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1 Introduction
1.1 Introduction
1.2 About Retain Wallchart

Retain Wallchart is a flexible planning tool for viewing and managing staff and job allocations through a user-friendly graphical interface. It has been designed to resemble the manual 'wallchart' booking system but is much more versatile than any manual booking system:

See the Overview of Retain section for more information.

1.3 About the guide

This guide is intended for new Retain users who wish to learn how to use the software as well as existing users who want to improve their knowledge of Retain and familiarise themselves with the new features and functionality.

The guide starts with an overview of the different elements and structure of Retain. It is advisable to read this chapter if you have not used Retain before.

The Getting Started chapter provides information on how to run Retain.

For concise descriptions of the basic functionality of Retain, see the Quick Start guide.

The following chapters provide an in-depth view of all the features and functionality of Retain.

Note: This user guide assumes that the new users start with an existing database (either from their organisation or an example file) that already contains resources and jobs. However, if you are starting 'from scratch', you are advised to read the Resources, jobs and components chapter before you start to make bookings.

Lastly, the guide provides useful reference information as well as support contact details.
1.4 Conventions

The following conventions are used throughout this user guide:

- Data file types are referred to as follows:

  The file extension for Version 5 Retain notebook files is '.RetainNotebook' (previously the extension was '.RTN').

- The text to be entered using the keyboard is in bold typeface, for example:

  Type A: as the run command.

- Menu options, options within dialogs and special terms are expressed in single quotes, for example:

  Select ‘File-> New’ from the menu.

- Keyboard strokes are represented in capital letters, for example:

  ESC represents the Escape key.

  F1, F2, etc. represent the function keys.

- A plus sign between two keys indicates a combination of the keys to be pressed, for example:

  CTRL+S represents the action of holding down the Control key and pressing the S key.

1.5 New features

Retain Resource Planning System Version 5.1 introduces the following enhancements:

- A new 'Booking' dialog
- Scenarios and Scenario Bookings
- Dockable Pane
- Numeric Formatting *(disabled by default)*
- A record of changes made to a booking
- Calculated Wallchart fields
- Job-specific Components

Retain Resource Planning System Version 5.0 introduces the following enhancements:

- 3-D Wallchart View
- Attachments
- Booking Shapes
- Booking Requests
- Over-allocation Notification
- Copy Checkboxes
- Mandatory and Optional Fields
• Screenshot Capture
• Default Notebook
• Multiple Selection of Records
• Fast Field Selection
• Edit Mode Password
• Improved Issue Reporting Tool

1.6 Where to get support

If you have any issues with Retain which you are unable to resolve using this user guide or through your local support contacts, please contact your Support Service Provider.
2 Overview of Retain

2.1 Overview

The main concept of Retain evolves around the idea of managing resources in order to perform jobs. The exact meaning of the terms 'resources' and 'jobs' varies from organisation to organisation but the process of allocating resources to jobs in the form of 'bookings' is applied in all the cases.

Retain is primarily a resource management (as opposed to a project management) tool. It is therefore not particularly concerned with the individual activities performed during each job. However, 'components', and 'booking types' can be used to indicate the nature of a job.

Furthermore, Retain allows you to maintain information on resources, jobs and components. Users are encouraged to record descriptive information about jobs and resources to help them in the planning process.

You should balance the benefit of recording this information to the planning process with the time taken to capture and maintain it. The data on resources, jobs, components, etc. can be updated on a continuing basis throughout the resource management process. You can build these details up from scratch but it is usually helpful if the starting position can be established as a one-off exercise, before you start making bookings.

Related Topics:

- Resources
- Jobs
- Bookings
- Components
- Booking Types
- Notebooks
- Notebook pages

2.2 Resources

Retain uses the term 'resources' as a general description of people or entities that can be applied to the process of completing a job.

In many organisations the term 'resources' simply refers to staff. However, since you can also use Retain to plan other types of resources such as machinery or training rooms, any item with a finite capacity that can perform a job might be considered a resource.

See the What are resources section for more information.

2.3 Jobs

Retain uses the term 'jobs' as a general description of any project, product or assignment that is being planned.

What constitutes a job in your organisation depends on the nature of your business and what you consider to be the 'unit' level of your planning in Retain. Some organisations may set up a separate job for each individual project, while others may group together projects under a single 'umbrella' job.

Since every booking in Retain must be made against a job, jobs should also be created for non-project activities such as vacation, sick leave or, in a manufacturing context, machine down-time.

You can group jobs for viewing or reporting purposes by a particular value that they share. For example, you can use the 'Industry' field to group jobs within the same industry.

See the What are jobs section for more information.
2.4 Bookings

In Retain a 'booking' represents an allocation of an individual resource (or several resources) to a specific job which covers a defined date range and a measurable number of hours.

In order to allocate resources to jobs in Retain you will need to make bookings. You can make bookings using both Wallchart and Calendar views, although it is usually easier to make them using the Wallchart view.

Retain treats all allocations as bookings, regardless of their nature. This means that 'non-jobs' such as vacation and sick leave should also be entered as bookings. You can use the fields associated with a job (e.g. booking type) to treat such jobs differently.

For more information on bookings, see the What are bookings section.

2.5 Components

In Retain 'components' are sub-jobs that provide information regarding the nature of each booking made against a job. Components supply an element of project planning within Retain, since you can assign a component for each booking and analyse the job into its component parts for reporting purposes.

Components take the form of a simple pick-list of descriptive names, available for selection each time you make a booking. They are usually defined in general terms applicable to most jobs, such as 'planning', 'fieldwork' and 'reporting'; although you can enter components relating to specific types of job such as 'branch visit' or 'security review', for example.

The level at which you define components should correspond to that at which you make bookings in Retain. For example, if your planning in Retain takes the form of bookings of two or more weeks each, your components should not represent the half-day elements within each booking.

See the What are components section for more information.

2.6 Notebooks and data

Retain uses a database structure to store its data. Resources, jobs, components and bookings are all stored in separate tables.

The files used by Retain are called Retain notebooks ('.RetainNotebook' files). Notebooks contain views of your Retain data, allowing you to display and edit your data in various ways as well as create reports using Retain Report Writer.

Each notebook points to a particular database. In most organisations, you are likely to have a single database but you may have several notebooks pointing to that data. In a network environment, your Retain data may be stored on a network drive and shared by many users. Each user may have their own notebook files, or you may even have notebook files which are shared by several users.

Note: If you intend to share notebook files, remember that the notebook file is changed each time someone saves it. You may prefer to make shared notebook files read-only so that they cannot be amended.

It is essential, while working with a Retain notebook, to appreciate that the underlying data is the same across all pages, notebook files and even users of that data.

For example, if you amend a booking in a particular notebook the booking itself is amended, not just the view. However, if you were to hide some bookings in a notebook then they would still be visible in all other notebooks - the underlying data would not change.

See the Working with notebooks chapter for more information.
2.7 Notebook pages

A Retain notebook contains one or more 'notebook pages', each page representing a different view of your data. The characteristics of each notebook page can be defined and maintained independently, using the various sort, selection and other display features.

Notebook pages allow you to create an almost unlimited number of views of your data. See the Notebook pages section for more information.

A notebook can be one of the following three types:

- **Wallchart** - the traditional Wallchart view with resources or jobs listed on the left-hand side of the page and a continuous time bar along the top. Each booking is represented as a coloured block within the Wallchart:

  ![Wallchart View](image)

- **Calendar** - a Calendar view where each screen page represents the bookings for one individual resource or job. Time is represented in a calendar style grid and special navigation features allow you to move between resources or jobs:

  ![Calendar View](image)
• **Report** - reports that you can easily develop and quickly generate using the powerful Retain Report Writer.

Retain notebook pages are dynamic because they represent the view of data.

The best way of working is to create a separate notebook page for each view of your data that you want to produce on a regular basis and work within these existing notebook pages, rather than create a separate page for every unique view.
3 Getting started

3.1 Installation

This guide assumes that Retain has already been installed on your personal computer or network drive and is available to you. If it is not, either consult your local support contacts or refer to the Technical Implementation Guide for instructions on installing Retain.

3.2 Initial set-up

After the software has been installed, the following initial set-up tasks should have been carried out prior to Retain 'going live' in your organisation:

1. For network versions, user names and access rights should be defined.

2. The Retain database file should be set up, including:
   - specifying the location of your data files;
   - setting up initial charge rates and charge periods;
   - defining the standard working diary for both calculation and display purposes;
   - setting up colours and shapes as well as defining colour /shape conventions and alias names.

3. The Retain notebook files should be set up, including:
   - amending the standard data structures, if required;
   - clearing out any sample or test data;
   - loading resources and jobs from other applications, if necessary.

3.3 Starting Retain

To launch the application, select the Retain icon and double-click on it (or press ENTER).

The start-up Retain window will open:

Using this window you can:

- create a new Retain notebook,
- open an existing Retain notebook,
• set up environment preferences,
• customise the toolbar,
• access the Retain help files
• or close the application.

You will usually start by creating or opening a Retain notebook which gives you access to your planning information. See the Working with notebooks chapter for more information on creating and/or opening notebooks.

3.4 Retain interface

Once you have created or opened a new notebook, it will be displayed on the main screen:

The view is divided into the following areas:

1. **The menu bar** - Located at the top of the screen, this menu provides access to all of the Retain's functions.

2. **The toolbar** - This is usually located immediately below the menu bar and contains several buttons. These buttons provide a quick access to many of the commonly used features in Retain. You can add and remove the toolbar buttons as required.

3. **The notebook page navigation list** - This drop-down list allows you to select the notebook page to be displayed within the Wallchart. You can only select from the pages within the currently open notebook. Think of a notebook as a document or a spreadsheet; you can have a number of notebook pages in Retain and each will reside in its own window. Links to the four most recently opened pages are displayed to the right of the drop-down.

4. **The notebook area** - The main part of the screen, this area displays the list of resources/jobs on the left-hand side and the bookings on the right-hand side.
5. *The status bar* - Located at the bottom of the screen, this area displays the name of the currently selected resource and the date range covered by the selected booking. It changes according to the displayed context. The status bar will also show hints for a menu item that you are pointing to.

6. *The dockable pane* - Located on the right-hand side of the screen, the dockable pane is used to ‘dock’ the dialogs you are working with, enabling you to navigate around theWalichart or see the changes being made without closing the dialogs.

### 3.5 Switching to edit mode

When you first enter Retain you will always be in the 'read-only mode'. While in read-only mode you can move around your Retain notebook and produce reports but you cannot amend any data.

To edit the data you have to be in the ‘edit mode’. In a network environment you will also need to have edit access rights which should have been set up by your Retain administrator.

**To switch to Edit mode:**

1. Select 'Edit-> Edit mode...' from the menu.
   
   Shortcuts: The ‘Edit-mode’ button or press CTRL+E.

2. Enter the edit password in the 'Password' dialog. The default password is ‘abc’ (case sensitive). To change the password, see the [Changing the edit password](#) section.

3. Click on 'OK' or press ENTER.

Once in the edit mode, the ‘Edit-mode’ button will be grayed out and the ‘Edit booking’ button will become enabled. You can now make changes to the data.

**Note:** If the edit button is grayed out, it means you do not have the appropriate access rights to switch to the edit mode.

You will remain in the edit mode until you choose to return to read-only mode. You may want to switch back to read-only mode at the end of an editing session or if you move away from your PC, to make sure you do not make changes accidentally. Click on the ‘Edit-mode’ button again.

Alternatively, you can **disable the need to enter a password** when switching between the read-only and edit modes by checking the ‘Don’t ask me again’ checkbox:

![Password dialog](image)

**Note:** If you wish to re-activate the prompt, go to the 'File-> Preferences', 'General' tab and tick the ‘Always show password dialog for authentication’ checkbox.
3.6 Changing the edit password

The edit password provides a simple access control mechanism for users who have full access to the system. Access for network users is also controlled by user access rights, as defined by your Retain administrator.

When you enter the correct password and enter the edit mode, you can amend all the data stored within Retain.

When Retain is first installed the edit password is 'abc' (case sensitive). If you are relying on this password to control access to edit facilities in Retain then you should change this password regularly.

To change the edit password:

1. Select 'Edit-> Change password...' from the menu.
2. In the 'Password' dialog enter the current password and click on the 'OK' button.
3. Enter your new password and click on the 'OK' button.
4. Re-enter the new password and confirm your changes by clicking on the 'OK' button.

Your new password will be saved and will be required whenever you switch into edit mode in the future.

Each Retain user with full edit access rights should maintain their own edit password.

Note that the password is case sensitive and is held locally. If you forget your password, contact your support provider.

3.7 Exiting Retain

To close the current notebook(s) and exit Retain, select 'File-> Exit' from the menu.

Shortcut: ALT+F4.

You do not need to save changes to the data before exiting Retain because all the changes are saved to the disk as they are made.

However, you may be prompted to save changes to your notebooks. See the Working with notebooks chapter for more information.
4 Quick start

4.1 Quick Wallchart

Opening Retain

Locate the Retain icon on your workspace and double-click on it or launch the application from the Start Menu. In the start-up screen you can create a new notebook or open an existing one.

Retain has been set up to resemble a personal notebook consisting of notebook pages that constitute a set of personalised views of one Retain database. Each notebook can contain one or more notebook pages, each representing a different view of the data (you can add up to forty notebook pages).

Altering resource, job or booking information within a notebook will change the information held in the database directly.

Altering the selection criteria, sort order or fields displayed only affects the notebook you are currently working with. By saving a notebook you will be saving these settings.

To create a new notebook, select ‘File-> New’ from the menu.

To open an existing notebook, select ‘File-> Open’ from the menu. The Wallchart view (the default view) will open. It has resources/jobs listed on the left-hand side with the date range at the top and bottom of the screen. Bookings are displayed in the middle of the screen.

Related Topics:

Notebooks overview
Creating a new notebook
Opening an existing notebook
Saving the notebook
Default notebook

Navigation

Menu options can be accessed from any part of the screen by right-clicking with your mouse. The contents of the drop-down menus vary depending on which part of the Wallchart the mouse cursor is positioned in.

There are several ways in which you can navigate within the Wallchart:

Scroll Bars

- The scroll bars at the right-hand side of the Wallchart enable you to scroll up and down the resource/job list.
- The scroll bars at the bottom of the Wallchart enable you to move forwards and backwards in time.
- The single arrow moves a single unit in time (depending on the date scale displayed).
- The double arrows move one Wallchart view in time.

Transparent Frame

The transparent rectangular frame at the bottom of the Wallchart can be dragged to the left/right or extended/condensed. The time period displayed in the Wallchart will correspond to that contained within the
rectangle.

The ‘Go To’ button

Clicking on the 'Go To' button at the bottom left corner of the screen will open up the 'Move to Date' dialog, allowing you to specify a required date to be displayed.

To change the time scale displayed within the Wallchart, right-click anywhere on the booking area of the Wallchart. Select 'Zoom...' from the menu and choose the required date scale. Alternatively, use the time scale buttons on the toolbar.

Locating a particular resource or job

To quickly locate a record, start typing the name of the required resource/job. See the Finding a particular resource or job section for more information.

Rotating the view

To switch from Resource to Job view, right-click anywhere within the Wallchart and select 'Job View' from the menu.

Alternatively, click on the 'Rotate View' button to switch between the views.

The job view displays the list of jobs on the left-hand side of the screen with the related bookings in the centre of the Wallchart. Right-click anywhere in the Wallchart and select 'Resource View' to switch back to the original view.

Booking bar tips

Booking bar tips are displayed when you hover over a booking with your mouse:

<table>
<thead>
<tr>
<th>Feb 2010</th>
<th></th>
<th></th>
<th></th>
<th>Mar</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 Feb</td>
<td>9 Feb</td>
<td>16 Feb</td>
<td>23 Feb</td>
<td>2 Mar</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Digitise</th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>resource Name</td>
<td>Frank Bell</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>job Name</td>
<td>Digitise</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start Date</td>
<td>30/01/2010 09:30</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>End Date</td>
<td>12/02/2010 17:30</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

These tips are configurable and can be edited to display the fields that are most relevant to you.
4.2 Quick bookings

Working with bookings

In order to make a booking, you need to:

- Be in edit mode
  You must be in the edit mode in order to make any changes to the data. This includes amending resource, job, component details, making bookings, etc. Select 'Edit-> Edit Mode' from the menu. Type in the password. The default password is 'abc' (case sensitive).

- Mark an area within Wallchart and make a booking
  To make a booking, mark an area within the Wallchart that encapsulates the necessary date range, right-click and select 'Make booking...' from the menu. See Making a booking section for more information.

You can make bookings for one or more resources using the 'Booking' dialog. A job and at least one resource must be selected in order to make a booking.

To edit the booking details, right-click on the necessary booking and select 'Edit booking...' from the menu. You can also change the booking start/end dates using the Wallchart: move the mouse over the left/right border of the booking and when the cursor changes to a resize the booking as necessary.

To move one or more bookings within the Wallchart, click on the necessary booking(s) and drag them to the required position.

To copy a booking, hold down the CTRL key and click on the booking you wish to copy then drag it to the position where you want it to be pasted.

To select multiple bookings, hold down the CTRL key and click on the necessary bookings.

To delete a booking, select the booking by clicking on it and press Delete(DEL). Alternatively, right-click on a booking and select 'Delete booking' from the menu. Click on 'Yes' to confirm the deletion.

Related Topics:

- Switching to edit mode
- Making a booking
- Editing bookings

Using the clipboard

Clipboard is useful when you want to move(copy bookings beyond the currently displayed area of Wallchart. It is located at the top left-hand side of the Wallchart page.

The clipboard is similar to the normal clipboard facility provided by other Windows applications as you can paste bookings from the clipboard. However, Retain clipboard is a little different because:

- it only deals with bookings,
- a number of bookings can be stored at any one time,
- each notebook page has its own clipboard. The bookings in one page's clipboard are unavailable in any other pages' clipboard.
Copying bookings

You can copy bookings between resources. To copy a booking to the clipboard, hold down the CTRL key and click on the booking you wish to copy then drag it to the clipboard.

Cutting bookings

Click on the booking to select it. Holding down the mouse button and drag it to the clipboard.

Moving up/down within the clipboard

When the clipboard fills up, arrow keys appear on the right-hand side allowing you to scroll up and down the list of bookings.

**Note** that you can also move/copy bookings from the clipboard in the same manner you move/copy them to the clipboard.

### 4.3 Quick resources and jobs

**Add/edit/delete**

Make sure you are in the **edit mode** before attempting to alter record details.

If unsure, you can check whether you are in edit mode or not by going to the 'Edit' menu. A tick next to the 'Edit Mode...' means you that you are and can edit records.

**Adding a resource/job**

Right-click on the resource/job list (displayed on the left-hand side of the screen). Choose the 'Modify Resources/Jobs' option from the menu and click on the 'New' button. Enter the necessary details in the 'Add Resource' or 'Add Job' dialog. When finished, click on the 'Add' button.

**Editing a resource/job**

Right-click on the resource/job list (displayed on the left-hand side of the screen). Choose the 'Modify Resources/Jobs' option from the menu. Locate the record you wish to edit from the drop-down list and click on the 'Edit' button. Edit the required details in the 'Edit Resource' or 'Edit Job' dialog. When finished, click on the 'OK' button.

**Deleting a resource/job**

Right-click on the resource/job list (displayed on the left-hand side of the screen). Choose the 'Modify Resources/Jobs' option. Locate the record you wish to delete and click on the 'Delete' button. A warning message will appear asking you to confirm the deletion. Click on 'Yes' to proceed or 'No' to cancel the deletion.
**Sorting**

Sorting is useful if, for example, you wish to sort your resources alphabetically by grade or office.

Right-click on the resource/job list on the left-hand side of the screen and select ‘Sort...’ from the menu. You can choose to sort by a number of different fields. See the Changing sort order section for more information.

**Note:** Do not forget to clear the sorting once finished.

**Selecting**

Selecting is very useful as it allows you to filter the view according to your needs. For example, you can display resources with the 'Manager' grade, show the London office staff only or view the jobs that Alice Jardine manages. See the Defining selection criteria section for more information.

Selecting – Marked records

You can view only the selected records. Use 'click and drag' functionality to select or deselect the required records. Alternatively, hold down the CTRL key and click on the records you want to be included in your selection (from the resource/job list on the left-hand side of the screen). Right-click on the resource list and choose the 'Select marked records' option.

To clear this selection, right-click on the resource/job list and choose the 'Clear entire selection' option from the menu. Alternatively, select the 'Data-> Clear entire selection'.

Selecting – Availability

If, for example, you want to show all the resources that are available during a particular time period, mark an area anywhere within the Wallchart (as if you were going to make a booking). Right-click and select 'Special Selections-> Add...' from the menu.

In the 'Special Selections' dialog make sure 'Availability' is selected in the 'Calculated Field' drop down and edit the start and end date of the preferred time frame. Enter an availability percentage (the default is 80%) and click on the 'OK' button to save changes.

You can perform these Special Selections on other calculated fields such as 'Utilisation'. See the 'Special Selections' dialog section for more information.

To clear the availability selection, right-click on the resource list and select 'Special Selections-> Clear...' from the menu.
4.4 Quick notebooks

Notebooks and pages

You can add up to forty notebook pages to your notebook, each page containing a different view of your data. You can add a Wallchart, Calendar or Report page. The characteristics of each notebook page can be defined and maintained independently using the various display features in Retain.

Adding a page

To add a new notebook page, select 'Notebook-> Add page...' from the menu or click on the 'Add page' button. In the 'Add Page' dialog, choose what type the new page will be (Wallchart, Calendar or Report), name the page and click on the 'OK' button. A new page will be added to your notebook.

Select the new page from the drop-down list. The sort and selection of the new page defaults to all resources sorted by name. Once in your new notebook page, use the appropriate sort and selection criteria to change the view as necessary.

Adding a Calendar page

The calendar view shows bookings for one individual resource or job. Time is represented in a calendar style grid and special navigation features allow you to move between resources or jobs.

To add a calendar page, select 'Notebook-> Add page...' from the menu or click on the 'Add page' button. Choose 'Calendar' in the 'Add Page' dialog, name the calendar page name click on the 'OK' button.

Note that the calendar displayed will default to the first resource in your resource list. For information on how to select a specific resource or move between resources, see the Calendar view chapter.

Adding a Report page

Reports page allows you to create customised job and resource based reports. You can format, sort, select and aggregate your reports in a number of ways.

To add a report page, select 'Notebook-> Add page...' from the menu or click on the 'Add page' button. Choose 'Report' in the 'Add Page' dialog, name the report page and click on the 'OK' button.

Using 'Setup Report' dialog define the fields you want to display in the report and choose the date range. You can also define sort or selection, if necessary.

Deleting a notebook page

To delete a page, select it from the drop-down list and choose 'Notebook-> Delete page...' from the menu. Click on the 'OK' button to confirm deletion of active page.

Saving and closing notebooks

Saving a notebook

To save a notebook, select 'File-> Save' from the menu or press CTRL+S. Select the required location and type in a name for your notebook. It will be saved with the '.RetainNotebook' file extension.

Note that the view settings such as the sort order or selection of fields of the data will be saved. Any changes to the actual data (e.g. bookings) will already have been saved within the database while the changes were being made. See the Saving the notebook section for more information.
Closing a notebook

To close a notebook, select 'File-> Close' from the menu. If any changes were made and you close the notebook or exit Retain without saving, you will be prompted with a dialog asking you to confirm that you do not wish to save changes.

Opening notebooks

When you open a previously saved notebook, the underlying data displayed will be the current data. The views will be those saved when you last closed the notebook.

To open an existing notebook, select 'File-> Open' from the menu or click on the 'Open' button. In the 'Open' dialog specify the location of the notebook, select it and click on the 'OK' button.

Format booking bars

Bookings are displayed as coloured bars within the Wallchart. You can customise the following features of booking bars:

Booking bar height/depth

To change the height of the booking bars on the Wallchart, right-click on a highlighted booking. Select 'Booking Bar-> Depth...' from the menu and choose the bar size you wish to use.

You can also choose to make the depth proportional to the loading of the booking by selecting the appropriate radio button.

Booking bar layout

To change the layout of your booking bars, right-click on a highlighted booking and select 'Booking Bar-> Layout...'. You can then choose whether to show bookings separate or stacked; select the 3-D look of the bar (Plain, Embossed or Recessed); and whether to show continuation arrows when the bookings go beyond the edge of the currently visible screen or to use the word wrap option. See the Booking bar formats section for more information.

Booking bar fields

To change the details displayed on the booking bars, right-click on a highlighted booking bar and select 'Booking Bar-> Bar Fields...'. From here you can add or delete fields in the booking bar. You can change the font of text by selecting 'Bar font' from the same menu. See the Booking bar fields section for more information.

Booking bar tips fields

To change the details displayed as the booking bar tips, right-click on a highlighted booking bar and select 'Booking Bar-> Tips Fields...'. From here you can add or delete fields in the tips box. To change the font of tips text, select 'Tip font' option from the same menu. See the Booking bar tips section for more information.
4.5 Quick reports

Report page

To create a Report page, follow the instructions provided in the Creating a report section.

Report fields are displayed on each row of the report. On the Fields tab of the Setup Report dialog select the fields you want to display in your report from the drop-down list in the 'Fields' panel.

You can select any of the fields from the resource, job and bookings tables, plus a number of special report fields (calculated fields).

Report sort criteria

Click on the 'Sort...' tab to sort the records listed in your report. See the Sorting and selecting chapter for more information.

Report selection criteria

Click on the 'Selection...' tab and input selection criteria to choose the records for your report.

Report date range

You can also specify the date range the report will be generated for. Select 'Data-> Date range' from the menu, click on the 'Date Type' tab and choose the time range you require. If you want to input a manual date range, choose the 'Manual Date Range' option at the top of the Date Type pick list and use the calendar buttons to select a start and end date for your report. When you are satisfied with your report specifications, click on the 'OK' button.

Viewing

Click on the new Report page to view your report. If you have entered sort criteria, the report will be grouped under sort headings.

To view all records' details right-click anywhere over the main report area and choose the 'Open All Detail' option.

Report header/footer

To edit the report header and footer, right-click anywhere over the Title area and select the 'Edit Header...' option. The Header/Footer Configuration dialog will open, from where you can edit either the header or the footer.

You may edit the following header details: title, sub-title, date of report generation, page number, date range covered by report, surrounding frame, column titles. You can also choose whether or not to show a header at all.

You can edit the following footer details: footnote, date of report generation, page number, surrounding frame, fonts for footer elements. Click on the Footer tab to edit footer details. When you have finished, click on the 'OK' button.
**Printing**

It is always a good idea to **preview** the report before printing it. Select 'File-> Print Preview...' from the menu. When you have finished viewing the page, click on 'Close'.

To **print** the active page, select 'File-> Print' from the menu. Using the 'Print' dialog, you can define the margins, header and footer information as well as the date range you want to be printed.

### 4.6 Quick preferences

**Preferences**

Retain preferences are the default settings which will be applied in various areas of Retain Wallchart.

**To set the preferences**, select 'File-> Preferences...' from the menu.

Available Preferences:

- **General**: These options will apply to all your Retain notebooks. For example, you can choose whether or not to display booking bar tips and whether you can make block bookings.

- **Bookings**: These options will apply to bookings. For example, you can choose whether to display field names on booking bars and booking tips.

- **Availability**: These options will apply to availability selections. For example, the default availability limit.

- **Printing**: These options will apply to printing. For example, whether or not the printing should be in colour.

**Toolbars**

Retain provides a 'toolbar', a panel of buttons located at the top of the screen. These buttons provide a quick access to most of the commonly used features in Retain. You may wish to customise the toolbar to include the buttons you will require most frequently.

**To customise your toolbar**, select 'View-> Toolbar options...' from the menu.

**To remove a button** from your current toolbar, click on the button in the 'Selected Toolbar' list on the right-hand side and drag it to the 'Available Buttons' list on the left-hand side.

**To add a button** to your current toolbar, select it from the 'Available Buttons' list and drag it to the 'Selected Toolbar' list. Alternatively, use the left and right arrow buttons to move the toolbar button from one list to another.

**To add a separator (space) between the buttons**, click on the position in the current toolbar above which you wish to add the space and click on the 'Separator' button.

**Note** that buttons can be rearranged using click and drag functionality. When you are finished, click on the 'OK' button.
4.7 Quick reference

Wallchart view

The following image is an example of a Wallchart view:

For more information see the Wallchart view chapter.

