option

The Guests function is a separate list of house guests, with their relevant information.

To enter a guest:

1. From the Main Menu select *Guests*.

2. Click on the *New* button.

3. Enter the guest name, arrive date, depart date.

4. Select the *Room / Bed / Ext.* from the pull-down list.

5. Select the *Guest of* from the pull-down list.

6. Click on *Save*.

Guest Master Screen

Other Guest Functions

Print: prints a guest list.

Deletions : to delete a guest from the register simply click on the *Delete* button.

Print Key Notes: prints an envelope to hold key.

Print Sign: prints sign with Guest name for the door.

Locating and Viewing Events

When you wish to view or change scheduled entries already generated in GEP use the *Find, Change or Delete Events* function on the Main Menu.

The screen that appears after you have selected *Find, Change or Delete Events* is called the *Select Which Calendar Activities to View.*screen. Any changes or deletions to existing scheduled items is done **after** the entry has been selected using the Select Calendar Activities screen. Groups of entries such as recurring events may also be selected from here for adjustment or deletion.

Select Calendar Activities Screen

Find

As mentioned above the first step in modifying events is to locate, or find the event you wish to change. This is done in four steps:

1. Find the event, or events, using the *Select Types to include* section.
2. Specify the details using specific information, under the *Select Types to include* function..
3. Tell CPS the date, or date sequence, using the *Which Dates..*selection function.
4. View the entry to ensure you have the correct one by selecting the view from the buttons to the lower right of the *Select Calendar...* screen.

The Select Which Calendar Activities to View Screen

The following is a guide to use to select events for viewing and modifying.

1. **Select Types to Include.**

    1. Select the appropriate type(s) of events you wish to view, print, or make a Calendar: Meetings, Rentals, Food Requests, Work Orders, Workshops, and / or Equipment. More than one type may be selected.

    2. Indicate if you wish to include *Private Only, Not Private, Publish Only, Not Publish Only* by clicking on the item so that a circle appears in the box next to the title. See Chapter 3 for an explanation of these items.

    3. **All Types.** Use this short cut when you want to include all events. When All Types is used EPS will not use the Event Types as part of the selection function.

2. **Select details to include.** This allows you to specify events assigned to specific rooms, staff and so on. The choices are: Room, Staff, Participants, Speaker, and Category. To use click on the arrow on the pull-down menu next to the item, then make your select from the menu.

    a. **Reset - to include all.** Use this to indicate not to use any of these "filters" in the selection function.

3. **Which dates do you want to include?** This part of the screen provides further clarification as to the dates you want to include in the view, or to modify.

    a. Enter a range of dates in the boxes under the heading. To view only one date begin and end with that day's date, e.g., 3/1/00 - 3/1/00. To view a month enter 3/1/00 - 3/31/00. Or go directly to item 2.b below.

    2. Click on the box that best describes the date you want to view: The choices are: *All Dates, Today Only, This Week, Next Week, This Month, Next Month, This Year, Today and Future.*

    How this works: If the date shown in the box is today's date and you click on *Today Only* EPS will automatically select the current day's scheduled events. By using *Today and Future* EPS will select every scheduled event from the current day onward.

3. Viewing your selection . Once you have specified the criteria for viewing you may view the
scheduled events on the screen, in a number of ways:

View / Print Timeline
View / Print List
View / Print a Calendar

To View or Print a Calendar you must first specify how you want it from the selections built into EPS. Note that the Start Date on the BUILD A CALENDAR screen determines where the Calendar boxes will start, but that the range of dates on the previous SELECT screen will

View \ Print a Calendar Screen

determine which boxes will show Event data. e.g. for a June Calendar you may have May 28 for the first box, and use June 1st through June 30th for the range of dates – that will leave the leading boxes blank and only show the June Events.

The bottom SELECT DETAILS TO INCLUDE section specifies how many lines per Event will be printed. The SHORT TITLE is one line, the TITLE ONLY is two lines, and the others are three or more lines.

