

# retain

Resource Planning System

Resource Management

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## 1 Introduction



# Retain Security Manual

[www.retaininternational.com](http://www.retaininternational.com)

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### 1.1 About Retain

Retain is a flexible planning tool for viewing and manipulating staff and job allocations through a user friendly graphical interface. It has been designed to resemble the manual "wallchart" booking system, but it is much more versatile than any manual booking system.

### 1.2 About Retain Security

Retain Security is an administration tool for Retain. It is used for initial setup and the subsequent administration of Retain users and some data files.

Retain Security is used to define and maintain:

- user roles and groups
- user security
- colour schemes
- field properties (Tables)
- currency exchange rates and default currency
- charge rates and charge rate periods

- database settings
- run scripts against database
- diaries (e.g. standard working days, weeks and years)
- grades assigned to resources and jobs

### 1.3 What's new

Retain 4 offers a few new technical features, that make Retain Security more powerful. For example,

- Enhanced flexibility with user access security. You do not have to set up security for individual users. This means that you can assign security for one user, against many resources. You assign the relevant user within Retain.
- Ability to change field properties including field order in Retain Security.

### 1.4 About this guide

Refer to this guide if you are doing any of the following:

- Set Retain up for the first time
- Perform administration tasks

Refer to the Retain help file for making bookings, viewing staff plans or reports.

### 1.5 Where to get support

If you have a problem with Retain products that you are unable to resolve through this user guide or through your local support contacts, please contact your [Support Service Provider](#).

### 1.6 Installing Retain

See Technical Implementation guide for further details.

If you are involved in the initial setup using Retain Security, the chapter on [General Principles](#) gives a rough idea on what need to be thought through.

After installation, Retain Security is enabled for full functional access for a limited number of attempts to allow the initial setup of the access permissions.

### 1.7 Conventions

The following conventions are used throughout this user guide:

- Menu options and options within dialog boxes are expressed in single quotes, for example:  
Select 'Data', 'Edit' from the menus.
- Keyboard strokes are represented by capitals, for example:  
ENTER represents the Enter or carriage return key (also referred to as the RETURN key in some computer manuals).  
ESC represents the Escape key.  
F1, F2 etc., represent the function keys.  
SHIFT represents the Shift key.  
CTRL represents the Control key.

ALT represents the Alt key.

- A plus sign between two key presses indicates a combination of key presses, for example CTRL+S represents the action of holding down the Control key and pressing the S key.

## 2 General principles

### 2.1 Introduction

This chapter contains information of vital importance to the initial setup of Retain. Most users will not need to read this chapter.

[Thinking it through](#) gives some ideas about how to approach the security options and achieve a clear, consistent and simple set of conventions.

[Preparing your data](#) gives the data backdrop against which the security options will have to exist, so that the structures are as harmonious as possible.

### 2.2 Thinking it through

It is important to think through the way in which you would like options to be set up in Retain Security. Starting in an ad-hoc fashion will result in confusing roles, users and defaults. This topic gives some ideas on the user security settings. The topic on [preparing your data](#) gives some ideas for how to approach the database tables, their defaults, aliases and limited lists.

You will want to try to make the role names reflect your longer term aspirations. For example, you may decide to have a super administrator and several sub-group administrators. These could be grouped by geography, subject, department, letter, number, etc. There will also be function-based roles, such as view, edit own line, etc. Make sure you develop a convention which will make the system easy to maintain and intuitively obvious, and consider using several sub-groups to define a group rather than creating many different unique roles. For example, you could have several levels of user in an office. They could be identified by combinations of the office role, view role, edit own line role, and administrator role. Thus there would only be one role unique to the office, the other three roles being used generally in many other groups, including other office groups.

A similar clarity is needed for the role names for [functional access](#). You can then use the [groups](#) facility to create groups of roles to make it easier to apply multiple roles.

For [users](#), you do not need to enter every user as an individual. Many will simply use the 'Default' user. Note that names must be unique, so your naming convention for users needs to have a simple strategy for coping with identical names within the naming convention used.

There is a tendency to make [charge rates](#) complex, and then leave much of the structure un-used. Generally jobs are chargeable or non-chargeable, needing only two charge rate descriptions initially. Then the types of resource are overlaid onto that, with resource charge bands. Once again, a simple naming strategy is needed that is intuitive or relates to a well-understood convention.

The [diary](#) is a particular area for confusing names or uninformative names, such as day1, week1 etc. Since it is possible to define diaries matching the huge variety of working patterns and including both standard and emergency working time, it is particularly important to develop a clear, concise naming convention. For example, the airlines use day numbers in their timetables to show when the flight operates (because single letters are not unique). It is also important to be clear how days, weeks and diaries (years) in a family are named.

### 2.3 Preparing your data

This topic gives the data backdrop against which the security options will have to exist, so that the structures are as harmonious as possible. Before using Retain on a daily basis, it is useful to set up permanent information, such as staff names and names of recurring tasks or assignments, so that this information will be readily available when you need to use it.

You should also think through the way in which you are going to structure your data files and then collect together the raw material in readiness for input. This process is likely to include:

- Defining conventions for the usage of the various fields in the Resource and Job data files.
- Preparing a schedule of staff and equipment details to add to the Resource data file.
- Preparing a schedule of recurring or forthcoming assignments to add to the Job data file.

- Preparing a schedule of generic sub-tasks to add to the 'Components' data file.

You may prefer to implement Retain starting with a blank database, allowing users to add records as and when they are needed. However, dealing with the set-up of data files as an 'up-front' exercise has several advantages:

- Conventions for usage of the different fields can be firmly established on set-up and are therefore less likely to be ignored.
- Data can be collated and checked centrally from other sources, such as staff and client systems, therefore reducing the risk of error.
- There may be scope to transfer this data automatically from other systems.
- People planning can see who is available and what assignments need to be planned from day 1.

## 3 Starting Retain Security

### 3.1 Overview

Retain Security is used for initial set-up and the subsequent administration of Retain users and data files. However the main purpose of Retain Security is to create users and set up their levels of access to Retain and to Retain Security itself.

To start Retain Security see [Getting Started](#). To learn how to set up users and assign them roles see [Users security settings](#). For other settings see [Licence settings](#) and [Database settings](#) for details.

### 3.2 Getting started

You should find Retain Security under the main Retain group from Start Menu. You may be prompted with a logon box:

A screenshot of a Windows-style dialog box titled "Server" with a close button (X) in the top right corner. The dialog contains three input fields: a dropdown menu for "Server" with "Default" selected, a text box for "Network/User name" containing "Hanif", and a text box for "Password" which is currently empty. Below the password field is a checkbox labeled "Change Password" which is unchecked. At the bottom of the dialog are two buttons: "OK" and "Cancel".

#### Server

It is the Retain Server you are connecting to, which should be left as Default since initial installation. However if you have more than one server set up you can choose an alternative from the drop-down list.

#### Network/User name

It should be consistent with the user's Windows logon. However if you are opening Retain Security for the first time it will have a default value e.g. Administrator.

#### Password

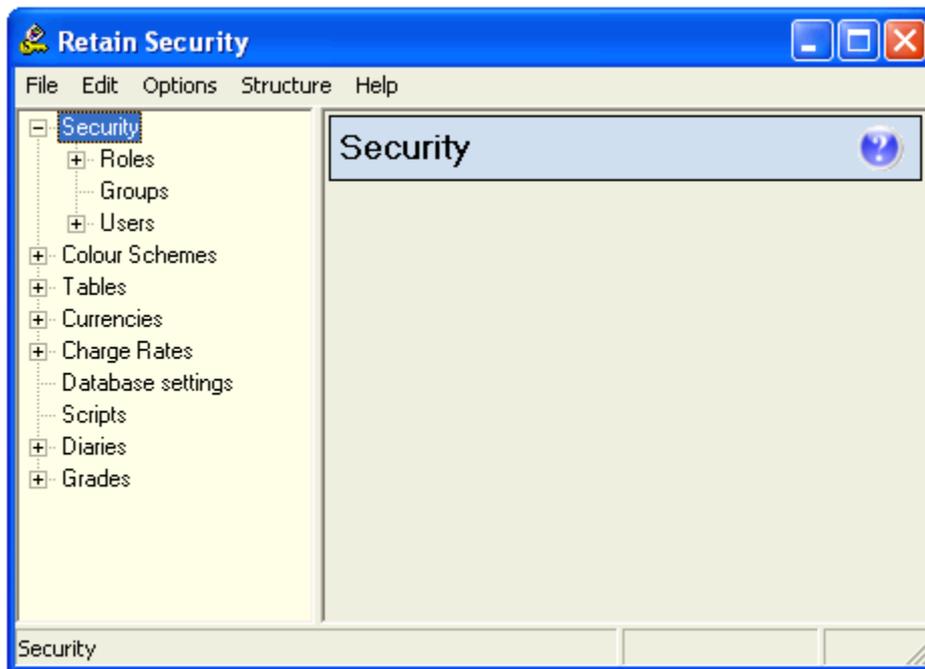
It should always be left blank unless for special configuration setups.

Click OK to open Retain Security or Cancel to exit.

### 3.3 The Retain Security interface

The Retain Security user interface will have entries like the ones shown below:

Here you can maintain:



Here you can maintain:

- user roles and groups
- user security
- colour schemes
- field properties (Tables)
- currency exchange rates and default currency
- charge rates and charge rate periods
- database settings
- run scripts against database
- diaries (e.g. standard working days, weeks and years)
- grades assigned to resources and jobs

### 3.4 Save and Exit Retain Security

After you edit each item in Retain Security, you should save the changes by clicking on **Save Changes** button shown below. You can use the **Undo Changes** button to reverse your last change.



To exit Retain Security choose 'File | Exit' from the menu, or click on the 'X' button at top right corner. You can also use shortcut ALT+F4.

✍ If you exit without saving any changes made, Retain Security will automatically save the changes for you.

## 4 Security

### 4.1 Overview

The following options in Retain Security support the administration of users and access rights:

- *Roles* – defines access rights by field, row or function. Roles are then used in both group and user definitions to select appropriate access right.
- *Groups* – are used as a standardisation tool for users needing similar access rights. You can group roles and assign the group to users.
- *Users* – defines the access rights for a user by making the link between the roles, and/or roles aggregated into groups, and the user.

### 4.2 Roles

#### Set up Roles

Roles are global access levels that are used when assigning specific access rights to users.

There are three **types** of roles, each defining roles from a different angle:

- [Field level access](#) – enables access permission to individual field in a table e.g. RES\_DESCR field in RES table.
- [Row level access](#) – enables access permission for a "row" in a table where a condition can be based on.
- [Functional access](#) – enables access permission to perform specific functions in the modules of Retain.

The access permissions are **Read**, **Insert**, **Update** and **Delete**.

To create a new role:

- Right-click on the appropriate role type, e.g. 'Row Level Access' and choose 'Add' or click the  button.
- Enter a name for the new role and click 'OK' .

✎ It is worth taking care to use different names in the different role types, otherwise you could have up to three items of the same name in your role list with no way to differentiate.

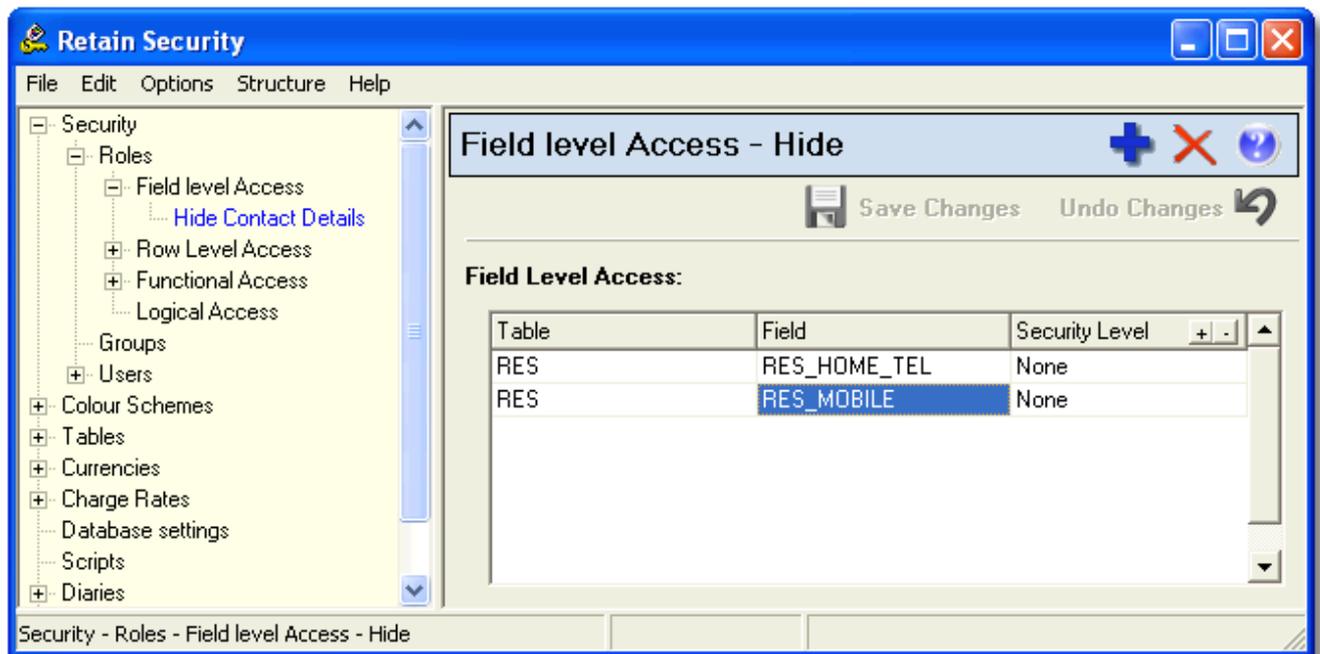
To rename an item, right-click on the item and select 'Rename'.

To remove an item, right-click on the item and select 'Delete'.

➔ Retain will not run without the Default role settings. Do not delete or rename any default settings.

## Field level Access

Field Level Access roles define how a user can access a particular field in a table. By default, no Field Level Access roles are installed.



You can define roles according to your needs. For example, you can hide sensitive information from normal users.

To create a new role:

- Right-click on 'Field Level Access' in the left pane and choose Add or click on  button.
- Name the new role.
- Define the role in the right pane.
- To add a condition to the right pane, click the  button or delete by clicking the  button.

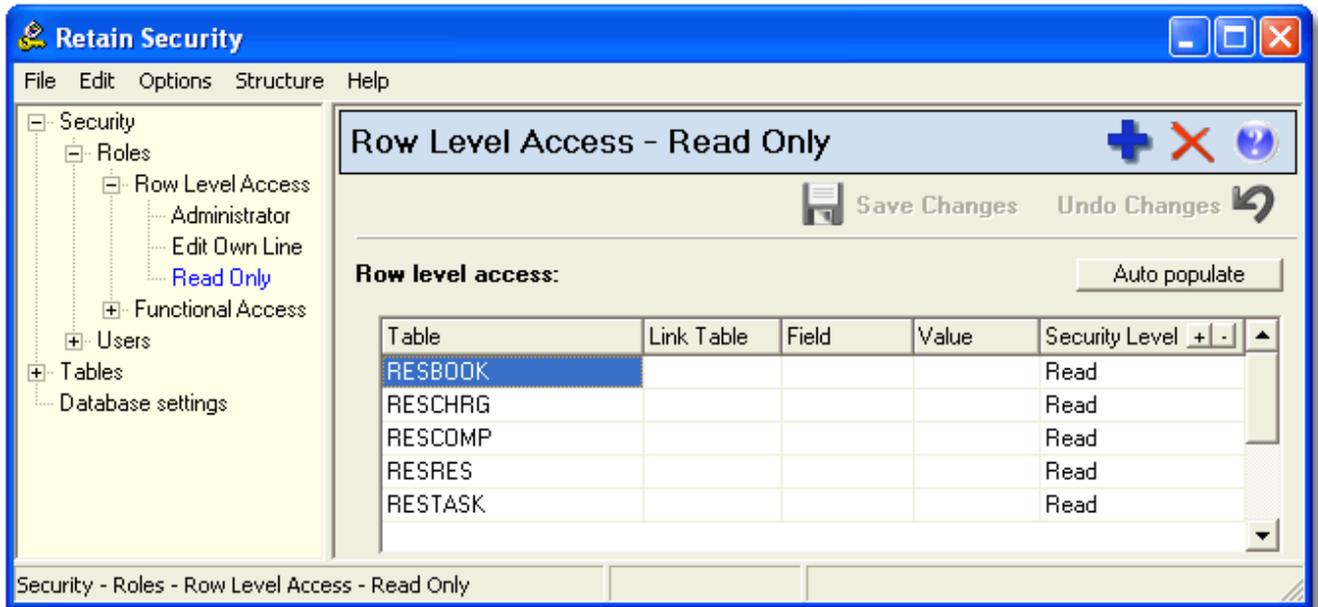
To define the conditions in the role:

- *Table* – select the table in which the field resides.
- *Field* – select the specific field to which user access rights are to be applied.
- *Security Level* – is the level of access allowed on the field. Select as many of the categories as required.