Calendar view

The following image is an example of a Calendar view:

For more information see the Calendar view chapter.
Report view

The following image is an example of a Report view:

For more information see the Retain Report Writer chapter.

Buttons

Main buttons:

- Create new notebook
- Open existing notebook
- Help Topics
- Wallchart view - Edit mode on/off
- Wallchart view - Switch between Resource/Job view
- Wallchart view - Add new notebook page
- Wallchart view - Delete active notebook page
- Wallchart view - Change active notebook page name
- Wallchart view - Make a booking
- Wallchart view - Edit selected booking
- Wallchart view - Delete selected booking
- Wallchart view - Copy selected booking to clipboard
- Wallchart view - Time scale, years
- Wallchart view - Time scale, months
- Wallchart view - Time scale, weeks
- Wallchart view - Time scale, days
- Wallchart view - Time scale, hours
Quick start

Wallchart view - Change sort order
Wallchart view - Change resource/job selection
Wallchart view - Edit page fields
Wallchart view - Turn Wallchart grid on/off
Print preview - Send to printer
Print preview - Edit print header
Print preview - Edit print footer
Reports - Show/don't show report header
Reports - Show/don't show report footer
Reports - Edit report header
Reports - Edit report footer
Reports - Show more record detail
Reports - Open all record details
Reports - Show less record detail
Reports - Close all record details
Calendar view - Show previous record
Calendar view - Show next record

Note: If you hover over the button with your mouse, a tip will appear indicating the function of that button.

For the full list of available buttons, see the Retain button reference section.
5 The Wallchart view

5.1 Overview

Wallchart pages in Retain look similar to a traditional 'wallchart' booking system. They have a date scale along the top and a list of resources on the left-hand side with a number of coloured bars on the grid representing bookings (commitments to work):

You can do much more with Retain Wallchart than any manual wallchart. In addition to making bookings, you can:

- **rotate the view** to see the bookings against jobs instead of resources;
- **sort the resources (or jobs)** in different ways and filter out unnecessary information from your current view of the Wallchart;
- **manipulate the scale of the booking bars** and Wallchart as a whole, as well as define the information displayed on the booking bars;
- **select several bookings at the same time** and make changes to all of the selected bookings simultaneously;
- manage the information on **resources** and **jobs** listed on the Wallchart;
- add **public holidays** and have bookings incorporate their effects.

Related Topics:

Working with the Wallchart
Wallchart display options
Public holidays
Booking display options
Wallchart fields
Setting the opening date
5.2 Wallchart 3-D view

Retain Wallchart can also be viewed three-dimensionally, providing you with the ability to instantly see the loading of bookings:

The 3-D view is an alternative view of the Wallchart rather than a replica of the 2-D Wallchart functionality.

To switch to the 3-D view, select 'View-> 3D Wallchart' from the menu.

You can rotate the view upwards, downwards, left or right by clicking on the appropriate arrow. Rotating the view will reveal the depth of the bookings, which represents their loading percentage (see the image above):

The hovering control for this view is displayed on the top right corner of the screen and does not move when the view is rotated.

Clicking on the + and - buttons will zoom the view in and out, respectively. This allows you to see a larger or smaller number of resources.

To reset the rotation, click on the ▼ button. Note that this does not reset the zoom in depth.

Since the 3-D view provides a visual indication of the loading of each booking, it is especially useful if you want to assign a booking to a resource with less loading.

For example, imagine you have two resources (Fiona Shoch and Frank Bell) that can be assigned to the 'Market Media' booking. In the original Wallchart view the situation would look similar to this:
Because you want to make sure the booking goes to the resource with less loading and the traditional Wallchart view does not visually indicate the loading of bookings (see the image above), you would have to check each booking ('E-Solutions', 'Urban Future' and 'Digitise') to calculate the total loading for each resource.

Furthermore, without checking the loading you would most likely assume that since Frank Bell has two bookings and Fiona Shoch only one, the person with less loading is Fiona Shoch and so you would assign the 'Market Media' booking to her.

However, if you were in the 3-D view, the loading of these bookings would be clearly visible and you would see that Fiona Shoch has a much greater workload than Frank Bell:

The 'Market Media' booking should therefore be assigned to Frank Bell.

The 3-D view also offers **autoscrolling functionality**. It allows you to move bookings both horizontally and vertically within the Wallchart. The view will automatically ‘move’ along together with the booking. This way you can move bookings to a date not currently displayed without using a clipboard.

To move a booking, click on it and drag to the required area.

Font scaling is another feature of the 3-D view. If you decide to change the size of the booking bar font, zooming the view in and out will automatically adjust the size of the font to fit the booking size.

Also, clicking on a booking makes it transparent thus allowing you to see the bookings behind it. This is especially useful for bookings with high loading:

To switch to the original Wallchart view, go to 'View-> Wallchart'.
5.3 Working with Wallchart

Working with Wallchart overview

Working with Wallchart includes:

- rotating the Wallchart
- changing the Wallchart date scale
- navigating within the Wallchart
- finding a particular resource or job
- using the Project view
- taking screenshots
- using the dockable pane

Rotating the Wallchart

The Wallchart page can be displayed in two basic views:

- Resource view - lists resources on the left-hand side. Bookings represent jobs allocated against the resource.
- Job view - lists the jobs on the left-hand side. Bookings represent resources booked to the displayed job.

To switch between these two views, click on a booking, if necessary (the rotated view will open with the selected booking on the top line) and select 'View-> Rotate view' from the menu.

Shortcuts: The 'Rotate view' button or press CTRL+R. Alternatively, right-click anywhere over the booking grid and select either 'Job view' or 'Resource view' as appropriate.

Within these two basic views, there are numerous further options which allow you to manipulate the Wallchart page on screen. See the Display options and Wallchart fields sections for more information.

Changing the Wallchart date scale

Retain Wallchart page can be displayed using a wide range of date scales. You can work in units as small as fractions of an hour and as large as months or even years.

You can amend the date scales at any time. This does not affect any of the underlying data and you can switch between date scales as often as you like.

To change the date scale, select 'View-> Zoom' from the menu and then choose a view.

Shortcuts: The date scale buttons: 365 (yearly), 31 (monthly), 7 (weekly), 1 (daily), (hourly).

The standard date scales are displayed as follows:

- Year Approximately 3 years displayed. Each cell represents 1 month.
- Month Approximately 3 months displayed. Each cell represents 1 day.
- Week Approximately 3 weeks displayed. Each cell represents 1 day.
The Wallchart view

- **Day** Approximately 3 days displayed. Each cell represents 1 hour.
- **Hour** Approximately 1 hour displayed. Each cell represents 5 minutes.

You might want to use the 'year' view for long-term and the 'week' or 'day' views for short-term planning.

You can also customise the settings associated with these **standard date ranges**.

To manipulate the date ranges manually, resize the transparent date box at the bottom of the Wallchart. Move the mouse pointer over one end of the box so that the pointer changes to a → ↔. Click on the border and drag it to resize the date box as necessary. The date range encapsulated within the date box will be displayed in the Wallchart.

**To navigate to a specific date**, click on the 'Go To' button at the bottom left corner of the Wallchart:

![Move to date dialog]

Enter the necessary date or select it from the calendar and click on the "OK" button.

**Navigating within the Wallchart**

There are a number of techniques you can use in order to navigate within the Wallchart:

- Use the date scale below the Wallchart grid. Click on the transparent rectangle and drag it left or right, as necessary.

- The 'Go To' button. This allows you to go to a specific date. The default value will be the current date, therefore clicking on the 'OK' button will take you to today's date (indicated by a coloured vertical line that goes through Wallchart).

- The single and double arrow buttons either side of the date scale. Press the arrows on the left-hand side to move back in time or the arrows on the right-hand side to move forward in time.

- The scroll bar on the right-hand side of the screen. This allows you to scroll through the list of resources/jobs displayed on the left-hand side of the screen.

- Cursor keys. Once you have clicked on the Wallchart grid, you can use the cursor keys to move between the cells on the grid.

  - **Changing the date scale**, increasing the date range displays more information on the grid.
Finding a particular resource or job

You can scroll up and down the resource (or job, in the Job view) list within the Wallchart to find a particular record. However, there is a quicker way to find a necessary record within the Wallchart.

To quickly find a record:

1. Start typing the name of the resource/job and the 'Select record' dialog will appear.
   Alternatively, use the 'Go to record' button.

For example, if you are in the Resource view and want to locate Alison Griffin, press 'A' and the 'Select Record' dialog will appear:

2. Double-click on the required resource name or select it from the list and click on the 'Goto' button.
3. The Wallchart will refresh with that resource displayed as the first record in the list.

If you have another field displayed within the Wallchart and sort the view by that field, it will also be shown in the 'Select Record' dialog:

Note: If the 'Use filtering in Select Dialog' checkbox is ticked in the 'Preferences' dialog, only the matching
The Wallchart view

records will be displayed as you type in the necessary name. Alternatively, all the records will be displayed with the matching record being highlighted.

The Project view

The Project view separates bookings into sub-fields, providing a better view of bookings belonging to each resource/job. It is often used to display bookings against a resource on a separate row for each job:

There are many ways of using the Project view. Some of the more frequently used views have bookings separated into rows:

**In Resource view**, each resource will have a separate row for:

- each job,
- each job manager.

**In Job view**, each job will have a separate row for:

- each resource booked to the job,
- each grade of the resource booked for the job.

**To turn the Project view on or off**, select 'View-> Project view' from the menu.

Shortcuts: The 'Project view' button or press CTRL+J.
Screenshot capture

Retain Wallchart has a built-in screenshot creation functionality.

You can take a quick screenshot of the current Wallchart view or a selected area by choosing 'View->Screenshot' from the menu:

To create a screenshot of the current Wallchart view, select the 'Quick Screenshot' option. Alternatively, if you want to take a screenshot of the bookings assigned to specific resources for a particular date range for example, click and drag an area that will encompass the region you wish to capture:

The screenshot will be automatically opened within your default image application. You can then name and save this screenshot in the required location on your computer.

Note that all the screenshots you take will be temporarily stored as bitmap images in the Windows temporary directory. Therefore, it is important to save the screenshots you wish to keep.
Dockable pane

When working with bookings, you may want to move around the Wallchart or see the changes being made without closing the dialog(s) you are currently working with. The 'Booking', 'Scenario Manager', 'Colour Legend' and 'Shape Legend' dialogs can be 'docked' in the dockable pane which is situated on the right-hand side of the Wallchart:

Note that the 'docked' dialogs will also be visible while working in Calendar and Report views.

To add a dialog to the dock, simply double-click on the title bar or drag and drop it on the dockable pane. You can add several items to the pane and move them around by dragging up/down or left/right as necessary:
To close a dialog within the pane, click on the button for that dialog.

To remove an item from the pane, click on the title bar and simply drag it to the main Wallchart area.

To hide the dockable pane from view, click on the button.

To resize the dockable pane, click on the border and move it to the right/left as required.

5.4 Wallchart display options

Wallchart display options overview

Retain provides various display options to allow you to view Wallchart and Calendar pages in different ways. Display options include:

- **grid lines** - turn the vertical grid lines on or off;
- **date scale settings** - change standard date settings, grid lines and shading for a more convenient display;
- **week display** - change how weeks are displayed in the date bar;
- **display diary** - change the displayed time per day and days per week.

All of these display options are applied to the currently open page, not all pages in the notebook. If you wish to have the same settings across all pages, create a page with the required settings and copy it. You can then edit each page as necessary.
**Note** that the current display options will be applied when you print out a Wallchart or a Calendar page.

**Related Topics:**
- Public holidays
- Booking display options
- Wallchart fields

**Grid lines and shading**

Vertical grid lines in Wallchart and Calendar pages help to identify the individual cells of the booking area.

Thick black grid lines indicate the main dividers within the current screen (e.g. weeks), while grey grid lines indicate the individual cells within each main divider (e.g. days). Broken grey grid lines indicate the lowest level of time division, if in use. For further help in identifying individual cells, shading can be applied to the grid.

To turn the vertical grid lines and shading on/off, select 'View-> Grid' from the menu.

Shortcuts: The 'Grid lines' button or press CTRL+G. Alternatively, right-click over the Wallchart area and select 'Grid' from the menu.

**Customising date scale settings**

To customise the date scale settings, select 'View-> Display settings...-> Date Scale Settings' tab from the menu.

Shortcuts: The 'Display settings' button ('Date Scale Settings' tab) or right-click anywhere over the date scale and select 'Date Settings-> Date Scale Settings' tab.

The 'Date Scale Settings' tab allows you to set up:

- the scaling;
- the time information shown in the calendar bars at the top of the resource screen;
- where the grid lines are displayed;
- where shading is applied;
- how booking start and end times should snap to the grid;
- the scrolling unit:
Select the necessary date scale by choosing the appropriate scale from the drop-down list.

Scale value - The 'Scale factor' field represents the scale value. The larger the number, the greater the amount of time shown on screen. The value represents the number of seconds for each pixel on screen. As a general rule, you do not need to adjust this number.

Date bars - Choose which scales you wish to appear in the date bar.

Grid lines - Choose at what time intervals you want the grid lines to appear.

Shade - Choose which time intervals you wish to shade.

Snap to - Choose the smallest unit you wish to plan against in this particular scale.

Unit scroll - Choose the unit of time used when you move the current view left or right by one step.

You can edit these settings for each different date scale for the current page in the notebook.

Week display

Weeks can be displayed in the date bar using either dates, week numbers or both.

To change display settings:

1. Select 'View-> Display settings-> Week Display Mode' tab from the menu:
2. Choose one of the following:
   
   - 'Show Date' radio button to display the date (first day of the week).
   - 'Show Week' radio button to display the week number.
   - 'Show Both' radio button to display both dates and week numbers.

3. Click on the 'OK' button to save your changes.

Display diary

Display diary settings allow you to customise the time range displayed within the Wallchart.
You will probably want the display diary to correspond your office hours.

To customise the display diary settings, select 'View'-> Display settings-> Display Diary' tab from the menu.

Shortcut: The 'Display settings' button, 'Display diary' tab.

- Amend the start and end time for the display diary by typing in the 'Start of day' and 'End of day' fields. Alternatively, use the up/down arrows to change the displayed time in 5 minute increments:

- Tick the 'Show weekends' checkbox if you want weekends (7 days per week) to be displayed within Wallchart.

- Tick the 'Mark non-working regions' checkbox if you want non-work time (e.g. public holidays) to be displayed within Wallchart (as crosshatched areas):

Having non-working regions displayed within the Wallchart will provide a visual display of resources' diaries and therefore their availability.

- You can also define colour for the non-working regions by clicking on the 'Colour' button. The default
The Wallchart view

colour is grey.

Click on the 'OK' button to save your changes.

5.5 Public holidays

Public (statutory) holidays in the Wallchart can be marked visually as crossed-out days. Furthermore, these days are accounted for in booking operations and calculations. Public holidays are defined using Retain Security Manager.

In terms of calculations, public holidays are similar to weekends:

- Making a booking that overlaps a public holiday, gives a booking time of one day less than without the public holiday. For example, if one day is 7.5 hours, then a five day booking overlapping a public holiday has 30 hours.

- Making a booking that starts or ends on a public holiday, includes the public holiday in the booking time. For example, if a five day booking starts or ends on a public holiday, it would have a booking time of 37.5 hours.

Note that Retain does not treat consecutive public holidays (e.g. Christmas) as one holiday. A four day booking starting on the first of two consecutive holidays would have a booking time of 30 hours, including the first but excluding the second holiday.

For utilisation and availability calculations, holidays are excluded from standard time. A month that would normally have 22 working days but has two public holidays uses 20 working days for its calculations.

Booking operations such as moving, copying, using the clipboard, rolling forward, duplicating and splitting bookings all take into account any public holidays by adjusting the booking details, depending on its settings:

- A five-day fixed-loading booking moved to a date range overlapping a public holiday would adjust the time to 30 hours to keep its loading of 100%.

- A five-day fixed-time booking moved to a date range overlapping a public holiday would change its loading to 125% to keep the booking time at 37.5 hours.

- Splitting a booking where the 'split' would occur on a public holiday will have the resulting bookings end on either side of the holiday.

Though these calculations are what will be most often used for Retain's purposes, it is recommended to explicitly book public holidays and have overlapping bookings split into one booking ending before and one starting after the holiday, to ensure the bookings behave as necessary.

5.6 Booking display options

Booking display options overview

Retain provides various display options to allow you to view bookings in different ways. Display options include:

- **booking bar fields** - change the fields displayed on the booking bars and in the booking tips.

- **booking bar formats** - change the depth, layout and font of the booking bars.

- **booking tips** - display or hide booking tips when moving the mouse over a booking bar and the font of the booking tips.
Like Wallchart display options, the current booking display options will also be reflected whenever you print out a Wallchart or calendar page.

All of these booking display options are specific to one particular page in a notebook and cannot be overridden globally for all pages. If you wish to maintain consistent settings across all pages, then create one page with the required settings and copy this page to establish the basic settings.

**Booking bar fields**

You can specify which fields will be displayed:

- within the booking bars themselves and
- within the tips window which pops up over each booking when booking tips are activated.

You can also define the fields separately for the Resource and Job views.

**To define booking bar fields:**

1. Select 'View-> Booking bars-> Bar fields or Tips fields' from the menu.
   
   Shortcut: Right-click on a booking and select 'Booking bars-> Bar fields... or Tips fields...' from the menu.

2. In the 'Booking Fields' dialog edit the bar or tips fields as required:

   ![Booking Fields Dialog]

3. Click on each tab heading and repeat step 2 for each set of fields as required.

4. Click on the 'OK' button to confirm your changes.

The 'Booking Fields' dialog (see the image above) also allows you to define the various booking bar and booking tips fields:

Fields can be defined independently under each of the four tab headings:

- **Bars (Res)** - Fields displayed inside each booking bar when in the Resource view.
- **Bars (Job)** - Fields displayed inside each booking bar when in the Job view.
• *Tips (Res)* - Fields displayed within the pop-up booking bar tips when you move the mouse pointer over a booking in the Resource view.

• *Tips (Job)* - Fields displayed within the pop-up booking bar tips when you move the mouse pointer over a booking in the Job view.

**In the 'Booking Fields' dialog:**

1. Select a field in the list on the left and click on the 'Add->' button to add it to the displayed fields for the current tab.
   
   Shortcut: Double-click on the selected item.

   *Tip 1:* You can include information relating to the booked resource and job in your displayed fields. In the fields list, resource fields are preceded by 'resource.' and job fields by 'job'. **Note** that adding resource and job fields may affect the speed of the application.

2. Select a field from the list on the right-hand side and click on the '<-Remove' button to remove it from the displayed fields for the current tab.
   
   Shortcut: Double-click on the selected item.

3. Select a field from the list on the right-hand side and click on the 'Up' and 'Down' buttons to reposition it within the displayed fields for the current tab.

4. Click on the tab heading to move between tabs.

5. Click on the 'OK' button when finished.

**Related Topics:**

[Booking bar formats](#)

[Booking tips](#)

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**Booking bar formats**

Booking bars can be amended by not only editing the [fields](#) and [tips](#) but also by defining the depth, layout and font of booking bars.

**Booking bar depth**

The depth of a booking bar is its vertical height visible in Wallchart and Calendar pages. You may want to increase the depth to display more information within each booking bar or to make the depth reflect the loading of bookings, for example.

**To change the depth of booking bars:**

1. Select 'View-> Booking bars-> Depth...' from the menu.
   
   Shortcut: Right-click on a booking and select 'Booking Bar-> Depth...' from the menu. There are also shortcut buttons for individual depth settings, as described below.

2. Set the depth settings as necessary:
3. Click on the 'OK' button to confirm your changes.

The booking bar depth is set in terms of both:

* **Standard Depth** - the absolute height of the booking bars measured in pixels, and
* **Relational Depth** - the depth relative to the booking's loading.

**To select a Standard Depth setting**, make sure you are in the 'Depth' tab of the 'Booking bars' dialog and tick the required checkbox:

- Choose 'Large' to display large booking bars. Shortcut: The 'Large booking bars' button.
- Choose 'Medium' to display medium booking bars. Shortcut: The 'Medium booking bars' button.
- Choose 'Small' to display small booking bars. Shortcut: The 'Small booking bars' button.

You can also define the size manually by amending the value (in pixels) for the appropriate option.

- Choose 'Fit fields' to set the standard depth with respect to the fields displayed within each booking bar. This option needs to be re-selected if fields are added to the booking bar. Shortcut: The 'Booking bars to fit fields' button.

**To select a Relational Depth setting**, make sure you are in the 'Depth' tab of the 'Booking bars' dialog and tick the required checkbox:

- Choose the 'Constant' option to display all the booking bars at the same (constant) height.
- Choose the 'Proportional to loading' option to set the depth of booking bars with respect to the loading of each booking. For example, a booking with 50% loading will be half the height of a booking with 100% loading. Shortcut: The 'Proportional bookings bars' button. See the [Proportional bookings section](#) for more information.

**Booking bar layout**

The layout of booking bars comprises of:

- **Bar Stacking** - When bookings overlap in time for the same resource or job you can choose this setting so that they stack vertically, to avoid booking lying on top of each other. Shortcut: The 'Stack booking bars' button.
The Wallchart view

- **3-D Look** - plain, embossed or recessed format.

- **Show Continuation Arrows** - tick the checkbox if you wish to display continuation arrows when bookings start before or/and finish after the currently visible area.

- **Word Wrap** - tick the checkbox if you wish the layout to resize according to the text displayed.

**To change the layout of booking bars:**

1. Select 'View-> Booking bars-> Layout...' from the menu.
   
   Shortcut: Right-click on a booking and select 'Booking Bar-> Layout...' from the menu.

2. Set the layout settings as necessary:

   ![Booking Bars Dialog]

3. Click on the 'OK' button to confirm your changes.

The **Bar Stacking** options define how bookings will be displayed when they overlap against the same resource (in the Resource view) or job (in the Job view):

- Choose the 'Separate' option for the bookings to be displayed separately. In cases where bookings overlap, the overall depth of the resource row will be increased.

- Choose the 'Stacked' option for the overlapping bookings to be stacked (like a deck of cards, for example) with only one booking fully displayed. This option reduces the screen usage when there are many overlapping bookings, as will often be the case in the Job view. Shortcut: The 'Bar stacking' button.

The **3-D Look** options change the look of all the booking bars in the current view:

- Choose 'Plain' for no 3-D effect.

- Choose 'Embossed' for the booking bars to appear as if being laid on top of the booking screen.

- Choose 'Recessed' for the booking bars to appear as if being inset into the booking screen.

**Booking bar font**

The booking bar font is the font used for the text displayed within the booking bars.

**To change the font of booking bars:**
1. Select 'View-> Booking bars-> Bar Font...' from the menu.

Shortcut: Right-click on a booking and select 'Booking Bar-> Bar font' from the menu.

2. Using the 'Font' dialog set the new font, as necessary. You can edit the type of font, its style, size and colour, as well as use of effects such as strikeout or underline:

![Font dialog]

3. Click on the 'OK' button to confirm your changes. The font you define will be applied to all the booking bars. You should therefore ensure that it is clearly readable for both on-screen viewing and printable versions.

**Booking bar tips**

Booking bar tips are text boxes that appear when you hover over (move the mouse pointer over) a booking. These text boxes provide additional information on bookings, allowing you to instantly see the details of the booking:

![Booking bar tips]

**To turn the booking bar tips on/off**, right-click over the booking area (not on a booking) and select 'Booking Tips' from the menu. Alternatively, select 'File-> Preferences...' from the menu. In the 'Preferences' dialog, go to the 'General' tab and tick the 'Booking bar tips' checkbox. Repeat the process to return the booking tips setting to its original state.

If you want to change the fields displayed within the booking tips window, see the [Booking bar fields](#) section.

**Note:** You can also choose whether to show the names of the fields displayed in the booking bar tips using the 'Show booking tip field names' checkbox in the 'File-> Preferences...-> Bookings' tab.

**To change the font of booking bar tips:**

1. Select 'View-> Booking bars-> Tip Font...' from the menu.
Shortcut: Right-click on a booking and select 'Booking Bar-> Tip Font' from the menu.

2. Using the 'Font' dialog set the new font, as necessary. You can edit the type of font, its style, size and colour, as well as use of effects such as strikeout or underline:

3. Click on the 'OK' button to confirm your changes. The font you define will be applied to all the booking tips. You should therefore ensure that it is clearly readable for the on-screen viewing of bookings.

5.7 Wallchart fields

You can specify the fields displayed on the left-hand side of the Wallchart in both Resource and Job views. You can also customise the position and width of these fields allowing you to tailor the Wallchart view to your requirements. For example, you can display resources and their department or jobs and their office.

In addition, you can add any calculated field to the left-hand side of the Wallchart. Calculated fields are fields that provide additional information about a resource or job, computed from the underlying data (e.g. availability or utilisation):
**Note** that calculated fields which require a date range (such as availability) will use the date range that is currently displayed within Wallchart.

**To define the fields:**

1. Select 'Data-> Fields' from the menu.

   **Shortcut:** The 'Fields' button.

2. In the 'Setup Wallchart' dialog, 'Fields' tab add or remove the fields for both Resource and Job view (see instructions below):

   ![Setup Wallchart](image)

   - **Fields** panel contains the fields displayed in the current view. The width of each column in this panel indicates the width of the column as it will be displayed in the Wallchart.
   - **Sub Project Field** drop-down list indicates the field that will be used for subsidiary rows in the Project view.
   - The 'Setup Wallchart' dialog may contain different tabs depending on the view of the page you are working within.

3. Click on the 'OK' button to confirm your changes.

You can specify resource fields for the Resource view and job fields for the Job view.

**To switch between fields in Resource and Job view,** select either 'resource' or 'job' from the 'View' drop-down list.

**Notes:**

- The 'Field' panel contains the fields displayed in the current view. The width of each column in this panel indicates the width of the column as it will be displayed in the Wallchart.
- The current value in the 'Sub Project Field' drop-down list indicates the field that will be used for subsidiary rows in the Project view.
- The 'Setup Wallchart' dialog may contain different tabs depending on the view of the page you are working within.

**To add a field:**

1. Select the field from the drop-down box in the 'Field' panel. You can also use the fast field selection functionality.
2. Adjust the width of the column by changing the number under 'Width' or by dragging the line which separates each field in the top box.

3. Adjust the order in which fields are displayed by clicking on the ● and dragging the line up or down.

4. Repeat steps 1 to 3 for each field as required.

To remove a field, click on the [x] button against the field or move the mouse pointer over a field in the top box and drag the field outside of the box.

To change the order of the fields, click on the ● on the left of the field and drag the line up or down. The top field will be the first field on the left-hand side. Alternatively, move the mouse pointer over the field in the top box and drag left or right.

To change the column width of a field, change the number under 'Width'. Alternatively, move the mouse pointer to the right-hand side edge of the field in the top box, so that the mouse pointer changes to a ↔ and drag the line to increase/decrease the width.

Shortcut: Resize the label column widths directly within the Wallchart view.

To change the field which is displayed in the Project view, click on the 'Sub Project Field' drop-down list and select the required field.

Note: Select a job field such as 'Job Name' for the Resource view and a resource field such as 'Name' for the Job view. See the Project view section for more information.

Graphical View Fonts

You can define the fonts for the following items within the Wallchart view:

- expanded records,
- collapsed records,
- sub fields and
- date bar.

To change the display fonts, select 'View-> Fonts' from the menu. Alternatively, click on the 'Fonts' [A] button. See the Editing fonts section for more information.

Like other display options, fields are specific to each notebook page. To maintain consistent settings throughout your notebook, create one page with the required settings and then copy that page.
6 The Calendar view

6.1 The Calendar view overview

The Calendar view in Retain displays the bookings for an individual resource or job in a format similar to a calendar:

You can set up separate calendar pages in your notebook, if necessary. See the Adding a page section for more information. Alternatively, you can switch between Wallchart and Calendar views.

To switch a Wallchart page into the Calendar view, select 'View-> Calendar' from the menu.

Shortcut: The 'Calendar view' button.

To switch back to the Wallchart view, select 'View-> Wallchart' from the menu.

Shortcut: The 'Wallchart view' button.

Related Topics:

Rotating the calendar
Changing the calendar date scale
Moving between calendar records
Navigating within the current record
Calendar display options
Making bookings in calendar view
Working with notebook pages
6.2 Rotating the Calendar

The Calendar page can be displayed in two basic views:

- **Resource view** - displays one resource per screen. Bookings represent jobs allocated against the resource.