3. **Changing or deleting the event.**

   a. **Individually scheduled events** are changed from the **View List** mode referred to in item 4.c above. From the View List screen locate the event, and click on *Change Booking* or *Delete*
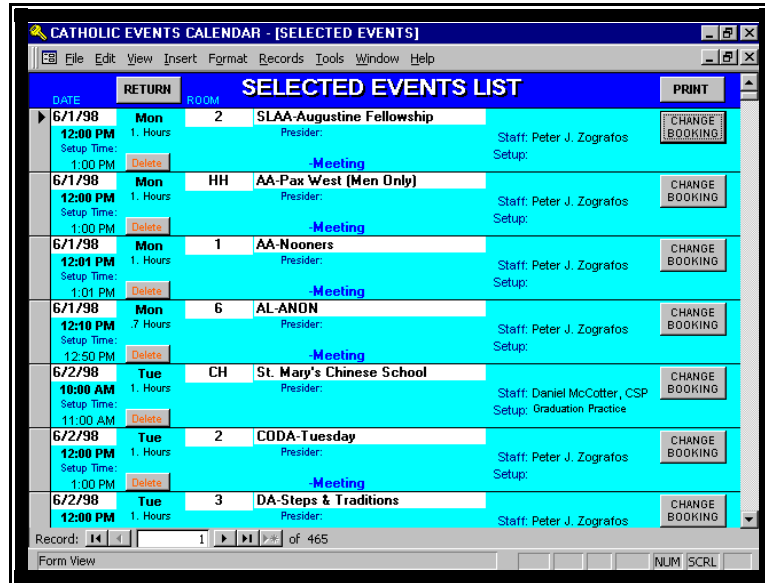
Selected Events List Screen
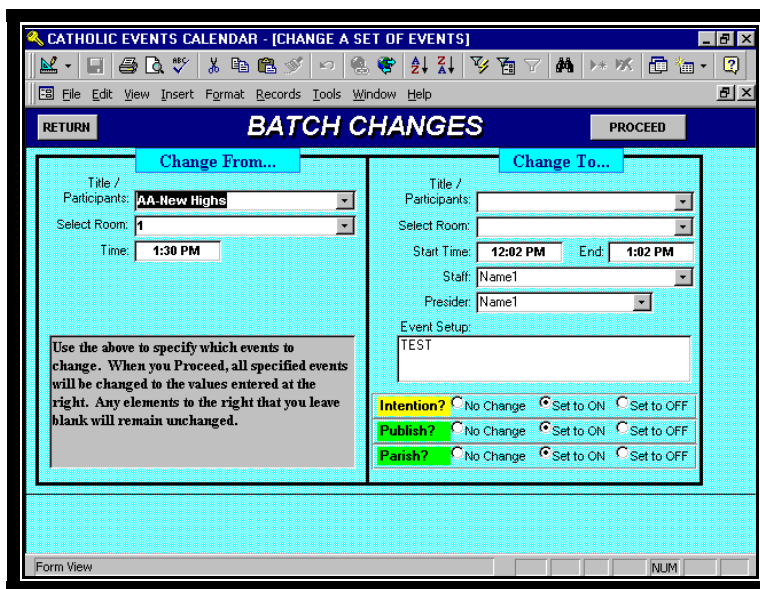
Batch Changes Screen

b. **Batch Changes.** To make changes to a group of common entries select the Batch Change function. Fill in the appropriate *Change From* data and *Change To* data. Make any selections applicable to *Publish* and / or *Private*, then click on **Proceed** to finish.

A Note on Batch Changes to Publish and to Private

The choices here are: *No Change, Set to On, Set to Off.*

No Change. The No Change flag is self explanatory.

Set to On. Flags every event in the set you're changing to be set to Private, or Publish, depending on which you selected.

Set to Off. Flags every event in the set you're changing to NOT be Private, or Publish, depending on which you selected.

5 Reports

There are three ways to print reports from EPS. One way is to print the report directly from the screen you are working in, to get that one event's details. Another is to go to CHANGE and select a set of events, then from the VIEW LIST screen to print the summary listing of that selection. Third, you can go to the Reports screen from the Main Menu. The following briefly explains the difference. The remainder of the Chapter will deal with printing reports specifically from the Reports screen.

Printing Event Information vs. Lists

Most detail screens and list screens have a *Print* button that will print the report appropriate for that screen. So if you want to print the full details of a particular wedding, for example, then you should go to the screen displaying that information and use its *Print* button. You use the same procedures to locate information, whether you want to edit/delete the event's data, or to print it.