➔ It is unwise to restrict access to tables for power users, and particularly to the bookings table. This could produce unexpected results, such as omitting updates on selected fields.

## Row level Access

Row Level Access defines how a user can access the rows in a particular table.

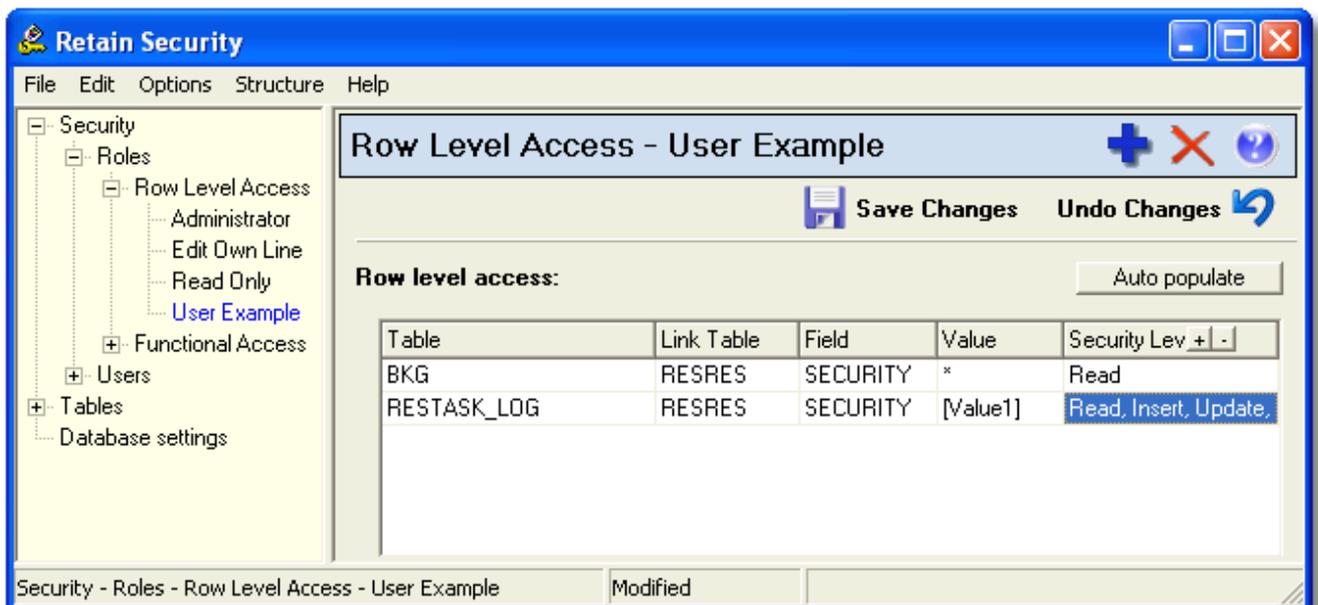


The default roles are:

- Edit All - have full access permissions to all 5 main tables
- Edit Own Line - can only edit user's own bookings and related details
- Read Only - can only view information on the wallchart

To create a new role:

- Right-click on 'Row Level Access' in the left pane and choose Add or click on  button.
- Name the new role.
- To add a condition to the right pane click the  button or delete by clicking the  button, and define the role.



- *Table* – select the table in which the field resides.

- *Link Table* – select the table where the conditional field resides.
- *Field* – select the field upon which the condition is to be applied.
- *Value* – the value of the field on which the condition is set. Enter \* as the value to imply 'any' value.
- *Security Level* – the permission(s) of access allowed to those selected rows.

The 'User Example' role defined above is a template where you can allow users with different security settings to access booking records. You can change [Value1] to identify the administrator users who can have full access rights to the booking records in BKG table. All the other users will have read only access.

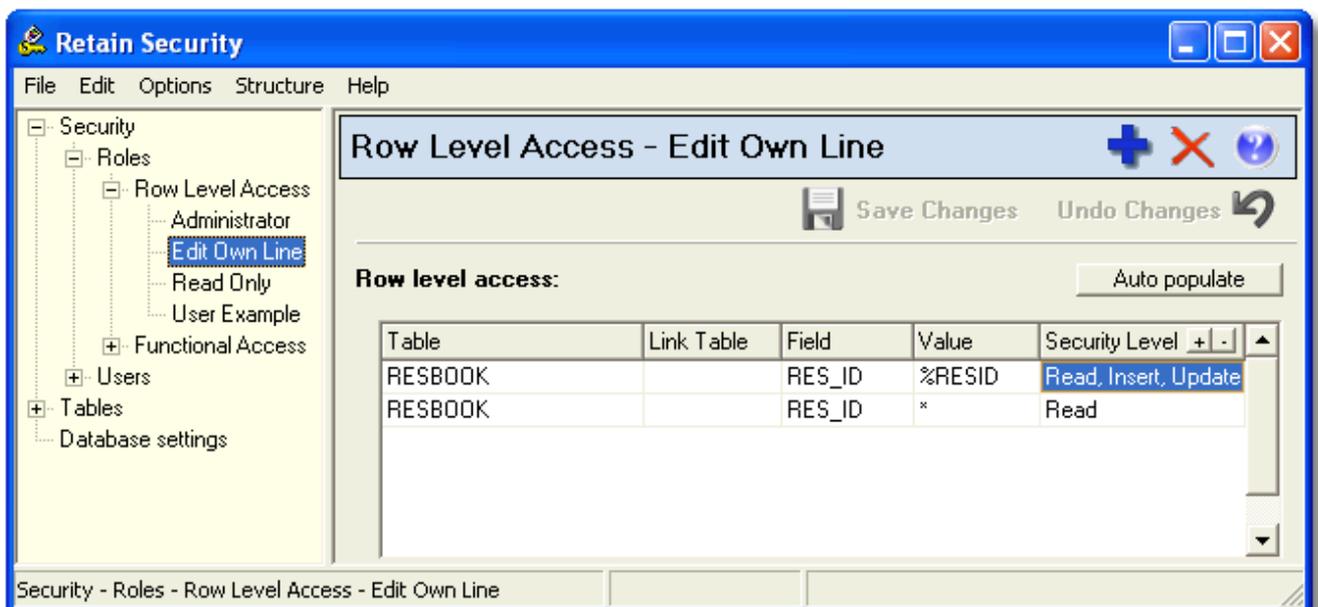
Rather than starting from scratch you may want to create a new role that is similar to or based on an existing role by 'Auto populating':

- Click on the Auto populate button in the right pane .
- Pick a suitable existing role from the list.
- Click on the OK button.

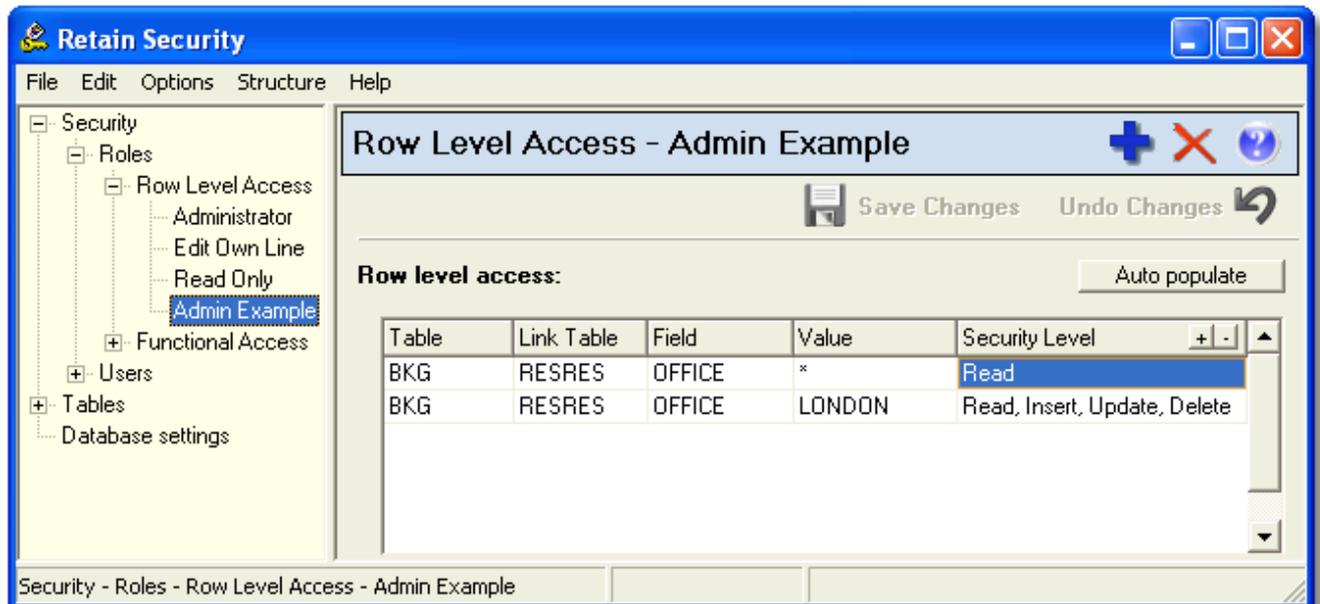
This will populate the new role with the access rights of the selected role. You can then edit on top of this role.

For users who will be allowed to edit their own bookings, the role 'Edit Own Line' is set up.

Note the use of %RESID to match the ID of the resource with the ID of the booking so that only the resource with matched ID can have full access to their bookings.



You can define roles to suit your organisation's requirements. For example, you may have offices in different locations and the access rights need to be different.



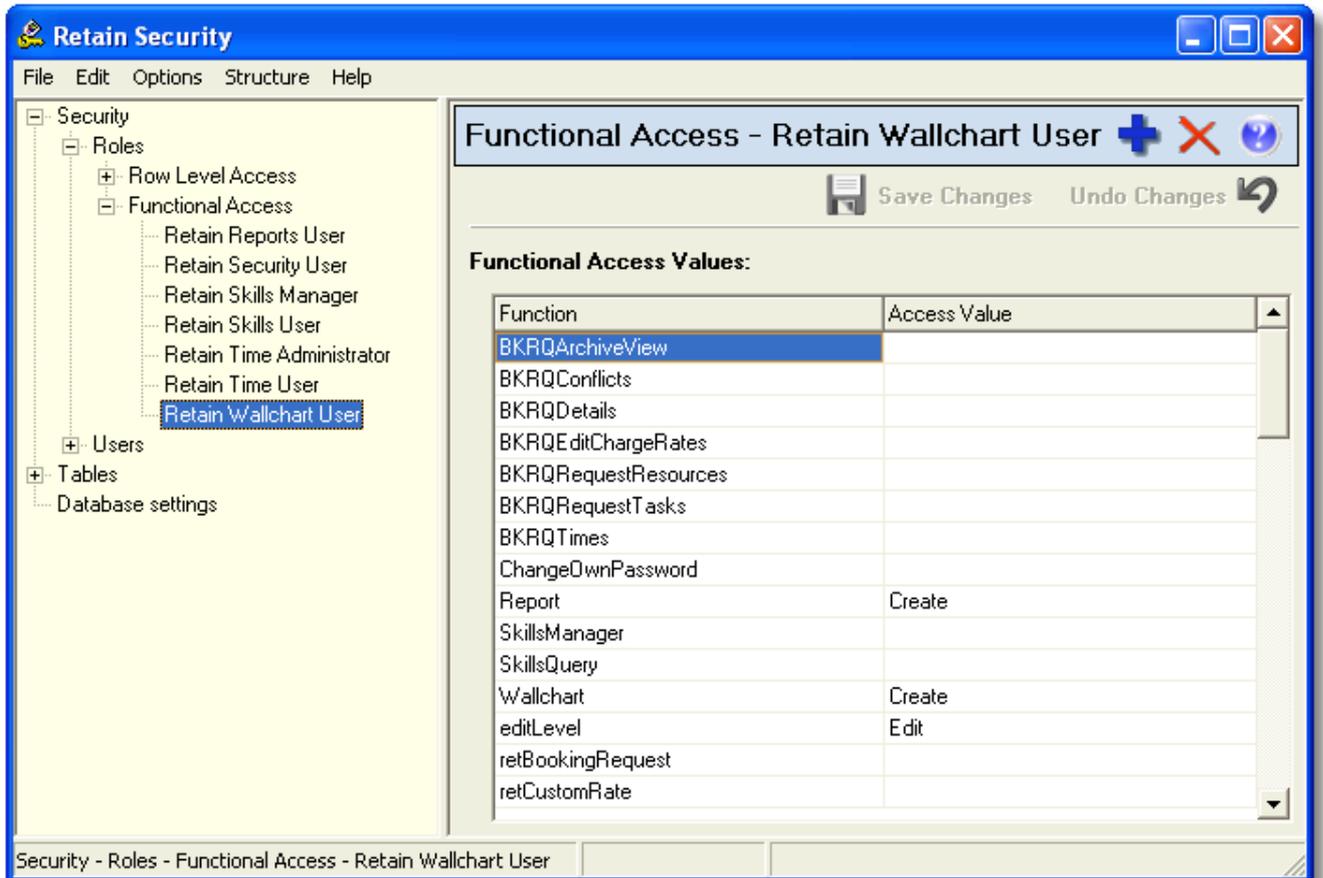
The role shown in the example above defines that administrators in the London office can have full access to the BKG table otherwise they have read only access.

Notes:

- Security access can be based on any field in the database, with any value. You can determine what data users actually see by the tables and associated field values you specify.
- Multiple fields and values can be used in defining roles, for example a second location value can be added which will then show those resources and bookings where the office field has a value of London or Paris.

## Functional Access

Functional Access defines what function modules of Retain Resource Planning System a user can access.



The default functional access roles are:

- Full Function - full access to Retain, Retain Security and any other additional modules e.g. Booking Requests
- Retain Security - full access to Retain Security only
- Retain Wallchart - full access to Retain only

The list below shows a naming convention used for the functions listed in the right pane.

- BKRQ     Booking Request
- ret      Retain
- rrp      Enterprise Reports
- rsm      Retain Security
- Skills   Retain Skills
- time     Retain Time

The various permissions, or functional access values, are generally obvious from the title of the function and the drop-down access value list. For example, BKRQArchiveView specifies whether the user of Booking Request is allowed to look at the whole archive (All), or the part of the archive relating to them only (Self), or has no access to the archive (None). You can define your own functional access roles according to your needs, for example you can define a 'Full Function' role that has all the functions.

### Notes:

- A higher level of access will override a lower one. If the Retain Security access is set to all functions i.e. rsmApplication = All then the subsidiary functions in Retain Security do not need to be defined and are left blank. If you assigned rsmApplication = Part, then you need to specifically select the level of access required for all the rsm functions.

- The rsmUser role value 'AssignAdminGroups' is the highest level of access to the 'Users' section of Retain Security. This role permits the user to edit the list of Users. This role also permits the user to limit the groups, (and therefore the roles contained within these groups), which other administrators can assign or edit. The number of users assigned this role should be limited to maintain the functional access to your group structure. Other administrators should therefore be assigned (rsmApplication = Part) with levels of access for 'rsm' functions assigned separately as appropriate .
- Combine different functional roles can define specific roles. For example a view only user (retUserLevel = viewOnly) can make booking requests (retBookingRequest = Yes), change the rate of a booking request (retCustomRate = Yes), and view ghost bookings (retViewGhostBookings = Yes).
- Only a power user (retUserLevel = power) can make bookings and make ghost bookings.

## Functional Access Values

The functions for each module:

[Booking Requests](#)  
[Retain Skills](#)  
[Retain Wallchart](#)  
[Enterprise Reports](#)  
[Retain Security](#)  
[Retain Time](#)  
[Miscellaneous](#)

## Booking Requests

- **BKRQAdministerRequests** - Ability to see submitted requests and be able to reject them, make live or ghost. In the Booking Requests module it determines whether the Admin tab is visible, while in Wallchart it determines if the administration actions are available.
  - No
  - Yes
- **BKRQArchiveView** - Ability to see inactive booking requests (either live, logged or rejected) in the booking request module.
  - None - The archive tab is not shown.
  - Self - The archive tab is shown but searches can be only performed on booking requests originated by the user.
  - All - The archive tab is shown and searches are open (subject to row and logical security).
- **BKRQConflicts** - Whether the user can make booking requests which, if lived, would create a conflict.
  - No
  - Yes
- **BKRQDetails** - Whether the user can open the detailed view of a booking request.
  - No
  - Yes
- **BKRQEditChargeRates** - Whether the user can edit the charge rates of booking lines in the booking requests.
  - None - No ability to see or edit charge rates of the booking request lines.
  - View - Read only access to the charge rate information.
  - Write - Ability to read and edit the charge rates.