- **Job view** - displays one job per screen. Bookings represent resources booked on the displayed job.

To switch between these two views, select 'View-> Rotate view' from the menu.

Shortcuts: The 'Rotate view' button or press CTRL+R. Alternatively, right-click anywhere over the booking grid and select either 'Job view' or 'Resource view' as required.

**Note:** If you click on a booking before switching the view, the axis on which the view is rotated will be fixed, so that the selected booking will be displayed as part of the rotated view. For example, if you are in Resource View and click on a job, when you switch to Job View, all the bookings for that job will be displayed.

6.3 Changing the Calendar date scale

The Calendar page can be displayed using a wide range of date scales. You can work in units as small as fractions of an hour or as large as months or even years.

You can amend the date scale at any time. This does not affect any of the underlying data and you can switch between the date scales as often as you like.

To select one of the standard date scales:

- Select 'View-> Zoom' from the menu and then choose a view.

- Select one of the pre-defined date scale buttons (Year, Month, Week, Day, Hour).

  Shortcuts: The date scale buttons.

In the Calendar view the standard date scales are displayed as follows:

- **Year** Year per row. Each cell represents 1 month.
- **Month** Month per row. Each cell represents 1 day.
- **Week** Week per row. Each cell represents 1 day.
- **Day** Day per row. Each cell represents 1 hour.
- **Hour** Hour per row. Each cell represents 10 minutes.

You might want to use the 'year' view for long-term and the 'week' or 'day' views for short-term planning.

You can also customise the settings associated with the standard date ranges.
Moving between Calendar records

In the Calendar view only one resource (in Resource view) or job (in Job view) is displayed on screen at a time. The currently selected resource or job name is displayed in the status bar at the bottom of the screen.

**To move to the next record**, right-click over the booking area and select 'Next record' from the menu.

Shortcuts: The 'Next record' button or press CTRL+SHIFT+N.

**To move to the previous record**, right-click over the booking area and choose 'Previous record' from the menu.

Shortcuts: The 'Previous record' button or press CTRL+SHIFT+P.

**To move to a particular record:**

1. Right-click over the booking area and choose 'Select record' from the menu.

   Shortcuts: The 'Go to record' button. Alternatively, start typing the first letter(s) of the resource/job you are looking for.

2. Select the necessary record in the 'Select Record' dialog.

3. Click on the 'OK' button to move to it.

6.4 Navigating within the current record

Use the following features to navigate within the current record in the Calendar view:

- **Cursor keys.** Once you have clicked on the calendar grid, you can use the cursor keys to move between the cells on the grid.

- The date scale on the right-hand side of the calendar grid. Click on the transparent rectangle and drag it up or down, as necessary.

- The single and double arrows either side of this date scale. Click on the up arrows to move back in time or the down arrows to move forward in time.

- [Changing the date scales](#). Increasing the date range displays more information on the grid.

6.5 Calendar display options

Most of the display options in the Calendar view are the same as those for Wallchart pages. The only difference is that the Project view is not available in the Calendar view.

**Graphical View Fonts**

You can define the following fonts in the Calendar view:

- expanded records,

- collapsed records,
• sub fields and
• date bar

To change the display fonts, select 'View-> Fonts' from the menu. Alternatively, click on the 'Fonts' button. See the Editing fonts section for more information.

6.6 Making bookings in Calendar view

You can make bookings in Calendar view in the same way as in Wallchart view. However, the following restrictions apply when making bookings in Calendar view:

• You can only mark an area for a single resource when in Resource view or a single job in Job view;
• You cannot move or copy the bookings graphically and you cannot use the clipboard.

You may therefore find it easier to make all your bookings within the Wallchart and use the Calendar for viewing purposes only.
7 Resources, jobs and other entities

7.1 General principles

The central concept of Retain is managing resources in order to perform jobs. The exact meaning of the terms ‘resources’ and ‘jobs’ varies from organisation to organisation but the process of allocating resources to jobs in the form of ‘bookings’ is the same in all cases.

To assist the planning process, Retain offers several levels of classifying bookings in terms of resources, jobs, components and booking types. The time taken to capture and maintain this information should be balanced with the benefit to the planning process.

Retain is primarily a resource management (as opposed to a project management) tool. It is therefore not particularly concerned with the individual activities performed during each job. However, components and booking types can be used to indicate the nature of a job.

Furthermore, Retain allows you to maintain the information stored on these entities. Users are encouraged to record descriptive information, especially resources and jobs. The data can be subsequently updated on a continuing basis.

Before making any bookings, it is advisable to first of all determine the level of detail required in order to maximise the effectiveness of the planning process. Secondly, establish the initial setup. In order to make a booking, at least one resource and one job is required.

Notes:

- You may want to consider transferring data automatically into Retain from other systems as part of this set-up exercise.
- Depending on your company's setup, you might not be able to see all of the entities mentioned above or they might be named differently.

Related Topics:

Attachments
Copy checkboxes
Numeric formatting
Linked field operators
Mandatory and optional fields
Editing multiple records
Attachments

You can attach and save files of any format to resources, jobs, types and bookings:

If you want to add attachments, go to the ‘Attachments’ tab within the appropriate edit dialog. For example, to add attachments to a job, go to the ‘Edit Job’ dialog. To add/modify booking attachments, use the ‘Booking’ dialog.

To add a file, click on the Upload button. Navigate to the location where the required file is, click on it and press the “OK” button.

The name of the attached file along with the size, the date it was last updated and the name of the user who updated it will be displayed (see the image above). 

Note that you will not be able to upload file(s) that exceed the server threshold.

To view the attached file, you can open it by selecting it and clicking on the Open button. Alternatively, simply double-click on it. The file will be automatically be opened in the appropriate application.

If any changes are made and saved to the file, Retain will detect the changes and ask you if you wish to save the amended file to the database. This allows you to quickly edit the file, without the need of downloading it, saving the changes, deleting the existing attachment and re-uploading the amended one.

To download the file to your computer, click on the Download button.

To delete the file from the record, click on the Delete button. Note that this removes the file from the database and can not be undone.

If you have any files attached already, you can perform all of the above actions (Open, Download, Delete and Upload) by right-clicking on a file and selecting the necessary option from the following menu:
Copy checkboxes

You can copy and paste any number of the field entries between dialogs when creating new (or editing existing) records for resources, jobs, booking types and bookings. This functionality allows you to speed up the process of creating new or editing existing records with common attributes (e.g. resources in the same office and department).

Note that for bookings you can only copy the values and paste them to clipboard but you can not paste them when creating new or editing existing bookings.

Once you have entered the necessary data for one Resource or Job, click on the button next to 'Copy Checkboxes' on the top right corner. A list of checkboxes will be displayed, each of which represents whether the value of that field will be copied when you click on the 'Copy Fields' button:

You can copy all the values from all fields by ticking the checkbox next to 'All'. Alternatively, select the required fields that you would like to copy.

For example, if you want to create a number of new resources working in IT department in the London office, tick the 'Office' and 'Department' checkboxes and click on the 'Copy Fields' button:
When you now re-open the 'Add Resource' dialog to create another resource record (by clicking on 'Add Again' for example), clicking on the 'Paste fields' button will paste the values you have just copied into the appropriate fields:

You can then enter all the other details as necessary.

The copied fields can also be pasted to external documents, such as Notepad:
Note: The order in which these pasted fields will be displayed in an external file is defined within Retain Security Manager.

**Numeric formatting**

Note: This functionality is disabled by default. Contact your Retain administrator if you wish to take advantage of this feature.

You can customise the display format of numeric data (e.g. the number of decimal places) using the 'Numeric Data Formatting' dialog.

Select 'View-> Numeric Data Formatting...' from the menu:

Using this dialog you can set the numeric formatting for the following four categories:

- **Number** - fields displaying whole numeric values (no decimal places).
- **Floating Number** - fields displaying numeric values with decimal places.
- **Percentage** - fields displaying numeric values as percentage (with a '%' sign at the end).
- **Currency** - fields displaying numeric values as currency.

The options for each category are:

- **Decimal Places** - select the number of decimal places you wish to be displayed from a drop-down menu. Note that if you have a different number of decimal places specified in Security Manager, that value will override the number specified here.

- **Decimal Symbol** - enter a symbol to separate decimal places.

- **Thousands Separator** - enter a symbol that will separate thousands in the numeric value. You can untick the checkbox if you do not want to have a separator.

- **Negative Numbers** - If you want negative numbers to be displayed, tick this checkbox. And select the colour the negative number will appear in (see the image bellow).

- **Symbol** (for Currency category only) - Select from a drop-down list the symbol you wish to be displayed in the Currency fields. You can also select the symbol to appear before or after the number, by selecting Prefix or Suffix option, respectively.

For each category of numeric data field, you are presented with a Sample of how your settings for the field will
Resources, jobs and other entities

appear in Retain:

Clicking on the 'Negative' button will automatically convert the value to a negative one:

Click on the 'Positive' button to revert this change.

The negative numbers are displayed in red because this is specified in the Negative Numbers setting. You can change the colour to any other by double-clicking on the Negative Numbers colour box and selecting the required colour from the pop-up dialog:

Click on the 'OK' button to save changes. You can set up different colours for each numeric data category, if necessary.

Linked field operators

Linked fields are fields that allow you to select the required value from the records of another table in the database. These fields are graphically presented with a button.

To perform a selection on a value, you can first select the required operator. Right-click on a linked field to see the list of available operators:

The list of available operators will depend on your setup. The default operator is set to 'Like'. Using this operator will return values similar to what you have typed in.

Note: Your operator selection will be remembered after the application is restarted. If nothing shows up in the drop-down menu, check the operator in use is the one you would expect.
Mandatory and optional fields

The fields for a resource or job can be classified as mandatory or optional, making it easier to distinguish the more important fields that always have to be filled in:

You can also hide the mandatory or optional group of fields by clicking on the button.

Editing multiple records

You can edit multiple records in one go by modifying the value of a certain field. For example, set the 'Office' to 'London' for a number of resources.

To edit multiple records:

1. When in Wallchart view, select the records you want to update.
2. Choose 'Actions-> Modify selected records' from the menu or right-click on the record lists and select the 'Update selected records' option.
3. Select the field you want to update (e.g. 'Office') and click on the 'OK' button.
4. Enter the required value (e.g. 'London') and click on the 'OK' button. In the pop-up window, displaying the number of records that are going to be updated, click on 'Yes' to confirm or 'No' to ignore your changes.

7.2 Resources

What are resources?

Retain uses the term 'resources' as a general description of people or entities that can be applied to the process of completing a job.

In many organisations the term 'resources' simply refers to staff. However, since you can also use Retain to plan other types of resources such as machinery or training rooms, any item with a finite capacity that goes into the performance of a job can be considered a resource.

Related Topics:

Adding resources
Adding resources

To add new resources:

1. Make sure that you are in 'Edit' mode.
2. Select 'Actions-> Modify records-> Resource' from the menu.
   
   Shortcuts: The 'Modify resources' button or right-click on a resource name and select 'Modify Resources'.
3. Click on the 'New' button.
4. In the 'Add Resource' dialog enter a unique name of the new resource and fill in other details, as required (see the image below).
5. Click on the 'Add' button to add the resource and return to the 'Modify resources' dialog.
6. To add multiple resources, click 'Add Again' and repeat steps 4 and 5 to add more resources, if necessary.
7. Click on the 'Close' button when finished.

The 'Add Resource' dialog allows you to record various details about each resource (this dialog may be customised to suit the requirements of your organisation). Make sure that you follow any conventions established by your organisation:

Note that if you need to create a number of resources that will share certain value(s), you can use the copy checkboxes functionality.
Editing resource details

To edit the details associated with a resource:

1. Make sure that you are in 'Edit' mode.

2. Select 'Actions-> Modify record-> Resource...' from the menu.

   Shortcuts: The 'Modify resources' button or right-click over the Resource list on the left-hand side of the screen (in Resource View) and select 'Modify Resources' from the context menu:

3. In the 'Modify Resource' dialog, select a resource and then click on 'Edit' to edit its details.

   Shortcut: Double-click on a resource to edit its details directly.

4. In the 'Edit Resource' dialog, edit the resource record details as required. Then click on the 'OK' to confirm or 'Cancel' to ignore your changes.

5. Repeat steps 3 and 4 to edit further resources as required.

6. Click on the 'Close' button to close the 'Modify Resources' dialog.

To update multiple resources with one value:

1. Select the resources you want to update in the Resource view. See the Making Selections section for more information.

   Tip: For a quick manual selection, highlight multiple resources by clicking and dragging the mouse over them. Right-click and choose 'Select marked records'. After updating, select 'Clear entire selection' to display all records.

2. Select 'Actions-> Modify selected records' from the menu.

3. In the 'Update selected resources' dialog, select the field you want to update and click on the 'OK' button.

4. Enter the required value.

   You will be asked to confirm the number of records to be updated.

The options available in the 'Modify Resources' dialog are:

- **Edit** - Change details of a selected record;
- **New** - Add a new resource;
- **Delete** - Delete the selected resource.
Deleting resources

You will want to delete resources when they leave your organisation or are no longer part of your Retain database for planning purposes.

To delete a resource:

1. Make sure that you are in 'Edit' mode.

2. Select 'Actions-> Modify Record-> 'Resource...'' from the menu.

   Shortcuts: The 'Modify resources' button or right-click on a resource name and select 'Modify Resources'.

3. In the 'Modify Resources' dialog, select a resource and then click on 'Delete' to delete the resource.

4. Click on 'OK' to confirm or 'Cancel' to ignore your changes.

5. Repeat steps 3 and 4 to delete more resources, if necessary.

6. Click on the 'Close' button when finished.

**Note:** When you delete a resource, all the bookings against that resource will also be deleted. Do not delete resources unless you are sure that you will not need to include the related bookings in reports or display them for historical purposes.

As an alternative you could assign a leaving date to a resource and/or assign the resource to a group called 'Left', for example.

Diary

A diary is a set of working days, weeks and years. It will be set up by the administrator and will depend on the needs of your organisation.

To define the start of the diary, open the 'Edit Resource' dialog for the necessary resource and enter the date he/she joined the company in the 'Start Date' field:

<table>
<thead>
<tr>
<th>Start Date</th>
<th>16/01/2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>End Date</td>
<td>31/12/2049</td>
</tr>
</tbody>
</table>

When the person leaves the company, end their diary by changing the value in the 'End Date' field.
7.3 Jobs

What are jobs?

Retain uses the term 'jobs' as a general description of any project, product or assignment being planned.

What constitutes a job in your organisation depends on the nature of your business and what you consider to be the 'unit' level of your planning in Retain. Some organisations may set up a separate job for each individual project, while others may group together projects under a single 'umbrella' job.

Since every booking in Retain must be made against a job, jobs should also be created for non-project activities such as vacation, sick leave or, in a manufacturing context, machine down-time.

You can group jobs for viewing or reporting purposes by a particular value that they share. For example, you can use the 'Industry' field to group jobs within the same industry.

Related Topics:

Adding jobs
Editing job details
Deleting jobs

Adding jobs

To add new jobs:

1. Make sure that you are in 'Edit' mode.
2. Select 'Actions-> Modify Record-> Job...' from the menu.

   Shortcuts: The 'Modify Jobs' button or right-click on a job name and select 'Modify Jobs'.

3. Click on the 'New' button.
4. In the 'Add Job' dialog enter a unique name for the new job and fill in other details, as required (see the image below).
5. Click on the 'Add' button to add the new job and return to the 'Modify jobs' dialog.
6. Click on the 'Add Again' button and repeat steps 4 and 5 to add more jobs, if necessary.
7. Click on the 'Close' button when finished.

The 'Add Job' dialog allows you to record various details about each job (this dialog may be customised to suit the requirements of your organisation). Make sure that you follow any conventions established by your organisation:
Note that if you need to create a number of jobs that will share certain value(s), you can use the copy checkboxes functionality.

Editing job details

To edit the details associated with a job:

1. Make sure that you are in 'Edit' mode.
2. Select 'Actions-> Modify record-> Job...' from the menu.

   Shortcuts: The 'Modify Jobs' button or right-click over the job list on the left-hand side of the screen (in Job View) and select 'Modify Jobs' from the context menu.

3. In the 'Modify Job' dialog, select a job and then click on 'Edit' to edit its details.

   Shortcut: While in Jobs view, double-click on a job to edit its details directly.

4. In the 'Edit Job' dialog, edit the job record details as required. Click on 'OK' to confirm or 'Cancel' to ignore your changes.

5. Repeat steps 3 and 4 to edit further jobs, as necessary.

6. Click on the 'Close' button to close the 'Modify Job' dialog.

To update multiple jobs with one value:

1. Select the jobs you want to update in the Job view. See the Making Selections section for more information.

2. Select 'Actions-> Modify selected records' from the menu.

3. In the 'Update selected jobs' dialog, select the field you want to update and click on the 'OK' button.

4. Enter the required value. A pop-up box will appear showing the number of records to be updated.

The options available in the 'Modify Jobs' dialog are:

- *Edit* - Change details of a selected job;
• New - Add a new job;

• Delete - Delete the selected job.

Deleting jobs

You will want to delete jobs from time to time, when they are no longer part of your Retain planning cycle.

To delete a job:

1. Make sure that you are in 'Edit' mode.

2. Select 'Actions-> Modify Record-> Job...' from the menu.

   Shortcuts: The 'Modify Jobs' button or right-click on a job name and select 'Modify Jobs'.

3. In the 'Modify Jobs' dialog, select a job and then click on 'Delete' to delete the job.

4. Click on the ‘OK’ button to confirm or 'Cancel' to ignore your changes.

5. Repeat steps 3 and 4 to delete more jobs, if necessary.

6. Click on the 'Close' button when finished.

Note: When you delete a job, all the bookings against that job will also be deleted. Do not delete jobs unless you are sure that you will not need to include the bookings in reports or display them for historical purposes.

7.4 Components

What are components?

In Retain, 'components' are sub-jobs, providing information regarding the nature of each booking made against a job. Components provide an element of project planning within Retain, since you can assign a component for each booking and analyse the job into its component parts for reporting purposes.

Components take the form of a list of descriptive names, available for selection each time you make a booking. Components are usually defined in general terms applicable to most jobs, such as 'planning', 'fieldwork' and 'reporting'; although you can have components relating to specific types of job such as 'branch visit' or 'security review'. The level at which you define components should correspond to that at which you make bookings in Retain. For instance, if your planning in Retain takes the form of bookings of two or more weeks each, your components should not represent the half-day elements within each booking.

Example:

   JOB = Arrow Treasury
   ASSIGNMENT = Arrow Treasury Audit 2009
   Booking COMPONENT = Planning

Related Topics:

   Job-specific components
   Adding components
   Editing component names
   Deleting components
Job-specific components

In addition to the general/shared component list you can also set up job-specific component lists. Job-specific components will appear in the list of available components only for related job(s).

To assign job-specific components for a job:

1. If you want to use an existing component, ensure that it is job-specific. Alternatively, create a job-specific component. You can now assign it to the selected job(s).

2. While in Jobs view, double click on the required job. Alternatively, select 'Actions-> Modify record-> Job...' from the menu. Choose the required job from the list and click on 'Edit'.

3. In the 'Edit Job' dialog, find the 'Job Specific Components' field and click on the button:

4. Select the job-specific component you have edited or created and click on 'OK' to confirm your changes.

When making a booking against this job, you will see both the general list and the job-specific component(s) you have just specified.

To see all the components that are specific to this job, click on the button. To remove a component from the job, click on the button and select the component you wish to remove.

Note that if this field is left blank, the general component list will be used when creating bookings.
Adding components

To add new components:

1. Make sure that you are in 'Edit' mode.
2. Select 'Actions-> Modify Record-> Component...' from the menu.
   
   Shortcut: The 'Modify Component' button.
3. Click on the 'New' button.
4. In the 'Add Component' dialog enter a unique name for the new component and fill in other details, as required:
   
   To create a job-specific component, tick the 'Is Job Specific?' checkbox. This component will not be displayed in the general/shared component list and will be available when booking against that specified job(s) only.
5. Click on the 'Add' button to add the new component and return to the 'Modify Component' dialog.
6. Click on the 'Add Again' button and repeat steps 4 and 5 to add more components, if necessary.
7. Click on the 'Close' button when finished.

Note that if you need to create a number of components that will share certain value(s), you can use the copy checkboxes functionality.

Depending on your access rights, you can also create general or job-specific components using the 'Booking' dialog:

Editing component details

To edit the details of a component:

1. Make sure that you are in 'Edit' mode.
2. Select 'Actions-> Modify Record-> Component...' from the menu.

   Shortcut: The 'Modify Component' button.
3. In the 'Modify Components' dialog, select a component and then click on 'Edit' to edit its name.
4. In the 'Modify Components' dialog, edit the name as required and click on 'OK' to confirm or 'Cancel' to ignore your changes.
5. Repeat steps 3 and 4 to edit the names of other components, if necessary.

6. Click on the 'Close' button when finished.

**Note:** Amending the details of a component does not update the existing bookings with that component. For the existing bookings to reflect the changes, you have to edit each booking separately.

**To make a component job-specific,** simply tick the 'Is job specific?' checkbox and confirm your changes. This component will not be displayed in the general/shared component list when making a booking.

The options available in the 'Modify Components' dialog are:

- *Edit* - Change the name of a selected component;
- *New* - Add a new component;
- *Delete* - Delete the selected component.

**Deleting components**

**To delete a component:**

1. Make sure that you are in 'Edit' mode.

2. Select 'Actions-> Modify Records-> Component' from the menu.

   Shortcut: The 'Modify Component' button.

3. In the 'Modify Components' dialog, select the existing component and then click on 'Delete' to delete the component.

4. Click on 'OK' to confirm or 'Cancel' to ignore your changes.

5. Repeat steps 3 and 4 to delete and 4 to delete more components, if necessary.

6. Click on the 'Close' button when finished.

**Note:** When you delete a component, all of the associated jobs and bookings will be affected: the component will be removed from all of these records.

### 7.5 Booking types

**What are booking types?**

In Retain, 'booking types' are used as an additional way of classifying bookings. For example, you might want to use the booking type to describe the nature of the job. You could therefore have 'chargeable', 'non-chargeable', 'training' and other booking types.

```
JOB = Arrow Treasury
ASSIGNMENT = Arrow Treasury Audit 2009
    Booking COMPONENT = Planning
        TYPE = Chargeable
```

Booking types take the form of a list of descriptive names, available for selection each time you make a booking.
Related Topics:
- Adding booking types
- Editing booking type name
- Deleting booking types

**Adding booking types**

To add new booking type names:

1. Make sure that you are in 'Edit' mode.
2. Select 'Action' -> 'Modify Record' -> 'Type...' option from the menu.
3. In the 'Modify Booking Types' dialog, click on the 'New' button.
4. In the 'Add Booking Type' dialog enter a unique name for the new booking type and fill in other details, as required:

5. Click on the 'Add' button to add the new type name or click on the 'Add Again' button to add more booking type names, if necessary.
6. Click on the 'Close' button when finished.

**Note** that if you need to create a number of booking types that will share certain value(s), you can use the copy checkboxes functionality.

**Editing booking type names**

To edit the name of a booking type:

1. Make sure that you are in 'Edit' mode.
2. Select 'Data-> Modify Record-> Type...' from the menu.
3. In the 'Modify Booking Types' dialog, click on the ... button and select a type name.
4. Click on the 'Edit' button to bring up the 'Edit Booking Type' dialog.
5. In the 'Edit Booking Type' dialog, modify the name of a booking type as required.
6. Click on 'OK' to confirm or 'Cancel' to ignore your changes.
7. Repeat steps 3 to 6 to edit the names of other booking types, if necessary.
8. Click on the 'Close' button when finished.

**Note:** Amending the name of a booking type will update all the existing bookings with the new name.

The options available in the 'Modify Booking Types' dialog are:

- *Edit* - Change details of a selected type;
- *New* - Add a new type;
- *Delete* - Delete the selected type.

**Deleting booking types**

**To delete a booking type:**

1. Make sure that you are in 'Edit' mode.
2. Select 'Data-> Modify Record-> Type...' option from the menu.
3. In the 'Modify Types' dialog, click on the button and select a type name.
4. Click on the 'Delete' button to delete the type name.
5. Click 'OK' to confirm or 'Cancel' to ignore your changes.
6. Repeat steps 3 to 5 to delete more type names, if necessary.
7. Click on the 'Close' button when finished.

**Note:** When you delete a booking type, all of the associated jobs and bookings will be affected: the type will be removed from all of these records.
8 Sorting and selecting

8.1 Sorting and selecting overview

One of the most powerful features of Retain is the ability to sort and select (i.e. filter) your data in a number of ways, providing powerful views of the data. You can, for example:

- display only those resources that are available for a specified date range;
- display only those jobs that are assigned to a particular project manager;
- sort the view in the descending order of resources' grades;
- produce reports by group or division, sub-totalled by manager and so on.

Sorting

You can sort using any fields in your Retain database. You can sort the Resource view by any resource field and the Job view by any job field. Resources can be sorted independently from jobs and each notebook page can be sorted differently. You can therefore create a number of different views of your data by simply setting up a different sort order in each page.

Selecting

There are a number of ways of selecting (i.e. filtering) the records that you want to be displayed. You can:

- define the necessary selection criteria,
- collapse records from the display,
- select marked records,
- use special selections with date ranges,
- use the quick selection functionality (see below)

In both Resource and Job views, you can perform a quick selection on a necessary resource or job, respectively. Simply select the required record from the 'Job Name/Resource Name' drop-down list:

![Resource Name Selection](image)

You can also change this filter to any resource/job field by making it the first sort field in the 'Setup Wallchart' dialog.
To remove the selection, select 'All' from the drop-down list.

Note that you can sort and select using any fields from your Retain database. If your organisation has customised the standard fields, these will also be available for sort and selection purposes.

8.2 Changing the sort order

You can sort the records in each notebook page based on any field, depending on the underlying view.

For example, you can sort the Resource view by any resource field and the Job view by any job field. You can also sort resources independently from jobs.

Furthermore, each notebook page can be sorted differently. This means that you can create a number of different views of the booking information simply by setting a different sort order in each page.

When making bookings against multiple resources, sorting can be used to create logical groups of resources.

To sort the active notebook page:

1. Select 'Data-> Sort' from the menu.

   Shortcut: The 'Sort' button.

2. In the 'Sort' dialog, specify the necessary sort criteria by selecting a sort field from the drop-down list (see the image below).

3. Click on the 'OK' button to confirm your changes.

The ‘Sort’ tab of the 'Setup Wallchart' dialog allows you to specify the sort order applying to both the Resource and Job view for the active page:

If there is more than one field in the list, the view will be sorted by the first then the second field and so on. The first sort field will also determine the contents of the quick selection drop-down list.

To switch between Resource and Job view, select either 'resource' or 'job' from the 'View' drop-down list.
You can also sort the order in which bookings are displayed in each view: click on the 'booking' tab and select the field to sort by from the drop-down list.

To add an item to the sort order criteria:
1. Select a field from the drop-down list.
2. Choose 'Ascending' or 'Descending' as the sort order for the selected field.
3. Repeat steps 1 and 2 to add further sort items, as necessary.

To remove an item from the current sort criteria, click on the button.

You also need to consider the sequence of items in the sort criteria carefully. For example, sorting by resource grade and then name should produce a meaningful result, but sorting by resource name and then grade may not.

To amend the sequence of items in the current sort criteria, click on the black dot and drag the line up or down.

Further sort options are available when working with Report pages. See the Report sort orders and subtotals section for more information.

8.3 Collapsing records

In Wallchart pages, you can collapse one or more rows in the Wallchart grid. Collapsing the records greys them out and hides their associated bookings. Collapsed records appear like this:
To collapse a resource (or job) record, click on the button on the left of the record name. The button will change to the button to indicate that the record is collapsed.

To collapse all the resource (or job) records at once, select 'View-> Close all records' from the menu.

Shortcut: Right-click on the list of records and select 'Close all records' from the menu.

To expand a resource (or job) record which has been previously collapsed, click on the button on the left of the record name. The button will change to the button to indicate that the record is now expanded.

To expand all the resource (or job) records at once, select 'View-> Open all records' from the menu.

Shortcut: Right-click on the list of records and choose 'Open all records' from the menu.

8.4 Selecting marked records

In Wallchart pages you can mark one or more resources or jobs and then filter the view to show only the marked records. To do this:

1. Select the first record from the resource or job list. Holding the CTRL key, select more records. Alternatively, use 'click and drag' functionality to select or deselect the required records.

