

# **SHUTTLE DIARIES: User Manual**

SHUTTLE ENTERPRISE SERVER

## **Introduction**

One may well wonder what percentage of people actually use some sort of a Diary. Considering how many people 'forget' to do things, it would appear that the number is not as high as it should be.

There are many varieties of Diary systems available, ranging from old fashioned 'books', to Pocket PC's, Mobile Phone Diaries, and on-line Electronic Systems.

The SHUTTLE Diaries do not compete with any of the above, and you can certainly continue to use whatever system gives you current satisfaction (although some Users have been known to switch to almost exclusive use of SHUTTLE Diaries, including the author of this Manual).

The strength of the SHUTTLE Diaries is found in their integration with the SHUTTLE Enterprise Server. If you work with SHUTTLE almost every day, then it is probably the best place for work related (and perhaps even personal) Diary Data.

## **Purpose of the Manual**

The purpose of this User Manual is to introduce you to the use of SHUTTLE Diaries.

## **What is it?**

The SHUTTLE Diary system is an electronic Diary System that is integrated to the Application Environment, and supports both Corporate (Project) Diaries and Personal Diaries in the same set. The Diary system is also in sync wherever you may be working in the system, i.e. whether you are working with the Accounting System, the Human Resource System, or any other (depending only on what is in your system), the same Diary Data is present and visible, dependent only on your Access Rights.

The Diary system offers both private (private entries are hidden from public scrutiny) and public space. In addition, private entry DETAIL may be encrypted to another level of privacy.

The Diaries are integrated to Customer Relationship Management, Task Desk and Time Sheets, and may be further integrated to any Applications by the Developers of your Solution.

## Rules of the Diary

Before we have look at how the Diary Functions are implemented in SHUTTLE, it is worth considering the Operating Rules upon which those Functions are based.

The Rules of the Diary System are easy enough to understand :-

- 01) Any User may create any number of entries for his / her own Diary;
- 02) A User may do new entries into another User's Diary in one of 2 ways –
  - a) When the Target User has specifically granted access to such a User to enter into his / her Diary
  - b) By being a member of a Project, any member of that Project may create Diary entries marked for the Project, and which will update all Member diaries (Hint: A User may be a member of multiple Projects);
- 03) Once an entry exists, it may only be Updated by the Owner (target Diary) or the Originator (if a different User);
- 04) Diary entries marked as confidential can only be seen by the Owner and Originator (if the Originator is a different User);
- 05) Diary entries NOT marked as confidential can be seen by anybody;
- 06) When another User creates an entry in your Diary, he / she retains access to that entry, can see it, can change it, BUT cannot access your other entries, except to SEE the ones that are public, i.e. NOT confidential.
- 07) When an existing Project Entry is Updated by –
  - a) The Originator : When the Originator of a Project Entry updates the entry, it affects the other Project Members as follows /
    - i) If Deleted, it is only Deleted from the Originator's Diary;
    - ii) If Amended, the system amends Member Entries as per the original time of entry (disregards changes to the Project Membership in the meantime) by Updating the current entry in each Member record where it still exists and is available for update. If it is locked, the system creates a new entry. If the User has already deleted his/her entry, the system creates a new entry again with the new information.
  - b) User who is not the Originator: The entry affects only the current User Diary, whether changed or deleted.

The DIARY function exhibits multiple entry points: Wizard, HowDoI, Menu, Companion and from any Screen you are using in SHUTTLE.

When the DIARY is opened, it automatically loads entries for the Current user for TODAY, plus any entries with a Date less than TODAY.

When you enter the Diary, the system defaults to settings that auto loads for Current User, Today, All Categories, Any Priority

By Using the LOAD PREFERENCES option (incl Set Category & Set Priority), you can LOAD ENTRIES for any Diary Content that is visible to you

**DIARY DESK ( )**

Set Category  
Set Priority

Date From: 29/09/2003 Date To: 29/09/2003

For User(s): Data Manager  
Category: All Categories  
Priority: Any

Set LOAD Preferences  
Set Date From Set Date To Set Today Set 1 Week  
Self Other User Project Users All Users

**DIARY ACTIONS**  
Export Report Load Entries New Entry Find Entry Diary Rules Exit

>>> Diary	Date	Appoint	Title	Reference
1 Data Manager	24/09/2003	11:00:00	Attend Staff Briefing	1305174342B
2 Data Manager	29/09/2003		Confirm Forex Rate on Contract # 734	1305645879A
3 Data Manager	29/09/2003	12:15:00	Lunch with Hooi	1305645935B
4 Data Manager	29/09/2003		Book flight to Zurich for 2nd Oct	1305645957B
5 Data Manager	29/09/2003	15:00:00	Staff Meeting	1305645990B

Next Pre

Total Entries 5

Apart from TODAY's entries, this User has an 'old' entry that has not been Signed Off, i.e. for 24<sup>th</sup> September

To load only entries for a Selected Diary Category, set it here

You can use 'Date From / Date To' to load Entries for a Date Range. At the same time, you can select a range of Users or a Project.