- **BKRQEditLoading** - Ability to edit the loading of booking request lines.
  - No
  - Yes
  
- **BKRQRequestResources** - Ability to submit booking requests for the user him/herself or multiple resources. In the booking request module it determines whether the user is able to see the User tab; in Wallchart it determines if the user has the ability of submitting booking requests.
  - None - No ability to perform booking requests.
  - Self - Request self in booking requests.
  - All - Request self or others in booking requests.
  
- **BKRQRequestTasks** - Whether the user is able to submit booking requests. The extensiveness of this functionality is partly determined by the BKRQRequestResources functional access.
  - No
  - Yes
  
- **BKRQTimes** - Currently not in use.
  - None
  - View
  - Edit

## Retain Skills

- **SkillsManager** - Whether the user can run skillmng32.exe
  - None - No ability to run the executable.
  - Full - Ability to run the executable.
  
- **SkillsQuery** - Whether the user can run skillsel.exe.
  - None - No ability to run the executable.
  - Full - Ability to run the executable.

## Retain Wallchart

- **retBookingRequest** - Whether the user is able to see and make booking requests.
  - No - No ability to see or make booking requests.
  - Yes - Ability to see and make booking requests.
  
- **retCustomRate** - Whether the user is able to see the cost tab in the make booking dialog.
  - No
  - Yes
  
- **retGhostBookings** - Whether the user is able to see or edit ghost bookings.
  - None - No ability to see or edit ghost bookings.
  - View - Ability to see ghost bookings only.
  - Edit - Ability to edit ghost bookings.
  
- **retRollForward** - Whether the user is able to use the roll forward functionality.

- No
- Yes
  
- **retTeamView** - Currently not in use.
  - No
  - Yes
  
- **retUserLevel** - Whether the user is able to view or edit records.
  - viewOnly - Ability to view records only.
  - fullViewer - Ability to create and edit report, calendar and wallchart pages but not manipulate records.
  - power - Ability to edit all records.

## Enterprise Reports

- **rrpConsolidation** - Whether the user is able to report across multiple databases. Should be set to 'No' unless instructed otherwise.
  - No
  - Yes
  
- **rrpGeneral** - Whether the user has general access to Enterprise Reports. Should normally be set to the same value as rrpReports functional access.
  - None - No ability to access Enterprise Reports.
  - View - Ability to view Enterprise Reports only.
  - Edit - Ability to edit Enterprise Reports.
  
- **rrpReports** - Whether the user has access to individual reports. Should normally be set to the same value as rrpGeneral functional access.
  - None - No ability to access individual reports.
  - View - Ability to view individual reports only.
  - Edit - Ability to edit individual reports.

## Retain Security

- **rsmApplication** - Whether the user is able to access Retain Security.
  - None - No ability to access Retain Security.
  - Part - Ability to access some parts of Retain Security, defined by other functional access values (listed below).
  - All - Ability to access Retain Security no matter what the other settings are.
  
- **rsmChargeRate** - Whether the user is able to edit charge rates.
  - None - No ability to edit charge rates.
  - Edit - Ability to edit existing charge rates.
  - AddRemove - Ability to add or remove charge rate categories.
  
- **rsmColorScheme** - Whether the user is able to edit colour schemes.
  - None - No ability to edit colour schemes.
  - Edit - Ability to edit existing colour schemes.

- AddRemove - Ability to add or remove colour schemes.
- **rsmCurrency** - Whether the user is able to edit currencies.
  - None - No ability to edit currencies.
  - Edit - Ability to edit currencies.
- **rsmDBSettings** - Whether the user is able to edit database settings.
  - No
  - Yes
- **rsmDay** - Whether the user is able to edit settings for days.
  - None - No ability to edit settings for days.
  - Edit - Ability to edit existing settings for days.
  - AddRemove - Ability to add or remove day types.
- **rsmWeek** - Whether the user is able to edit settings for weeks.
  - None - No ability to edit settings for weeks.
  - Edit - Ability to edit existing settings for weeks.
  - AddRemove - Ability to add or remove week types.
- **rsmDiary** - Whether the user is able to edit diaries.
  - None - No ability to edit diary settings.
  - Edit - Ability to edit existing diary settings.
  - AddRemove - Ability to add or remove diaries.
- **rsmEditGrd** - Whether the user is able to edit grades.
  - None - No ability to edit grades.
  - Edit - Ability to edit existing grades.
  - AddRemove - Ability to add or remove grades.
- **rsmGroup** - Whether the user is able to edit security groups.
  - None - No ability to edit security groups.
  - Edit - Ability to edit existing security groups.
  - AddRemove - Ability to add or remove security groups.
- **rsmRole** - Whether the user is able to create new or edit existing security roles.
  - None - No ability to edit security roles.
  - Edit - Ability to edit existing security roles.
  - AddRemove - Ability to add or remove security roles.
- **rsmScript** - Whether the user is able run scripts.
  - No
  - Yes
- **rsmTableDefaults** - Whether the user is able to edit the settings for tables.
  - No

- Yes
- **rsmUser** - Whether the user is able to create new or edit existing users.
  - None - No ability to edit users.
  - Edit - Ability to edit existing users.
  - AddRemove - Ability to add or remove users.
  - AssignAdminGroups - Highest level of access, including ability to delegate the use of Retain Security using the 'Administrator for Groups' option against delegated users.

## Retain Time

- **timeAdminLogon** - Whether the user is able to log on without an assigned resource.
  - N
  - Y
- **timeApproveJob** - Whether the user is able to approve by job (access Approve Job view).
  - N - No ability to approve by job.
  - View - Ability to view jobs and people allocated to each job.
  - Y - Ability to approve by job.
- **timeApprovePerson** - Whether the user is able to approve by staff (access Approve Person view).
  - N - No ability to approve by staff.
  - View - Ability to read timesheets against people.
  - Y - Ability to approve by staff.
- **timeApprover** - Whether the user is able to approve the timesheet.
  - N - The default value. No ability to approve the timesheet.
  - Y - Ability to approve the timesheet.
- **timeChargeView** - Whether the user can see the charge view.
  - N
  - Y
- **timeEditComponents** - Whether the user is able to edit the components.
  - N - The component view is hidden.
  - View - Ability to view components only.
  - Y - Ability to edit components.
- **timeEditJobs** - Whether the user is able to edit the jobs.
  - N - The jobs view is hidden.
  - View - Ability to view jobs only.
  - Y - Ability to edit jobs.
- **timeEditRates** - Whether the user is able to edit charge rates.
  - N - The rates view is hidden.
  - View - Ability to view rates only.
  - Y - Ability to edit rates.

- **timeEditResources** - Whether the user is able to edit resources.
  - N - The resource view is hidden.
  - View - Ability to view resources only.
  - Y - Ability to edit resources.
  
- **timeLimitJobs** - Whether the user is able to access the jobs according to the settings.
  - N - Ability to access all the jobs.
  - Y - Restricts access to jobs according to the settings.
  
- **timePeriodSetup** - Whether the user is able to edit periods.
  - N - The periods view is hidden.
  - View - Ability to view periods only.
  - Y - Ability to edit periods.
  
- **timeRetainTimeSettings** - Whether the user is able to customise settings.
  - N - No access to settings.
  - Y - Ability to edit the settings.
  
- **timeTimesheetEntry** - Whether the user can see the time view.
  - N
  - Y
  
- **timeValueView** - Whether the user can see the value view.
  - N
  - Y
  
- **timeReportingLevel** - Whether the user is able to view or edit reports.
  - Full - Ability to view and edit reports.
  - Default - Ability to view all the reports.
  - Own - Ability to view user's own reports.
  - None - No access to reports.
  
- **timeCanImport** - Whether the user is able to import timesheet.
  - No
  - Yes
  
- **timeCanExport** - Whether the user is able to export timesheet.
  - No
  - Yes

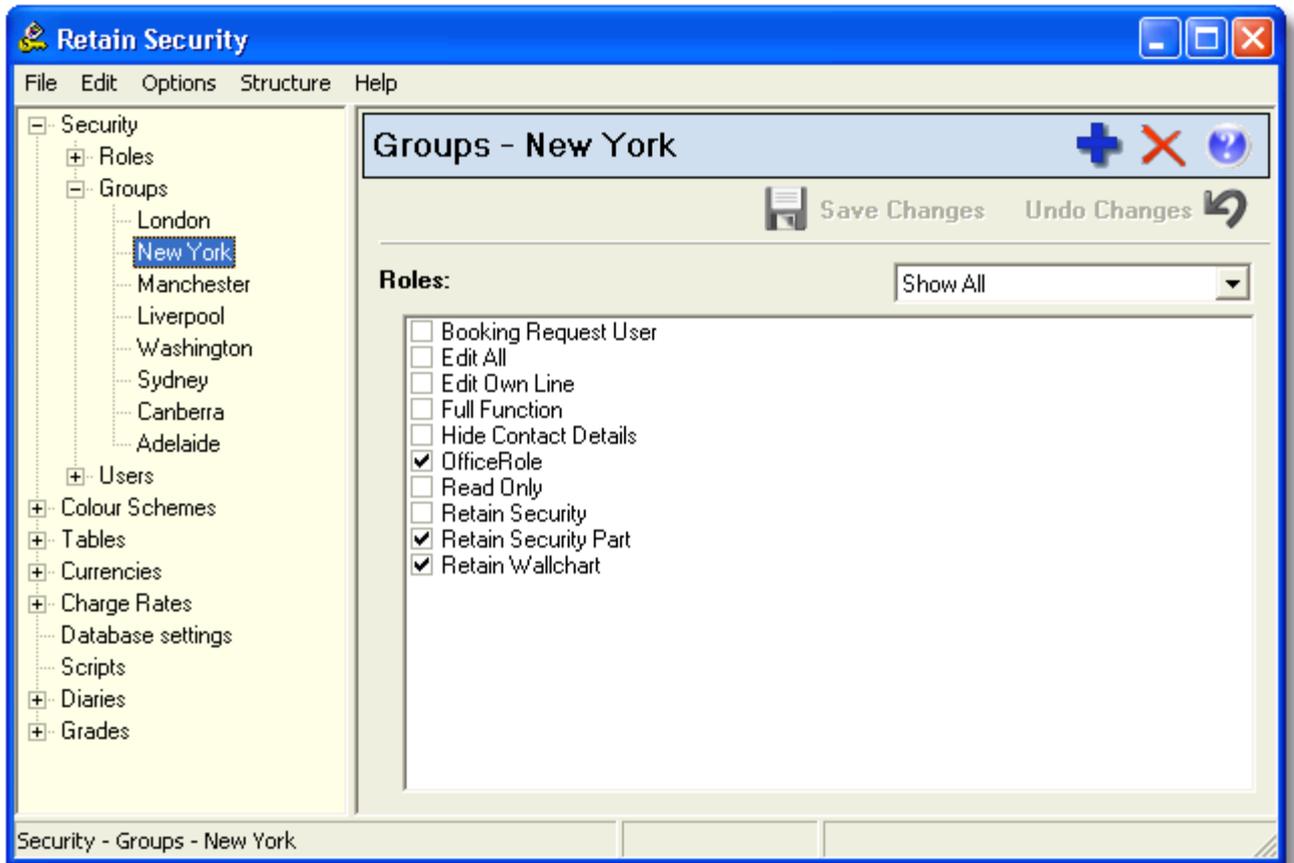
## Miscellaneous

- **ChangeOwnPassword** - Whether the user is able to change his/her own password.
  - No
  - Yes

## 4.3 Groups

### Set up Groups

A group is an efficient way to combine roles together. It allows standardisation and avoids repetitive role selections for each user.



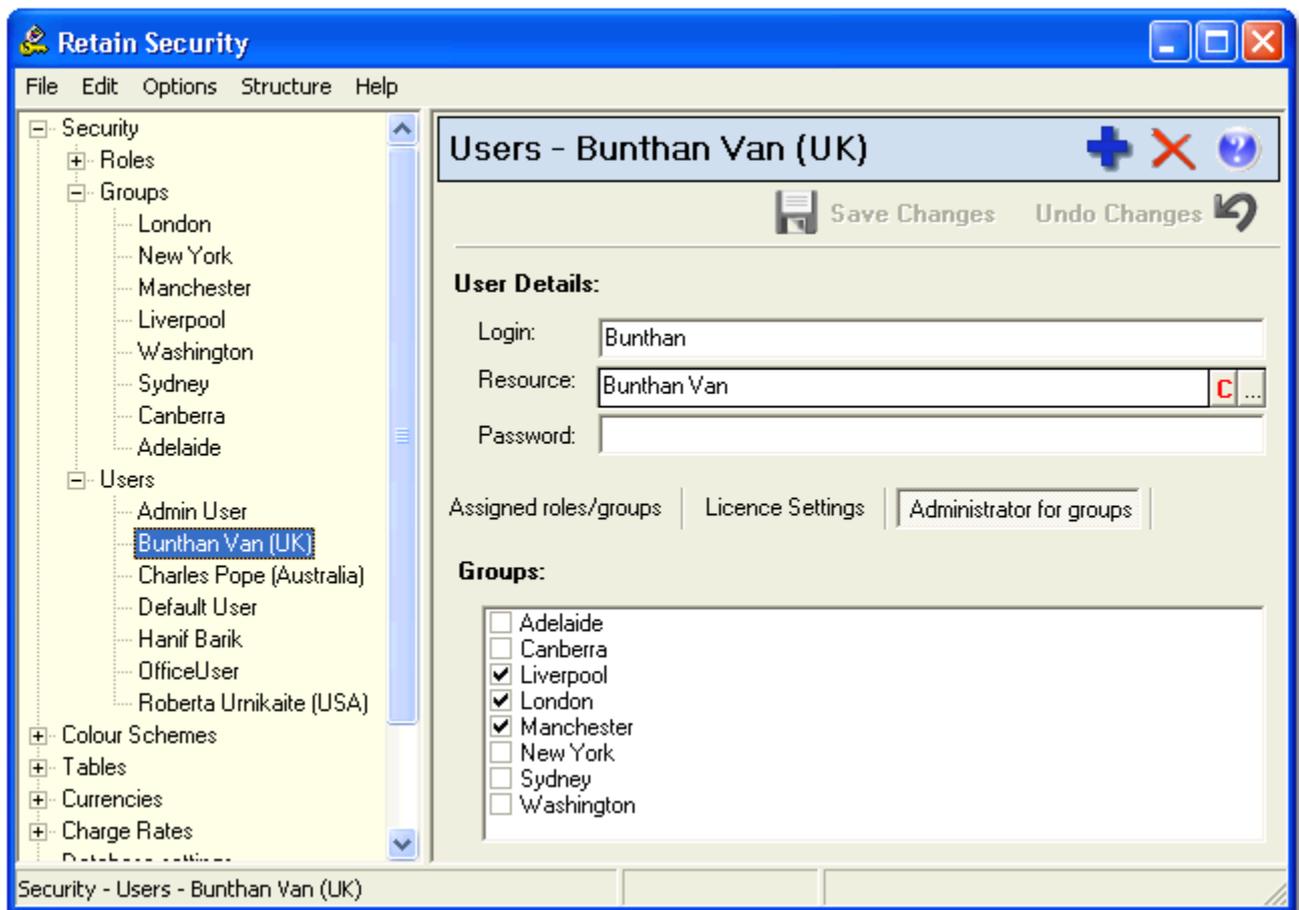
To set up a new group:

- Right-click on 'Groups' in the left pane and choose Add or click on  button.
- Enter a name for the group.
- Select the roles you would like to group together from the right pane.

All the **roles** previously defined are shown here to select for the current group. You can mix row level and functional roles together to suit your needs.