2. Right-click on the list of highlighted records and choose 'Select marked records' from the menu:

Shortcut: The 'Select marked records' button.

Marked records will be displayed and all other records will be excluded from the display.

To clear the marked records selection, select 'Data-> Clear selection' from the menu.

Shortcuts: The 'Clear selection' button or right-click on the list of records and choose 'Clear entire
8.5 Defining selection criteria

Selection criteria overview

You can perform quick searches on the current view by either Selecting marked records or Special selections. To perform other types of searches you will need to define selection criteria.

To define selection criteria for the active notebook page:

1. Select 'Data-> Selection' from the menu.

   Shortcuts: The 'Selection' button. Alternatively, right-click on the record list on the left-hand side of the Wallchart and choose 'Selection...'.

2. In the 'Selection' dialog specify the selection criteria as necessary.

3. Click on the 'OK' button to confirm your changes. The Wallchart view will refresh listing the resources that match the selection criteria.

You will also see the 'Selection' icon below the toolbar indicating that a selection is applied to the current view. Hover your mouse over the icon and the details of the selection will be displayed:

Related Topics:

- The selection dialog
- Selection operators and conditions
- Selection on date fields
- Booking selection filters
- Fast field selection
- Cross-referencing Resource and Job view selections
- Locking selection criteria
- Removing selection criteria
The selection dialog

The ‘Selection’ tab within the ‘Setup Wallchart’ dialog allows you to specify the selection criteria that applies to both the Resource and Job views for the currently active page.

You can also cross reference your selections between Resource and Job views and include booking fields in your selection criteria:

Select 'Data-> Selection...' from the menu:

![Setup Wallchart dialog](image)

The current selection criteria are displayed in the middle of the screen.

Note: Consider the sequence of items in the selection criteria as the order of items can determine the meaning of the selection.

To switch between Resource and Job view, select either ‘resource’ or ‘job’ from the ‘View’ drop-down list.

You can also apply selections to bookings.

To add an item to the selection criteria:

1. Choose an ‘Operation’ setting to apply to this item from the drop-down list.
2. Select a field in the 'Field' column.
3. Choose a ‘Condition’ followed by a value in the pop-up box.
4. Click on the 'OK' button within the pop-up box and the 'OK' button within the main dialog. The Wallchart view will refresh the list of resources that match the selection criteria.

Repeat the steps 1 to 3 to add further selection criteria, if necessary.

To remove an item from the current selection criteria, click on the button against the relevant row.

To amend the sequence of items in the current selection criteria, click on the • button and drag the line up or down.
You can also lock the selections, allowing you to clear selections up to the last locked selection. Tick the checkbox under the icon against the row you would like to lock.

### Related Topics:
- Selection operators and conditions
- Selection on date fields
- Removing selection filters

**Selection operators and conditions**

Selection filters in Retain are derived from the selection operations and conditions applied to one or more of the underlying database fields. For example, the selection criteria that you would use to display all resources of grade 2 will consist of the following elements:

<table>
<thead>
<tr>
<th>Operation</th>
<th>Selection Field</th>
<th>Condition</th>
<th>Condition Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>AND</td>
<td>resource.Grade</td>
<td>=</td>
<td>2</td>
</tr>
</tbody>
</table>

In most cases your searches will probably be very simple, like the one above.

However, Retain allows you to build up complex selection criteria using the above elements. For complex criteria it is important to understand the usage of these elements in Retain.

If you make a mistake or change your mind, you can start again without closing the dialog by clicking on the 'Clear selection' button.

To clear the selection within the Wallchart, right-click on the resource list and select 'Special Selections-> Clear...' from the menu.

**Operations**

Each item in your selection criteria must use one of these three operations:

- **And** - Includes all records which satisfy the expression. This is the basic selection operator to which you can add other expressions. For instance, if you wish to view resources with the grades equal to Manager, then the expression would be 'AND Resource.Grade = Manager'.

- **Subtract** - Excludes all records which satisfy the expression. For example, 'Subtract Resource.Grade = Manager' will show all resources excluding the ones with the grade equal to Manager.

- **Or** - Includes all records that satisfy any of the values. For instance, if you want to display either resources of grade 2 or grade 3:

<table>
<thead>
<tr>
<th>Operation</th>
<th>Selection Field</th>
<th>Condition</th>
<th>Condition Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>AND</td>
<td>resource.Grade</td>
<td>=</td>
<td>2</td>
</tr>
<tr>
<td>OR</td>
<td>resource.Grade</td>
<td>=</td>
<td>3</td>
</tr>
</tbody>
</table>

Other examples:

- Display only resources of grade 2 and in the 'London' department:

<table>
<thead>
<tr>
<th>Operation</th>
<th>Selection Field</th>
<th>Condition</th>
<th>Condition Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>AND</td>
<td>resource.Grade</td>
<td>=</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>resource.Department</td>
<td>=</td>
<td>London</td>
</tr>
</tbody>
</table>

- Display resources of grade 2, excluding those in the 'London' department:
Sorting and selecting

<table>
<thead>
<tr>
<th>Operation</th>
<th>Selection Field</th>
<th>Condition</th>
<th>Condition Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>AND</td>
<td>resource.Grade</td>
<td>=</td>
<td>2</td>
</tr>
<tr>
<td>SUB</td>
<td>resource.Department</td>
<td>=</td>
<td>London</td>
</tr>
</tbody>
</table>

Conditions

Each value in your selection criteria will use one of the following conditions:

- **Equals**
  The value in the database field equals the condition value.

- **Greater than or equal to**
  The value in the database field is greater than or equal to the condition value.

- **Contains**
  The value in the database field contains the condition value (the text string).

- **Less than**
  The value in the database field is less than the condition value.

- **is Blank**
  There is no value in the database field.

- **is One Of**
  The value in the database field is one of the condition values (used with multi-value fields).

Examples:

Display only those resources that are of grade ‘2’ or above:

<table>
<thead>
<tr>
<th>Operation</th>
<th>Selection Field</th>
<th>Condition</th>
<th>Condition Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>AND</td>
<td>resource.Grade</td>
<td>&gt;=</td>
<td>2</td>
</tr>
</tbody>
</table>

Display only those jobs that contain ‘ABC’ in their name:

<table>
<thead>
<tr>
<th>Operation</th>
<th>Selection Field</th>
<th>Condition</th>
<th>Condition Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>AND</td>
<td>job.Name</td>
<td>Contains</td>
<td>ABC</td>
</tr>
</tbody>
</table>
Selection on date fields

When selecting on date fields, you can either select the necessary date from the pop-up calendar or enter the date manually:

For example, if you want to create a selection on resources that have left on or after the 16th of March 2009, choose the appropriate condition and select the date using the calendar (or enter it in the text box).

If you plan to use the selection in the future, tick the 'Relative to today' checkbox. This will adjust the selection results according to today's date every time the selection is performed. That is, if we use the above selection two months later, the result will also include the people who have left within that period.

Booking selection filters

You can restrict the bookings that are displayed on the Wallchart in two ways:

- By specifying selection criteria.
- By setting up cross-references between your resource and/or job selection criteria.

Select 'Data-> Selection...' from the menu and click on the 'booking' tab within the 'Setup Wallchart' dialog:
The booking selection hides bookings that do not meet the selection criteria but does not restrict the rows displayed within Wallchart. For this reason, booking selection filters operate differently to resource and job selection filters.

For example:

**IF**
You select resources with grade = 1

**THEN**
The Resource view only displays rows for grade 1 resources. All the bookings are displayed for these resources.

You select resources with grade = 1 and cross-refer to the Job view

As above but in the Job view only bookings with respect to grade 1 resources are displayed.

Select bookings with resgrade = 1

All the resources are displayed in the Resource view. Only bookings with resgrade 1 are displayed in either Resource or Job view.

You can also add a sort order within the ‘Sort Order’ panel. This will determine how the results of the selection will be displayed within the Wallchart.

The following checkboxes provide additional settings that can be applied:

*Filter Res /Jobs* - Takes out resources (in Resource view) or jobs (in Job view) for which there are no bookings.

*Show All Bookings* - For the displayed Jobs or Resources, shows all the bookings.

Furthermore, since in Retain you can set details such as resource grade or job priority on a booking by booking basis, the information stored in booking level fields such as ‘resgrade’ is not necessarily the same as in the underlying resources or jobs. From the above example, information in ‘resgrade’ in the booking table need not be the same as the current ‘grade’ of the resource.

To clear the selection or the sort order, click on the ‘Clear Selection’ or ‘Clear Sort Order’ button, respectively.
Fast field selection

The fast field selection functionality is available within the field list pop-ups in the Fields, Sort and Selection tabs within the 'Setup Wallchart' dialog.

This allows you to find the fields you want to use much faster.

When you start typing in the name of the required field, the closest match will be automatically highlighted in the list.

For example, if your required field was 'Mobile Number', typing in 'mob' will automatically display 'Mobile Number' in the drop-down list:

Cross-reference view selections

Using the basic selection criteria you can filter Resource and Job views independently. For example, you can filter the Resource view to display only resources of grade 1 and the Job view to display jobs where the manager name is 'Smith'.

The 'Selection' tab also allows you to cross-reference your selection filters. In this way you can apply your resource selection criteria to the bookings displayed in the Job view and vice-versa.

For example, you can display resources of grade 1 in the Resource view and the bookings relating to grade 1 resources when you rotate the screen to the Job view. Likewise, you can display jobs belonging to manager 'Smith' in the Job view and the bookings relating to manager 'Smith' jobs when you rotate the screen to the Resource view.

To apply resource selection criteria to the Job view:

1. Switch to the 'Resource' view in the 'Setup Wallchart' dialog (using the drop-down menu at the top right corner).
2. Define your resource selection criteria in the usual way within the 'Selection' tab.
3. Tick the 'Use selection in Job view' checkbox.

To apply job selection criteria to the Resource view:

1. Switch to the 'Job' view in the 'Setup Wallchart' dialog (using the drop-down menu at the top right corner).
2. Define your job selection criteria in the usual way within the 'Selection' tab.

3. Tick the 'Use selection in Resource view' checkbox.

**Note:** Reset these cross-reference checkboxes once you have finished filtering.

### Locking selection criteria

You can lock selection criteria at a particular level so that it is always applied, even after clearing (the unlocked) selections.

**To lock a selection criterion,** select the line you wish to lock and tick the checkbox under the 'Lock' icon.

If you lock one or more selection criteria and tick the 'Limit results by the locked criteria' checkbox, the results of the unlocked criteria will be limited to the locked selection. This is effectively an AND between the lines which are locked and the unlocked lines below.

For example:

AND Office=London
AND Position=Auditor
AND Position=Consultant

This selection will return auditors from the London office and consultants from all offices.

To display auditors and consultants from the London office only, you can lock the 'Office=London' selection line and tick the 'Limit results by the locked criteria' checkbox. This way the two subsequent selections (i.e. the 'position' field) will be applied to the results of the locked selection (i.e. 'London' office).

When [clearing a selection](#), the locked criteria will still be applied. You therefore need to unlock it in order to remove it.

**To unlock selection criteria,** display the selection dialog by selecting 'Data-> Selection...' from the main menu. Remove the tick from the checkbox under the 'Lock' icon.

### Removing selection criteria

**To remove selection criteria,** select 'Data-> Clear selection' from the menu.

Shortcuts: The 'Clear selection' button or right-click anywhere within the Wallchart and select 'Clear entire selection' from the menu.

**Notes:**

- Resource and Job view selections can be set up independently, therefore must be removed separately.
- The [locked selection criteria](#) needs to be unlocked in order to be cleared.
8.6 Special selections using date ranges

Special selections overview

A number of frequent planning requirements refer to time periods, for example finding out which resources are available to perform a job during a specified time period. In Retain there are a number of special functions to perform such selections. They are independent of the other selections using selection criteria.

To select resource or job records based on time periods:

1. Make sure that you are in a Wallchart page, either in the Resource or Job view.

2. Mark an area anywhere on the booking grid.
   
   Tip: It does not matter which resource record the marked area covers, but the start and end dates should match the time period in which you are interested.

3. Select 'Data-> Special selections-> Add...' from the menu. This will use the default selection criteria.

   Shortcuts: The 'Add a special selection' button or right-click anywhere within the Wallchart and select 'Special selections-> Add...' from the menu.

4. If necessary, amend your special selection using the 'Special Selections’ dialog and click on the 'OK’ button.

Records matching the criteria will be displayed and all other records will be excluded from the display. When a special selection is already active, an additional selection line will be applied using the same procedure. Remember this when using the button - it adds an additional selection line to the dialog when used.

To edit the current special selection, select 'Data-> Special selections-> Edit...' from the menu, or right-click anywhere within the Wallchart and select 'Special selections-> Edit...'.

This allows you to edit the current special selection. If no special selection is active, 'Edit' takes you to an empty 'Special selections' dialog.

Related Topics:

- The 'Special selections’ dialog
- Hiding the 'Special selections’ dialog
- Deactivating special selections
- Clearing special selections
- Availability preferences
The 'Special selections' dialog

The 'Special selections' dialog allows you to enter special selection criteria based on parameters such as: **availability** percentage, available days for resources or adjusted revenue for jobs:

![Special Selections Dialog](image)

You can define separate date range for each selection criterion. All criteria use their own date range to which the criteria are applied. Special selections consist of a number of selection criteria.

**To create selection criteria:**

1. Select the field you want to use, for example 'availability' for resources, that selects based on availability percentage.

2. Select the start and end date for the date range of the booking. Note that each line has its own date range. If you marked an area before displaying the dialog, this will automatically populate these values.

3. Select the condition to use for this field, either '=' (equal to); '>=' (greater than or equal to); '<' (less than) and 'Contains' (contains text string).

4. Enter the value to compare the field to in the selected date range.

5. Click on the 'OK' button.

For example, select '>=a' as a Condition and enter 80 as the condition value to select on all resources who have availability of 80% or more for the selected period.

**To add a selection line**, click on the 'Add Line' button.

When using multiple lines, the resources displayed are those for which each line is true, i.e. the lines are combined using an **AND** operator.

**To remove a selection line**, click on the ![Remove Line](image) button.

**Further options**

- Hide the dialog window with 'Hide for availability' (Resource view only).
- (De)activate special selections with 'Special Selection Active'.
Hiding the 'Special selections' dialog

For people primarily using the default availability selection, it is possible to hide the 'Special selection' dialog when using 'Special Selections-> Add...' from the menu.

This is only available for the Resource View. When used, this will add a default line to the current selection and will directly apply the selection. When there is no current selection, this is equivalent to directly applying the default selection. The criteria can still be edited using the 'Special Selections-> Edit...' option.

**To hide the 'Special Selections' dialog,** tick the 'Hide for availability' checkbox. See the Availability preferences section for an alternative way to hide the dialog.

De-activating special selections

**To de-activate special selections,** open up the 'Special selections' dialog and remove the tick for the 'Special Selection Active' checkbox. Alternatively, select 'Data-> Special selections' from the menu and uncheck 'Use'.

This will keep the selection criteria in memory (as opposed to clearing the selection) but will not apply the selection to the resources displayed, allowing you to change any other selection criteria independently.

To re-activate the special selection, tick the 'Special Selection Active' checkbox in the 'Special selections' dialog or select 'Use' from the 'Data-> Special selections'.

Clearing special selections

**To clear special selections,** select 'Data-> Special selections-> Clear' from the menu. Alternatively, use the 'Clear special selection' button or right-click on the booking grid and choose 'Special selections-> Clear' from the menu.

All records will again be displayed in the current view. This will empty the 'Special selection' dialog.

**To temporarily deactivate the selection** (and reactivate it later), remove the tick from the 'Special Selection Active' checkbox in the 'Special selection' dialog.
9 Working with bookings

9.1 Bookings overview

In Retain a booking represents an allocation of an individual resource (or several resources) against a specific job which covers a defined date range and a measurable number of hours.

In order to allocate resources to jobs in Retain you will need to make bookings. You can make bookings in either Wallchart or Calendar view, although it is usually easier to make them in Wallchart. Bookings have a solid black border in both normal and 3-D Wallchart views.

Retain treats all allocations to the Wallchart as 'bookings', regardless of their nature. This means that 'non-jobs', such as vacation and sick leave also need to be entered as bookings. You can use the fields associated with the job to treat bookings against these special types of jobs differently from other types. See the Adding jobs section for more information.

Related Topics:

- Making a booking
- Entering main booking details
- Entering additional booking details
- Booking list display
- Visual Warnings
- Make proportional bookings
- Viewing bookings
- Editing bookings
- Splitting bookings
- Locking bookings
- Cutting bookings
- Using the clipboard
- Duplicating bookings
- Rolling bookings forward
- Deleting bookings
- Undo booking operations
- Scenario bookings
- Ghost bookings
- Booking requests
- Booking colours
- Over-allocation notification
- Booking shapes

9.2 Making a booking

In order to make scenario bookings and see them within the Wallchart, you must be in edit mode and have 'Data-> Booking Visibility-> Show Normal Bookings' option selected.

Shortcut: The 'Show Normal Bookings' button.

To make a booking:

1. **Mark an area** within the Wallchart.
2. Select 'Actions-> Make booking...' from the menu.
   
   Shortcut: Right-click over the marked area and select 'Make booking...'.
3. Enter the **main booking details** using the 'Booking' dialog:
Note that your 'Booking' dialog might look different from the above image as it is fully customisable and will depend on the requirements of your organisation.

4. Entering additional booking details, if necessary.

5. Saving the changes by clicking on the 'Save' button.

One job and at least one resource must be selected. If you are in the Resource view, the 'Resource' field will contain the resource(s) selected when you marked a booking area. If you are in the Job view, the marked job will be selected in the 'Job' field.

Using the 'Booking' dialog you can create multiple bookings at the same time, and work with both new and existing bookings. See the Booking list display section for more information.

Resizable Components

Depending on the settings within your bkgDialog.ini, you can resize the 'Booking' dialog components as necessary. Simply move the border of the section you want to increase or decrease. All the other sections within the dialog will be automatically resized.

You can also double-click on the border of a section to make it auto size.

To reset all the size changes, right-click anywhere within the dialog and select 'Reset dimensions' from the menu.

UNDO/REDO functionality

You can undo and redo the actions performed using the 'Booking' dialog (that are not related to attachments) by pressing the appropriate button.

Click on the button to undo or the button to redo the action.

Note: The undo and redo functionality is applied to the 'Booking' dialog only; any other changes made in Wallchart will not be affected.
Marking an area

There are two different ways of marking an area within the Wallchart in preparation for making a booking:

Using the mouse:

1. Find the resource (or job) against which you want to make the booking.
2. Move the mouse pointer to the start date of the booking, adjacent to the required resource or job.
3. Click and hold down the left button of your mouse.
4. Move the mouse pointer to the end date of the booking.
5. Release the mouse button.

Using the keyboard:

1. Find the resource (or job) against which you want to make the booking.
2. Using the cursor keys, move the black rectangle to the start date of the booking adjacent to the required resource or job.
3. Hold down the SHIFT key while using the cursor keys to move to the end date of the booking.
4. Release the SHIFT key.

A black bar marks the scope of the booking you are about to make.

Note: make sure you have selected the correct resource (or job) and the start and end dates covered by the marked area correspond to the duration of the booking you wish to make.

Entering booking details

Main booking details

Once you have marked an area within the Wallchart, make a booking:

- Select 'Actions-> Make booking' from the menu.

  Shortcuts: The 'Make booking' button or right-click anywhere within the Wallchart and select 'Make booking...' from the menu. Alternatively, press CTRL+K.

- Enter the basic booking details in the 'Main' tab and click on the 'Save' button when finished. When you click on the 'Save' button, changes to all the bookings currently displayed within the 'Booking' dialog will be saved, even if not all of them are selected:
Note that your 'Booking' dialog might look slightly different from the above image as it is fully customisable and will depend on the requirements of your organisation.

A job and at least one resource must be selected in order to make a booking. If you are in Resource view when you mark an area within the Wallchart, the 'Resource' field will display the selected resource; if you are in Job view, the selected job will be displayed in the 'Job' field.

The 'Booking' dialog allows you to work with multiple bookings at the same time; to create new and edit existing bookings simultaneously.

If you select more than one resource, a separate booking will be created against each of the resources in the booking list display. The booking list display is the top pane of the 'Booking' dialog, listing the details of all the bookings being worked on.

For each field you will find all or some of the following controls:

- To select a value, click on the button and start typing in the necessary value and/or select it from the drop-down list.

- If you wish to assign a value that does not exist in the list, you can create it by clicking on the button.

- To clear all of the selected values, click on the button. To clear the currently selected value, click on the button.

Resource/Job

You need to specify a resource and a job in order to make a booking.

You can also book several resources at once by:

- marking an area within the Wallchart (while in Resource view) that encapsulates the necessary resources; or

- selecting the necessary resources and choosing 'Actions-> Make block booking...' from the menu. All the visible resources will appear in the booking list display in the 'Booking' dialog.
Component

You can add a component to further describe the booking. Components are usually generic 'sub-jobs' which break down a job into its component parts.

When making a booking against a job that has job-specific components assigned to it, you will see both the general/shared component list as well as the job-specific components.

Type

You can also select a type for your booking. Types can be used to classify bookings in terms of 'chargeable' and 'non-chargeable', for example.

If a job has a default type (JOB_BKG_BTY_ID) and you make a booking against that job, the type will default to that job type.

Booking Start/End dates

The easiest way to define the start and end dates for a booking is to mark an area within the Wallchart encapsulating the necessary date range. However, you can also edit the start and end dates using the 'Booking' dialog.

Simply type in the dates or click on the button and select the required dates from the calendar.

Note that when you amend the start and/or end dates, the size of the booking will be adjusted automatically within the Wallchart.

Booking Loading/Time

Select the 'Loading' radio button and enter the percentage of commitment for this booking or select 'Time' to assign a fixed number of hours for the job (despite the length of a booking). See the Making proportional bookings section for more information.

Note: Loading and time values are important for the way bookings are handled with regards to public holidays.

'Book partial day' checkbox

When you want to make a booking that ignores the start and/or end time of the resource's diary, you can book time outside the usual working hours by ticking the 'Book partial day' checkbox. For example, if you wish to make a booking that starts earlier than your working day, lasts two and a half days or is on a weekend, you have to tick this checkbox.

'Include non-working days' checkbox

Tick this checkbox if you want to include the non-working days (e.g. weekends) into the booking time calculations. You will not be able to book time outside the resource's diary unless you tick this checkbox.

'Grouped' checkbox

Bookings that have the same start date, job and duration can be grouped, allowing you to manipulate several bookings as a set. This is especially useful if you have, for example, a number of resources assigned to a training course. Using the grouped bookings functionality you can easily manage these bookings as one unit. If the training course is postponed, you can simply move the group to another date without having to edit each booking individually.
To group selected bookings, tick the 'Grouped' checkbox.

Note that when you make changes to a booking in a group, you will be asked if you want to apply them to all the other bookings within that group.

'Move and Resize' menu

If you select the ‘Move...’ option from this menu, the 'Move Bookings' dialog will pop-up, allowing you to move one or more bookings further in the future by specifying the necessary number of days and/or weeks:

You can change the duration of one or more bookings by selecting the necessary number of days and/or weeks in the 'Booking Offset' dialog:

![Move Bookings dialog]

If you select the 'Change Length...' option from this menu, the 'Change Booking(s) length' dialog will pop-up, allowing you to change the length of one or more bookings by entering the necessary number of days to be added:

![Change Booking(s) length dialog]

'Book Partial Day' menu

This menu is not displayed by default. It allows you to quickly book the first half ('Book AM'), second half ('Book PM') or the whole day ('Book Full Day') when editing a one day long booking, without having to edit the times manually:

![Book Partial Day dialog]

Note: If the selected booking is longer than one day or if no bookings are selected, the menu will not appear.

Colour Scheme Based Values

If the colour scheme is based on an entity displayed in the 'Booking' dialog (e.g. component or booking type), the values in the appropriate drop down list will be colour coded accordingly.

For example, if the colour scheme is based on the booking type (BKG_BTY_ID), when you click on the button for the 'Type' field, you will see the value as well as its corresponding colour:
To cancel the changes made to one or more bookings, click on the ‘Clear’ button.

Note that when you make changes to bookings using the Wallchart, the ‘Booking’ dialog will get updated even if hidden or docked.

Related Topics:
- Additional booking details
- Create resource shortcut
- Create job shortcut
- Create component shortcut
- Create booking type shortcut
- Booking list display
- Visual warnings

Create resource shortcut

The create resource shortcut allows you to create a new resource without exiting the ‘Booking’ dialog.

To create a resource using the ‘Booking’ dialog:

1. Click on the button next to the Resource field.
2. The following dialog will be displayed, allowing you to create a new resource:
3. Fill in the necessary details.

4. Click on the 'Add' button to complete the creation of a resource or 'Add Again' to add another one.

The newly created resource will be displayed in the Resource field in the 'Booking' dialog, enabling you to continue with the creation/editing of a booking.

See the Adding resources section for more information.

Create job shortcut

The create job shortcut allows you to create a new job without exiting the 'Booking' dialog.

To create a job using the 'Booking' dialog:

1. Click on the button next to the Job field.

2. The following dialog will be displayed, allowing you to create a new job:
3. Fill in the necessary details.

4. Click on the 'Add' button to complete the creation of a job or 'Add Again' to add another one.

The newly created job will be displayed in the Job field in the 'Booking' dialog, enabling you to continue with the creation/editing of a booking.

See the Adding jobs section for more information.

Create component shortcut

The create component shortcut within the 'Booking' dialog allows you to add a new component without interrupting the process of creating/editing a booking.

To create a component using the 'Booking' dialog:

1. Click on the button next to the Component field.

2. The following dialog will be displayed, allowing you to create a new component:

3. Fill in the necessary details.

To create a job-specific component, tick the 'Is Job Specific?' checkbox. This component will not be displayed in the general/shared component list but will be available when booking against the specified job(s). The job(s) you select while making/editing a booking will be assigned this component.
**Note** that the job-specific component will become job-specific only after you click on 'Save' in the 'Booking' dialog.

4. Click on the 'Add' button to complete the creation of a component or 'Add Again' to add another one.

The newly created component will be displayed in the Component field in the 'Booking' dialog, enabling you to continue with the creation/editing of a booking.

See the [Adding components](#) section for more information.

**Create booking type shortcut**

The create type shortcut within the 'Booking' dialog allows you to add a new booking type without interrupting the process of creating/editing a booking.

**To create a booking type using the 'Booking' dialog:**

1. Click on the button next to the Type field.

2. The following dialog will be displayed, allowing you to create a new booking type:

   ![Add Booking Type](image)

3. Fill in the necessary details.

4. Click on the 'Add' button to complete the creation of a booking type or 'Add Again' to add another one.

The newly created type will be displayed in the Type field in the 'Booking' dialog, enabling you to continue with the creation/editing of a booking.

See the [Adding booking types](#) section for more information.
Additional booking details

You can also add additional details when making a booking.

Click on the 'Additional' tab within the 'Booking' dialog:

![Additional booking dialog](image)

**Note** that your 'Booking' dialog might look slightly different from the above image, as it is fully customisable and will depend on the requirements of your organisation.

Notes

If you have several people who are in charge of the planning process or simply wish to leave a reminder for yourself about a certain booking, you can attach notes. Type in the text in the editable box and click on the 'Save' button:

![Notes](image)

Custom Rates (Revenue)

Retain derives the charge rate applied to each booking automatically, based on its 'charge code'.

The charge rate is a combination of:

- Charge band of the selected resource,
- Charge rate description of the job selected and
- Date range of the booking

When you select a resource and job for the booking, the corresponding charge rate should already be defined, so you need do no more. However, you can override the default revenue rate by ticking the 'Customise Rate' checkbox and amending the appropriate rate for the current booking. Change the rate either by typing in a new figure or using the up and down arrows to adjust the figure.
Attachments

Depending on your setup, you may also be able to add attachments to bookings using the 'Booking' dialog.

**To add a file**, click on the **Upload** button. Navigate to the location where the required file is and click on the 'OK' button. Navigate to the location where the required file is, click on it and press the 'OK' button.

The name of the attached file along with the size, the date it was last updated and the name of the user who updated it will be displayed.

**To view the attached file**, you can open it by selecting it and clicking on the **Open** button. Alternatively, simply double-click on it. The file will be automatically opened with the appropriate application.