Set Category  
Set Priority

Date From: 29/09/2003 Date To: 29/09/2003

For User(s): Data Manager  
Category: All Categories  
Priority: Any

Set LOAD Preferences  
Set Date From Set Date To Set Today Set 1 Week  
Self Other User Project Users All Users

To select only Entries with a specified Priority, set it here

The system displays the criteria that will be applied when you choose LOAD ENTRIES ...

Export and Report initiates an export to Spreadsheet or Report, on the current selection of entries

You may use FIND to locate a Title anywhere in the Diary

**DIARY ACTIONS**  
Export Report Load Entries New Entry Find Entry Diary Rules Exit

LOAD retrieves entries based on currently set criteria, or REFRESHES the current view

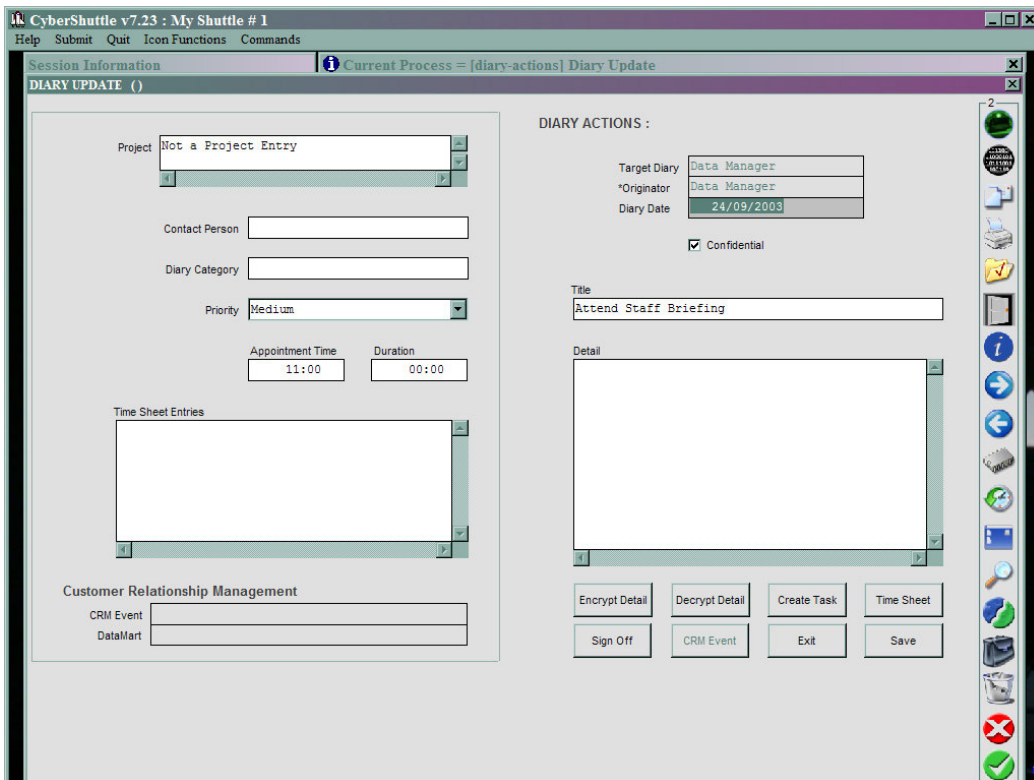
Use NEW to add an entry to the Diary system

View the Diary Rules, or grant someone access to your Diary

To access a Diary Entry, e.g. View details, Sign Off, Move to another Date, Create Task, etc., just dbl-click the row where it is shown ...