Information Reports that Print From the Various Detail Screens

Basic Event (BOOK A ROOM, EDIT A ROOM)

Print a Calendar (from within CHANGE)

Event Planning Screens

    Sponsored Meeting Details
    Outside Rental Detail
    Outside Rental Letter
    Outside Rental Contract
    Food Service Request
    Work Order Details
    Workshop
    Workshop with Attendees
    Equipment List
    Activities Details

How to Print a Calendar

Calendar printouts are done from the *Change* option off of the Main Menu.

Here are the steps:

1. From the Main Menu select *Change*

2. At the *Select Calendar Activities* screen select the desired events and dates to include on the calendar.

3. Click on the *View / Print a Calendar* button.

Calendar Printout Screen

4. Choose:

    1. paper size, letter or legal

    2. row-size, two weeks per page or five weeks per page

    3. start date -- this is a different date than the one selected on the *Select Activities Screen.-* It determines the starting box date of the calendar boxes, for example if you want to start the calendar on a Sunday, which may not be the first of a month, enter that date Note that setting the First Day of Week and Select a Month automatically sets the Starting Date for you.

        The *Plus 2 Weeks* feature – this is a shortcut to the *Adjust Start Date* function, when used it automatically adds two weeks the starting date.

    4. month

    5. year

    6. show names of special days (Christmas, et cetera), if applicable

    7. view or print the calendar

Printing from the Reports Screen

The *Reports* function (accessed through the Main Menu) lets you select various types of report *lists*, for any range of dates -- as opposed to printing details for one event.

The *Select a Report* screen lets you select various types of report lists, for any range of dates.

If you Preview the report you can see the number of pages as well as the layout and information. The page numbers are at the lower left; go directly to the last page by clicking on the right-arrow that has the vertical bar. Also, you can print a range of pages from the Preview: select File then Print from the pull-down menus at the top of the screen. On the Preview, a click on the report alternates between shrinking and expanding the view.

Every event has a *Publish?* check-box and a *Private?* check-box on the Book/Edit-a-Room screens. You can utilize this on the Events List - Medium and the Events List - 1 line reports on the *Select a Report* screen, by specifying to only include the checked events. This is useful for printing out event lists for a newsletter, for example, where you only want certain events to be published (You may, however, find these indicators useful for some other purposes as well).

Reports that print from the Reports Screen are:

> Events List - 3 to 4 lines
> Events List - 1 line
> Food Requests
> Equipment List
> Events with their Activities
> Outside Rentals
> Sponsored Meetings
> Timeline Listing
> Work Orders
> Workshops
> Workshops with Attendees
> Intentions

Reports Screen
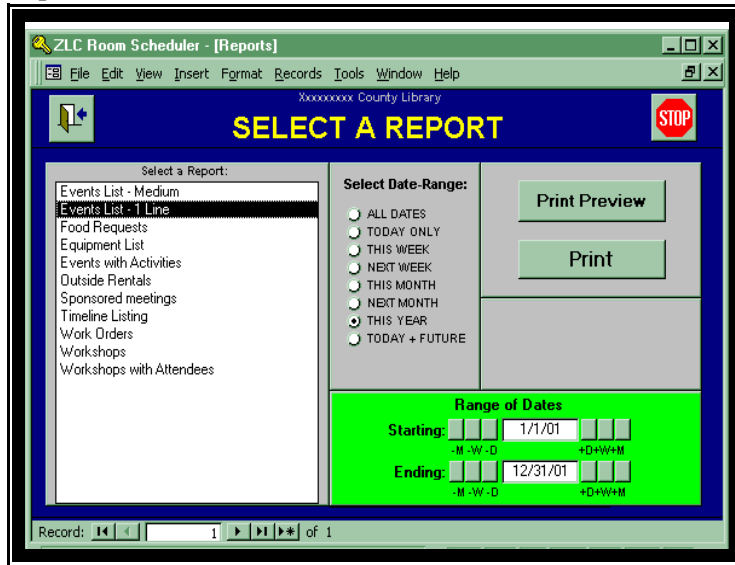
How to Select a Report to Print

1. From the report list highlight the desired report with a click of the mouse.

2. There are two ways to choose the date(s) range for reports.

    a. From the Select Date-Ranges column select one:

All Dates	Prints all events for all dates in the computer, past and present.
Today Only	Prints the events set to occur on the current date.
This Week	Prints events coming up this week.
Next Week	Prints events coming up over the next week.
This Month	Prints events coming up over the next month.
Next Month	Prints events coming up over the next week.
Today and Future	Prints all events from today's date to all future scheduled events.