If any changes are made and saved to the file, Retain will detect the changes and ask you if you wish to save the amended file to the database. This allows you to quickly edit the file, without the need of downloading it, saving the changes, deleting the existing attachment and re-uploading the amended one.

**Note** that you can also view booking attachments using the 'View Booking' dialog.

**To download the file** to your computer, click on the **Download** button.

**To delete the file from the record**, click on the **Delete** button. This removes the file from the database and can not be undone.

**Note** that the undo/redo functionality is not be applied to any actions related to attachments.

**Related Topics:**
- Booking list display
- Visual warnings

**Booking list display**

The top section of the 'Booking' dialog displays the list of bookings you are currently working on.

Since the new booking dialog allows you to work with multiple bookings at the same time, the booking list display is used to manage these bookings:

You can only edit the selected bookings from the list. The bookings that are not selected will not be updated.

The 'Selected' column shows the bookings that will be affected with the changes you make. **To select a booking**, simply double-click on it or tick the 'Selected' checkbox.

If you have a booking selected and double-click on it, all the bookings in the list will be selected. If you double-click on a booking that is not selected, it gets selected while the rest of the bookings will be de-selected.
**Note** that when you click on the 'Save' button, changes to all the bookings displayed in the booking list, not just selected bookings will be saved.

**To resize the booking list display** by clicking on the tabs below it and dragging them up or down, as necessary.

**To hide the booking list display**, click on the button. Click on the same button to show the list.

You can also select the booking values you wish to be displayed by clicking on the button on the top left-hand side. A list of all the available values will appear:

![Booking Display Options](image)

Each value represents a column in the booking list display. Tick/untick the checkbox for each column that you want visible/hide. You can change this at any time.

If you are editing a large number of bookings, you can navigate through them by using the buttons.

To go to a previous record in the list, click on the button. To go to the next record, click on the button. To go to the first record in the list, click on the button and click on the button to go to the last booking in the list.

**To remove a booking** from the list, select it (tick the 'Selected' checkbox) and click on the button. A warning message will pop-up asking you to confirm the deletion.

**To add a booking** to the list, click on the button. If you have any booking selected, all the values from the selected booking will be copied to the new booking. If you do not have any booking selected, a new booking with only the following default information will be created: start date (today), end date (tomorrow), loading (100%) and zero booking time.

**Note**: When you click on the button or mark an area within Wallchart to create one or more bookings, only the recently added booking(s) will be selected, allowing you to edit the necessary details.

By default, the time in the 'Booking Time' column is displayed in minutes. You can change the format of the value to be displayed to hours as well as minutes. To do that, right-click anywhere in the booking list display and select the required value(s) (minutes, hours) from the menu.
Visual warnings

A visual warning ⚠️ sign will appear for the fields that might affect other bookings. For example, if you have several bookings selected the warning will appear, indicating that the resource will be changed for all selected bookings if a value is selected.

Hover over this warning sign to see the description of the warning.

Another visual indication of warnings and errors is provided at the bottom of the 'Booking' dialog. As soon as you make a change to one or more bookings, an appropriate error/warning message will be displayed. You can then make the necessary changes before saving.

For example, if you forget to add a job to a booking and you try to save the changes, you will get the following error message:

Warnings/errors of the same type are grouped. Click on the ⬇️ button to view them:

9.3 Making proportional bookings

When you make a booking, Retain assumes that the work requires 100% commitment. For example, if the standard working week in your organisation is 35 hours long, a two-week booking will take up 70 hours.

The duration of the booking is displayed in the 'Booking' dialog as 'Start/End Time'. The 'Time' box shows the total number of booked hours for a booking. In case of a 100% commitment, this is equal to the duration of the booking.

You can make proportional bookings by:

- Ticking the 'Loading' checkbox and enter a percentage commitment for this booking. The corresponding fixed hours will be calculated automatically. For example, a 50% commitment over a 70 hour period would produce a 35 hour booking.

- Alternatively, tick the 'Time' checkbox and enter a fixed number of hours for the booking. The corresponding loading percentage will be calculated automatically. For instance, 35 hours over a 105 hour booking period would represent a loading percentage of 33%.

In Wallchart or Calendar pages you can represent the loading of bookings graphically by setting the booking bar depth to 'Proportional to loading'. See the Booking bar display options section for more information.
9.4 Viewing bookings

To view a booking:

1. Find the necessary booking within the Wallchart. See the Navigating within the Wallchart section for more information.

2. Move the mouse pointer over the booking so that the mouse pointer changes to a . If booking tips are activated, a text box will appear, displaying information about the booking. See the Booking bar tips section for more information.

3. Select 'Actions-> Booking Info' from the menu to see all the details of the booking.

    Shortcuts: Double-click on the booking or select it and press the 'Booking info' button. Alternatively, right-click on a booking and select 'Booking info...' from the menu.

To view information on the resource or job related to the selected booking, select 'Actions-> Resource info...' or 'Job info...' from the menu. Alternatively, press the 'Resource info' or 'Job info' button or right-click on the selected booking and then select 'Resource info...' or 'Job info...' from the menu.

A record of changes made to a booking

The 'Booking Audit Trail' field within the 'View Booking' dialog displays the last five changes made to that booking. The user name of the person who made the changes as well as the date and time of change will be shown:

<table>
<thead>
<tr>
<th>Booking Audit Trail</th>
<th>Booking amended by Frank Bell on 26 Jan 2010 at 15:15:49</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Booking inserted by Frank Bell on 20 Jan 2010 at 12:00:33</td>
</tr>
</tbody>
</table>

9.5 Editing bookings

You can edit bookings either graphically on the Wallchart or manually through the booking details screen. Once you have made a booking you will normally find it quicker to edit it graphically through the Wallchart.

Moving bookings

Moving a booking in the Wallchart automatically updates booking details such as the resource (or job) name and the start and end dates of the booking.

Charge code and charge rate information may also be updated. For example, if you move a booking relating to resource grade "1" to a resource with grade "2" the booking adopts the charge rate associated with grade 2 (unless the charge rate is fixed). Other details about the booking remain the same.

To move a booking:

1. Move the mouse pointer over the booking so that the mouse pointer changes to a .

2. Click and hold down the left button of your mouse.
The mouse pointer will change to a hand symbol to indicate the move operation.

3. Move the highlighted booking to the new location. You will see a transparent copy of the booking floating over the Wallchart behind the mouse pointer, indicating where the booking would end up if you were to let go of the mouse button:

![Wallchart with digital solutions booking highlighted](image)

4. Release the mouse button. The booking will be moved to the new location.

See the [Booking preferences](#) section for the 'snap to' settings.

Wallchart view also offers **autoscrolling functionality**. You can move bookings both horizontally and vertically within the Wallchart. The view will automatically 'move' along together with the booking. This way you can move bookings to a date not currently displayed without using a clipboard.

Alternatively, **use the clipboard** to move bookings to resources, jobs or time periods outside the currently displayed view.

### Copying bookings

Copying a booking creates a new booking with identical characteristics to the first, but with new details such as the resource (or job) name and the start and end dates of the booking, if relevant, based on the location of the new booking.

Charge code and rate information may also be updated. For example, if you copy a booking relating to resource grade ‘1’ to a resource with grade ‘2’ the new booking adopts the charge rate associated with grade 2. If the booking was originally entered with a manual charge code or rate, it will be updated to the default charge code or rate. Other details about the booking remain the same.

**To copy a booking:**

1. Move the mouse pointer over the booking so that the mouse pointer changes to a hand symbol.
2. Hold the CTRL key down and then click and hold down the left button of your mouse.
   
   The mouse pointer will change to a hand symbol with a ‘+' sign inside the hand indicating that this is a copy operation.
3. Move the outlined booking to the new location.
   
   *Tip:* Concentrate on placing the bottom left corner of the booking into the cell into which you want to copy the booking.
4. Release the mouse button and the CTRL key. The booking will be copied to the new location. See the [Booking preferences](#) section for different 'snap to' settings.

**Use the clipboard** to copy bookings to resources, jobs or time periods outside the current view of the booking.
Resizing a booking

Resizing a booking on the Wallchart automatically updates its start or end date, depending on which end of the booking you move.

Unless the booking is for a fixed number of hours (see the Making proportional bookings section for more information), resizing also changes the number of hours allocated to the booking; 'stretching' the booking increases the booked hours and 'shrinking' the booking reduces the booked hours. Other details about the booking remain the same.

To resize a booking:

1. Move the mouse pointer over either to the left or right end of the booking, so that the mouse pointer changes to a ↔.
2. Click and hold down the left button of your mouse.
3. Move the mouse pointer to the new location.
   A marked area will indicate the scale of the amended booking.
4. Release the mouse button.

The booking will be resized to the new location. Repeat the process if the booking isn't exactly where you wanted it.

Selecting multiple bookings

You can select multiple bookings and then move, copy or delete them in one go. However, you can only resize one booking at a time. Selecting multiple bookings is particularly useful when there is a relationship between the bookings which you want to preserve. For example, you can use this functionality when a job has been rescheduled by selecting all the bookings against that job and moving them to the new start date.

To select multiple bookings you can:

- Click on one of the required bookings. Hold down the CTRL key down and click on other bookings to select or deselect them, as necessary. The booking colour will change to indicate that they are currently selected.

- Release the CTRL key. Perform the necessary operations on the selected bookings.

Alternatively:

- Mark an area within the Wallchart that encapsulates the required bookings.

- Right-click anywhere within the selected area (but not on a booking) and choose 'Select touched bookings' from the menu. All the bookings within the marked area will be selected. You can now add more bookings or remove the unnecessary ones by holding down the CTRL key.

Note that all booking operations (editing, duplicating, splitting and so on) are affected by public holidays.
9.6 Splitting bookings

This function will split a booking in half, rounding each half to the current 'snap to' settings. This is useful for spreading out bookings over resources or time while fixing the number of hours.

See the Customising date scale settings section for more information.

To split a booking:

1. Click on the necessary booking in the Wallchart.
2. Select 'Actions-> Split booking' from the menu.
   Shortcut: Right-click on the booking and select 'Modify-> Split booking' from the menu.
3. A booking smaller than the current 'snap to' settings will be split in two. It is recommended to do the splitting on a smaller date scale (from months to weeks, for example).

9.7 Locking bookings

The database can be set up so that individual bookings can be locked.

Note that only normal (live) bookings can be locked.

To lock a booking, right-click on the required booking and select 'Modify-> Lock Booking' from the menu:

The locked booking will be outlined in red:

The booking must be unlocked before it can be modified. To unlock a booking, right-click on it and select 'Modify-> Unlock Booking' from the menu.
9.8 Cutting bookings

Users have the ability to divide one booking into two by visually cutting the booking in the Wallchart view at any point along its length. The two newly created ends of the bookings will ‘snap to’ as defined in your preferences. See the Customising date scale settings section for more information.

To cut a booking:

1. Select the booking you wish to cut and choose ‘Actions-> Cut booking tool’ from the menu.

   Shortcut: Right-click on the booking and select ‘Cut booking tool’ from the menu.

2. Move the mouse pointer to the position at which you wish to cut the booking and click the left button of your mouse:

   ![Cutting Booking](image)

3. The booking will be cut:

   ![Cut booking](image)

9.9 Using the clipboard

To enable Retain's clipboard, select 'View-> Booking Clipboard' from the menu. It will appear as the rectangular area immediately above the list of resources/jobs.

To see (or enlarge) the clipboard, click on the top left corner of the Wallchart and drag it downwards:

![Clipboard](image)

This clipboard is particularly useful when you want to move or copy bookings beyond the currently displayed area in the Wallchart.

The Retain clipboard is similar to a normal Windows clipboard, in that you can cut (move) and copy bookings to the clipboard and paste them back into the Wallchart.

The Retain clipboard is different from other clipboards, however, because:

- A number of bookings can be stored in the clipboard at any one time.
- The clipboard only deals with bookings.
- Each notebook page has its own clipboard and the bookings in one page's clipboard are not available in any other page's clipboard.

To copy or move a booking to the clipboard:

- To copy a booking to the clipboard, right-click on a booking and select 'Copy to Clipboard'. Alternatively, select a booking and click on the button in the toolbar.
To move a booking to the clipboard, drag it to the clipboard directly and release the booking within the clipboard area.

Note that if you perform the Undo action at this point, the booking will re-appear on the Wallchart but a copy in the clipboard will remain.

Bookings remain on the clipboard until you move them back to the Wallchart. If you have several bookings on the clipboard at the same time scroll bars will appear to allow you to navigate between bookings.

**To copy or move a booking from the clipboard,** you can either:

1. Move the mouse pointer over the booking in the clipboard.
2. Drag the booking to move the booking in the usual way, or press CTRL and then drag to copy the booking.
3. Release the booking within the required location of the Wallchart.

Alternatively:

1. Select an area within the Wallchart you want to copy/move the booking to.
2. Choose the required booking within the clipboard.
3. Right-click and select 'Move to wallchart' to move or 'Copy to wallchart' to copy the booking.

**Note:** The original start time of the booking is maintained, the 'Snap to' settings are ignored.

**To remove bookings from the clipboard:**

1. Move the mouse pointer over the clipboard area.
2. Right-click with the mouse.
3. Choose 'Delete selected' to delete a selected booking.

Alternatively, select 'Clear Clipboard' to remove all the bookings from the clipboard.

**Note** that you can hide and unhide the clipboard by selecting 'View-> Booking Clipboard'.

### 9.10 Duplicating bookings

If you have a booking that you want to assign to other resources or you know will re-occur in the future, you can use the duplication wizard:

To duplicate a booking over time or resources:

1. Select 'Actions-> Duplicate bookings...' from the menu. The 'Duplication wizard' dialog will open.

   Shortcuts: The 'Duplicate bookings' button or right-click on a booking.

2. Select whether to duplicate bookings over time, resources (or both) by ticking the appropriate
3. If duplicating bookings across resources, select the required resources by highlighting them in the 'Available' list and moving to the 'Selected' list using the '>' button. You can move a resource from the 'Selected' list using the '<' button, add all resources using '>>' and remove all resources using the '<<' button.

4. Check to see if your settings are correct and click on 'Finish' to duplicate the bookings.

Duplicating over time depends on the duplication period selected:

1. Select 'Actions-> Duplicate bookings...' from the menu. The 'Duplication wizard' dialog will open.
   
   Shortcut: Right-click on a booking and select 'Duplicate bookings'.

2. Select whether to repeat bookings across time by clicking the appropriate checkbox.

3. If duplicating over time, select duplication period, either yearly, monthly, weekly, daily or custom.

4. For yearly, monthly or weekly bookings, select the duplication interval (e.g.: every 5 weeks).

5. Select the dates the duplicating bookings should start, depending on the period:
   
   **Yearly:** Select the day of the year.
   
   **Monthly:** Select the day of the month or 'Last day of the month'.
   
   **Weekly:** Select the day(s) of the week.
   
   **Custom:** Enter custom dates.

6. Choose a day when to start duplicating. The default start date is the first day after the selected booking ends:
7. Select when to stop duplicating. The 'Duplicates' field will show the number of duplications to be made within that period. The default is one duplication. Alternatively, type in or use the up/down arrows to change the required number of duplications.

**Note:** Daily and weekly duplication will not copy to weekends but copies for yearly or monthly duplication might end on weekends or public holidays. Check the duplicates and move them to weekdays, if necessary.

8. Review your settings and click on 'Finish' to duplicate the bookings:

9.11 Rolling bookings forward

Rolling bookings forward functionality is especially useful when scheduling recurring jobs.

You can save time by rolling normal (live) bookings forward without the need to create each booking again for the second and subsequent periods.

**To roll bookings forward:**

1. In Wallchart, filter the Resource and/or Job view as required, so that only the bookings that you want to roll forward are displayed. See the Sorting and selecting section for more information.

   For example, if you only want to roll forward bookings for jobs belonging to manager Smith, filter the jobs view by setting selection criteria where Manager = 'Smith'.

   **Note:** Only normal (live) bookings can be rolled forward.

2. Select 'Actions-> Roll forward' from the menu.

   Shortcut: The 'Roll forward' button.
3. In the 'Roll forward' dialog, specify the roll forward dates.

4. Click on the 'OK' button to roll the bookings forward.
   
   A status bar will be displayed while the bookings are rolled forward. This may take some time.

5. Once the roll forward process is complete, check the new bookings and amend them for the current period as required.

The 'Roll forward' dialog

When you select 'Actions-> Roll forward' from the menu, the following dialog will be displayed:

Using the 'Roll forward' dialog:

1. Choose one of the following options:
   
   • *Roll forward all resources visible in this wallchart (number of records)*: bookings of all the resources of current Wallchart will be rolled forward.
   
   • *Roll forward only the resources touched by the selected region (number of records)*: only bookings of the resources in the selected region will be rolled forward.

2. Specify the *Date range* of the bookings to be copied forward. This could also be done by highlighting an area within the Wallchart. All bookings starting within the specified date range (and matching the current selection settings) will be rolled forward.

3. Specify the *Destination date* for the new bookings. If the start date of the area you have highlighted is different from the start date of the selected booking, the difference between these two start dates will be applied.

   For example, if you have a three-day-long booking that starts on 04/05/2012 and the specified date range is between 29/04/2012 and 08/05/2012, the difference between these two start dates is 3 working days (the weekend is excluded). Therefore, if the destination date is 03/06/2012, the new booking will start on 08/06/2012.

   *Hint*: Use the same day of the week for the destination date to avoid creating weekend bookings.

4. Select the type of bookings you wish to create by ticking the appropriate checkbox. The rolled forward bookings can be created as:

   • *live (normal) bookings*
Working with bookings

- **scenario bookings**

  **Note:** When roll-forwarding to scenario bookings, you can specify a scenario these bookings will belong to. You can either select from an existing list of active scenarios or type in a new name. Entering a new name means the bookings will be rolled forward to a new scenario with the name you specified.

- **ghost bookings**
- **booking requests**

When done, click on the 'OK' and select 'Yes' in the confirmation message to perform the roll forwarding.

If you are in the Job view, you will also see the 'Target jobs' tab:

![Roll forward dialog](image)

- **Roll forward to the original job.** This option will make new bookings against the original job.
- **Roll forward to new job.** With this option you may choose a different job for the new bookings.

Rolling bookings forward is normally only the starting point of planning the recurring jobs. Move, copy and resize the new bookings as usual, taking into account the differences in timing and duration of the jobs and reallocating the bookings to different resources as necessary.

  **Note:** Although rolling forward functionality resembles duplicating bookings, the difference is that it works with multiple bookings, allowing you to create a copy of a number of bookings and move them to the required date.

9.12 Deleting bookings

Deleting bookings removes them permanently from the Wallchart and all reports.

**To delete bookings:**

1. Click on the booking in the Wallchart.
2. Select 'Actions-> Delete booking' from the menu.

  **Shortcuts:** The 'Delete selected booking' button or press Delete(DEL). Alternatively, right-click on a booking and select 'Delete Booking...' from the menu.

3. The 'Delete Booking' dialog will appear. Click on 'Yes' to delete the displayed booking or 'No' to cancel deletion of the displayed booking. Select 'Yes to All' to delete all the selected bookings or 'Cancel' to abort the deletion.
If you delete a booking by mistake, you can undo this action by pressing CTRL+Z.

9.13 Undo booking operations

All editions of Retain now have the facility to undo the last action that was performed on a booking.

To undo the last action, select 'Edit-> Undo' from the menu or press CTRL+Z:

![Undo Booking Operations](image)

Note that this does not apply to any other operations performed within the Wallchart.

9.14 Scenarios

Depending on your access rights, you might be able to create and edit scenarios and scenario bookings. You can create scenarios using the Scenario Manager.

In Retain, a scenario is a collection of potential bookings that are called scenario bookings.

Scenarios provide an additional tool for planning your work with Retain. A scenario allows you to see how a potential project or several projects would look like if comprised of different bookings. This is especially useful if you are planning several projects and wish to have an overview of a possible scenario and compare collections of bookings.

For example, if you think that you will win a tender and want to see which resources would be most suitable for the job, you can create a scenario for this hypothetical project. If you win the tender, you can simply make that scenario live. If you do not win the tender, you can delete the scenario or archive it for historical purposes.

Scenarios are divided into four types depending on their status.

Notes: You can not report on scenarios. Also, scenarios are user-specific which means that you will only be able to see the scenarios you have created.

Types of scenarios

Scenarios can be divided into the following three types, according to their status:

Active

Active scenarios are the ones you are currently working with. You can edit scenario bookings that belong to active scenarios and you can make an active scenario live.

Lived

When a potential project has been confirmed, you can make that scenario live. Once a scenario booking is lived, the bookings that belong to it become live bookings (normal bookings). Therefore, if you edit the bookings that belong to a lived scenario you will be editing live bookings, not scenario bookings. You can also rollback a 'lived' scenario or archive it.
Archived

When a potential project has been canceled or postponed, you can archive the scenario for historical purposes or potential future use. Archived scenarios are also useful for comparing the initial planning with the final result. Only 'lived' scenarios can be archived and the scenario bookings belonging to an archived scenario are uneditable.

Rollback a scenario

If you 'live' a scenario by mistake or before the project has been confirmed, you can roll it back to the 'active' state. Only 'lived' scenarios can be rolled back.

In cases when a scenario is rolled back but some of the bookings have been lived or deleted in the meantime, you will, depending on your functional access rights, either:
- get a warning asking whether you want to roll back all the live bookings generated from the scenario, even if they have been modified or
- will not be allowed to roll back a scenario if another user has changed any of the live bookings generated from the scenario.

To illustrate, the following diagram represents the transitions allowed in the scenario model:

![Diagram](image)

To manage scenarios, use the 'Scenario Manager' dialog.
**Scenario Manager**

The ‘Scenario Manager’ dialog allows you to manage scenarios. Select 'View-> Scenario Manager' from the menu to open the dialog:

You can move the ‘Scenario Manager’ dialog around or add it to the dockable pane. When you close the ‘Scenario Manager’ dialog, Retain will remember whether it was docked or not and will re-open it accordingly.

You can also choose which scenario bookings you wish to be displayed within the Wallchart by ticking the appropriate checkboxes. To display all the scenarios, click on the ‘Show/Select All’ button. To hide all the scenarios, click on the ‘Hide/Deselect All’ button.

**To create a scenario:**

1. Click on the **New** button or right-click anywhere in the ‘Scenario Manager’ dialog and select 'New Scenario' from the menu.
2. Enter a descriptive name for the scenario in the ‘Name’ column.
3. Click on the required scenario to select it and add scenario bookings to it.

**To see a particular scenario booking within the Wallchart:**

1. Tick the ‘Selected’ checkbox for the scenario the booking belongs to.
2. Expand the scenario by clicking on the **Expand** button.
3. Double-click on the necessary booking. It will be displayed in top-left corner of the Wallchart.

**To delete a scenario**, select it from the ‘Scenario Manager’ dialog by clicking on it, right-click on the scenario and select 'Delete Scenario' from the menu. Alternatively, press DELETE (DEL) button on your keyboard or click on the **Delete** button. A warning pop-up message will appear, asking you to confirm the deletion.
To make an active scenario live, select it from the 'Scenario Manager' dialog by clicking on it, right-click on the scenario and select 'Live Scenario' from the menu. Alternatively, click on the button.

To archive a lived scenario, select it from the 'Scenario Manager' dialog by clicking on it, right-click on the scenario and select 'Archive Scenario' from the menu.

To rollback a lived scenario, select it from the 'Scenario Manager' dialog by clicking on it, right-click on the scenario and select 'Rollback Scenario' from the menu. Alternatively, click on the button.

To edit the name of a scenario:

1. Select the required scenario from the 'Scenario Manager' dialog by clicking on it.
2. Click on the 'Name' value for the scenario and edit the name as necessary.
3. Press 'Enter' or click away from the modified scenario for the new name to be saved.

The button provides the same options as the right-click menu.

If you have a number of scenarios, you can group them according to their visibility in Wallchart, name or status. For example, click on the 'Status' column header and drag it to the area above to display the scenarios according to their status.

The 'Current Scenario' drop-down list shows the active scenario and is only used when performing operations through the 'Booking' dialog. When editing bookings (e.g. duplicating, rolling forward, copying to clipboard), the scenario of the bookings you are working with will be used (not the scenario selected in the 'Current Scenario' drop-down).

WARNINGS are displayed at the bottom of the 'Scenario Manager' dialog. Click on the button to display/hide them.

Depending on your setup, you may be able to filter the data displayed in the dialog by clicking on the button and defining the necessary conditions. Alternatively, you can hover over a column header and click on the button. You can now sort the view by choosing from the possible values or customising your own filter.

The selected value(s) will appear at the bottom of the booking list display.

To remove the selection, click on the button.
9.15 Scenario bookings

Depending on your access rights, you might be able to create and edit scenario bookings. A 'scenario booking' is a booking that is assigned to one or more scenarios.

You are able to toggle on and off the visibility of scenario bookings using the main menu. Select 'Data->Booking Visibility' and make sure there is a tick against 'Show Scenario Bookings'.

Shortcut: The 'Show Scenario Bookings' button.

Scenario bookings appear as hatched out bookings with a stippled border and an 'S' in the top right corner in the normal Wallchart view:

![Scenario Booking in Wallchart View](image)

In the 3-D View scenario bookings are presented with a solid black border and an 'S' in the top right corner:

![Scenario Booking in 3-D View](image)

**Note:** While you can display only scenario bookings within the Wallchart, you will most likely want to view normal bookings as well, in order to see how scenario bookings appear alongside the existing normal bookings.

See the following section on how to make scenario bookings.

**Making a scenario booking**

In order to make scenario bookings and see them within the Wallchart, you must be in edit mode and have 'Data->Booking Visibility->Show Scenario Bookings' option selected.

**To make a scenario booking:**

1. Create a scenario and name it (or select an existing scenario from the 'Scenario Mode' drop-down menu).
2. Once you have a required scenario selected, mark an area within the Wallchart.
3. Select 'Actions->Make scenario booking' from the menu.
   
   Shortcut: Right-click over the marked area and select 'Make scenario booking...'.
4. In the 'Scenario Booking' dialog, enter the booking details as for a normal booking and click on the 'Save' button. This will save all the bookings currently displayed in the 'Scenario Booking' dialog, even if some are not selected.

One job and at least one resource must be selected. If you are in the Resource view, the 'Resource' field will contain the resource(s) selected when you marked a booking area. If you are in the Job view, the marked job will be selected in the 'Job' field.
If you select more than one resource, a separate booking will be created against each of the resources.

**To delete scenario bookings:**

1. Click on the booking in the Wallchart.
2. Select 'Actions-> Delete booking' from the menu.

   Shortcuts: The 'Delete selected booking' button or press Delete(DEL). Alternatively, right-click on a booking and select 'Delete Booking...' from the menu.

3. The 'Delete Booking' dialog will appear. Click on 'Yes' to delete the displayed booking or 'No' to cancel deletion of the displayed booking. Select 'Yes to All' to delete all the selected bookings or 'Cancel' to abort the deletion.

**Making scenario bookings live**

Once a scenario booking is confirmed, you can make it 'live'. You can also live all bookings in a scenario in one go. When you make scenario bookings live, they become normal bookings.

**To make scenario bookings live**, select the necessary scenario from the 'Scenario Manager' dialog by clicking on it and click on the Live button. Alternatively, right-click on the scenario and select 'Live Scenario' from the menu.

A copy of the booking will appear below the scenario booking within the Wallchart, indicating that this scenario booking has been lived:

![Live Scenario Booking]

**9.16 Ghost bookings**

'Ghost bookings' in Retain are planned but unconfirmed bookings. For example, if you know that a certain project will take place in two months time but the exact day has not been confirmed yet, you can make a ghost booking. Similarly, if you are considering two people for a particular job, you can make ghost bookings against both of them.

You are able to toggle on and off the visibility of ghost bookings using the main menu. Select 'Data-> Booking Visibility' and make sure there is a tick against 'Show ghost bookings'.

Shortcut: The 'Show Ghost Bookings' button.

**Note:** If you want to see only ghost bookings displayed in the Wallchart, make sure you tick 'Show Ghost Bookings' in the 'Data-> Booking Visibility' menu.

Ghost bookings appear as bookings with a solid grey border within the Wallchart (in both normal Wallchart view and the 3-D View):
Making a ghost booking

In order to make ghost bookings and see them within the Wallchart, you must be in edit mode and have 'Data-> Booking Visibility-> Show Ghost Bookings' option selected.