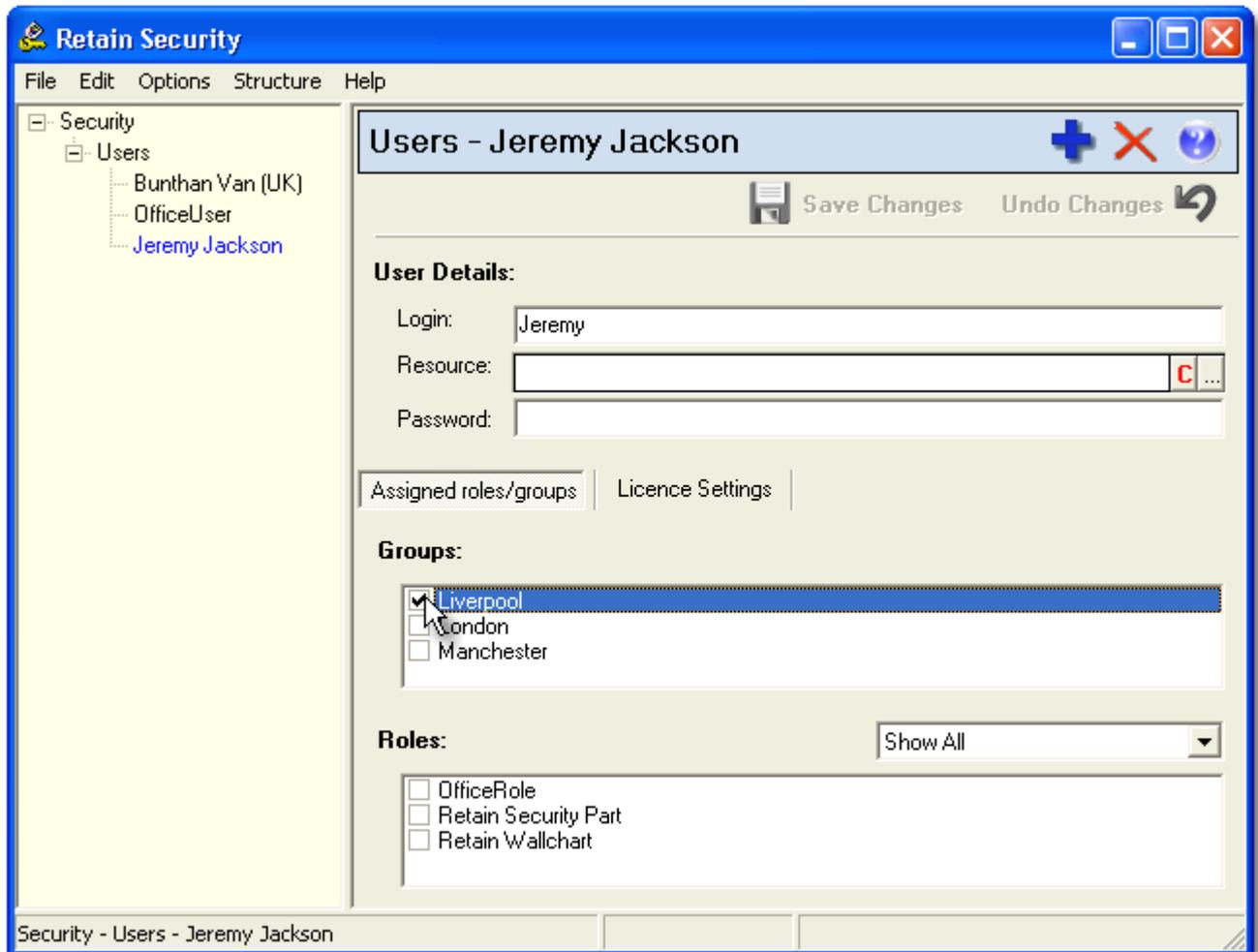
## Administering Groups

To control the **Groups** which can be assigned to users by a Retain Security user, click on the **Administrator for groups** button after selecting the user.

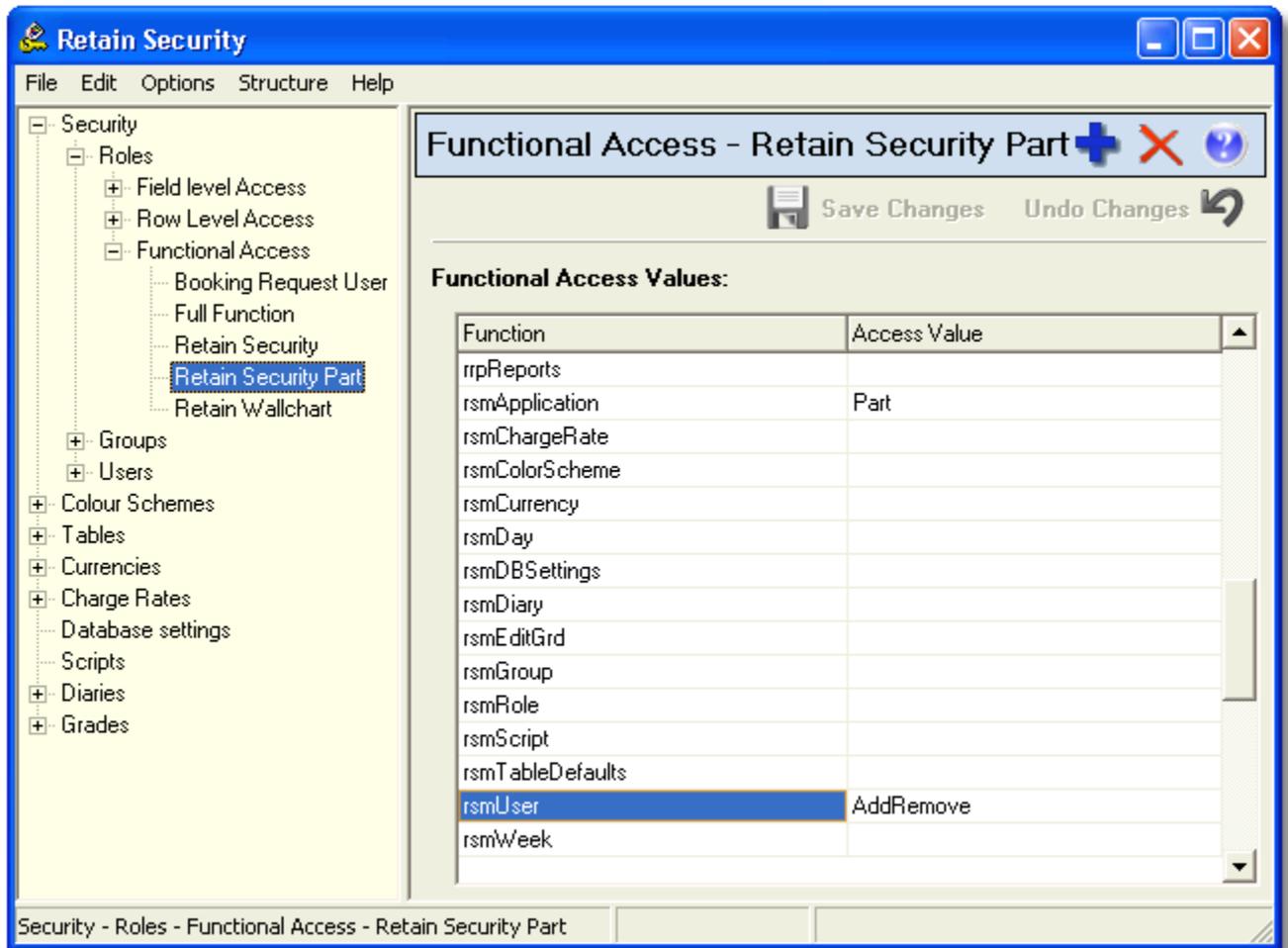


Select the **Groups** the user is allowed to assign to other users and **Save Changes**.

When the user logs in to Retain Security, he/she can only assign **Groups** they have been set up to administer to other users.



The **Administrator for groups** works in conjunction with [Functional Access](#) roles for Retain Security. A functional access role must be created which restricts the functionality the user has access to in relation to setting up users and assigning groups/roles. For example, if the role contains **rsmApplication=Part** and **rsmUser=AddRemove** then any user assigned this role will only have the ability to add/remove users and assign any groups/roles they have permission to administer.

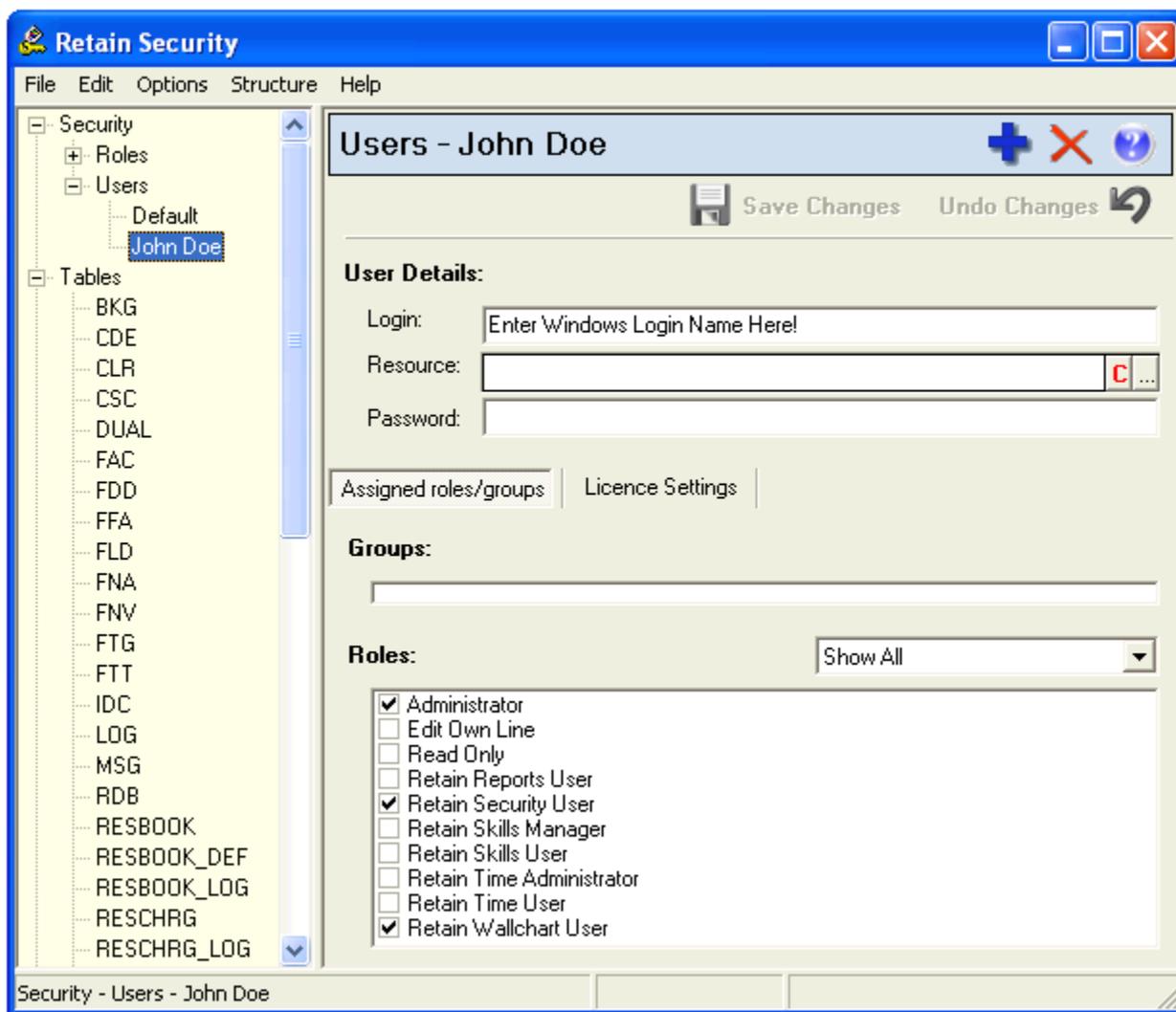


See [Functional Access](#) for more information.

## 4.4 User Security

### User security settings

When you open Retain Security for the first time it has an interface like the one below. This is where you create different type of roles and assign roles to a user.



### Default user

Before any users have been set up in Retain Security there is only one user - 'Default'. We recommend that you never delete the Default user or modify the login details - you can change the roles assigned to it. A Default user initially has all the necessary roles so that anyone can access Retain and Retain Security. You require the Default user to have these roles to complete the initial setup. Once you have an Administrator user set up, you may want to change the roles assigned to the Default user to be a minimum set of roles.

➔ Be careful not to remove the Retain Security access from the Default User until you are sure you have an alternative user with access to Retain Security.

The Default user is a special user:

- roles assigned to the 'Default' user are inherited by all other users.
- users who are not explicitly defined in Retain Security can log into Retain as the 'Default' user. For example, if you have many users who require read only access in Retain then instead of going through the time consuming process of adding each individual user, you can simply set the roles assigned to the Default user to the minimum and the read only users can log in as the Default user.

### New user

To add a new user, for example an Administrator user:

- Right-click on 'Users' in the tree diagram in the left panel and select 'Add' or click on  button.
- Name this user e.g. Jane Doe.
- Login should be the same as the user's Windows login, which can be confirmed with the 'whoAml.exe' utility.
- Resource can be selected if the user is also a resource in Retain and requires an 'Edit Own Line' role.
- Password should always be left blank unless you would like to password protect access to Retain.
- Save the changes by clicking on  button.
  - ✎ You should not set up a password. Retain is set up to use the Windows user name to identify users and does not prompt for passwords by default.

## Groups

A group is a collection of roles used in advanced implementations. You will see a list of groups that you set up earlier. You can assign a user group(s) by ticking the check box next to a group name. See [Set up Groups](#) for definition of groups.

## Roles

The drop-down list on the right-hand side of the Roles section contains several levels of roles to select from, e.g. Functional or Row Level. See [Set up Roles](#) for definition of role types. You can use the drop-down to select the types of roles you would like to view.

'Show All' will display all roles:

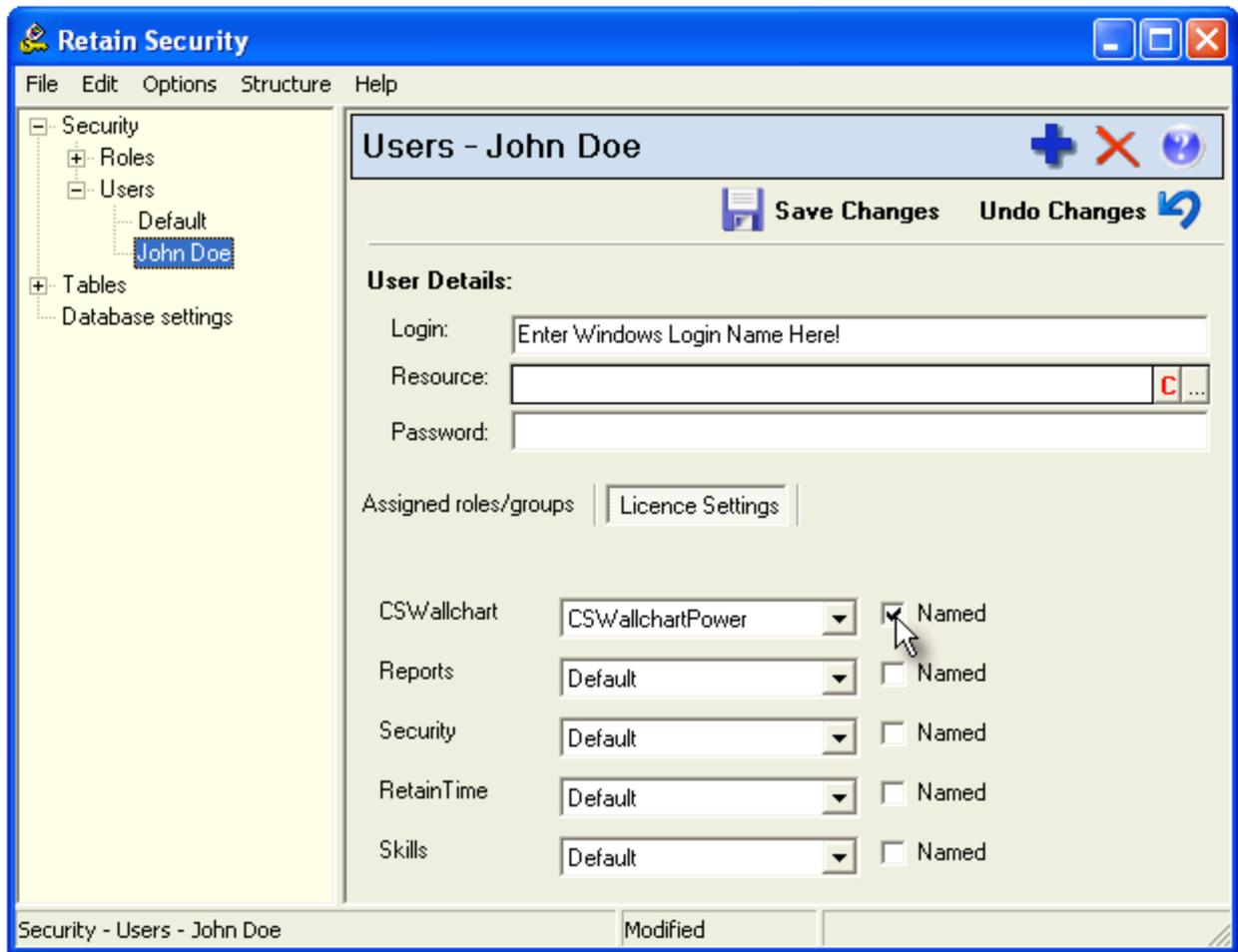
- Edit All - have full access permissions to all 5 main tables
- Edit Own Line - can only edit user's own bookings and related details
- Read Only - can only view information on the wallchart
- Full Function - full access to Retain, Retain Security and any other additional modules e.g. Booking Request
- Retain Security - full access to Retain Security only
- Retain Wallchart - full access to Retain only

✎ Notes:

- Roles relating to Retain Skills, Enterprise Reports and Retain Time modules are used when the additional modules are installed.
- The Edit Own Line role allows a user to view the wallchart and add or edit bookings relating only to themselves. Be careful when assigning this role to the Default user.