Note: Date ranges, except for the *All Dates* selection, print from the current date to the date at the of the range selected, e.g., if it is Tuesday May 6 and *This Week* is selected the report will include the events dated From May 6 through May 13.

    b. You can also obtain a report by entering the range of dates you desire in the *Range of Dates* area.

Starting	Enter the date to begin printing events.
Ending	Enter the date to end printing events.

To print one date enter the same starting and ending dates: e.g.,1/1/00-1/1/00.
To print a week enter starting date 1/1/00, and an ending date 1/7/00.

3. Print the report by selecting either the *Print Preview* or *Print* button. The *Print Preview* will show the report to the screen, while the *Print* selection will print the report to hard copy.

Appendix A - ACCESS Tips and Techniques

Even if you prefer using the mouse, there are certain keystrokes you should know for the most effective use of your ZLC Ministry Scheduler. For example, you may find it far easier, when you arrive at a pull-down lookup box, to just press F4 than to click on the tiny pull-down arrow. Also, if you are working on the same data column in a list-view, you should know that CTRL-DOWN/UP moves to the next/prior employee without moving the cursor away from that data field.

Two major window-types

There are two different ways your data may be displayed, depending on the current context.

1. **List-windows** show multiple records at once, and you can use a vertical scroll-bar on the right side to move through them. Each record usually has a small [1]"record-selector" button at its left end (used for selecting sets of multiple records and for dealing with whole records: for cutting and pasting operations, for example).

2. **Record-windows** show a single record at a time -- as if each is a page in a book and you can only see one page at a time. There is no vertical scroll-bar, and usually no "record-selector" at the left.

The same information records can be shown in either type of window. And any particular window may not show all of the record's data, i.e., a summary list may just have dates and titles, whereas a full-screen view may show all of the detail.

While the appearance is very different, you will be dealing with these views in similar ways. When you change any data, it does not mailer which view you are in: if you change the starting time in a list window, that same event will have the new starting time henceforth in every other view and report.

When moving among multiple records, there is a "Ditto" function available: in any cell you can enter Ctrl-" or Ctrl-' to duplicate the contents of the same cell in the previous record.

Both types of windows use the "record-navigation" buttons at the lower left of the window to step through the records, or to go directly to the first or last record of the set. Both also allow you to move through the records using Ctrl-PageUp / Ctrl-PageDown keys.

Moving around on a screen or a list

Note that the Scheduler screens contain Labels and Data, and that not all data can be changed. If the field background is white, that usually indicates data that can be changed. The Read-only data is presented for information, but usually must be changed on another, more basic screen (where it can be updated to all the various levels appropriately).

1. To move between the active data fields on a screen/form use:

    DOWN or TAB or ENTER to move forward to the next field;
    UP arrow or SHIFT-TAB to move back one field.
    TAB and SHIFT-TAB are the recommended way to move from field to field.

    Note that if you use the mouse and click on a field you usually end up in the middle of a field in Edit-Mode. For replacing the field contents, it is more efficient to click on the prior field then switch to the keyboard and TAB into the desired field. Then you can either type new information in immediately, or use F2 for Edit Mode.

2. To move to the next/prior record use PGUP/PGDN or CTRL-PGUP/DN. Or, you can use the *"record-navigation"* buttons at the lower-left of every window: these will take you to the first, previous, next, and last record respectively. Also, you can push F5 then type in a record number to go directly to that record.

3. You can also locate a particular record by using the *Find* function. You should first enter the field you want to search on, then push CTRL-F (or use the Edit-Find menu) and fill in the pop-up window as appropriate. (Use ESC key to remove the window. Use CTRL-F then ALT-F to do a Find-Next -- or use F3.)

Editing within a field

1. When you first enter a field, the contents are highlighted. At that point you can use Edit - Cut / Copy Paste, or if you type new data the old disappears (to make it reappear, push Esc before exiting that field). Shift-Insert / Shift-Delete are the same as cut and paste.