To make a ghost booking:

1. Mark an area within the Wallchart.
2. Select 'Actions-> Make ghost booking' from the menu.
3. In the 'Booking' dialog, enter the required details as for a normal booking.
   Shortcut: Right-click over the marked area and select 'Make ghost booking...'.

One job and at least one resource must be selected. If you are in the Resource view, the 'Resource' field will will contain the resource(s) selected when you marked a booking area. If you are in the Job view, the marked job will be selected in the 'Job' field.

If you select more than one resource, a separate booking will be created against each of the resources.

4. Click on the 'Save' button to confirm. That this will save all the bookings currently displayed in the 'Booking' dialog, even if some were not selected.

Convert to ghost bookings

You can also convert 'normal' bookings to 'ghost' bookings. This feature is useful if, for example, a job is postponed and you are not sure if the person will still be available.

To convert a normal booking to a ghost booking, select the necessary booking, right-click on the booking and select 'Convert to Ghost'.

Confirm ghost bookings

Once the planned project or resource's availability is confirmed, simply confirm a ghost booking to make it a 'normal' booking.

Select 'Data-> Booking Visibility-> Show Ghost Bookings' from the menu.

To confirm a ghost booking, select it in the Wallchart and choose 'Actions-> Confirm booking' from the menu. Alternatively, right-click on the booking and select 'Modify-> Confirm Booking' from the menu.

To confirm multiple ghost bookings, select multiple bookings by holding down the CTRL key and and choose 'Actions-> Confirm booking' from the menu.
9.17 Booking requests

Retain offers the ability to make 'Booking requests'. For example, a user may want to make a booking request for vacation time or a project manager may create a series of booking requests to organise resources for a potential job.

You are able to toggle on and off the visibility of booking requests using the main menu. Select 'Data->Booking Visibility' and make sure there is a tick against 'Show Booking Requests'.

Shortcut: The 'Show Booking Requests' button.

The number of booking requests you will see depends on whether you are an administrator or a requester. The administrator will see all the booking requests he/she is a manager of, while the requester will only see booking requests he/she has submitted:

Note: If you want to see only booking requests displayed in the Wallchart, make sure you tick 'Show Booking Requests' in the 'Data->Booking Visibility' menu.

Booking requests appear as transparent bookings with stippled border in the normal Wallchart view:

- **Booking requests** (requests for booking creation) have a '+' symbol at the top right corner:
  ![ABZ Technologies +]

- **Booking requests for deletion** have a '-' symbol at the top right corner:
  ![ABZ Technologies -]

- **Rejected booking requests** have a red cross going through them:
  ![ABZ Technologies]

- **Ghosted booking requests** have a 'R' symbol at the top right corner and they are duplicated below the booking request that was ghosted (which in turn will be marked with a 'G' sign):
  ![ABZ Technologies R]
Note that in 3-D view booking requests have a solid black (not stippled) border.

Once a booking request is confirmed ('made live') by the administrator, it will appear as a normal booking.

Related Topics:

Making a booking request
Requesting a booking deletion
Administering booking requests

Making a booking request

In order to make booking requests and see them within the Wallchart, you must be in edit mode and have 'Data-> Booking Visibility-> Show Booking Requests' option selected.

To make a booking request:

1. Mark an area within the Wallchart.
2. Right-click over the marked area and select 'Make booking request...'.
3. In the 'Booking' dialog, enter the details as for a normal booking.
4. Click on 'Save' to confirm. This will save all the bookings currently displayed in the 'Booking' dialog, even if some are not selected:

One job and at least one resource must be selected. If you are in the Resource view, the 'Resource' field will will contain the resource(s) selected when you marked a booking area. If you are in the Job view, the marked job will be selected in the 'Job' field.

If you select more than one resource, a separate booking will be created against each of the resources.

When you successfully create a booking request, you will be presented with a confirmation dialog:

Note: When the booking request is modified by the resource manager, the booking status will change to 'Ghost' or 'Confirmed'. They can be seen through the separate Booking Request module. See the Booking Requests section for more information.

Requesting a booking deletion

You can submit a request to delete a booking in Retain Enterprise and this request will appear in the User Request Queue in the Booking Request module.

To submit a request for deletion:

1. Right-click on the booking you want to delete.
2. Select 'Modify-> Request Deletion'.
3. In the 'Request Deletion' dialog, click on 'Yes' to submit or 'No' to cancel the request.
Working with bookings

4. A pop-up message confirming your request details will appear:

You should also be able to see this request in the User Request Queue of the Booking Request Module. Once the administrator accepts this request your booking will be deleted from the Wallchart.

**Administering booking requests**

Retain also has the ability to convert 'request' bookings to 'ghost', 'normal' or 'rejected' bookings. These features help the resource manager to modify booking requests through the Wallchart.

To see an existing booking request, you must ensure that the 'Show Booking Requests' option from the 'Data' menu, 'Booking Visibility' is active.

In order to convert booking requests, you must first be in edit mode. See the [Switching to edit mode](#) section if you are not sure whether you are in edit mode.

**To convert a booking request to a normal booking,** right-click on the required booking request and choose 'Live Request' from the menu.

If the request was for deletion, the original booking and the request will be deleted. Otherwise, the request will be converted to a normal booking.

**To reject a booking request,** right-click on the required booking request and select 'Reject Request' from the menu. In the pop-up window you can enter the reason for rejection. It will be stored in the 'Rejection Reason' field within the 'View Booking' dialog:

| Rejection Reason | Project postponed to next year. |

You can **resubmit a rejected request** by right-clicking on it and selecting 'Resubmit Request from the menu.

You can also **send a booking request to ghost** by selecting the 'Send Request To Ghost' option from the menu; however, this functionality has now been almost entirely replaced by the integration of booking requests in Wallchart.

**Administering multiple booking requests**

When you want to edit a booking request that was created for more than one resource, you will be presented with a 'Booking Request Group' dialog:
To edit all of the booking requests displayed in the dialog, click on the 'Live All', 'Ghost All' or 'Reject All' button, as necessary.

To edit only one/some of the booking requests or to perform different actions on different requests, select the required resource and click on the 'Live Selected', 'Ghost Selected' or 'Reject Selected' button, as necessary.

Once finished, click on the 'Close' button.

9.18 Booking colours

The colour of a booking represents a particular value of that booking. The colour scheme is essentially a set of colours, with each colour representing a certain value. Your administrator will be able to edit the colour scheme but not rename or delete it.

For example, a default colour scheme displaying bookings according to their type may look similar to this:

The 'Colour Legend' (see the image above) displays the values that each colour represents. To open the colour legend, go to 'View-> Colour Key'. You can use the colour legend to change the booking colour (and in this example, the booking type) and apply it to bookings.
**Note:** you will not be able to change the colour of: lived or archived scenario bookings and booking requests for deletion.

**To change the colour of a booking:**

1. Select a colour from the colour legend. The mouse pointer will change to 'paint-pot'.

2. Move the mouse pointer over the required booking. The mouse pointer will change to 'pouring paint-pot'.

For instance, to change the type for 'E-Solutions' booking to 'Chargeable', select it from the colour legend and click on the booking:

![Colour Legend](image)

The booking colour (and at the same time the booking type) will be changed:

![Colour Legend](image)

3. Once finished, click anywhere on the booking grid (away from the bookings) to remove the 'paint-pot'.

You can also change the booking colour (and the booking type in this example) by right-clicking on a booking and selecting 'Change colour to' option from the menu. The list of colours and their descriptions will be displayed:
Note: The ‘Change colour to’ menu option and the ability to change the colour of a booking using the colour legend will be disabled if the colour scheme is not based on one of the acceptable fields from the BKG table. This prevents you from accidentally changing the values of internal Retain fields such as job (if the colour scheme is based on the JOB table field) by editing a booking. You can keep the colour legend displayed throughout your current session and use it whenever you need it.

To move the colour legend:
1. Click on the header bar or the colour legend dialog, holding the mouse button down.
2. Move the mouse pointer to the new location.
3. Release the mouse button.

You can also move the colour legend from the main Wallchart view by dragging it to dockable pane on the right-hand side of the screen.

To close the colour legend, click on the button.

A booking will be of the default colour when it is not assigned a value corresponding to the colour scheme.

The default colour of the booking is white and the default shape is rectangular:
Over-allocation notification

**Note** that if you do not have the appropriate access rights, you may not be able to over-allocate.

Over-allocation occurs when the total value of loading (for one or more bookings) for a specific date range is more than 120%. Over-allocated bookings are displayed in red.

For example, if you have several bookings (none of which exceeds the maximum loading):

![Diagram 1](image1)

and you move one of the bookings to the same date range as an existing booking, thus causing over-allocation, both of the bookings in conflict will become red:

![Diagram 2](image2)

Since the total loading for 'Virgin Media' and 'Digital Solutions' for that date range now equals 200%, both bookings become red.

To compare, if you make several bookings against the same date range but the total value of loading does not exceed 120%, the bookings will not be considered to be in conflict:

![Diagram 3](image3)

Since the total loading value of these four bookings is 115%, over-allocation does not occur.
9.19 Booking shapes

In addition to colours, you can create bookings with different shapes:

The shape of a booking depends on a particular value of that booking, as is in the case of colours. Colours and shapes allow you to visually represent two individual values for each booking.

For example, you can have booking shapes which are dependent on the component of the booking.

The 'Shape Legend', available from 'View-> Shape Key' menu option, allows you to see the values assigned to each shape.

**Note:** you will not be able to change the shape of: lived or archived scenario bookings and booking requests for deletion.

You can also easily change the value of the booking that the shape represents by using the shape legend.

In this example, the shape of each booking represents its component. If you wanted to change the component for the 'E-Solutions' booking to 'Audit', you would select the component in the shape legend:
then hover over the booking, and click on it:

The component of the booking changes to 'Audit' and consequently, the booking shape becomes ribboned:

Alternatively, you can change the booking shape (and the booking component in this example) by right-clicking on a booking and selecting 'Change shape to' option from the menu. The list of shapes and their descriptions will be displayed:
Note: The ‘Change shape to’ menu option and the ability to change the shape of a booking using the shape legend will be disabled if the shape scheme is not based on one of the acceptable fields from the BKG table. This prevents you from accidentally changing the values of internal Retain fields such as job (if the colour scheme is based on the JOB table field) by editing a booking. You can keep the shape legend displayed throughout your current session and use it whenever you need it.

To move the shape legend:

1. Click on the header bar or the shape legend dialog, holding the mouse button down.
2. Move the mouse pointer to the new location.
3. Release the mouse button.

You can also move the shape legend from the main wallchart view by dragging it to dockable pane on the right-hand side of the screen.

To close the shape legend, click on the button.

A booking will be of the default shape when it is not assigned a value corresponding to the shape scheme. The default shape of the booking is rectangular and the default colour is white:
10 Working with notebooks

10.1 Notebooks overview

Notebooks contain views of your Retain data. They allow you to display your Retain Wallchart in various ways and to define report formats used by the Retain Report Writer.

Each notebook can contain one or more notebook pages, each page representing a different view of your data. Each notebook page may be either a Wallchart, calendar or report type page and can be defined independently. See the Working with notebook pages section for more information.

Each notebook points to a particular database. In most organisations, you are likely to have a single database, but you may have several notebooks pointing to that data. In a network environment, your Retain data may be stored on a network drive and shared by many users. Each user may have their own notebooks, or you may even have notebooks which are shared by several users. (Note: If you intend to share notebooks the notebook file is changed each time someone saves it. You may prefer to make shared notebook files read only so that they cannot be amended.)

It is essential, while working with a Retain notebook, to appreciate that the underlying data is the same across all pages, notebook files and even users of that data.

For example, if you amend a booking in a particular notebook the booking itself is amended, not just the view. However, if you were to hide some bookings in a notebook then they would still be visible in all other notebooks - the underlying data would not change.

Related Topics:

Creating a new notebook
Opening an existing notebook
Saving the notebook
Default notebook
Closing the notebook
Importing/exporting notebook pages
Notebook windows

10.2 Creating a new notebook

To create a new notebook, select 'File-> New' from the menu. Alternatively, use the 'New file' button or press CTRL+N.

The new notebook file will be created with a temporary name such as 'ntbk1' and a default 'Resource' page will be provided. You can now work with the notebook as necessary.

A temporary notebook name given to a new notebook is equivalent to an untitled document in a word processing application or unsaved workbook in a spreadsheet application. Remember to save your new notebook under a meaningful name and to save changes to your notebooks from time to time, such as when you add new notebook pages. See the Saving the notebook section for more information.
10.3 Opening an existing notebook

If you currently have a notebook open, you should close it before opening another notebook.

To open an existing notebook, select 'File-> Open' from the menu. Alternatively, use the 'Open' button or press CTRL+O. You can open both, notebooks with the current ("*.RetainNotebook") and old ("*.RTN") file extensions.

Generally, you should only need to have one notebook open at any one time, since you may be working with several pages within that notebook. See the Working with notebook pages chapter for more information.

Note: The four most recently opened notebooks will be listed in the 'File' menu.

10.4 Saving the notebook

To save the current notebook, select 'File-> Save' from the menu. Alternatively, use the ‘Save’ button or press CTRL+S.

If the notebook has not been named previously, you will be prompted to enter a name for it.

To save the current notebook under a different name, or to save a notebook which has not been previously named:

1. Select 'File-> Save As' from the menu.

2. Enter the new name of the notebook file. Retain notebook files should be given a '.RetainNotebook' file extension.

3. Click on the 'OK' button to save the notebook under this new name.

If you enter an existing filename, Retain will ask if you want to overwrite the existing notebook. Click on 'Yes' to overwrite the existing notebook or 'No' to enter a different filename.

Note: When you save a notebook, you are saving your views of the Retain data, including any pages added or deleted and any changes to the formats of existing pages. You are not saving the data itself. Changes to your bookings, jobs, resources and components are saved to the underlying database as you go along, so you do not need to worry about saving these changes separately.
10.5 Default notebook

You can save a notebook with the current settings as your 'Default Notebook'. Every time a new notebook is created, it will inherit the settings of the default notebook.

If you want to save the current notebook settings to be the default settings, select 'File-> Save As Default Notebook':

**Note** that you can have only one default notebook at a time. It will be saved locally on your machine and under your username and will not be accessible to other users.

To restore the factory settings select 'File-> Clear Default Notebook'. Make sure you clear the default notebook before connecting to a different database.

10.6 Closing the notebook

To close the current notebook, select 'File-> Close' from the menu. Alternatively, double-click on the icon at the top left corner of the notebook window or press CTRL+F4.

If you have made changes to your notebook, you will be prompted to save them before closing the file. See the **Saving the notebook** section for more information.

When you **exit Retain**, you will automatically close all open notebooks.
10.7 Importing/exporting notebook pages

You can import and export individual notebook pages so that pages can be easily moved between different notebooks. Select 'Notebook-> Export page...' to export and 'Notebook-> Import page...' to import a page:

By exporting a notebook page you will be able to use it within another notebook or make it available for other users to use.

For example, if two users are working on separate notebooks and one of them wants to use a report that the other user has designed, the creator of the report needs to export it by selecting 'Notebook-> Export page...' from the menu to save the file as a Retain notebook page:

![Image of exporting a page]

Enter a name for your page (it will be saved with the '.RetainPage' extension) and click on the 'Save' button. In the example above, the exported page is a report page called *UtilisationReport*.

The user who wants to use this report has to navigate to the file and import it to their own notebook by selecting 'Notebook-> Import page...':

![Image of importing a page]
Navigate to the file and click on the 'Open' button. The selected page will be displayed in Retain.

You can import both pages with the new (*.RetainPage') and old (*.rtnPage') file extensions:

10.8 Notebook windows

In Retain you can open several notebooks at once, as long as they point to the same underlying database. See the Opening an existing notebook section for more information.

Each notebook you open in Retain is contained in its own window.

Resizing notebook windows

You can manipulate each notebook window as follows:

- To expand the notebook window to its maximum size, click on the 'Maximise' button at the top right of the window.

- To restore a maximised window to its original size, click on the ‘Restore down’ button at the top right of the window.

- To minimise the notebook, click on the or button at the top right of the window.

To manually resize a window, move the mouse pointer to the border of the window you want to resize. The mouse pointer will change to . Now drag the border until the window is of the size you want and then release the mouse button.

To close a notebook window, click on the or button at the top right corner of the window.
Window menu options

Any open notebook windows are listed in the 'Window' menu. To switch to a different window, select it from the 'Window' menu. Alternatively, if the notebook windows are minimised, click anywhere on the window area to activate it.

The following options are also available from the 'Window' menu:

- **Cascade** - overlays your open notebook windows one on top of another, each window having the same dimensions.
- **Tile vertically** - tiles your open notebook windows side by side, each window being of the same width.
- **Tile horizontally** - tiles your open notebook windows on top of each other, each window being of the same height.
- **Arrange icons** - when all the open notebook windows are minimised, arranges them evenly across the bottom of the screen.
- **Close all** - closes all open notebook windows.
11 Working with notebook pages

11.1 Notebook pages overview

Each notebook can contain one or more notebook ‘pages’, each page containing a different view of your data.

The characteristics of each notebook page can be defined and maintained independently, using the various sort, selection and other display features in Retain, allowing you to create an almost unlimited number of views of your data.

You can see all the pages of the currently open notebook in the page drop-down list:

A notebook page can be one of the following three types:

- **Wallchart** - the traditional Wallchart view with resources/jobs listed on the left-hand side of the page and a date bar along the top. Each booking is represented as a coloured block in the middle of the screen.

- **Calendar** - a calendar view where each screen page represents the bookings for one individual resource or job. Time is represented in a calendar style grid and special navigation features allow you to move to other resources or jobs.

- **Report** - a powerful Report Writer view that allows you to easily develop and quickly generate various reports.

Create a separate notebook page for each view of your data that you want to produce on a regular basis. When you save a notebook, all the page formats are stored so you can retrieve them quickly at a later date.

Remove notebook pages that you no longer need or simply update them as necessary. You will often be able to work using your existing notebook pages, rather than creating a separate page for every unique view.

If you decide to use a number of notebook pages, consider creating separate notebooks to deal with pages of a similar type. For example, you might set up pages relating to monthly reports in a 'MonthlyReports' notebook or pages relating to particular staff groups into a 'Groups' notebook.

Note: No more than 40 pages per notebook can be created. If the ‘Add page’ and ‘Copy page’ buttons (and the appropriate menu options) are disabled, you already have 40 pages in the current notebook.

Related Topics:

- Adding a page
- Inserting a page
- Copying a page
- Renaming a page
- Deleting a page
- Navigating between pages
- Switching to Wallchart or Calendar view
11.2 Adding a page

To add a new page to the current notebook:

1. Select 'Notebook-> Add page' from the menu.

   Shortcut: The 'Add page' button.

2. Choose the page type by selecting the appropriate radio button.

3. Type in a descriptive name for the new notebook page.

4. Click on the 'OK' button to confirm your changes. The new page will be added as the last page in the page drop-down list.

Notes:

- When adding a Report page you will be prompted to define the report format. See the Creating a report section for more information.

- The maximum number of pages for a notebook is 40. Therefore, both the 'Add page' button and the appropriate menu option will be disabled when a notebook has 40 pages.

11.3 Inserting a page

To insert a new page in the current notebook:

1. If you have several pages in your notebook, select the page you want to appear after the inserted page in the page drop-down list.

2. Select 'Notebook-> Insert page' from the menu.

   Shortcut: The 'Insert page' button.

3. Choose the page type by selecting the appropriate radio button.

4. Type in a descriptive name for the new page.

5. Click on the 'OK' button to confirm your changes. The inserted page will always appear before the page selected in step 1.

Note: When adding a Report page you will be prompted to define the report format. See the Creating a report section for more information.
11.4 Copying a page

To make a copy of a notebook page:

1. If it is not the currently open page, select the page you want to copy from the page drop-down list.
2. Select 'Notebook-> Copy page' from the menu. Shortcut: The 'Copy page' button.
3. The new page will be added as the last page in the current notebook drop-down list. The copied page will contain all the characteristics of the original page but can be amended as required without affecting the original page. See the Renaming a page section for more information.

Note: The maximum number of pages for a notebook is 40. Therefore, both the 'Copy page' button and the appropriate menu option will be disabled when a notebook has 40 pages.

11.5 Renaming a page

To rename a notebook page:

1. If it is not the currently open page, select the page you want to rename from the page drop-down list.
2. Select 'Notebook-> Rename page' from the menu. Shortcut: The 'Rename page' button.
3. Type in the new name for the page.
4. Click on the 'OK' button to confirm your changes.

11.6 Deleting a page

To delete a notebook page:

1. If it is not the currently open page, select the page you want to delete from the page drop-down list.
2. Choose 'Notebook-> Delete page' from the menu. Shortcut: The 'Delete page' button.
3. Click on the 'OK' button to confirm the deletion.

Notes:

- Deleting a page does not affect any underlying data such as resources, jobs or bookings that were displayed in the deleted page.
- A notebook needs to have at least one page. Therefore, you will not be able to delete the last page.
11.7 Navigating between pages

To switch to a different page:

- Using the mouse: select the page from the page drop-down list.
- Using the keyboard: use CTRL+PageUp and CTRL+PageDown to move through the pages in the page drop-down list.

You can change the order of notebook pages by moving them up or down. This is useful for notebooks with a lot of pages.

To move a page, select the page (if it is not the currently active page) you want to move from the page drop-down list and choose 'Notebook-> Move page up' or 'Move page down' from the menu. The page will be moved accordingly.

11.8 Switching to Wallchart or Calendar view

To switch from Wallchart to Calendar view, ensure that the Wallchart view is the currently active view and select 'View-> Calendar' from the menu.

Shortcut: The 'Calendar view' button.

To switch from Calendar to Wallchart view, ensure that the Calendar view is the currently active view and select 'View-> Wallchart' from the menu.

Shortcut: The 'Wallchart view' button.

Notes:

- If you are using both views regularly you may find it convenient to create a separate page for each view.
- Report pages cannot be converted to Wallchart or Calendar views.

11.9 Setting the opening date

When you open a Wallchart or Calendar page, the view will start with today's date. You can change the date to:

- a certain fixed date;
- a date relative to today's date;
- a date the view started when the notebook was last closed.

To set the opening date for a currently active notebook page:

1. Select 'View-> Opening date...' from the menu.
2. In the 'Opening Date' dialog, set the opening date for the current page as required (see the instructions below):
3. Click on the 'OK' button to confirm your changes.

The opening date guidelines:

- Specify a *Fixed* date if you want the notebook page to always start with the same date. You are likely to use this option for historical views of your data or when you are planning from a fixed point of time in the future, for example.

- Select a *Relative* date with an offset value of zero if you want the notebook to always start with today's date, based on your computer's internal clock. You are likely to use this option for most of your resource planning activities.

  You can also specify a start date relative to today's date by setting a required value in the 'Offset from today (Days)' box. For example, set the offset to '+30' if you want the notebook page to start 30 days after today or '-30' for 30 days prior to today.

- Choose the *Last Closed Date* option if you want the notebook page to always start with the date that the last saved notebook page started with.

**11.10 Editing fonts**

You can edit the fonts of several Retain components:

- expanded and collapsed records, sub fields and date bar in Wallchart and Calendar views;
- **report fonts**: report detail, total and sort levels;
- **report header** fonts: header title, sub-title, date, page number, date range and columns;
- **report footer** fonts: footer date, page number and footnote;
- **header** and **footer** fonts when printing Wallchart and Calendar pages.

**To edit fonts:**

1. Select 'View-> Fonts' from the menu.

   **Shortcut: The 'Fonts' button.**

2. Depending on which fonts you are editing (see the list above), you will be presented with a dialog similar to this:
3. Using this dialog, select an item that you want to edit and click on the 'Set font...' button. Alternatively, double-click on the required item.

4. The 'Font' dialog will appear, allowing you to alter the font as required. You can edit the type of font, its style, size and colour, as well as use of effects such as strikeout or underline:

5. Click on the 'OK' button to confirm your changes.

**Note:** When altering fonts, make sure that they are clearly visible for both on-screen viewing and printable versions.
12 The Retain Report Writer

12.1 Report writer overview

Retain provides its own versatile and powerful report writer which allows you to create various customised reports.

You can use the Retain Report Writer to produce both job-based (such as job cost and forecast revenues) and resource-based (such as resource allocations and utilisation analyses) reports. You can format, sort, perform selections and aggregate your reports in a number of ways.

Related Topics:
- Creating a report
- Report fields
- Calculated fields
- Report date range
- Report selection criteria
- Report grouping and subtotals
- Viewing the report
- Report headers and footers
- Saving and exporting reports
- Report Examples

12.2 Creating a report

To create a new report, you need to add a new notebook page with a 'Report' page type:

1. Select the 'Add page' option from the 'Notebook' menu.

   Shortcut: The 'Add page' button.

   Tip: Use the 'Copy page' function if you want to create a report based on an existing report format.

2. Choose the 'Report' page type by selecting the appropriate radio button.

3. Type in a descriptive name for the new report.

4. Select the 'OK' button to add the Report page to your notebook.

5. Define the report formats for the new report as required (see the image below).

6. Click on the the 'OK' button to confirm your report formats. A new notebook page will be created for your report.

7. Select the new page from the drop-down to generate the report.

When you create a new Report page you will be prompted to define the report formats at the 'Setup Report' dialog:
Use this dialog to define the following information about the report:

- **Fields** - add the resource, job or booking fields that you want to appear in each row of your report.
- **Date** - specify the date range to be covered by the report.
- **Sort** - specify the order in which the report data will be sorted, including any aggregation of your data by way of sub-totals.
- **Selection** - enter any criteria by which you want to filter the contents of the report.

As a minimum you should normally enter one or two fields and a date range for your report. You can produce a quick report in less than a minute with just these elements, although in practice you may want to experiment with the different report settings to produce the report in your preferred format.

### 12.3 Report fields

Report fields are displayed on each row of the report. You can select any of the fields from the resource, job and booking tables. You can also customise the position and width of these fields in the report.

**To define report fields:**

1. Select 'Data-> Fields' from the menu.
   
   Shortcut: The 'Fields' button.

2. In the 'Setup Report' dialog, 'Fields' tab, add or remove the fields you want to be displayed in the report (see the instructions below):
3. Click on the 'OK' button to confirm your changes.

**To add a field:**

1. Select the field from the drop-down list in the 'Field' panel.

2. Adjust the width of the column by changing the number under 'Width' or by dragging the line which separates each field in the top pane.

3. Adjust the order in which fields are displayed by clicking on the ◆ and dragging the line up or down.

4. Repeat steps 1 to 3 for each field as required.

*Tip:* You do not need to include the fields you wish to use for sorting here. The sort fields are added using the 'Sort tab' and will be displayed in the report automatically.

Only combine report fields if they have a logical relationship. Generally, this means producing reports based on fields from either resource, job or booking tables but not a combination of fields across these tables. For instance, the resource 'grade' and the job 'priority' fields do not have a logical relationship.

Since the booking table contains information related to both resources and jobs, you can often use this table to produce booking level reports. For example, you can use the 'Resource Name' and 'Job Name' fields from the booking table rather than extracting these name fields from the resource and job tables.

If using booking level fields rather than the values held in the corresponding resource or job tables, note that Retain allows you to change the priority colour, resource grade and charge type on a booking by booking basis. You may therefore notice differences between the reports using these fields at a booking level from those at the resource/job level.

**To remove a field from the report**, click on the ✗ button against the field or move the mouse pointer over a field in the top pane and drag the field outside of the box.

**To reposition a field within the report**, click on the ◆ on the left of the field and and drag the line up or down. The top field will be the first field on the left-hand side. Alternatively, move the mouse pointer over the field in the top pane and drag it left or right.
To change the width of a field within the report definition, change the number under 'Width'. Alternatively, move the mouse pointer to the right edge of the field in the top pane, so that the mouse pointer changes to a ↔ and drag the line to increase/decrease the width.

Shortcut: You can also resize the fields within the report by dragging the column header separators left or right.

To create time series reports (reports spanning over periods of time), add the field(s) you wish to report on for each of the period individually.