## Licence settings

Below the User Details section there is a Licence Settings tab next to Assigned roles/groups. Licence Settings allow you to further refine a user's levels of access to the Retain applications according to your licensing information. These should normally be left unchanged as Default.



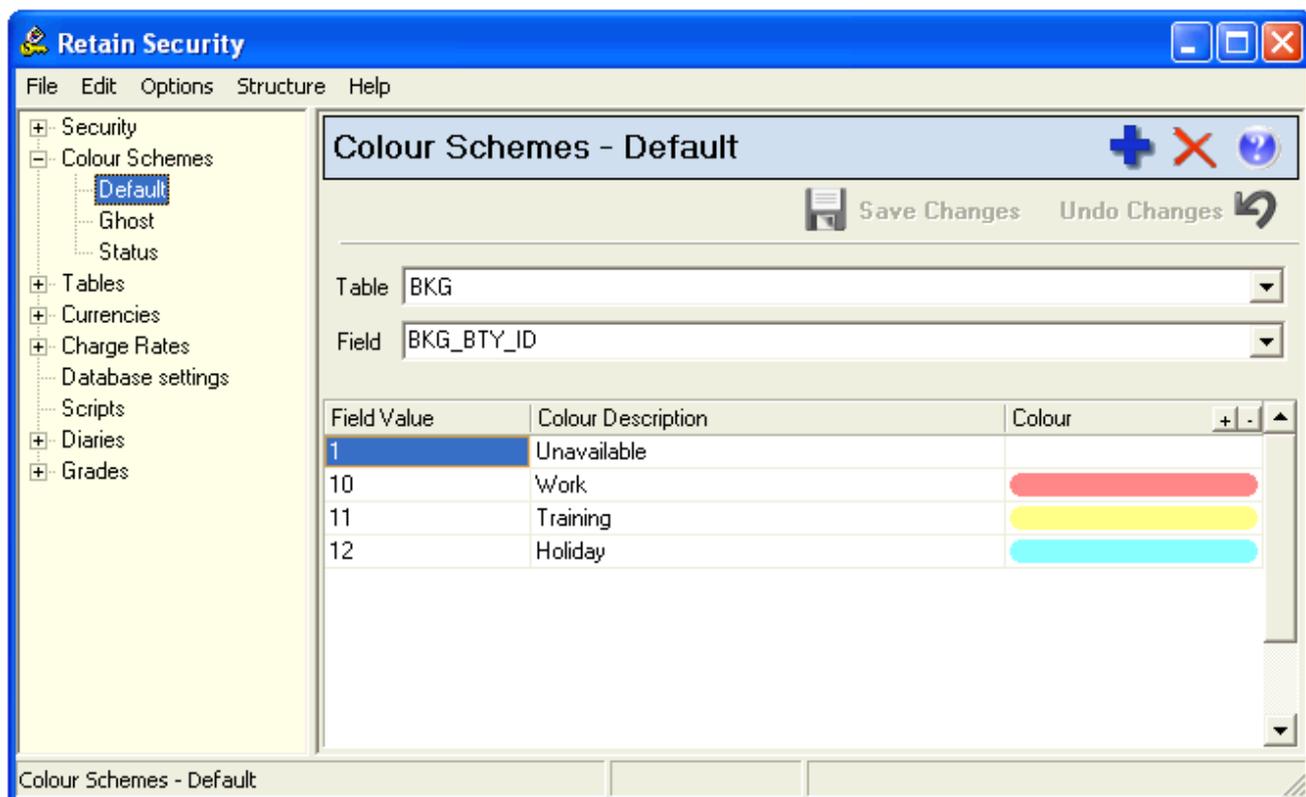
However, if you have named (fixed) user licence(s) instead of concurrent user licence(s), then you must select an access level from the drop-down list against the appropriate module and check the NAMED box.

## 5 Colours

### 5.1 Colour scheme options

Colour schemes are used in Retain module to give different colour coded displays based on the contents of the field value. One example is the [painting on values](#) option in Retain. Colour schemes can also be defined on calculated fields to allow more sophisticated behaviour such as detecting over-allocated bookings.

Below is an example of a default colour scheme for BKG table based on BKG\_BTY\_ID field.



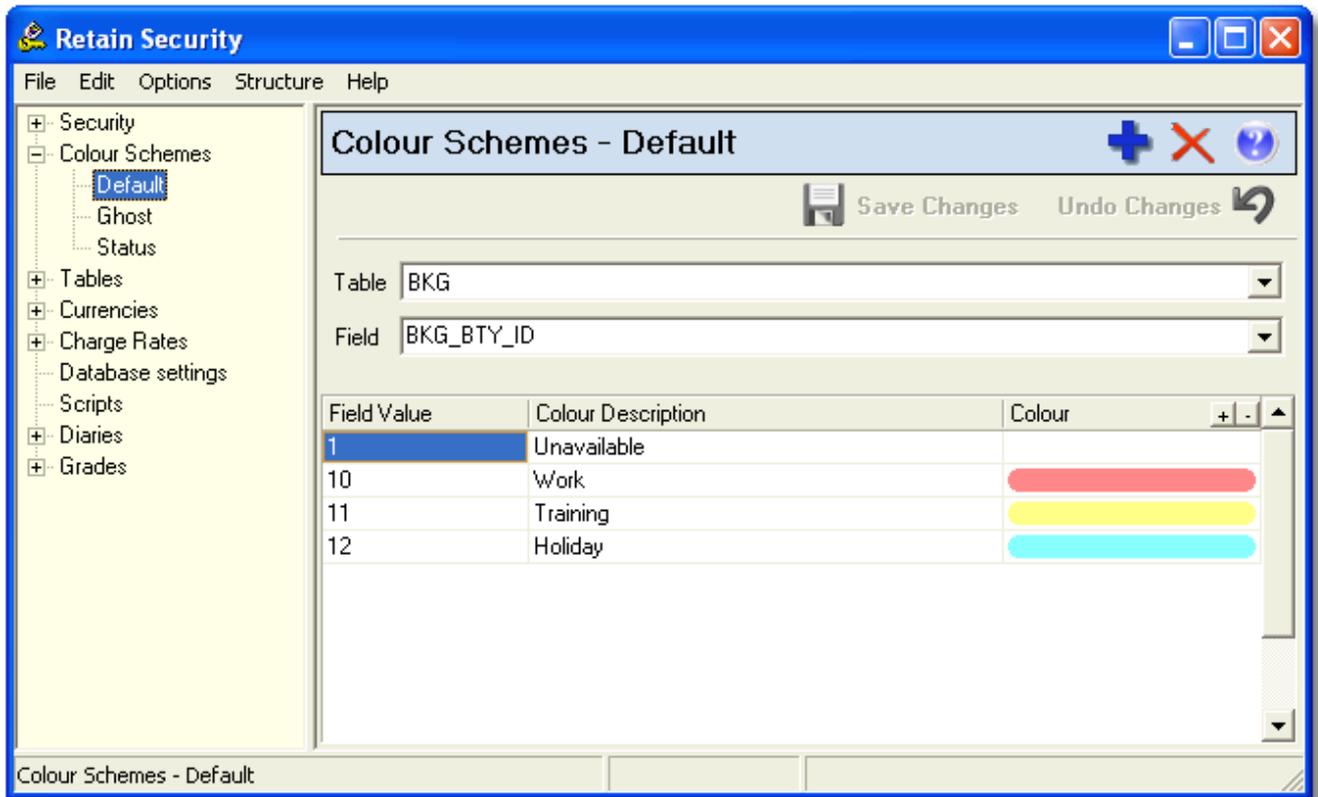
To add a colour scheme,

- Right-click on 'Colour Schemes' in the left pane and choose Add or click on  button.
- Name the new colour scheme.
- Select a table and a field on which the scheme will be based.
- *Field Value* – this is the specific value of the field for which the colour is to be associated. If all values are to have the same colour, enter "\*" as the value, implying 'any' value.
- *Colour Description* – this is a description of what the colour represents, since the field value may be a code.
- *Colour* – double click on the colour cell to reveal the colour chart. Select a colour by clicking the appropriate colour button and click 'OK'. The selected colour will then show in the colour cell.

To add a row to the colour scheme table click on the  button to the right of colour. To delete a row, click the  button.

## 5.2 Paint on values

Retain has a special colour option called "Paint on Value". This is based on booking types, and allows colours on the wallchart to be changed for an individual booking. The colour must be based on the field BKG\_BTY\_ID for paint on value to work. The example below shows how the colour scheme for paint on value might be set up.



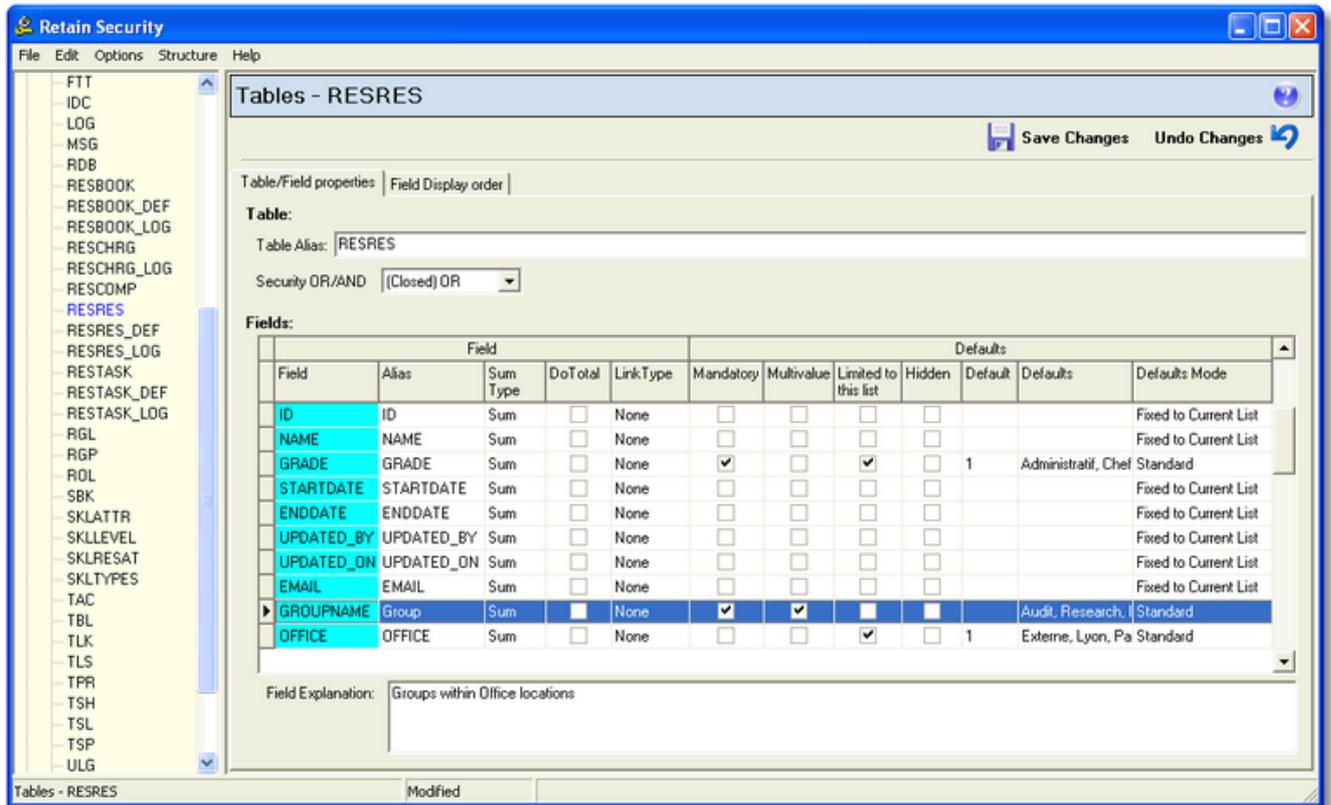
If you would like to paint on value to be based on a calculated field you can use "|" to concatenate the fields e.g. "BookingDisplay|BKG\_BTY\_ID" to be the field to base on.

## 6 Tables

### 6.1 Database table alias and default options

When viewing resource/job records or producing reports within Retain or Enterprise Reports module, users may want to see more descriptive field names as opposed to the generic field names in the database. Through the Tables option in Retain Security, you can define alias names for the fields used in Retain.

You can also define the behaviour of fields in the database when records are being added and edited.



To set up a table alias and define its default options, select the table on which you wish to work by clicking on the table name in the left pane. The right pane will display the table.

- **Table Alias** – normally the default table aliases will be suitable. If they are not, you can edit the descriptive name for the table.
- **Security OR/AND** – OR option allows the fields used to define a field or row level access role to have 'either' relationship. (Open) OR is suggested to be used. AND option forces all field settings for a role to be satisfied when the role is used. See [AND, OR \(Closed\) and OR \(Open\) Security](#).
- **Field** – this is the database field name, and cannot be changed.
- **Alias** – the alias can be edited to reflect the name users would prefer to see associated with the database field. This will be used in resource/job records and in reports as the column heading. Note that as a column header, you will not want it to be too long.
- **Sum Type** – you can change the default type to count, sum, average, show minimum or maximum. (For Enterprise Reports)
- **Do Total** – calculate total of all values in the field. (For Enterprise Reports)
- **Link Type** – this allows you to define a field as being used for path to a file. Only the File option is currently supported by Wallchart. Note that this does not store the actual file within the database, just the path to the file. Typically any paths should point to a common path on a file server.
- **Mandatory** – tick this box if this field must be completed (users will receive an error message and will not be able to create or edit the record unless there is an entry in this field).

- *Multivalued* – you can add more than one value to the field. For example, ticking the 'multivalued' box for the 'languages' field, you will have a drop-down menu within Retain where you can choose the necessary languages. (For Retain Enterprise)
- *Limited to this list* – tick this box if the only values allowed in this field are listed in 'Defaults'. Users cannot enter new values. They must select one from the list defined in 'Defaults'.
- *Hidden* – tick this box if you want the field to be hidden.
- *Default* – type here the value, if any, you would like to be pre-entered in the field when creating a new record.
- *Defaults* – define a list of values for users to select from when adding or editing records. Set the 'Defaults Mode' to **Fixed to Current List**.



To add an entry, click the drop-down arrow to the right of the field (if there is no drop-down arrow, one will appear when you click in the field). Then click on the **+** button in the top right of the drop-down box. This will blank out the line and allow you to type in the data entry field at the bottom of the drop-down box.

To remove an entry, click on it to select it, then click on the **-** button in the top right of the drop-down box. To finish, either add another line to the list by clicking again on the **+**, or click elsewhere. Your selections will then appear in the Defaults field.

If you want Retain to use the values already in the database for the defaults for a particular field, type **\_\_auto** (two underscores auto) in the Defaults box.

- *Defaults Mode* - set a mode for how defaults appear in Retain. Use defaults mode to control what data is entered into fields.
  - **Standard** - users can enter any value into the field box.
  - **Fixed To Current List** - users can enter any value which will then be available in a drop-down against this field. You can also predefine a list of values under 'Defaults'.
  - **Automaintained** - similar to 'Fixed To Current List' but should only be used for booking fields e.g. RESBOOK.TEXT1. Generates a unique list of values from those already entered into the field.
- *Field Explanation* – field descriptions can help users add the right data into the right field when creating or editing records. This is shown in the status bar of the 'Add' and 'Edit' record dialog within Retain.