>>> Diary	Date	Appoint	Title	Reference
1 Data Manager	24/09/2003	11:00:00	Attend Staff Briefing	1305174342B
2 Data Manager	29/09/2003		Confirm Forex Rate on Contract # 734	1305645879A
3 Data Manager	29/09/2003	12:15:00	Lunch with Hooi	1305645935B
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The Diary is designed for ease of use. Now let's have a look at an existing Diary Entry. If we choose the top entry shown above, we get the following -



And then let's blow up the different sections of the screen to see it more clearly -

**DIARY ACTIONS :**

Target Diary: Data Manager

\*Originator: Data Manager

Diary Date: 24/09/2003

Confidential

Title: Attend Staff Briefing

Detail:

The system displays in who's Diary the entry lives, as well as the Originator of the Entry (who may possibly be somebody different)

DbI-click the Date, choose Lookup, select a different Date, choose SAVE, and the entry moves there ...

Confidential Entries cannot be seen by others

The Title is what appears on the Grid in the main Diary Display, and the Detail is optional (some entries may require more than just a title)

ENCRYPT will encrypt any text in the DETAIL section, and DECRYPT will make it intelligible again (the system knows who you are, no codes are required)

CREATE TASK will automatically submit a Task based on this Entry, and you can choose whether the Diary Entry is retained or Signed Off

Encrypt Detail

Decrypt Detail

Create Task

Time Sheet

Sign Off

CRM Event

Exit

Save

TIME SHEET will pop an entry to your Time Sheet, and you may do this multiple times, i.e. some entries may stay in your Diary, rolled fwd all the time, while regularly logging to your Time Sheet ...

An entry remains in your Diary until you SIGN it OFF, at which time you may also automatically have your Time Sheet updated

CRM EVENT will light up if the entry was created by CRM, in which case you can link directly to that CRM Event for further action ...

Project

Contact Person

Diary Category

Priority

Appointment Time

Duration

Time Sheet Entries

Customer Relationship Management

CRM Event

DataMart

Project is an optional field. If specified, it reflects in all Project Member Diaries

CONTACT and CATEGORY are both optional

Appointment and Duration are optional

The Time Sheet log will reflect all updates to your Time Sheet from this Diary Entry

An entry that is related to a CRM Event will show details here

From the example shown above, if we choose SIGN OFF, we get the following –

**DIARY SIGNOFF**  
with optional  
Time Sheet Update

User: Data Manager  
Task Title: Attend Staff Briefing  
Billing Reference:  
Time Class:  
Detail:

**Select Time From / To**

Time From: HOURS 00 MINUTES 00  
Time To: HOURS 00 MINUTES 00  
Translate

**OR Select Time Applied**

Time Applied: HOURS 00 MINUTES 00  
Translate

TimeSheet Date: 29/09/2003  
Item Key: 1305659563  
Time From:  
Time To:  
Time Applied:

No TimeSheet, just Sign Off  
Update TimeSheet and Sign Off  
Neither: Just Exit

For Sign Off with Time Sheet update, select Time From/To or Applied, then choose Translate

Changed your mind about Sign Off? Just choose EXIT. Otherwise, choose Sign Off with or without Time Sheet update. For Time Sheet update, you need to apply Time and a Time Class.

For the same example, if we choose CREATE TASK, we will get the following –

*Menu Links
1

Select Menu Link(s)

Notes

\*Description: Attend Staff Briefing  
Priority: 4 - medium  
Task Project: dia Diaries  
User To Complete: dm Data Manager  
Submitted By: dm Data Manager  
Progress: 1 - not done  
Sign Off: Manual  
Hours To Complete: 0.50  
Date Submitted: 29/09/2003  
Complete By Date: 29/09/2003

Private-Task  
Task Flag:  
Time Class:

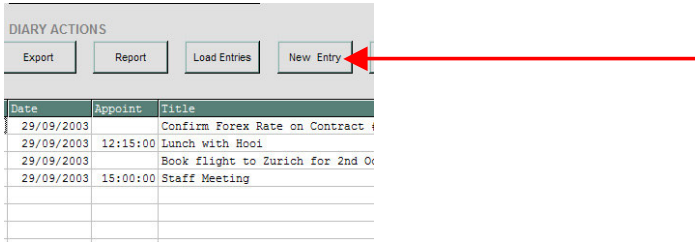
Assist Me CRM Event Quit Update

CRM Event:

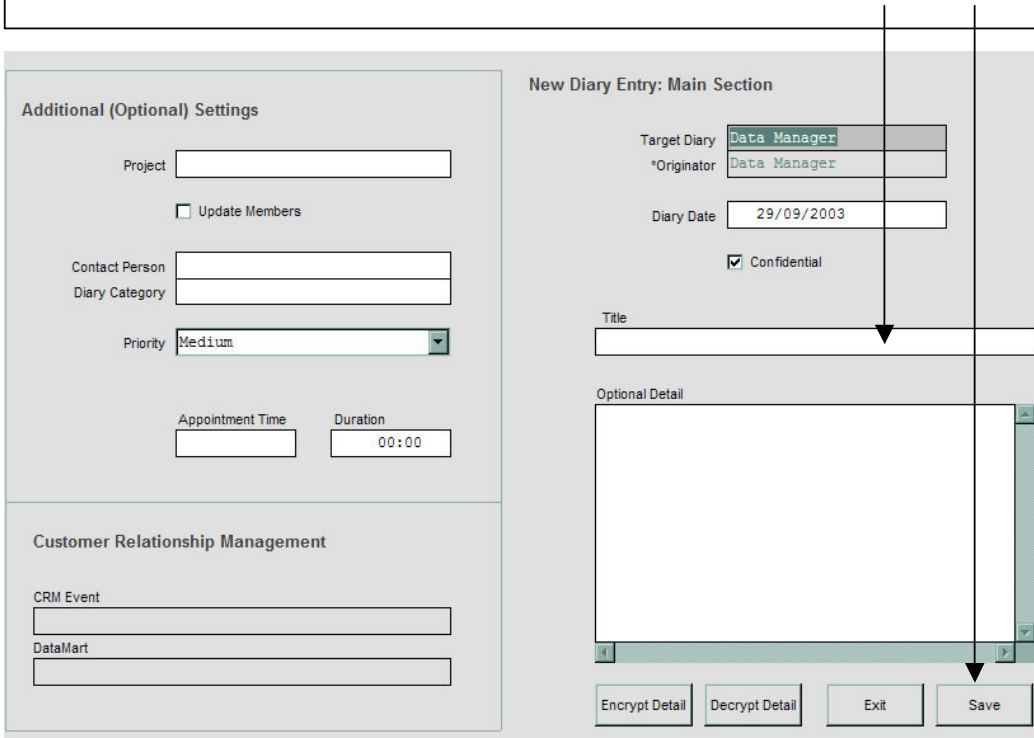
In most cases, you will be able to just choose UPDATE, unless you wish to change the Task Project, Time Allowed, or other. When we choose UPDATE, the Task is submitted. We also get an opportunity to Sign Off the Diary Entry (unless we

choose to retain it), and it looks the same as the Sign Off shown above (i.e. with an optional Time Sheet update ...

When, from our main DIARY Screen we choose NEW ENTRY, the following happens –



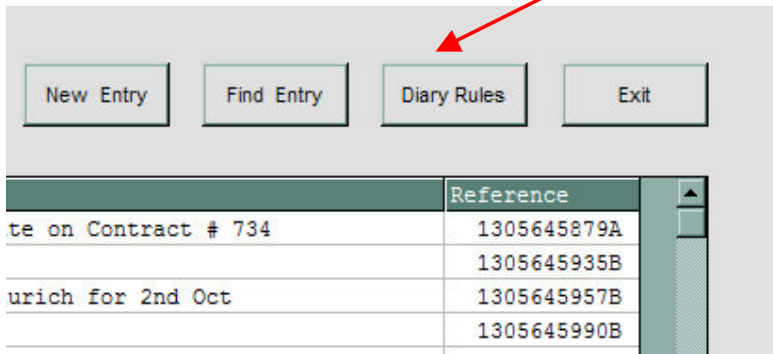
Most new entries will simply require a Title, since the system defaults to the Current User's Diary, and today's Date. Therefore, just put TITLE, and choose SAVE. Simple as that.



And if you wish to use / change any of the other (optional) fields, you are welcome. You may of course change TARGET DIARY to another User (use Lookup), provided you have access to insert to that Diary, and the DIARY DATE is easily changed with dbl-click (on Diary Date field), Lookup, and select a new Date ...