For example, if you wish to report on the utilisation of resources over the next three months, add the 'utilisation' field three times and select 'Next month' as the Date type in the 'Date' tab. The report may look similar to this:

<table>
<thead>
<tr>
<th>Date</th>
<th>Utilisation</th>
<th>Utilisation</th>
<th>Utilisation</th>
</tr>
</thead>
<tbody>
<tr>
<td>April 2012</td>
<td>39.12%</td>
<td>63.87%</td>
<td>45.30%</td>
</tr>
<tr>
<td>May 2012</td>
<td>72.67%</td>
<td>77.14%</td>
<td>43.54%</td>
</tr>
<tr>
<td>June 2012</td>
<td>22.02%</td>
<td>87.00%</td>
<td>13.35%</td>
</tr>
</tbody>
</table>

For more sample reports see the Report Examples section.

12.4 Calculated fields

Standard report fields are preceded by 'resource', 'job' or 'booking' to indicate the table they relate to. For example:

- `resource.Name` - the resource name field in the Resource (RES) table;
- `job.Name` - the job name field in the Job (JOB) table;
- `booking.Startdate` - the booking start date from the Booking (BKG) table.

In addition to the standard database fields, Retain also provides a number of special fields that provide additional information about a resource or job, computed from the underlying data (e.g. availability, utilisation, revenue), called 'calculated fields'.

The two most commonly used calculated fields are:

Availability

This field calculates the resource's availability percentage for a given date range.
Public holidays/weekends (as defined in the diary) do not count towards diary time.

Utilisation

This field calculates the resource's utilisation percentage for a given date range depending on the charge rates of the jobs he/she is booked on.

\[
\text{Utilisation} = \frac{\text{Chargeable booked time}}{\text{Diary time} - \text{Deducted time}}
\]

Deducted time refers to non-work bookings (such as holidays) that are setup through Retain Security to be excluded from utilisation calculations.

It is important that these definitions are understood by everyone using Retain.

The behaviour of these calculated fields can be modified in Retain Security Manager for different charge rates.

For example, there is a resource booked for two weeks, one week on a chargeable job and another week on a holiday. The utilisation percentage will depend on the charge band of these jobs. In this case, 'Chargeable job' charge band is always 'included', therefore the calculation will differ depending on whether you wish to take into account the time spent on holidays or not.

In other words, if 'Holiday' charge band is defined as 'deducted' then the overall utilisation for this two week period will be 100%. If 'Holiday' charge band is defined as 'excluded', utilisation will be 50%:

<table>
<thead>
<tr>
<th>Deducted utilisation for the Holiday charge band</th>
<th>Excluded utilisation for the Holiday charge band</th>
</tr>
</thead>
<tbody>
<tr>
<td>Utilisation for the whole 2 week period: 100%</td>
<td>Utilisation for the whole 2 week period: 50%</td>
</tr>
</tbody>
</table>

Note: The term 'reporting period' used below refers to both, the currently displayed or selected date range within Wallchart as well as the date range used when creating a report.

<table>
<thead>
<tr>
<th>Table</th>
<th>Calculated Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RES</td>
<td>All booked time</td>
<td>Total booked time within the reporting period, including time coming from ghost bookings</td>
</tr>
<tr>
<td></td>
<td>Availability</td>
<td>The resource's availability percentage in the reporting period</td>
</tr>
<tr>
<td></td>
<td>Available Time</td>
<td>The resource's available time (in minutes) within the reporting period with no negative values allowed</td>
</tr>
<tr>
<td></td>
<td>Booked Days</td>
<td>Total amount of time (in days) the resource has been booked on within the reporting period</td>
</tr>
<tr>
<td></td>
<td>Booked Time</td>
<td>Total amount of time (in minutes) the resource has been booked on within the reporting period</td>
</tr>
<tr>
<td></td>
<td>Current Charge Band</td>
<td>The current value of the resource's 'Charge band' history field</td>
</tr>
<tr>
<td></td>
<td>Current Diary</td>
<td>Resource's diary</td>
</tr>
<tr>
<td></td>
<td>Default Diary Time</td>
<td>Total diary time for the default diary (in minutes) within the reporting period</td>
</tr>
<tr>
<td></td>
<td>End Date</td>
<td>End date of the Blank diary</td>
</tr>
<tr>
<td><strong>Diary Time</strong></td>
<td>Total diary time for the resource (in minutes) within the reporting period</td>
<td></td>
</tr>
<tr>
<td>----------------</td>
<td>--------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td><strong>Ghost Utilisation</strong></td>
<td>Utilisation percentage for the reporting period based on the charge band of the jobs and including ghost bookings</td>
<td></td>
</tr>
<tr>
<td><strong>Ghost true diary time</strong></td>
<td>Utilisation percentage for the reporting period, computed using the diary time excluding holidays (including those generated by ghost bookings)</td>
<td></td>
</tr>
<tr>
<td><strong>Ghosted availability</strong></td>
<td>Availability percentage for the resource including time generated by ghost bookings in the computation</td>
<td></td>
</tr>
<tr>
<td><strong>Holiday Booking time</strong></td>
<td>Total time (in minutes) the resource is booked on holidays in the reporting period</td>
<td></td>
</tr>
<tr>
<td><strong>Is in submitted booking request</strong></td>
<td>Returns 'Y' if the resource has a submitted request; 'N' otherwise</td>
<td></td>
</tr>
<tr>
<td><strong>Last Booking Change Date</strong></td>
<td>Returns the last change date of a live booking made against the resource</td>
<td></td>
</tr>
<tr>
<td><strong>Revenue</strong></td>
<td>Revenue</td>
<td></td>
</tr>
<tr>
<td><strong>Start Date</strong></td>
<td>Start date of the Default diary</td>
<td></td>
</tr>
<tr>
<td><strong>Utilisation</strong></td>
<td>Utilisation percentage for the resource within the reporting period based on the charge rate of the jobs the resource is assigned to</td>
<td></td>
</tr>
<tr>
<td><strong>Utilised Time</strong></td>
<td>Total utilised time (in minutes) for the resource within the reporting period</td>
<td></td>
</tr>
<tr>
<td><strong>Maximum Loading %</strong></td>
<td>Maximum percentage booked in a day within the period</td>
<td></td>
</tr>
<tr>
<td><strong>Utilised Days</strong></td>
<td>Utilised days within the period by resource</td>
<td></td>
</tr>
<tr>
<td><strong>Available Days</strong></td>
<td>Available days within the period for a resource</td>
<td></td>
</tr>
<tr>
<td><strong>Booking Count</strong></td>
<td>Number of bookings within the period for a given resource</td>
<td></td>
</tr>
<tr>
<td><strong>Diary Days</strong></td>
<td>Total amount of diary time (in days) for the resource</td>
<td></td>
</tr>
<tr>
<td><strong>Scenario Status Code</strong></td>
<td>Returns the status code of the scenario booking</td>
<td></td>
</tr>
<tr>
<td><strong>Scenario Name</strong></td>
<td>Name of the scenario which the live booking belongs to</td>
<td></td>
</tr>
<tr>
<td><strong>Scenario ID of booking</strong></td>
<td>The Scenario ID which the booking belongs to</td>
<td></td>
</tr>
<tr>
<td><strong>Scenario Available Time</strong></td>
<td>The resource available time (in minutes) within the currently displayed date range including active scenario bookings</td>
<td></td>
</tr>
<tr>
<td><strong>Scenario Availability</strong></td>
<td>The resource's availability percentage within the currently displayed date range including active scenario bookings</td>
<td></td>
</tr>
<tr>
<td><strong>Scenario Ultisation</strong></td>
<td>Utilisation percentage for the resource within the displayed date range based on the charge rate of the jobs the resource is assigned to, including scenario bookings</td>
<td></td>
</tr>
<tr>
<td><strong>Scenario Booked Time</strong></td>
<td>Total booked time against the resource in the currently displayed date range including scenario bookings</td>
<td></td>
</tr>
<tr>
<td><strong>Scenario Utilised Time</strong></td>
<td>Total utilised time (in hours) for the resource within the currently displayed date range including scenario bookings</td>
<td></td>
</tr>
<tr>
<td><strong>Attachments Count</strong></td>
<td>The number of attachments associated with the resource</td>
<td></td>
</tr>
<tr>
<td><strong>Booked Days</strong></td>
<td>Total amount of time (in days) booked against the job within the reporting period</td>
<td></td>
</tr>
<tr>
<td><strong>Booked Time (Hours)</strong></td>
<td>Total amount of time (in hours) booked against the job within the reporting period</td>
<td></td>
</tr>
<tr>
<td><strong>Revenue</strong></td>
<td>Job revenue</td>
<td></td>
</tr>
<tr>
<td><strong>Revenue Variance</strong></td>
<td>Job revenue variance</td>
<td></td>
</tr>
<tr>
<td><strong>Time Variance</strong></td>
<td>Time variance (in hours) between the job budgeted time and the total booked time against it</td>
<td></td>
</tr>
<tr>
<td><strong>Total Booked Time (Hours)</strong></td>
<td>Total hours booked against a job regardless of the reporting period</td>
<td></td>
</tr>
<tr>
<td><strong>Bookings Count</strong></td>
<td>Number of bookings within the period for a given job</td>
<td></td>
</tr>
<tr>
<td><strong>Attachments Count</strong></td>
<td>The number of attachments associated with the job</td>
<td></td>
</tr>
<tr>
<td><strong>BRQ Submit Date</strong></td>
<td>Returns the earliest request submission date</td>
<td></td>
</tr>
<tr>
<td><strong>Booking Class</strong></td>
<td>Displays the booking class: line of a booking request, actual or ghost</td>
<td></td>
</tr>
<tr>
<td><strong>Booking Conflict</strong></td>
<td>Total loading for the reporting period</td>
<td></td>
</tr>
<tr>
<td><strong>Booking Request Notes</strong></td>
<td>Returns the notes stored against booking requests</td>
<td></td>
</tr>
<tr>
<td><strong>Fast Time (Hours)</strong></td>
<td>Time (in hours) against a booking for the reporting period</td>
<td></td>
</tr>
<tr>
<td><strong>Is Active Scenario Booking</strong></td>
<td>Returns 'Y' if the booking is in an active scenario; 'N' otherwise</td>
<td></td>
</tr>
<tr>
<td><strong>Is Live Booking or Submitted BRQ</strong></td>
<td>Returns 'Y' if the booking is a live or submitted request; 'N' otherwise</td>
<td></td>
</tr>
<tr>
<td><strong>Is Submitted BRQ line</strong></td>
<td>Returns 'Y' for submitted requests; 'N' otherwise</td>
<td></td>
</tr>
<tr>
<td><strong>Is a Administered Booking Request Line</strong></td>
<td>Returns 'Y' if the request is in the currently logged on user's administered queue; 'N' otherwise</td>
<td></td>
</tr>
<tr>
<td><strong>Is in conflict on managed job?</strong></td>
<td>Returns 1 if there is a conflict on a job managed by the currently logged on user; 0 otherwise</td>
<td></td>
</tr>
<tr>
<td><strong>Is in conflict on managed resource?</strong></td>
<td>Returns 1 if there is a conflict on a resource managed by currently logged on user; 0 otherwise</td>
<td></td>
</tr>
<tr>
<td><strong>Resource Diary Time</strong></td>
<td>The amount of diary hours against the booked user during the date range of the booking</td>
<td></td>
</tr>
<tr>
<td><strong>Resource Emergency Diary Time</strong></td>
<td>The resource emergency time (in hours) during the date range of the booking</td>
<td></td>
</tr>
<tr>
<td><strong>Scenario ID of booking</strong></td>
<td>The Scenario ID which the booking belongs to</td>
<td></td>
</tr>
<tr>
<td><strong>Scenario Name</strong></td>
<td>Name of the scenario which the live booking belongs to</td>
<td></td>
</tr>
<tr>
<td><strong>Scenario Status Code</strong></td>
<td>Returns the status code of the scenario booking</td>
<td></td>
</tr>
<tr>
<td><strong>Time (Days)</strong></td>
<td>Total time of the booking in days</td>
<td></td>
</tr>
<tr>
<td><strong>Time (Hours)</strong></td>
<td>The time of the booking in hours</td>
<td></td>
</tr>
<tr>
<td><strong>True Loading</strong></td>
<td>True loading for fixed time bookings</td>
<td></td>
</tr>
<tr>
<td><strong>True Time</strong></td>
<td>The time of the booking in hours used to fix up fixed loading Bookings</td>
<td></td>
</tr>
<tr>
<td><strong>Booking Record Time (Hours)</strong></td>
<td>Total booking hours irrespective of the currently displayed date range</td>
<td></td>
</tr>
<tr>
<td><strong>Booking Record Time (Days)</strong></td>
<td>Total booking days irrespective of the currently displayed date range</td>
<td></td>
</tr>
<tr>
<td><strong>Maximum Loading %</strong></td>
<td>Maximum percentage booked in a day within the period</td>
<td></td>
</tr>
<tr>
<td><strong>Attachments Count</strong></td>
<td>The number of attachments associated with the booking</td>
<td></td>
</tr>
</tbody>
</table>
12.5 Report date range

Most of the reports you create will require a date range. The date range of the report determines the cut off points for all calculations in the report, including utilisation percentages, booked hours and job costs.

Where bookings span across the specified date range then they will be time apportioned for the purposes on each report. For example, if only one week of a three-week booking is included in the date range of a report, then 33.3% of the booking will be included in the report for the purposes of generating time and cost figures.

To define the date range:

1. Select ‘Data-> Date range’ from the menu or click on the ‘Date’ tab in the ‘Setup Report’ dialog.

   Shortcut: The ‘Date range’ button.

2. In the ‘Date’ dialog, edit the date range as necessary:

   ![Setup Report Dialog]

3. Click on the ‘OK’ button to confirm your changes.

The ‘Date Type’ drop-down list includes several pre-defined date ranges (‘Last quarter’, ‘Next month’, ‘This year’, etc.). It is advisable to use one of these values where possible because the report will then automatically use the appropriate date range whenever you run the report.

To select a pre-defined date range, click on the ‘Date Type’ drop-down list and select the required item from the ‘Date Type’ drop-down list.

The pre-defined date ranges are calculated automatically with reference to your computer’s internal clock. Make sure your clock is set to the correct date. If your date range needs to be absolute, not relative, select the required range first to set the dates, and then select Manual Date Range to make them absolute.

If none of the pre-defined date ranges are suitable for your requirements then you will need to specify a date range manually.
The Retain Report Writer

To set a manual date range, select 'Manual Date Range' from the 'Date Type' drop-down list and enter start and end dates manually as required.

*Tip:* Click on the calendar buttons to the right of each box to select the date from the pop-up calendar.

To set a report with no date range, select 'No Date Range' from the 'Date Type' drop-down list.

Note: Generally, reports using booking information will require a date range.

12.6 Report selection criteria

Use report selection criteria to filter the contents of your report in much the same way as you filter the display of a Wallchart or Calendar view.

To define selection criteria for your report:

1. Select 'Data-> Selection' from the menu or click on the 'Selection' tab heading in the 'Setup Report' dialog.  
   
   *Shortcut:* The 'Selection' button.

2. In the 'Selection' dialog, specify criteria as required (see the image below).

3. Click on the 'OK' button to confirm your changes.

The report selection dialog

The 'Selection' tab in the 'Setup Report' dialog allows you to specify the selection criteria to be applied to the active Report page:

To add a selection criterion:

1. Choose an 'Operation' to be applied. See the Selection operators and conditions section for more information.
2. Select the necessary table (resource, job or bookings) and choose the required field from the 'Field' drop-down list.

3. Choose a 'Condition' followed by a value in the pop-up box. See the Selection operators and conditions section for more information.

4. Repeat steps 1 to 3 to add further selection criteria as required. Click on the 'OK' button once finished.

Your report selection criteria should form a logical relationship with the rest of the report definition. For example, if your report contains resource based fields you should not attempt to filter the report based on job selection criteria.

Note: You should consider the sequence of items in the selection criteria carefully because the order of items can determine the meaning of the selection.

To amend the sequence of selection criteria, click on the ● and drag the line up or down.

If you are reporting on bookings and have resource or job field as your first field in the report, you can display resources/jobs with bookings only by ticking the 'Filter Res/Jobs' checkbox.

To remove a selection criterion, click on the x button against that value. Alternatively, click on the Clear Selection button to remove all of the criteria.

For time series reports with date dependent fields (such as availability or utilisation) you can specify time series selections.

To specify a time series selection, add the criteria as usual (see above) and tick one of the following checkboxes:

- **First Column** - the criteria applied to the first report period only. The records that match the specified selection criteria for the first period only (disregarding the values of other periods) will be shown.

- **All Columns** - the criteria applied to all of the report periods. Only the records that match the specified selection criteria for all of the periods will be shown.

- **Any Columns** - the criteria applied to one or more report periods. The records that match the specified selection criteria for either of the periods (one or more) will be shown.
12.7 Report sort orders and subtotals

Report sort overview

Use the report sort order both to sort the rows displayed in your report and to provide sub-totals in the report, analysing the report in logical groupings as required.

To specify the report sort order and subtotals:

1. Select 'Data-> Sort' from the menu or click on the 'Sort' tab heading in the 'Setup Report' dialog.

   Shortcut: The 'Sort order' button.

2. In the 'Sort' tab, specify sort criteria as necessary.

3. Click on the 'OK' button to confirm your changes.

Related Topics:

The report sort dialog
Grouping and expanding

The report sort dialog

The 'Sort' tab in the 'Setup Report' dialog allows you to specify both the sort order and, using the 'Group By' setting, the levels at which the report will be aggregated:

To add a sort order criterion to the report:

1. Select a field from the drop-down list in the 'Field' box.

2. Select the direction of a field as 'Ascending' or 'Descending'.

![Setup Report dialog](image)
3. Repeat steps 1 and 2, as necessary.

4. Click on the 'OK' button once finished.

**To remove a sort order criterion**, click on the **X** button.

You should consider the sequence of items in the sort criteria carefully. For example, sorting by resource grade and then resource name will produce a meaningful report, while sorting by resource name and then grade will not.

**To amend the sequence of items in the sort criteria**, click on the ● and drag the line up or down.

You can also **hide the field headers** for the sub-totals within the report by un-ticking the 'Field Headers' checkbox. It is ticket by default.

**Group By and Expand To**

In the 'Sort' tab of the 'Setup Report' dialog you can select 'Group By' and 'Expand To' to control how your report looks:

- **Group By** - determines which sort fields will be displayed as titles and subtotals in the report for expanding and collapsing.
  
  The sort fields you include here need not be defined in the 'Fields' tab, otherwise they will appear twice.

- **Expand To** - defines the level of detail at which the report will open when first generated.

**12.8 Viewing the report**

**Viewing report overview**

If you have any reports created, they will be available in the notebook page drop-down list.

If the report has not been generated during your current session, then a progress bar will indicate that the report is being generated.

If the report has been generated before and you want to make sure you have the latest report data, you should **refresh the report**.

**Related Topics:**

- Expanding and collapsing report sections
- Report display options
- Recalculating the report
- Refreshing the report
- Report headers and footers
- Report Examples
Expanding and collapsing report sections

If your report has one or more sort titles, you can expand and collapse the sections of the report as defined by those titles. The ▼ or ▶ buttons adjacent to the report sort titles will indicate whether they can be expanded or collapsed:

Expanded report sections are indicated by the ▶ button. Collapsed sections are indicated by the ▼ button.

To expand or collapse an individual report section, double-click on the report section row or click on the report section and press the SPACEBAR.

To expand all the nodes in the report by one section level, select 'Actions-> Show more detail' from the menu.

Shortcuts: The 'Show more detail' ▶ button or right-click over the report area and select 'Show more detail' from the menu.

To expand all the nodes in the report fully, select 'Actions-> Open all details' from the menu.

Shortcuts: The 'Open all details' ▶ button or right-click over the report area and select 'Open all details' from the menu.

To collapse all the nodes in the report by one section level, select 'Actions-> Show less detail' from the menu.

Shortcuts: The 'Show less detail' ▼ button or right-click over the report area and select 'Show less detail' from the menu.

To collapse all the nodes in the report fully, select 'Actions-> Close all details' from the menu.
Shortcuts: The 'Close all details' button or right-click over the report area and select 'Close all details' from the menu.

The level of expansion of the report on screen will be used when the report is printed out or exported.

Note: It is generally preferable to use these shortcuts to modify the report outline level rather than editing the settings in the 'Sort' tab of 'Report Setup' dialog. Using the dialog will result in a full recalculation of the report which is not desirable for complex reports because it might be time consuming.

Report display options

The following display options are available for Report pages:

- **Grid lines** - turn the report record grid lines on or off.
- **Fonts** - set the fonts for different elements of the report as required.
- **Indent totals** - choose whether to indent report totals or to have them appear directly beneath their corresponding report entries.
- **Report column widths** - resize the report columns as required.

Grid lines

Grid lines surrounding the records in the report can help to identify the individual fields in the report. However, you may find that grid lines make the report look cluttered. You may also want to exclude the grid lines when printing out the current view of the Report page.

**To turn the report grid lines on or off**, select 'View-> Grid' from the menu.

Shortcuts: The 'Grid lines' button or press CTRL+G. Alternatively, right-click over the report area and select 'Grid' from the menu.

Repeat the process to return the grid lines to their original state.

Fonts

You can define fonts for each of the following elements of the report:

- report details;
- report totals;
- report sort levels (up to 5 levels).

**To change the report fonts**, select 'View-> Fonts' from the menu. Alternatively, click on the 'Fonts' button. See the Editing fonts section for more information.

Indent totals

You can indent the sub-totals and totals in the report or have them appear directly underneath their respective columns. Indented totals may look more pleasing to the eye, although they do take up more room; with indented totals you may also need to adjust the width of the report columns.

**To turn the indent totals on or off**, select 'View-> Indent Totals' from the menu.
Shortcut: Right-click over the report area and select 'Indent totals' from the menu.

Report column widths

You may need to adjust the widths of the columns in your report in order to accommodate large numbers or indented totals. You can also adjust the column widths as a way of hiding the columns from the view.

**To adjust the report columns widths:**

1. Move the mouse pointer over the right side of the title of the column you wish to change, so that the mouse pointer changes to a ↔.
2. Click on the left button of your mouse and hold it down.
3. Move the mouse pointer horizontally to the required new position.
4. Release the mouse button.
5. Repeat steps 1 to 4 for each column, if necessary.

You can also adjust the report column widths using the fields definition while creating a report. See the Report fields section for more information.

**Note:** If you see ****** instead of data, it means that the column is too narrow for the data to be displayed. Make the column wider (see above).

**Recalculating the report**

When you first define or view a report in your current Retain session it will be calculated based on the latest available data. However, once you have viewed a report once it will not be calculated again until you require it to be updated, as calculating a report takes some time.

**To recalculate the report**, select 'Actions-> Refresh' from the menu.

Shortcuts: The 'Refresh' button or press F5.

**Refreshing the report**

If you are running Retain in a network environment and other users have made changes to the data, you can use the refresh command to ensure all the latest changes will be reflected in your report.

**To refresh a report**, click on the 'Refresh' button or press F5.

**Note** that this command takes longer than recalculating.
12.9 Report headers and footers

Headers and footers overview

You can customise the layout of a report by including page numbers, dates, titles, etc. by editing the report's header and footer.

Related Topics:

- Editing the header
- Editing the footer
- Hiding and showing the header
- Hiding and showing the footer

Editing the header

To edit the report header:

1. Select 'View-> Header...' from the menu.

   Shortcuts: The 'Header' button or right-click over the report's header and choose 'Edit Header...' from the menu.

2. In the 'Page Setup' dialog, define the report header details as necessary:

   ![Page Setup dialog]

   - Show header - show or hide the report header.
   - Title - show or hide the report title. If showing, type in the title for the report.
   - Sub-title - show or hide the report sub-title. If showing, type in the sub-title for the report.
   - Date - show or hide the report date.
   - Page number - show or hide the report page number.
   - Show date range - show or hide the date range covered by the report.

3. Click on the 'OK' button to save your changes.
- **Surrounding frame** - show or hide the frame surrounding the report header.

- **Column titles** - show or hide the column titles.

- **Fonts** - set the fonts for the various header elements by clicking on the 'Font...' button. See the [Editing fonts](#) section for more information.

**Editing the footer**

**To edit the report footer:**

1. Select 'View-> Footer...' from the menu.

   Shortcuts: The 'Edit footer' button or right-click over the report's footer and choose 'Edit Footer...' from the menu.

2. In the 'Page Setup' dialog, define the report footer details as necessary:

![Page Setup](image)

3. Click on the 'OK' button to save your changes.

- **Show footer** - show or hide the report footer.

- **Footnote** - show or hide the report footnote. If showing, type in the footnote for the report.

- **Date** - show or hide the report date.

- **Page number** - show or hide the report page number.

- **Surrounding frame** - show or hide the frame surrounding the report footer.

- **Font** - set the fonts for the various footer elements by clicking on the 'Font...' button. See the [Editing fonts](#) section for more information.
Hiding and showing the header

To show or hide the report header, tick the ‘Show header’ checkbox in the ‘Header configuration’ dialog.

Shortcuts: The ‘Toggle header’ button or right-click over the report header area and choose 'Header...' from the menu.

Hiding and showing the footer

To show or hide the report footer, tick the ‘Show footer’ checkbox in the ‘Footer configuration’ dialog.

Shortcuts: The ‘Toggle footer’ button or right-click over the report footer area and choose 'Footer...' from the menu.

12.10 Saving and exporting reports

Your report definitions are stored along with all your other notebook pages in your Retain notebook. Although you can produce reports very quickly with the Retain report writer, it is worthwhile saving any report formats that you intend to use on a regular basis. See the Saving your notebook section for more information.

Exporting reports

Reports created using the Retain report writer can be exported in spreadsheet format and hence transferred to other applications such as popular spreadsheet packages.

You can either:

- export the report to clipboard, for immediate transfer. Exporting a report to clipboard will copy the contents of the current report to the Windows clipboard.

- export the report to a file, for later use. Exporting a report to a file will copy the contents of the current report to a text file.

To export a report to clipboard, generate the report and customise the view on screen as required then select 'Edit-> Export to clipboard' from the menu.

The report will remain on the Windows clipboard until replaced by another 'Cut' or 'Copy' operation. Switch to another application such as Excel and paste the report contents into the application using the normal Windows ‘Paste’ function.

To export a report to file, generate the report and customise the view on screen as required then select 'Edit-> Export to file' from the menu. Enter a name and path for the report file and save it.

Open a TXT file in another application, such as Notepad. The exported report file will contain separate rows and columns for each report record and field, respectively. The report data can now be easily manipulated using a spreadsheet application.
13 Printing

13.1 Printing overview

Retain enables you to print both Reports and Wallcharts for use within your company. There are various settings available to enable you to produce the printout you require. However, it is easy to overlook certain settings and it is recommended to take note of the general rules for printing.

Related Topics:

- General rules for printing
- Previewing the current page
- Printing the current page
- Printing Wallcharts
- Print configuration options
- Page setup

13.2 General rules for printing

These are the general rules for printing from Retain:

- Retain prints the currently active notebook page.

If you want to print a particular report, make sure that the report is the active page. Similarly, if you want to print a Wallchart page, make sure that it is the active page.

- Retain prints the current view of your data.

Set your sort and selection criteria as necessary and consider recalculating the report before printing. Use the print preview option to ensure the view is as required.

- Retain printing takes into account the current display options.

If you are printing a Wallchart page, define the display settings such as grid lines, date scales, booking bar formats, etc. Similarly, when printing a report, define the report display settings.

- Graphical printing can take some time.

Use a fast printer with a large printer memory if possible. If you are using a shared printer, you may want to do the graphical printing during the off-peak hours. Use print preview to check you have the correct settings.

13.3 Previewing the current page

It is usually a good idea to preview the page before printing it, in order to check that the format of the print out is what you require.

Retain always prints the currently active notebook page. If the page you want to preview is not currently displayed, select it from the page drop-down list to make it the active page.

To preview the current page:

1. Set sort, selection and other display options as required.
2. Refresh the view if needed.
3. Select 'File-> Print preview' from the menu.
4. Set the configuration options. See the Print configuration overview section for more information.

The following options are available in the 'Print Preview' window:

- Display the previous print page (if there is more than one page).
- Display the next print page (if there is more than one page).
- Display one page.
- Display two pages side by side.
- Magnify the view (zoom in to display half of the page). Shortcut: Click on the previewed page.
- Reduce magnification (zoom out to display the full page). Shortcut: Click on the previewed page.
- Print the page(s) being previewed.
- Print the current page.
- Edit the print header.
- Edit the print footer.
- Specify the type of page numbering (only for reports).
- Insert page breaks (only for reports).
- Close the preview window.
13.4 Printing the current page

Retain always prints the currently active notebook page. If the page you want to print out is not currently displayed, select it from the page drop-down list to make it the active page.