#### Notes:

- To avoid typing errors and synonyms, and to conform data to a standard, use **\_\_auto**, but be sure to use it sparingly as it has an impact on the performance not only for individuals, but also for the whole system.
- Never use **\_\_auto** in the Bookings table (RESBOOK or BKG) as it will severely impact performance (it will generate a list of unique values by searching the whole database each time a booking is made or changed). It is better not to use **\_\_auto** for date and note type fields.
- For a well defined list, pre-define the values under Defaults column.

- If your entries in the field name or table name aliases do not appear to take effect after stopping and restarting the server then check that they are not being overridden by entries in the 'clntcfg.ini' file (see technical implementation guide).

Please note that changes are not applied until 'Structure | Effect changes' is selected from the menu in Retain Security or the server is stopped and re-started.

## 6.2 AND, OR (Closed) and OR (Open) Security

A user can be linked to multiple row level access roles. The Retain Security model offers three different ways of combining row level access for each table in the repository.

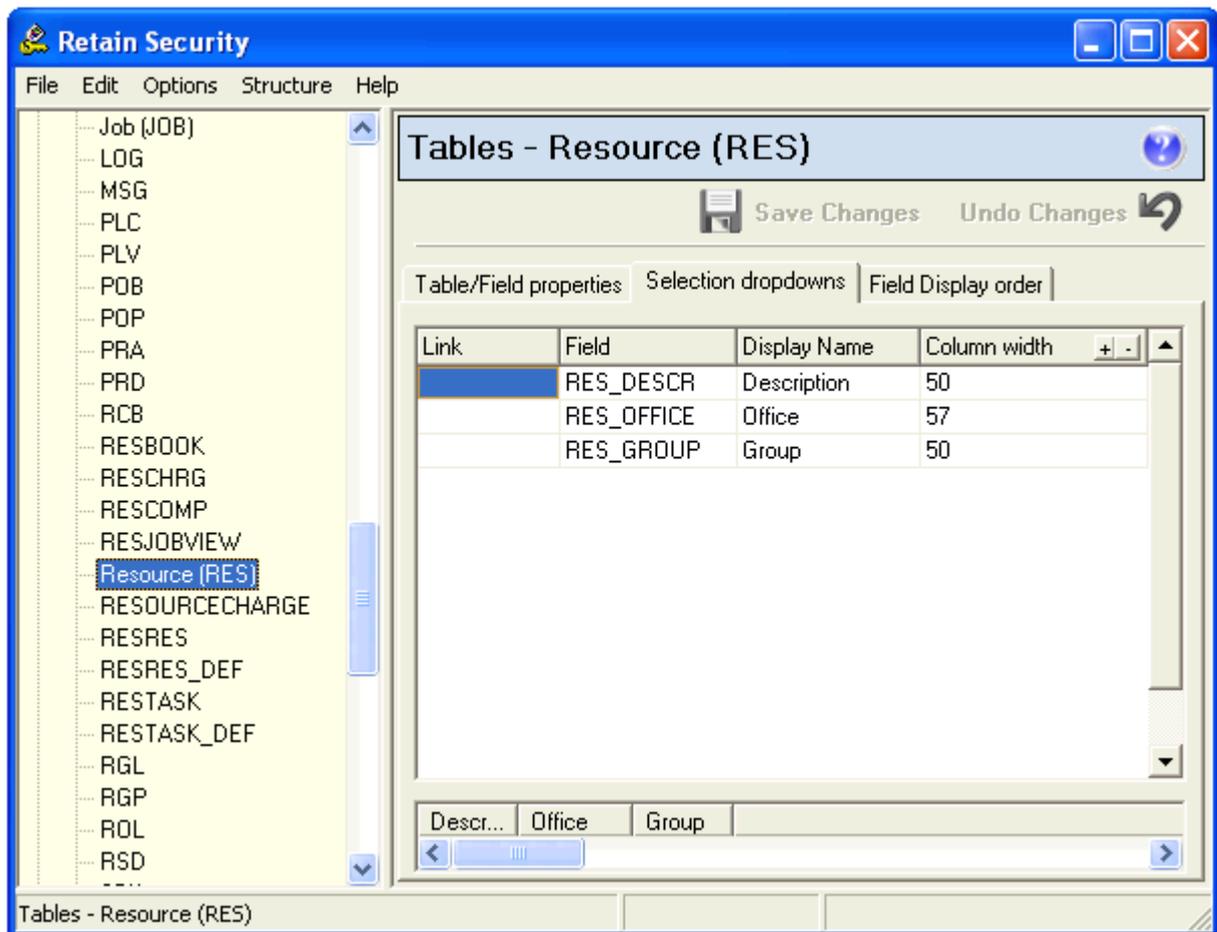
- **Open OR** is the most common way of thinking about the combination of rules. Given a record, all the rights granted from the different rules are added together. For instance, if one row level role is based on the OFFICE field and grants you *insert* and *update* rights, while another is based on the GROUP field and grants you *read* access; the complete set of access rights (*read, insert, update*) will be available to the user after assigning the roles.
- **Closed OR** is the default value and is similar to the **Open OR** security. The main difference is that when updating an existing record, if a field in one of the row level roles was not granting *edit* rights, that field cannot be changed to another value; whereas other fields in the record can be changed.
- **AND** is the most infrequently used condition. The set of rights granted on a record is the intersection of the sets of rights granted by a single role. If, for example, any of the row level roles grants no rights on a specific record while another role grants all possible rights; the user who has both profiles associated to it will have no access to the record. If one record has *read* access and another one *read* and *insert*, the resulting rights on that record would be *read* only.

To define AND/OR security for a given table, go to **Tables** section of Retain Security and select the required table. The AND/OR conditions can be defined using the drop down menu in the Table/Field properties tab.

**Note** that you can have different AND/OR conditions for different tables.

### 6.3 Selection dropdown fields

Fields used to perform look-ups can be customised. Typically this would be used for Resources and Jobs to make it convenient to search when making a booking.



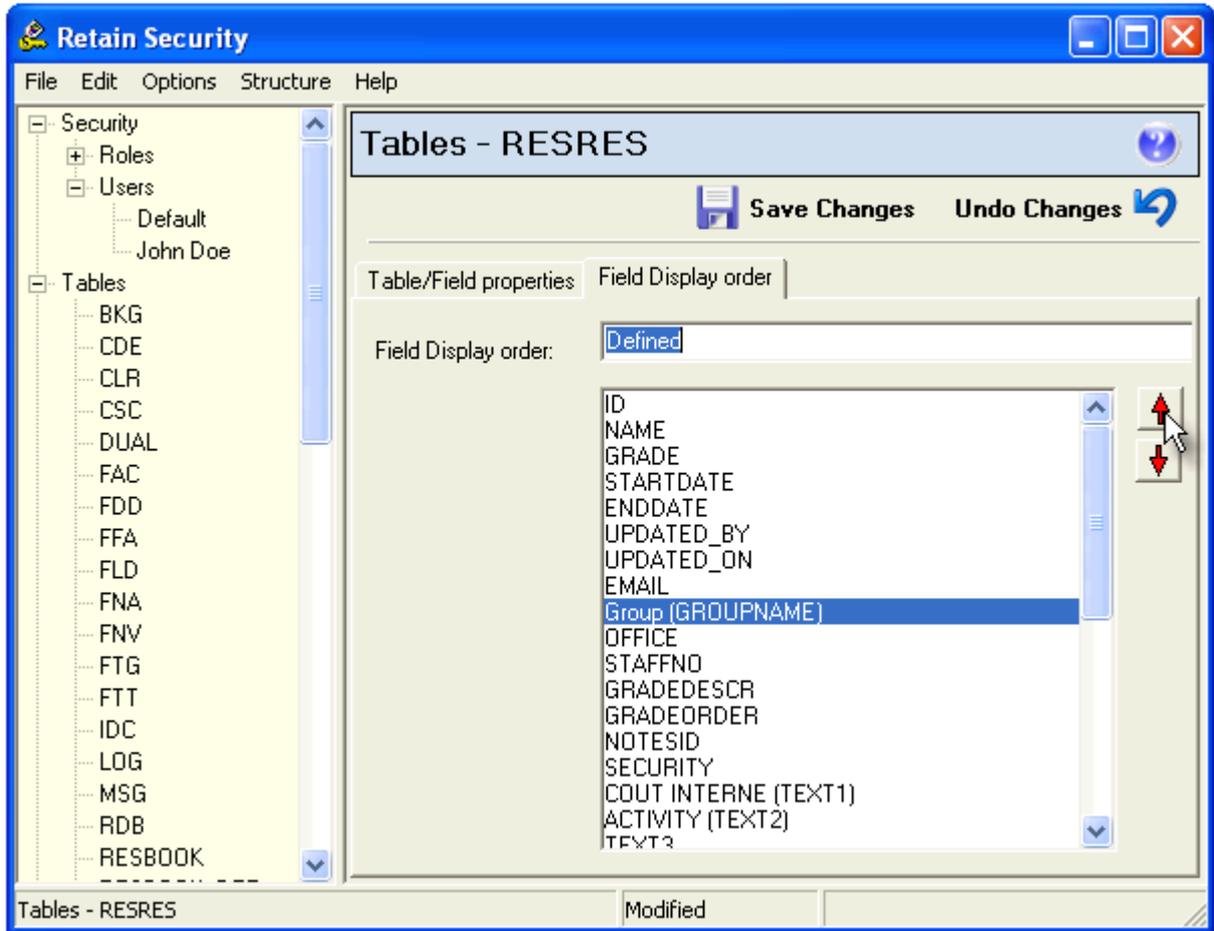
Before adding any fields, you need to click on the **+** button in the top right-hand corner to add a row. Then you can define the fields from the drop-downs. For a straight forward set of fields available within the table you do not need to use the 'Link' column.

The display name is the description the user sees for the field and the column width reflects the space used in the drop-down. You can use the representation at the bottom of the screen to change the widths or you can change the number directly.

You may want to use the Link column when defining your Job fields and you wish to be able to search on Client Name. In the definition for the JOB table, one of the entries will have the link table as CLT and the field CLT\_DESCR.

## 6.4 Field display order

The order in which fields are displayed in Retain can be changed.



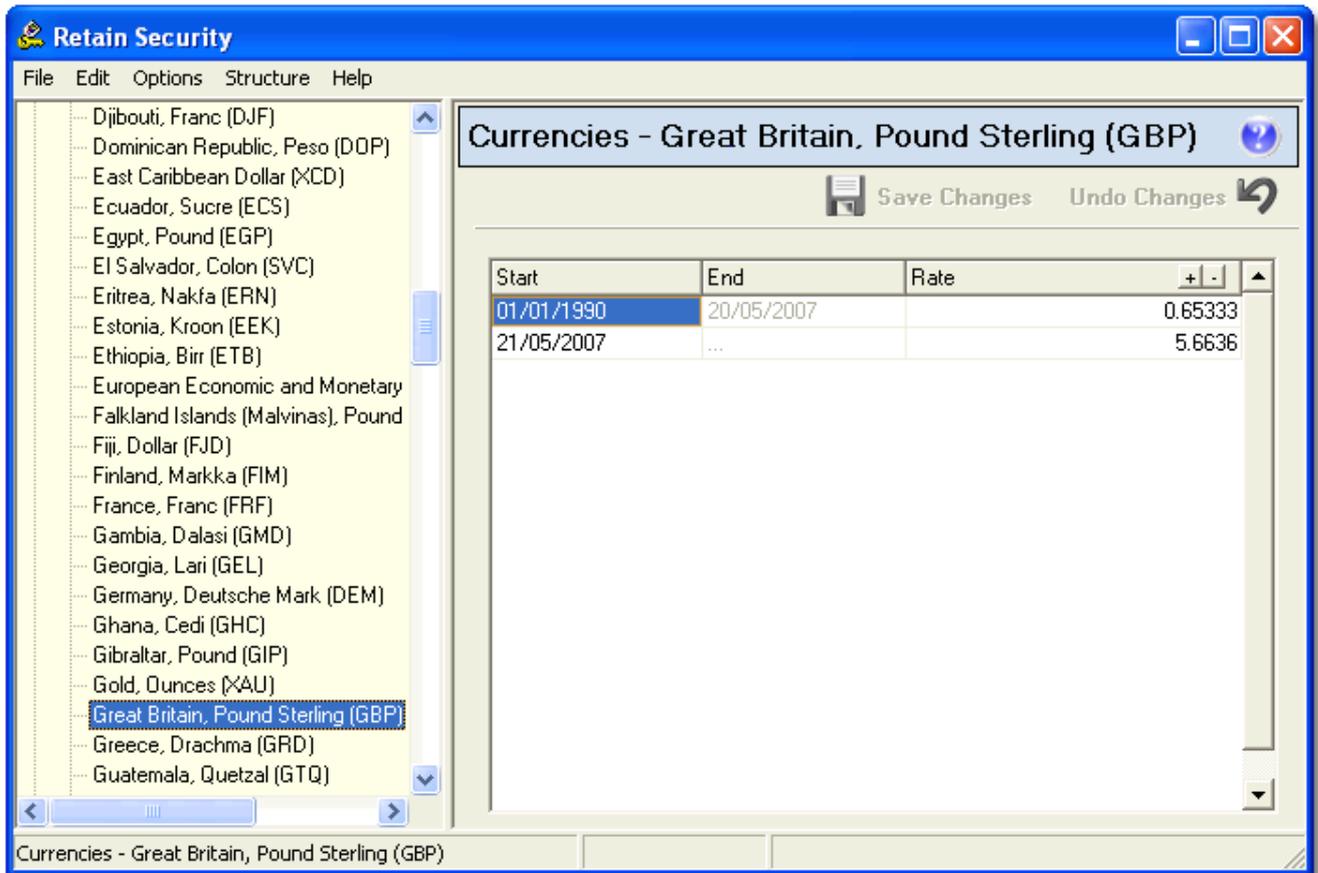
The Field Display Order can either be set to the "Default" from the drop-down list at the top of the form, where the forms within Retain will reflect the order within the database.

Alternatively, it can be set to "Defined" where you are presented with a list of all the fields, and the up and down arrow buttons on the left can be used to reorder the fields.

## 7 Currencies

### 7.1 Currency options

The currency option allows you to add or change exchange rates for existing currencies if required. Generally currency exchange rates will be updated through the [Scripts](#) section.



To add a row to the currency, click on the **+** button to the right of rate. To delete a row, click the **-** button. This will allow you to add a new rate valid in a new date range to the currency.

- **Start** - the date from which this exchange rate is valid. Choose a date either by typing the date or selecting the date from the drop-down calendar.
- **End** - the date on which this rate ceases to be valid. This is set automatically.
- **Rate** - the exchange rate for this currency relative to the initial currency. The initial currency is set to 1 and is often the default currency for the database.

## 8 Charge rates

### 8.1 Charge rate options

Charge rates applied to bookings in Retain are determined using a three-dimensional matrix set up in the Charge Rate option of Retain Security.

- *resource charge band* – the charge band of the [resource](#) being booked.
- *charge codes* – the charge rate description (CRD table) of the [job or assignment](#).
- *date ranges* – the effective date of the charge rate determined by the rate in force on the start date of a booking.

By combining these three elements, sophisticated charging system can be implemented in Retain.

Two charge rates are provided:

- *Rate1* - This is generally the revenue charge rate, and is the one used for calculated fields related to charging.
- *Rate2* - This is generally the cost charge rate. There are no calculated fields related to rate2 in the default set up of Retain.

You would expect, therefore, Rate1 to represent the revenue expected for a job, and would be zero for a non-chargeable job. Similarly, you would expect Rate2 to represent the cost of a job, and to be less than Rate1 for a chargeable job. Rate2 for a non-chargeable job would still represent the cost of a job, often the same as that for a chargeable job.

Note that the BTY (booking type) and CMP (component) charge rates are currently not used, reserved for future expansion to the charge rate matrix.

### 8.2 Charge rates setup

The screenshot shows the 'Retain Security' application window. The title bar reads 'Retain Security'. The menu bar includes 'File', 'Edit', 'Options', 'Structure', and 'Help'. The left-hand pane shows a tree view with the following structure:

- Security
- Colour Schemes
- Tables
- Currencies
- Charge Rates
  - BTY
  - Resource
    - Job
      - C (selected)
      - E
    - CMP
  - Assignment
    - Booking Request
    - RESRES
    - RESTASK
  - Database settings
  - Scripts
  - Diaries
  - Grades

The main window displays 'Job - C' with a toolbar containing '+', 'X', and '?'. Below the toolbar are 'Save Changes' and 'Undo Changes' buttons. The main area contains a table with the following data:

Description	Rate1		Rate2			
	Start	End	Currency	Value	Currency	Value
<input checked="" type="checkbox"/> D	13/07/2006	31/12/2049	USD	200	USD	300
<input type="checkbox"/> H						
<input type="checkbox"/> Manager						
<input checked="" type="checkbox"/> Junior						
<input type="checkbox"/> Senior						

The status bar at the bottom of the window reads 'Charge Rates - Job - C'.