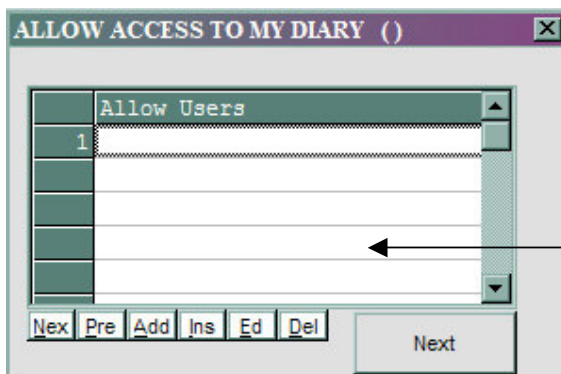
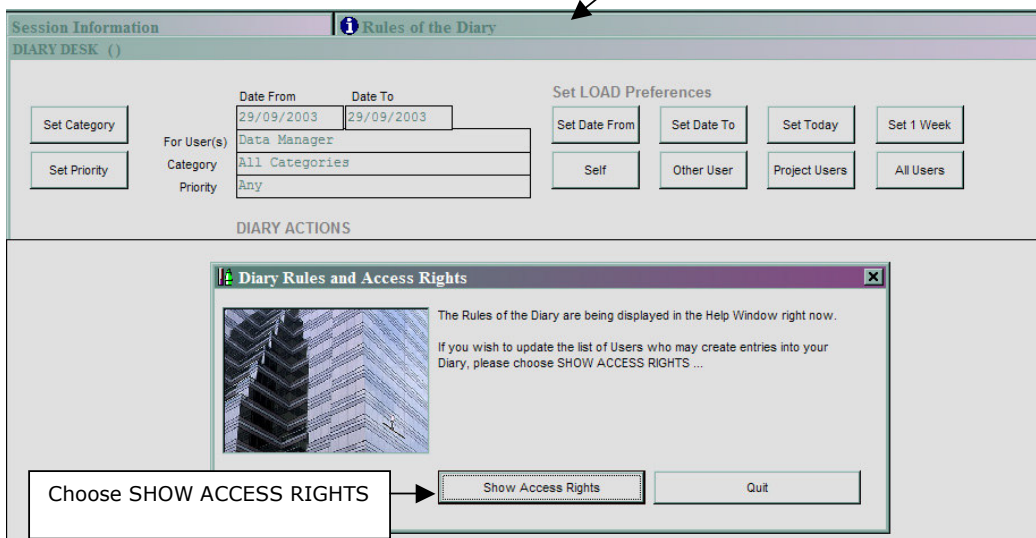
To grant someone access to insert Entries to your Diary, choose DIARY RULES –



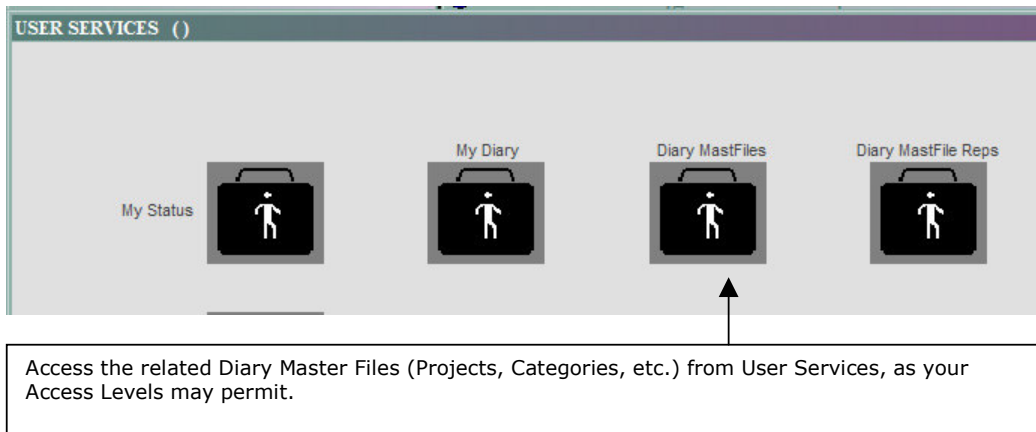


	Reference
te on Contract # 734	1305645879A
	1305645935B
urich for 2nd Oct	1305645957B
	1305645990B

To see the Diary Rules in the Help Window, just gives focus to this window by clicking it's Title Bar ...



Some Diary related Functions are not available from the primary Diary Screen, but are accessed from USER SERVICES Wizard instead :



#### DEVELOPER'S NOTE:

For Developers, please note that you may integrate automatic submission of Diary Entries from any Application, by using an AFS (Application Function Subroutine) call. Please use the HowDoI Function and search on '[tips]' to find the details for this call.

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