To print out the current page:

1. Set sort, selection and other display options, as required.
2. Recalculate/refresh the view, if necessary.
3. Select 'File-> Print...' from the menu.

Shortcuts: The 'Print' button or press CTRL+P.

4. In the 'Print' dialog set the configuration options as necessary. To print out the current page only, select pages from 1 to 1 in the 'Print range' section.
5. Click on the 'OK' button to start printing.

**Note** that clicking on the 'Page Setup' button will open up the 'Page Setup' dialog, allowing you to customise the header and footer settings.

13.5 Printing Wallcharts

When printing Wallcharts, the date range is significant. The date range specifies the span of the print. The number of pages affects how much time is printed on each page. In the screen shot above, three months will be on one page.

**Note** that all resources/jobs (not just the ones visible on the screen) will be printed.

In the 'Print Preview' dialog, right-click anywhere within the main window and select 'Dates...' from the menu:
Using the 'Dates' dialog, specify the date range and number of pages to be printed.

13.6 Print configuration options

Print configuration overview

In the 'Print' dialog, clicking on the 'Page Setup' button will open up the 'Page Setup' dialog allowing you can define the following page settings:

- **Header** - edit the page header details.
- **Footer** - edit the page footer details.
- **Page numbering** - set horizontal or vertical page numbering when dealing with adjacent pages in reports.
- **Page breaks** - insert page breaks between the sections of a report.

Related Topics:

- General Printing settings
- Page setup
Print headers

The 'Header' tab in the 'Page Setup' dialog allows you to define various header settings when printing Wallchart and Calendar pages.

Shortcut: The 'Edit Header' button in the 'Print Preview' window:

- **Show header** - show or hide the whole header.
- **Title** - show or hide the print title and type a title for the printout.
- **Sub-title** - show or hide the sub-title and type a sub-title for the printout.
- **Date** - show or hide the date of printing.
- **Time** - show or hide the time of printing.
- **Page number** - show or hide the print page number.
- **Show date range** - show or hide the date range covered by the printout.
- **Surrounding frame** - show or hide the frame surrounding the print header.
- **Column titles** - show or hide the column titles (reports only).
- **Font...** - set the fonts for the various header elements by clicking on the 'Font...' button. See the Editing fonts section for more information.
Print footers

The 'Footer' tab in the 'Page Setup' dialog allows you to define various footer settings when printing Wallchart and Calendar pages.

Shortcut: The 'Edit footer' button in the 'Print Preview' window:

- **Show footer** - show or hide the whole footer.
- **Footnote** - show or hide the report footnote and type a footnote for the printout.
- **Date** - show or hide the date of printing.
- **Time** - show or hide the time of printing.
- **Page number** - show or hide the print page number.
- **Surrounding frame** - show or hide the frame surrounding the print footer.
- **Font...** - set the fonts for the various footer elements by clicking on the 'Font...' button. See the [Editing fonts](#) section for more information.
**Print page numbering**

When the contents of Report page exceed the width of a standard page, you can use the 'Numbering' tab in the 'Page Setup' dialog to define the sequence of page numbering.

Shortcut: The 'Page numbering' button in the 'Print Preview' window:

- *horizontal* - pages are numbered across each adjacent page before moving to the next vertical page.
- *vertical* - pages are numbered vertically before moving to the next adjacent page.

**Print page breaks**

The 'Breaks' tab in the 'Page Setup' dialog allows you to insert page breaks between the sections of a report.

Shortcut: The 'Page breaks' button in the 'Print Preview' window:

- *Use page breaks* - tick this checkbox to force page breaks between the sections of the report or clear the checkbox to remove page breaks.
- **Page break level** - specify the level at which page breaks will be made. Up to 4 page break levels are available, based on the sort titles defined for the report.

Page breaks will only be applied if you have expanded the corresponding view in the report. See the [Expanding and collapsing report sections](#) section for more information.

**General printing settings**

**To set general printing preferences:**

1. Select 'File-> Preferences...', 'Printing' tab:

![Preferences dialog box](#)

2. Tick the appropriate check box for the settings you require:
   - To use colours when printing
   - To print all calendars in one session
   - To use an alternative printing mode

3. Click on the 'OK' button to confirm your changes.

**Notes:**

- Use colours only if printing with a colour printer. The colours of booking bars in Wallchart or Calendar view may will depend on the resolution of your printer.
- You may find that with certain printers the use of the alternative printing mode is necessary to achieve the required results.
**Page setup**

Retain prints using your default printer. You may need to amend settings in the 'Page Setup' dialog to obtain the required results in your printing.

For example, you can adjust the margins and select the orientation of the printout (portrait or landscape) using this dialog.

**To amend the page setup:**

1. Select 'File-> Print setup...' from the menu.
2. In the 'Page Setup' dialog, amend the printing settings as required:

   ![Page Setup Dialog](image)

   - **Paper**
     - **Size**: Select the paper size (e.g., A4, Letter).
     - **Source**: Choose the paper source (e.g., Tray 1).  
   - **Orientation**
     - Select between portrait or landscape orientation.
   - **Margins**
     - Adjust the margins (left, right, top, and bottom).

3. Click on the 'OK' button to confirm your changes.

**Note:** Click on the 'Printer...' button to select the printer you wish to use.
14 Customising Wallchart

14.1 Retain preferences

Retain preferences overview

Retain preferences are the default settings which will be applied in various areas of the software. You can set preferences for your use of Retain in several areas as follows:

- **General** - Set whether booking bar tips are displayed, what happens when you drag bookings in Project view and whether you can make block bookings.

- **Bookings** - Set where bookings will 'snap to' when moved graphically and whether to display fields names on booking bars and booking tips.

- **Availability** - Set the default percentage to apply when performing a special selection and whether to display the special selection dialog when adding special selections.

- **Printing** - Set the general printing options.

**Note**: These settings are personal to each retain user and are stored in each user's local Windows directory as 'retain.cfg'.

To set Retain preferences:

1. Select 'File-> Preferences' from the menu.
2. In the 'Preferences' dialog amend the default settings as required.
3. Click on the 'OK' button to confirm your changes.

**General preferences**

The 'General' tab of the 'Preferences' dialog allows you to define various settings which will apply to all your Retain notebooks:
• **Booking bar tips** - Tick this checkbox if you want booking bar tips to be displayed when you move the mouse pointer over booking bars in Wallchart or Calendar views. Untick the checkbox if you do not want booking tips displayed.

  Shortcut: Right-click over a booking area (but not a booking) within Wallchart and select 'Booking tips' from the menu.

• **Dragging Booking Bars in Wallchart** - This option defines what happens when you drag bookings to a different sub-booking line when in Project view. If you tick these checkboxes:

  - **Job Project view**: when dragging a booking from one job to another, if you move the booking onto a different resource sub-line at the new job then the booking will also be moved to that new resource.

  - **Resource Project view**: when dragging a booking from one resource to another, if you move the booking onto a different job sub-line at the new resource then the booking will also be moved to that new job.

• **Enable auto-scrolling** - Tick this checkbox to enable auto-scrolling while moving bookings within the Wallchart.

• **Block Bookings** - Tick this checkbox if you want to be able to make block bookings (by drawing a rectangular block vertically across adjacent resources). The block bookings facility only applies to the Resource view on Wallchart pages. If you remove the tick, you will only be able to mark an area horizontally across one resource.

• **Date range popup** - When you mark an area within Wallchart, a window showing the selected date range will appear. If you do not tick this checkbox, the date range window will not appear.

• **Dialog visibility** - Ticking the 'Always show password dialog for authentication' checkbox will enable a prompt window every time you want to switch to Edit mode.

  The second checkbox should be ticked if you wish a pop-up window to appear when you reject a booking request. This allows you to provide reasons for the rejection. Deselect the checkbox to disable this pop-up.

• **Close booking dialog on save** - Tick this checkbox if you want the 'Booking' dialog to close immediately after clicking on the 'Save' button. It is ticked by default.

• **Use filtering in Select Dialog** - If you have a large number of resources/jobs, tick this checkbox to optimise the work of the 'Select Record' dialog. Also, if this checkbox is ticked, only the matching records will be displayed as you type in the necessary name.
Booking preferences

The 'Bookings' tab of the 'Preferences' dialog allows you to define settings relating to bookings:

- **Snap to** - Set this option to determine where bookings will 'snap to' when moved graphically within the Wallchart. For example, if you set the 'snap to' option to 'Left', when you move a booking on the Wallchart it will be positioned to the cell which contains the left edge of the booking when you release the mouse button.

- **Field names** - Tick the 'Show booking bar field names' checkbox if you want to display the field names on booking bars and tick the 'Show booking tip field names' checkbox if you want to display the field names on booking bar tips.

- **Visual** - Tick the 'Visually indicate which bookings I can edit' checkbox if you want to have a visual indication (a small black square at the bottom right corner of a booking) of bookings that you have the authority to edit while 'edit mode' is turned on.

- **Confirmations** - Tick the 'Confirm dragged bookings' checkbox if you want a notification dialog to appear when you try to move a booking by dragging it within the Wallchart. Enabling this option ensures that you do not move bookings accidentally. You can also tick the 'Indicate successful creation of bookings' checkbox to be notified every time a booking is created.
Availability preferences

The 'Availability' tab of the 'Preferences' dialog allows you to define settings relating to special selections:

- **Availability limit** - This is the default percentage criteria to apply to the availability searches. For example, if the availability percentage is 80% then records will be displayed if they are at least 80% available during the selected period.

- **Hide availability dialog** - Tick this checkbox if you want to hide the availability dialog when making availability selections.

Note: Unless you frequently perform searches based on different availability percentages you will probably want to hide the availability dialog.

14.2 Customising the toolbar

**Toolbar customising overview**

Like most Windows applications, Retain provides a 'toolbar' - a list of buttons - located at the top of the screen. These buttons provide quick access to most of the commonly used features in Retain. See the Button reference section for a complete list of the Retain buttons.

Related Topics:

- Toolbar types
- Adding and removing toolbar buttons
**Toolbar types**

There are four separate toolbars in Retain:

- **No Windows** - The toolbar that is displayed when you do not have any open notebooks.
- **Wallchart** - The toolbar that is displayed when the currently active notebook page is a Wallchart view.
- **Calendar** - The toolbar that is displayed when the currently active notebook page is a Calendar view.
- **Reports** - The toolbar that is displayed when the currently active notebook page is a Report page.

Each toolbar should contain only the buttons relevant to the current context. For example, the 'No Windows' toolbar contains only the buttons to create or open a notebook; the 'Reports' toolbar contains buttons that are specific to the preparation of reports and so on.

**Adding and removing toolbar buttons**

The software is supplied with a default set of buttons in each toolbar. You may wish to customise the toolbar to include the options you use most frequently.

**To customise the toolbar:**

1. Select 'View-> Toolbar Options...' from the menu.

   Shortcut: Right-click over the toolbar area and choose 'Toolbar Options...' from the menu.

2. In the 'Customise Toolbar' dialog, add and remove toolbar buttons as required:

3. Click on the 'OK' button to confirm your changes.

The 'Customise Toolbar' dialog allows you to add and remove buttons for each of the toolbars, set the location of the toolbar and show or hide the tool tips.

The full list of available buttons is displayed on the left-hand side of the screen and the buttons currently defined for the selected toolbar are displayed on the right-hand side of the screen.

You can also have different toolbars for Report and Calendar views, for example. **To create a different**
**toolbar for another view**, choose the view from the drop-down list under the 'Selected Toolbar' section header and customise the toolbar as necessary.

**To add a button to the selected toolbar:**
1. Click on the position in the current toolbar above which you wish to add the button.
2. Select the new button in the 'Available Buttons' list.
3. Click on the '->' button to add the item to the end of the current toolbar.
   
   **Shortcuts:** Double-click on the selected item or 'drag and drop' the item to the required location on the current toolbar.

Repeat the steps above to add more buttons to the toolbar, as necessary.

**To remove a button from the selected toolbar:**
1. Select the button in the current toolbar.
2. Click on the '<-' button to remove the button from the toolbar.
   
   **Shortcuts:** Double-click on the selected item or 'drag and drop' the item back to the 'Available Buttons' list.

Repeat the steps above to remove more buttons, as necessary.

**To add a separator (space) to the selected toolbar:**
1. Click on the position in the current toolbar above which you wish to add the separator.
2. Click on the 'Separator' button to add the separator to the current toolbar.

Repeat the steps above to add more spaces in the toolbar, as necessary.

**Tip:** Use the gaps in the toolbar to group buttons by type and to distinguish between different types of function.

**To remove a separator (space) from the selected toolbar:**
1. Select the separator in the current toolbar.
2. Click on the '<-' button to remove the separator from the toolbar.
   
   **Shortcuts:** Double-click on the selected item or 'drag and drop' the item back to the 'Available Buttons' list.

Repeat the steps above to remove more spaces, as required.

**To move items within the selected toolbar:**
1. Select the item in the current toolbar.
2. Click on the 'Up' button to promote the item in the toolbar or 'Down' to demote the item.
   
   **Shortcut:** 'Drag and drop' the selected item to a new position in the toolbar.

Repeat the steps above to move further items within the selected toolbar, as required.
To restore the default toolbar buttons, click on the 'Reset' button.
15 Reference

15.1 Glossary

Booking
An allocation of an individual resource (or several resources) to a job for a specific job which covers a defined date range and a measurable number of hours.

Calendar View
Shows bookings for one individual resource or job. Time is represented in a calendar style grid and special navigation features allow you to move between resources or jobs.

Component
A sub-job that provides information regarding the nature of each booking made against a job. Components supply an element of project planning within Retain, since you can assign a component for each booking and analyse the job into its component parts for reporting purposes.

Job
Retain uses the term 'jobs' as a general description of any project, product or assignment that is being planned.

Notebook
Contains one or more notebook pages, allowing you to display and edit your data in various ways as well as create reports using Retain Report Writer.

Notebook Page
Represents a view of your data. The characteristics of each notebook page can be defined and maintained independently, using the various sort, selection and other display features.

Project View
Separates bookings into sub-fields, providing a better view of bookings belonging to each resource/job. It is often used to display bookings against a resource on a separate row for each job.

Reports Page
Allows you to create customised job and resource based reports. You can format, sort, select and aggregate your reports in a number of ways.

Resource
Retain uses the term 'resources' as a general description of people or entities that can be applied to the process of completing a job.

Selecting
Refers to filtering resources, jobs and bookings based on certain criteria. Selections are used for viewing or collective manipulation.

Toolbar
A panel of buttons located at the top of the screen.

Wallchart
Wallchart is a flexible planning tool for viewing and managing staff and job allocations through a user friendly graphical interface.
## 15.2 Button reference

<table>
<thead>
<tr>
<th>Button Menu</th>
<th>Description</th>
<th>Hot-key</th>
</tr>
</thead>
<tbody>
<tr>
<td>File</td>
<td>New</td>
<td>Creates a new notebook</td>
</tr>
<tr>
<td>File</td>
<td>Open...</td>
<td>Opens an existing notebook</td>
</tr>
<tr>
<td>File</td>
<td>Save</td>
<td>Save this document</td>
</tr>
<tr>
<td>File</td>
<td>Print preview...</td>
<td>Print preview</td>
</tr>
<tr>
<td>File</td>
<td>Print...</td>
<td>Print this document</td>
</tr>
<tr>
<td>Edit</td>
<td>Edit mode...</td>
<td>Toggle edit mode</td>
</tr>
<tr>
<td>Edit</td>
<td>Undo</td>
<td>Undo the last booking change</td>
</tr>
<tr>
<td>View</td>
<td>Wallchart</td>
<td>Wallchart view</td>
</tr>
<tr>
<td>View</td>
<td>Calendar</td>
<td>Calendar view</td>
</tr>
<tr>
<td>View</td>
<td>3D Wallchart</td>
<td>3-D Wallchart view</td>
</tr>
<tr>
<td>View</td>
<td>Project view</td>
<td>Project view</td>
</tr>
<tr>
<td>View</td>
<td>Rotate view</td>
<td>Toggle Resource and Job view</td>
</tr>
<tr>
<td>View</td>
<td>Display settings</td>
<td>Change the default date scale settings</td>
</tr>
<tr>
<td>View</td>
<td>Fonts...</td>
<td>Edit the format of the report</td>
</tr>
<tr>
<td>View</td>
<td>Zoom...</td>
<td>Year</td>
</tr>
<tr>
<td>View</td>
<td>Zoom...</td>
<td>Month</td>
</tr>
<tr>
<td>View</td>
<td>Zoom...</td>
<td>Week</td>
</tr>
<tr>
<td>View</td>
<td>Zoom...</td>
<td>Day</td>
</tr>
<tr>
<td>View</td>
<td>Zoom...</td>
<td>Hour</td>
</tr>
<tr>
<td>View</td>
<td>Grid</td>
<td>Toggles the grid lines</td>
</tr>
<tr>
<td>Notebook</td>
<td>Add page...</td>
<td>Add a new page to the notebook</td>
</tr>
<tr>
<td>Notebook</td>
<td>Insert page...</td>
<td>Insert a new page into the notebook</td>
</tr>
<tr>
<td>Notebook</td>
<td>Delete page...</td>
<td>Delete the active page</td>
</tr>
<tr>
<td>Notebook</td>
<td>Rename page...</td>
<td>Rename the active page</td>
</tr>
<tr>
<td>Notebook</td>
<td>Copy page...</td>
<td>Copy the active page</td>
</tr>
<tr>
<td>Actions</td>
<td>Make booking...</td>
<td>Make new booking(s)</td>
</tr>
<tr>
<td>Actions</td>
<td>Edit booking...</td>
<td>Edit currently selected booking(s)</td>
</tr>
<tr>
<td>Actions</td>
<td>Delete booking...</td>
<td>Delete the selected booking(s)</td>
</tr>
<tr>
<td>Actions</td>
<td>Booking info...</td>
<td>View current booking</td>
</tr>
<tr>
<td>Actions</td>
<td>Job info...</td>
<td>View job info for current booking</td>
</tr>
<tr>
<td>Actions</td>
<td>Resource info...</td>
<td>View resource info for current booking</td>
</tr>
<tr>
<td>Actions</td>
<td>Duplicate bookings...</td>
<td>Duplicate the currently selected booking</td>
</tr>
<tr>
<td>Actions</td>
<td>Modify Record</td>
<td>Resource...</td>
</tr>
</tbody>
</table>
### Reference

<table>
<thead>
<tr>
<th>Actions</th>
<th>Modify Record</th>
<th>Modify jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actions</td>
<td>Modify Record</td>
<td>Modify components</td>
</tr>
<tr>
<td>Actions</td>
<td>Modify Record</td>
<td>Modify booking types</td>
</tr>
<tr>
<td>Actions</td>
<td>Roll forward...</td>
<td>Copy bookings forward</td>
</tr>
<tr>
<td>Actions</td>
<td>Refresh</td>
<td>Reload data and recalculate F5</td>
</tr>
<tr>
<td>Data</td>
<td>Fields...</td>
<td>Specify the resource and job fields</td>
</tr>
<tr>
<td>Data</td>
<td>Sort...</td>
<td>Specify the sort order</td>
</tr>
<tr>
<td>Data</td>
<td>Selection...</td>
<td>Specify the selection criteria</td>
</tr>
<tr>
<td>Data</td>
<td>Booking Visibility</td>
<td>Show Normal Bookings Show/hide normal bookings</td>
</tr>
<tr>
<td>Data</td>
<td>Booking Visibility</td>
<td>Show Ghost Bookings Show/hide ghost bookings</td>
</tr>
<tr>
<td>Data</td>
<td>Booking Visibility</td>
<td>Show Booking Requests Show/hide booking requests</td>
</tr>
<tr>
<td>Data</td>
<td>Booking Visibility</td>
<td>Show Scenario Bookings Show/hide scenario bookings</td>
</tr>
<tr>
<td>Data</td>
<td>Special selections</td>
<td>Add a special selection for the displayed date range</td>
</tr>
<tr>
<td>Data</td>
<td>Clear entire selection</td>
<td>Reset the selection to show all records</td>
</tr>
<tr>
<td>Data</td>
<td>Clear selection</td>
<td>Remove the marked record selection</td>
</tr>
<tr>
<td>Help</td>
<td>Help Topics</td>
<td>Help table of contents</td>
</tr>
</tbody>
</table>

### Report View:

<table>
<thead>
<tr>
<th>View</th>
<th>Header</th>
<th>Edit the header format (Edit the print header in print preview)</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>Footer</td>
<td>Edit the footer format (Edit the print footer in print preview)</td>
</tr>
<tr>
<td>Actions</td>
<td>Open all details</td>
<td>Open all nodes to show maximum detail</td>
</tr>
<tr>
<td>Actions</td>
<td>Close all details</td>
<td>Close all nodes to show minimum detail</td>
</tr>
</tbody>
</table>
15.3 Report examples

- 'Planned Revenue' report:

<table>
<thead>
<tr>
<th>Project Name</th>
<th>Revenue Apr 2012 - Jun 2012</th>
<th>Revenue Jul 2012 - Sep 2012</th>
<th>Revenue Oct 2012 - Dec 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>ATP</td>
<td>33,244.05</td>
<td>8,169.10</td>
<td>22,198.92</td>
</tr>
<tr>
<td>RW Tracking</td>
<td>4,247.92</td>
<td>31,271.04</td>
<td>9,755.84</td>
</tr>
<tr>
<td>Alpha Pharmaceuticals</td>
<td>18,389.23</td>
<td>18,389.23</td>
<td>14,037.98</td>
</tr>
<tr>
<td>Vacation</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>TVN Media</td>
<td>999,741.36</td>
<td>999,741.36</td>
<td>999,741.36</td>
</tr>
<tr>
<td>Total - RW Tracking</td>
<td>455,999.12</td>
<td>455,999.12</td>
<td>353,783.72</td>
</tr>
</tbody>
</table>

- 'Resource Schedule' report:
- 'Booking Conflict' report:

<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
<th>Time (Hours)</th>
<th>Booking Conflict</th>
<th>Updated By</th>
</tr>
</thead>
<tbody>
<tr>
<td>24/02/2012 08:00</td>
<td>09/04/2012 17:10</td>
<td>250.00</td>
<td>193.28</td>
<td>Keith Batworth</td>
</tr>
<tr>
<td>02/05/2012 08:00</td>
<td>30/05/2012 18:00</td>
<td>250.00</td>
<td>193.28</td>
<td>Martha Foster</td>
</tr>
</tbody>
</table>

- 'Utilisation by Grade' report:
<table>
<thead>
<tr>
<th>Resource Name</th>
<th>Utilisation Apr 2012</th>
<th>Utilisation May 2012</th>
<th>Utilisation Jun 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alison Griffin</td>
<td>39.12%</td>
<td>60.07%</td>
<td>15.00%</td>
</tr>
<tr>
<td>Ben Ashworth</td>
<td>12.42%</td>
<td>87.58%</td>
<td>10.00%</td>
</tr>
<tr>
<td>Gordon Bishop</td>
<td>0.00%</td>
<td>100.00%</td>
<td>100.00%</td>
</tr>
<tr>
<td>Robert Shawmoe</td>
<td>28.13%</td>
<td>68.13%</td>
<td>30.13%</td>
</tr>
<tr>
<td><strong>Totals: Manager</strong></td>
<td><strong>72.87%</strong></td>
<td><strong>77.12%</strong></td>
<td><strong>45.59%</strong></td>
</tr>
<tr>
<td>Current Grade - Partner</td>
<td>12.42%</td>
<td>87.58%</td>
<td>13.25%</td>
</tr>
<tr>
<td>Current Grade - Senior</td>
<td>30.13%</td>
<td>68.13%</td>
<td>30.13%</td>
</tr>
<tr>
<td>Carl Harper</td>
<td>30.13%</td>
<td>68.13%</td>
<td>30.13%</td>
</tr>
<tr>
<td><strong>Totals: Senior</strong></td>
<td><strong>30.13%</strong></td>
<td><strong>68.13%</strong></td>
<td><strong>30.13%</strong></td>
</tr>
<tr>
<td>Current Grade - Senior Manager</td>
<td>40.53%</td>
<td>28.70%</td>
<td>18.38%</td>
</tr>
<tr>
<td><strong>Report Totals</strong></td>
<td><strong>28.69%</strong></td>
<td><strong>61.50%</strong></td>
<td><strong>23.46%</strong></td>
</tr>
</tbody>
</table>
16 Support

16.1 Issue reporting tool

In the unlikely event of Retain crashing, the Retain Error Submitter is automatically run:

![Retain Error Submitter](image)

This application allows you to provide a brief description of the actions you have taken before the crash occurred by typing in the text box.

Clicking on the 'Email Error Report' button will open your default E-mail client, automatically attach the error log, set the recipient and copy the description you have provided to the message's body.

Alternatively, the Retain Error Submitter allows you to copy the contents of the error log to the Windows clipboard.

16.2 Troubleshooting

General issues

- **Can not change the colour/shape of a booking using the Colour/Shape Legend**
  - Check that the booking you wish to edit is not a booking request for deletion or a lived/archived scenario booking.
  - Check in Retain Security Manager that the colour/shape scheme you wish to use is based on the BKG table. If, for example, the scheme is based on JOB_CRD_ID (JOB table), you will not be able to change the colour/shape of a booking. This prevents you from accidentally changing the values of internal Retain fields such as job (if the colour scheme is based on the JOB table field) by editing a booking.

- **Get 'table is not valid' error when setting up colour/shape scheme**
  
  For both colour and shape schemes you should only use tables that are directly linked to bookings, i.e. the Booking (BKG) table: RES (Resources), JOB, JAS (Assignment), BTY (Booking Type) and CMP (Component).

- **Utilisation is appearing as 100% in reports even though the resource is booked for less**
  
  This issue can occur after adding a new resource with a new diary. Check the 'Diary Time' value: if it is zero, run the overnight script to update the DGD_SUM table.

- **Can not see the changes made to data after updating the existing/switching to a new database**
Ensure that you clear the cache before using the new/updated database: For Retain Web, clear the contents in the 'rwpcache' folder; for Retain Wallchart and Security Manager clear the 'cache' folder.

**Retain Wallchart specific**

- **The fields in 'Booking' dialog are not displayed properly**
  Right-click within the dialog and select ‘Reset dimensions’.

- **Can not make/edit bookings**
  Ensure that you are in 'Edit Mode'. In the main menu within Wallchart go to 'Edit-> Edit mode...'. If you still can not make/edit bookings, it is possible that you do not have the appropriate access rights.

- **Can not create a report**
  You probably do not have the appropriate access rights.

- **Some of the data is suddenly missing/has changed**
  - It is most likely that there is a selection applied to the view you are in. Clear the selection by going to Data-> Clear Selections. Note that only unlocked selection will be cleared.
  - Check that you are looking at the correct date range, i.e. the date bar at the bottom of the screen is showing the date range you expect.
  - It is also possible that another user has deleted/amended the data.

- **'Limit results by the locked criteria' checkbox is not working**
  Ensure that you understand the behaviour of this functionality. If you lock a selection criterion and tick the 'Limit results by the locked criteria' checkbox, the results of the unlocked criteria will be limited to the locked selection. See Retain Wallchart User guide for more information.

- **Increasing the decimal places through 'Numeric Data Formatting' dialog does not work**
  The number of decimal places is specified in Retain Security Manager. If you wish to override it with a value entered through the 'Numeric Data Formatting' dialog within Retain Wallchart, enter '-2' as the decimal places value for that field.

- **I want the decimal places defined in 'Numeric Data Formatting' dialog to depend on the regional settings**
  In Retain Security Manager, Tables section select the required field and enter '-1' as the decimal places value.

- **Get ‘Failed to obtain exclusive licence lock’ error**
  Confirm that Retain Server is not already running. If the server is on your machine, check the Task Manager or use a different port.
Retain Security Manager specific

- The changes made using Security Manager are not applied in Retain Wallchart/Retain Web

Make sure you have saved your changes in Security Manager by clicking on the 'Save Changes' button and selected ‘Structure-> Effect changes’ from the menu. If that does not work, try restarting Retain Server (after saving your changes) as well as Retain Wallchart/Retain Web.

16.3 Support Services

Support for Retain is available worldwide. This topic is linked to your support provider’s information: Support Service Provider.

retaininternational

USA phone: 1 646 688 4496
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World phone: +44 20 7538 4774

USA fax: 1 646 478 9475
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General E-mail: info@retaininternational.com
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