To create a new charge rate:

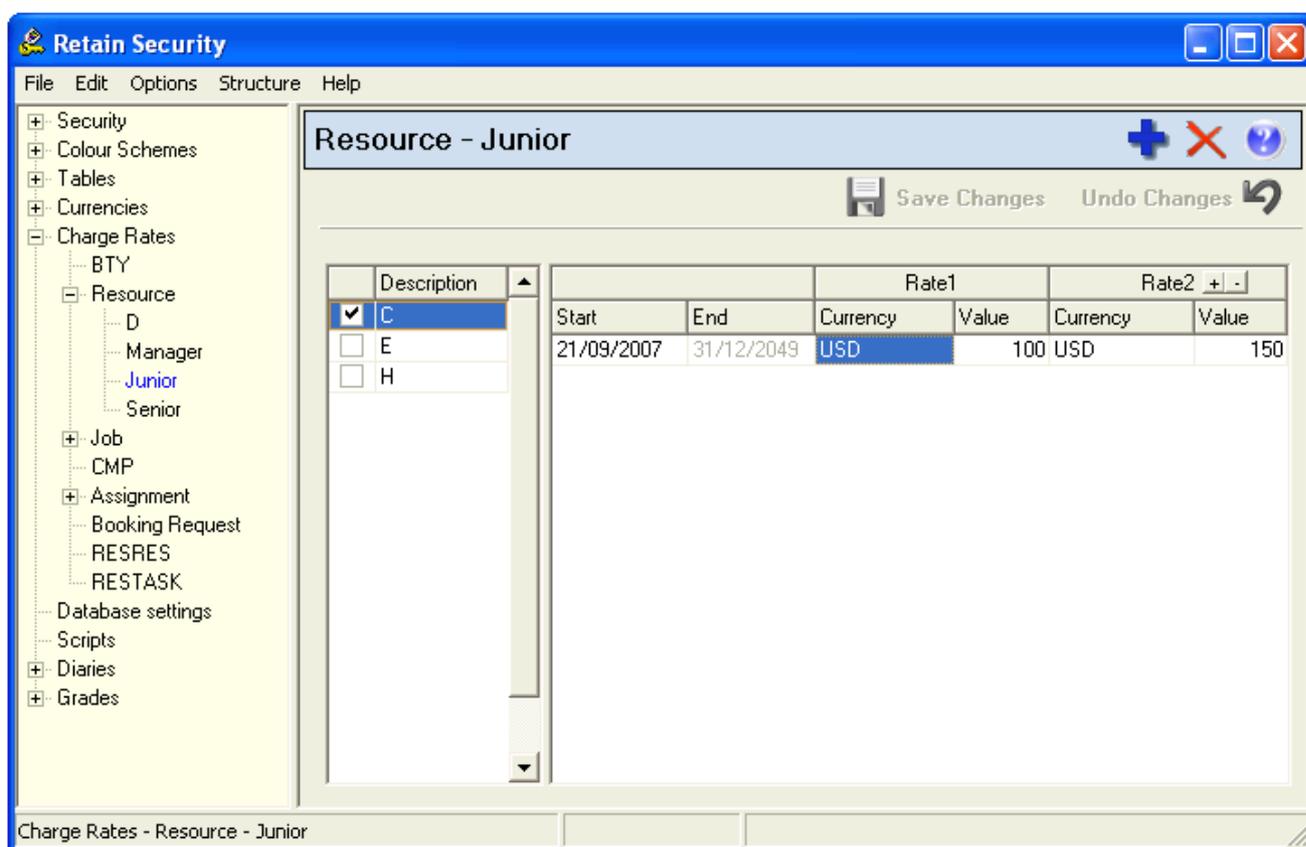
- Right-click on 'Job' and choose 'Add' or click on  button.
- Enter a name for the new charge rate and click on 'OK'.

You can create a charge bands for resources in the same way.

When you create the charge rate, you will see a message on the right hand pane "Before editing, charge rates must exist for both the Resource and Job tables". This message reminds you that you would need both entries to set up the charging system. Therefore you will need to create at least one charge band for resource before you can edit them in the right pane.

### 8.3 Resource charge band

Charge rates for resources are based on the charge band of the resource.



- *Description* – select the charge rate description for which you wish to set a charge rate.
- *Start* – select the date from which you wish the rate to be valid.
- *End* – this date is selected automatically and is the day on which the rate expires.
- *Currency* – choose the currency for Rate1 from the drop-down list or type in the three letter currency abbreviation. You will not be allowed to enter currencies which are not in the currency list.
- *Value* – enter the amount per hour for Rate1.
- *Rate2* – choose the currency and enter the value per hour for Rate2.

A tick will be checked automatically once you click away after editing the charge band pane.

To add a row to the resource charge rate table, click on the  button to the right of Rate2. To delete a row, click the  button.

To enter or edit a rate for a different charge rate description, click on the appropriate description in the middle pane and enter charge rates. You will want to enter rates for most, if not all, charge rate descriptions for your resource charge band.

#### 8.4 Job or Assignment?

Charge rate descriptions can be entered for both job and assignment records:

- JOB\_CRD\_ID for jobs
- JAS\_CRD\_ID for assignments

Retain uses the charge rate descriptions in the following order (three different ways of saying the same thing):

- Assignment charge rate descriptions take precedence over job charge rate descriptions.
- If there is no assignment record, or the charge rate description for the assignment is blank, then the job charge rate description will be used.
- Retain looks first at the assignment charge rate description, and defaults to the job charge rate description if one does not exist for assignments.

#### Notes:

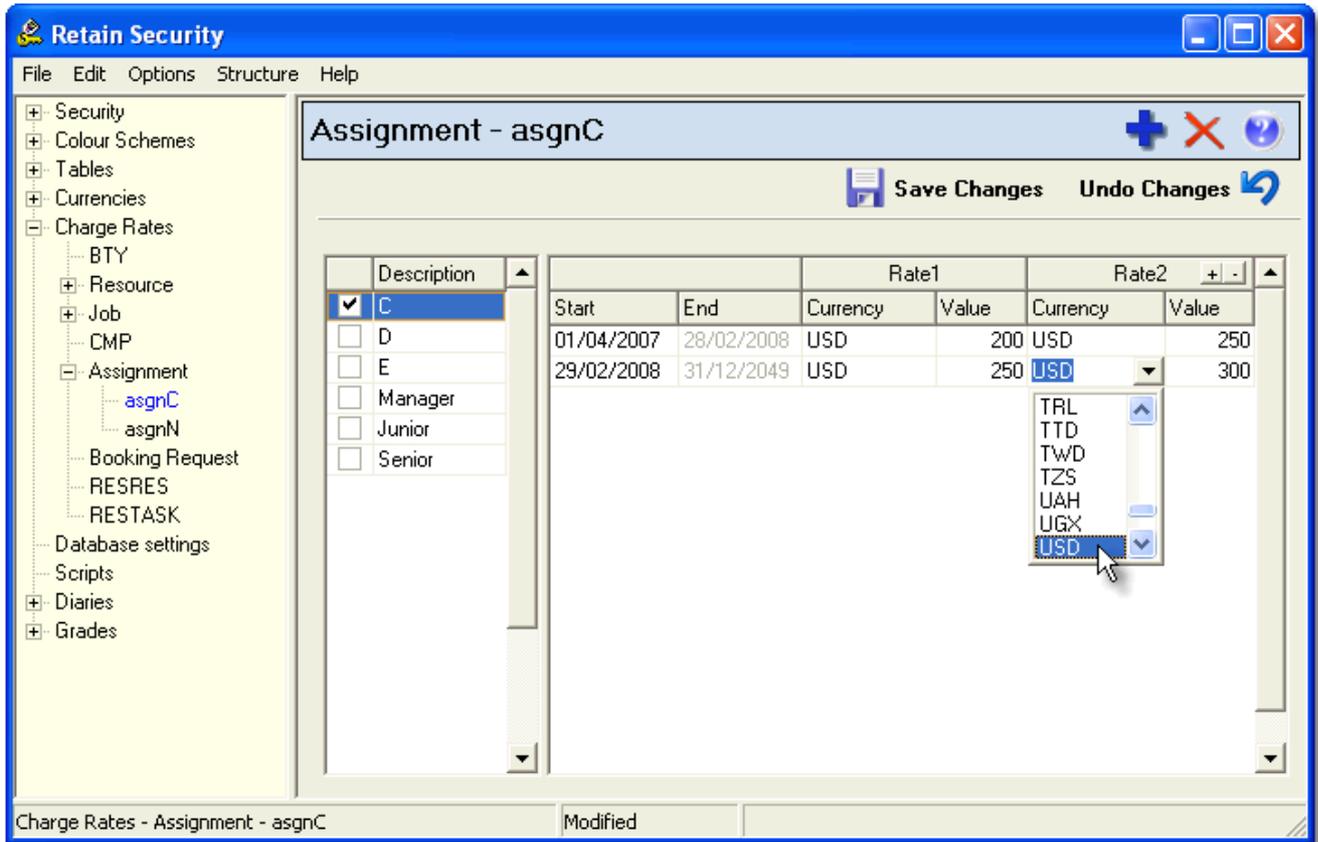
- Assignment and job charge rate descriptions all appear in the same description table. It is strongly recommended that you name them differently so that it is easy to see which are job and which are assignment. For example, you can use single letters C and N for job, and whole words chargeable and non-chargeable for assignment. Or you could prefix assignment, for example, asgnC and asgnN.

## 8.5 Assignment charge rate description

Charge rates for assignments are based on the charge rate description (JAS\_CRD\_ID) of the job.

To create a new charge rate description:

- Right-click on 'Assignment' and choose 'Add' or click on 'Assignment' then click the  button.
- Enter a [name](#) for the new charge rate and click 'OK'.



To set up charge rates:

- *Description* – select the charge band description for which you wish to set a charge rate.
- *Start* – select the date from which you wish the rate to be valid.
- *End* – this date is selected automatically and is the day on which the rate expires.
- *Currency* – choose the currency for Rate1 from the drop-down list or type in the three letter currency abbreviation. You will not be allowed to enter currencies which are not in the currency list.
- *Value* – enter the amount per hour for Rate1.
- *Rate2* – choose the currency and enter the value per hour for Rate2.

A tick will be entered automatically against the charge rate description once you click away from the assignment charge rate pane.

To add a row to the assignment charge rate table, click on the  button to the right of Rate2. To delete a row, click the  button.

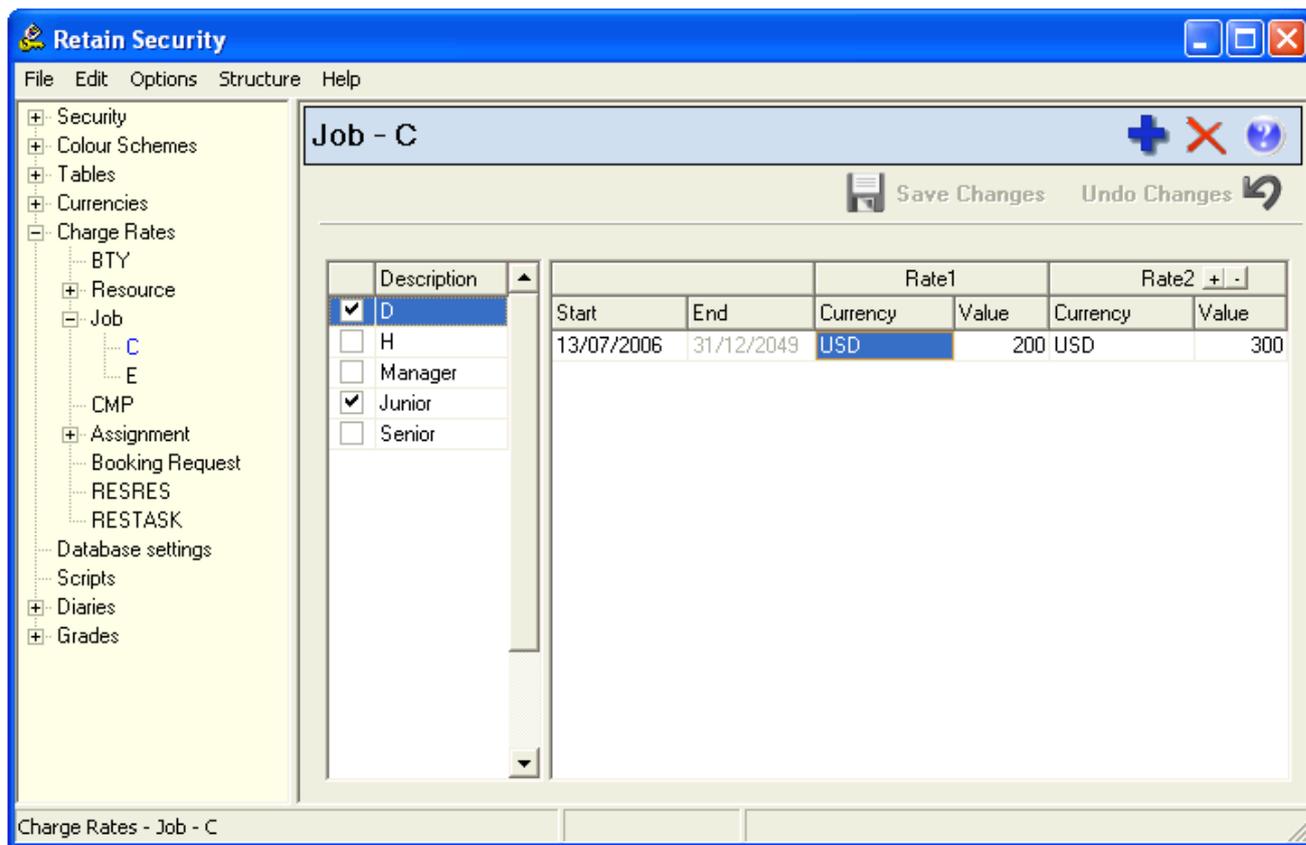
To enter or edit a rate for a different charge rate description, click on the appropriate description in the middle pane and enter charge rates. You will want to enter rates for most, if not all, charge rate descriptions for your assignment charge rate.

## 8.6 Job charge rate description

Charge rates for jobs are based on the charge rate description (JOB\_CRD\_ID) of the job.

To create a new charge rate description:

- Right-click on 'Job' and choose 'Add' or click on the 'Job' then click the  button.
- Enter a [name](#) for the new charge rate and click 'OK'.



To set up charge rates:

- *Description* – select the charge band description for which you wish to set a charge rate.
- *Start* – select the date from which you wish the rate to be valid.
- *End* – this date is selected automatically and is the day on which the rate expires.
- *Currency* – choose the currency for Rate1 from the drop-down list or type in the three letter currency abbreviation. You will not be allowed to enter currencies which are not in the currency list.
- *Value* – enter the amount per hour for Rate1.
- *Rate2* – choose the currency and enter the value per hour for Rate2.

A tick will be entered automatically once you click away from the job charge rate pane.

To add a row to the job charge rate table, click on the  button to the right of Rate2. To delete a row, click the  button.

To enter or edit a rate for a different charge band description, click on the appropriate description in the middle pane and enter charge rates. You will want to enter rates for most, if not all, charge band descriptions for your job charge rate.

## 8.7 Charge rate applicability

Charge rates can be defined for one or more date ranges. The date ranges usually reflect periodic adjustments to your organisation's charging structure, such as the annual increase in charge rates. At least one date range must be specified. You can add or amend the date ranges as and when changes in your organisation's charge rates are announced.

Job charge rate descriptions allow you to set up rates which will be picked up automatically in Retain every time a booking is made against a job with a corresponding charge rate description code where the resource has a defined charge band for that charge rate description code. For example, you may use job charge rate description code of 'N' for non-chargeable jobs and 'C' for chargeable jobs. Assignment charge rate descriptions have the same properties as job charge rate descriptions. Assignment takes [precedence](#) over job.

Deleting a job charge rate description removes the charge rate description and associated charge rates from the charge rates matrix, but it does not affect the charge rate descriptions of jobs in the jobs database or the charge rates applied to **existing** bookings of that code.

Deleting a resource charge band removes the charge band and associated charge rates from the charge rates matrix, but it does not affect the charge bands of resources in the resource database or the charge rates applied to **existing** bookings of that charge band.