2. To edit that pre-existing data (instead of over-writing it) push F2 to enter Edit-Mode. (Use F2 again to EXIT Edit-Mode and stay in the same field).

3. In Edit-Mode:

   LEFT arrow moves left one character;
   RIGHT arrow moves right one character;
   Ctrl-LEFT arrow moves left one word;
   Ctrl-RIGHT arrow moves right one word;
   HOME moves you to the far left end;
   END moves you to the far right end;
   ENTER leaves the field and moves you on to the next field.
   ESCAPE returns the contents to the starting point (you lose all the changes you have made).

   Special considerations for editing inside a MEMO (multi-line) Box:

   Ctrl-ENTER starts a new line (ENTER exits the field!);
   Ctrl-HOME arrow moves to the upper left corner;
   Ctrl-END arrow moves to the lower right corner;
   ESCAPE returns the contents to the starting point (you lose all the changes you have made).

Entering / editing dates

You enter dates by typing MMDDYYYY - the rest is entered for you automatically. Or, you can enter m/d/yyyy if you prefer that way. Note that to edit an existing date is more difficult than typing it in anew. You must be sure to enter mm/dd/yyyy when editing – so for January 1st, for example, you must use 01/01/...

Pull-down lookup lists

Whenever you get to a field with a pull-down arrow at the right end, it may be easier to open the lookup list by using either your F4 or ALT-DOWN keys than to reach for the mouse. And whether the list is open or closed, when you start typing each letter will search for and present the first matching item from the list. As soon as you have the desired match, use TAB or Enter to move to the next field (or Ctrl-PageUp/Down to move to the next record - same field). Some situations allow you to enter information that is not on the Lookup List, others enforce a match. If you must make an entry that is not on an enforced list, you must contact the system administrator to alter the Lookup Table.

Adding and deleting records

In EPS the ADD is automatic. If you make any entries at all, when you leave the record it is automatically saved. If you use the Save button on such a new record but then decide you do not want it (while you are still in that record), you can use the Delete button to remove it. You will get a message that it has been deleted, and end up with a new empty screen.

To delete a previously added event you locate that event in the LOCATE / CHANGE function and then use its Delete button. All of its attendant planning details will automatically be deleted as well.

Appendix B - Instructions for Switching Data Files

We include with EPS two different data files: EPDATA14.MDB and EPXMPL14.MDB. The former is empty of services and individuals, and the latter has many entries illustrating all the ways the Scheduler handles various types of events.

We recommend you spend time with the sample data viewing all of the various services. It will be much clearer how to set up your own data after you are more familiar with the various features that are available.

Switching between the sample data file and your own data

The Scheduler program can only be connected to one of these data files at a time. When you are ready to set up and use the system with your own events, you will need to attach the Scheduler program to the EPDATA14 file. Then if you later wish to view the examples again, you will attach to the EPXMPL14 file.

You accomplish the switch in SETUP. To attach to EPDATA14 use the CHANGE COMPANY button, and fill in the screen as follows:

　　File Name:EPDATA14
　　File Path:C:\GEP

then click on REATTACH and wait for the system message that it has completed the process.

Then to switch back to the example data, you just substitute EPXMPL14 as the file name above. You can switch between those two data files as many times and whenever as you wish. Note that if you have not registered the sample data file (using the same code, etc. as on your live data file) then you may get "not-registered" messages popping up. You should be able to proceed in the XMPL file despite these messages – or just register it to stop the messages.

Appendix C - Key Error Messages

If you attempt to leave a record or a screen that contains invalid "key" data - the information used to link various parts of the system - then you might receive one of the following two error messages.

Index or primary key can't contain a null value.

This message indicates that an important piece of information has been left blank.

Duplicate value in index, primary key, or relationship.
Changes were unsuccessful.

This message indicates that a field - or combination of fields - already exists and that the new record is attempting to create a duplicate that is not allowed.

In either case, if it is not apparent how to correct the problem, you can always use the ESC (Escape key) to undo the changes you have just made. This puts the system back into an acceptable state. EPS simply always insists on "good" data before saving any record - and this assures you that you will always have an accurate and properly structured set of information.