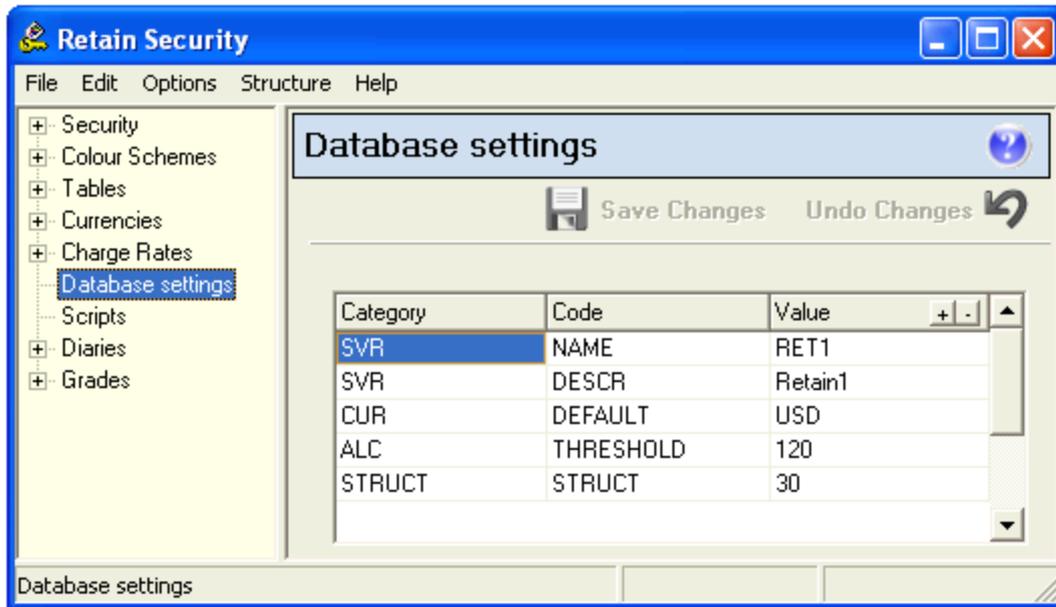
Charge rate amendments are applied to all **new** bookings made in Retain but do not affect any **existing** bookings.

 Note that amendments to charge rates do not take effect until client applications (e.g. Retain) is restarted.

## 9 Database

### 9.1 Database settings

This is where you define properties against the database. You should not need to change the settings here unless you have more than one database server.



The values of the three columns in the database settings are characteristics associated with the particular database server being connected to.

- [SVR NAME](#) – this is the unique Retain name for this database.
- [SVR DESCR](#) – this is the user-friendly description of the server for use in reports.
- [CUR DEFAULT](#) – this is the default currency for this database.
- ALC THRESHOLD - do not change this setting.
- STRUCT STRUCT - do not change this setting.

In the event there is more than one server, each one should have a unique name within the network. The category and code columns should always be left unchanged.

To add a row for a database setting, click on 'Database Settings' then click the button to the right of the database settings title in the title bar. Fill in the first row for the first setting by clicking in each cell in the row in turn. To delete a row, click the button.

### 9.2 SVR Name

- *Category* – type SVR
- *Code* – type NAME
- *Value* – type a unique name for the database being used, such as RetainLondon or RetainAudit. This must be an alphanumeric string, preferably with no spaces, suitable for use as a file name, since it is used to identify cache directories associated with this particular database.

### 9.3 SVR Description

- *Category* – type SVR
- *Code* – type DESCR
- *Value* – type a description for this database, such as Aberdeen bookings database. This is used in reports as a readable and understandable identifier, particularly for multi-database reporting. It should, of course, be distinguishable from any other database description so that there is no confusion.

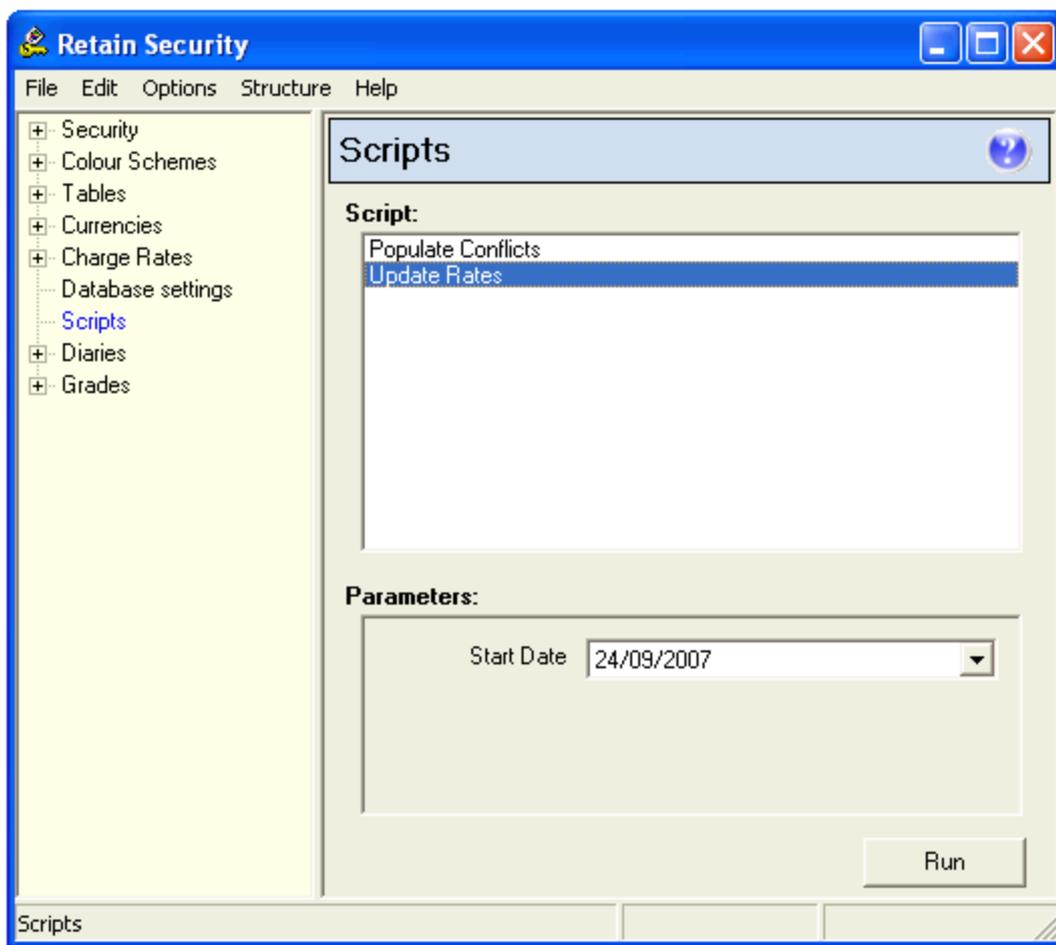
### 9.4 CUR Default

- *Category* – type CUR
- *Code* – type DEFAULT
- *Value* – type the three letter currency code for the default currency for this database, such as GBP or USD. The currency code must be one that appears in the Currency table, and should have an exchange rate of 1.

## 10 Scripts

### 10.1 Script options

This option allows database administrators and developers to offer bounded services to administrators. It may be used, for example, to make regular bulk updates of currency. It offers a limited selection of tested scripts in SQL that can only be run (not changed in any way) without the need to use database tools or SQL servers



The scripts are stored in a sub-directory of the Retain Server directory called 'Scripts'. Parameters can be offered which allow limited tailoring of the script. More information about setting up these scripts and the access to them can be found in the 'Retain Enterprise Installation Guide'.

## 11 Diaries

### 11.1 Diary options

Diaries in Retain Enterprise define working days, weeks and years. There can be several of each, and diaries can be based on others so that only differences need be defined.

Diaries define the following characteristics:

- **Days** – the start and end of the working day, the amount of standard working time in the day and the amount of emergency working time in the day.
- **Weeks** – the reference date for the start of the working week, the number of days in the weekly working pattern and the type of day each one is (e.g. normal working day, weekend) from the day definitions.
- **Years** – the standard week for this year, any assumed year characteristics (any year diary upon which this one is based), the non-standard days that occur in the year (e.g. bank holidays) and the non-standard weeks in the year (e.g. dates where the diary is different or plant holidays).

### 11.2 Days

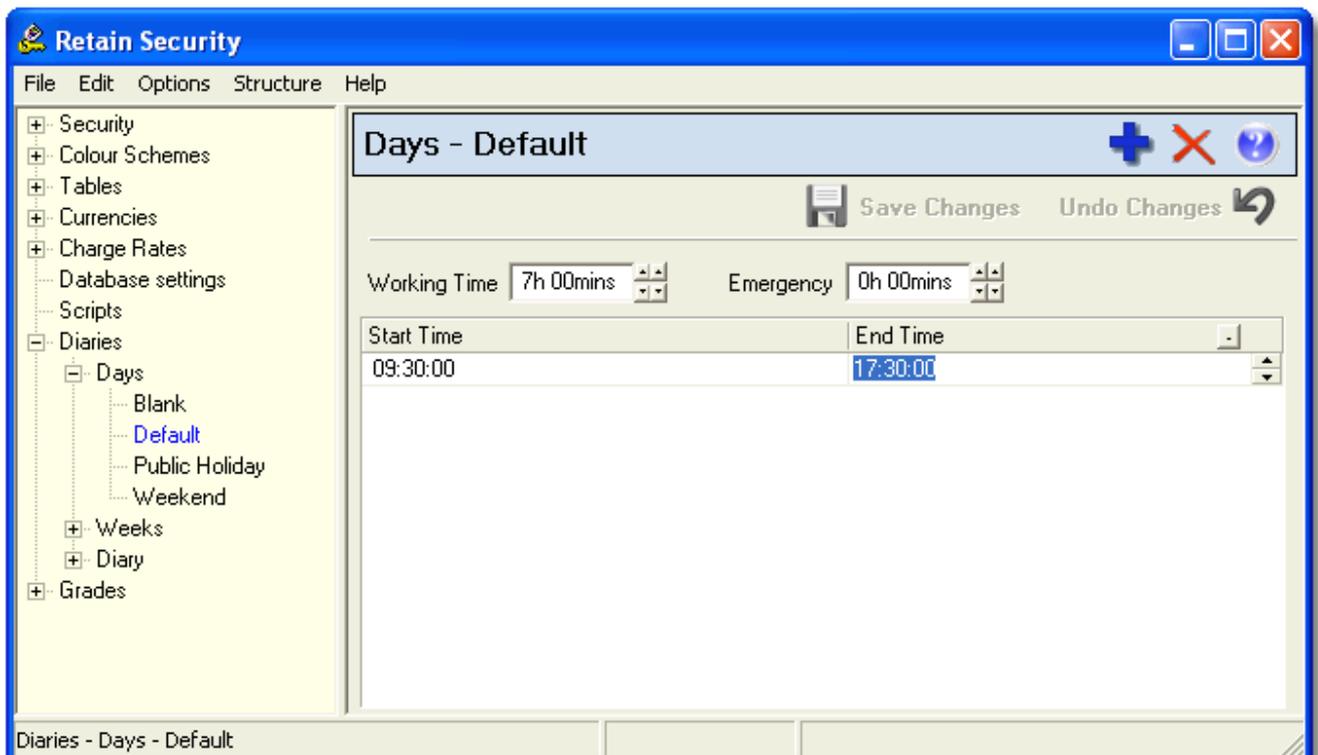
It is worth using different names for days, weeks and years in a set, otherwise you could have up to three items of the same name with no way to differentiate.

To create a new day:

- Right-click on the 'Days' and choose 'Add' or click on the 'Days' then click the  button.
- Enter a name for the new day and click 'OK'.

You can then set up the standards for that day.

To rename an item, right-click on the item and select 'Rename'. If you want to remove an item, right-click on the item and select 'Delete'. You will not be allowed to delete days that are used in a week.



- **Working time** – enter the standard working time either by typing in the numbers of hours and

minutes or clicking on the up and down arrows for hours and minutes respectively. It is easier to enter four digits e.g. 0830 rather than 830. If you position the cursor on the second digit, you can enter three digits e.g. 830.

- **Emergency** – enter the normal number of emergency hours you would expect a resource to work either by typing or using the buttons.
- **Start time** – type in the normal start time for work or use the up and down arrow keys to select the start time.
- **End time** – type in or use the arrow keys to enter the normal finish time for work.

To delete the start and end times, click on the  button to the right of end time.

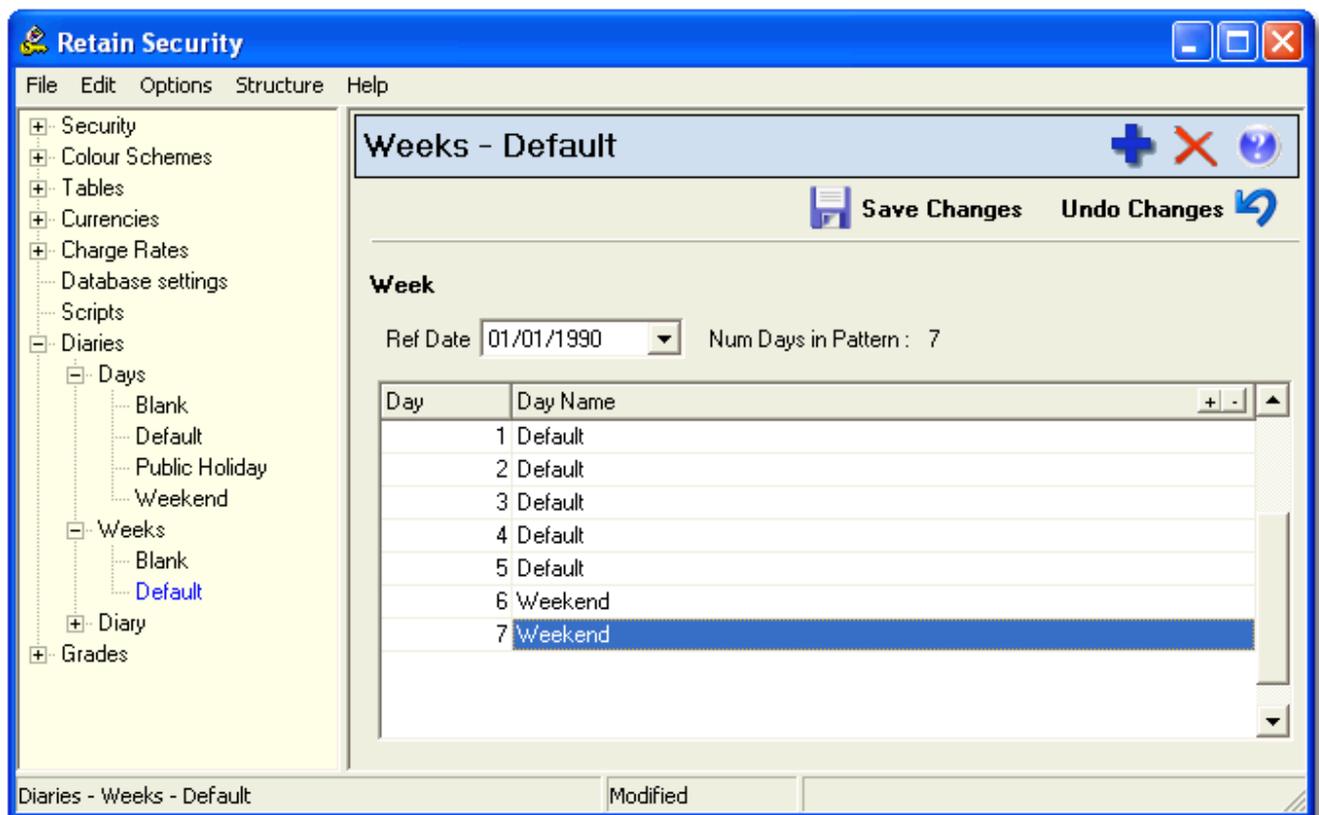
### 11.3 Weeks

To create a new week:

- Right-click on the 'Weeks' and choose 'Add' or click on the 'Weeks' then click the  button.
- Enter a name for the new week and click 'OK'.

You can then set up the standards for that week.

To rename an item, right-click on the item and select 'Rename'. If you want to remove an item, right-click on the item and select 'Delete'. You will not be allowed to delete weeks that are used in a diary.



- **Ref Date** – this sets the day number reference. 01/01/90 is Monday 1st January 1990, and means that day 1 is a Monday. Unless you have specific reason to change it, it is recommended that you leave the Ref Date set to 01/01/90. If you want to change it, either click on the date components and type in the values you want, or click on the drop-down and select the date.
- **Num Days in Pattern** – this is the number of days you specify for the working pattern of this diary. To add days click on the  button to the right of the day name title. To remove days click on the  button.

- *Day Name* – either click on the down arrow to reveal the drop-down box with the selection of days you can choose, or click in the box and type the first few characters of the day name.

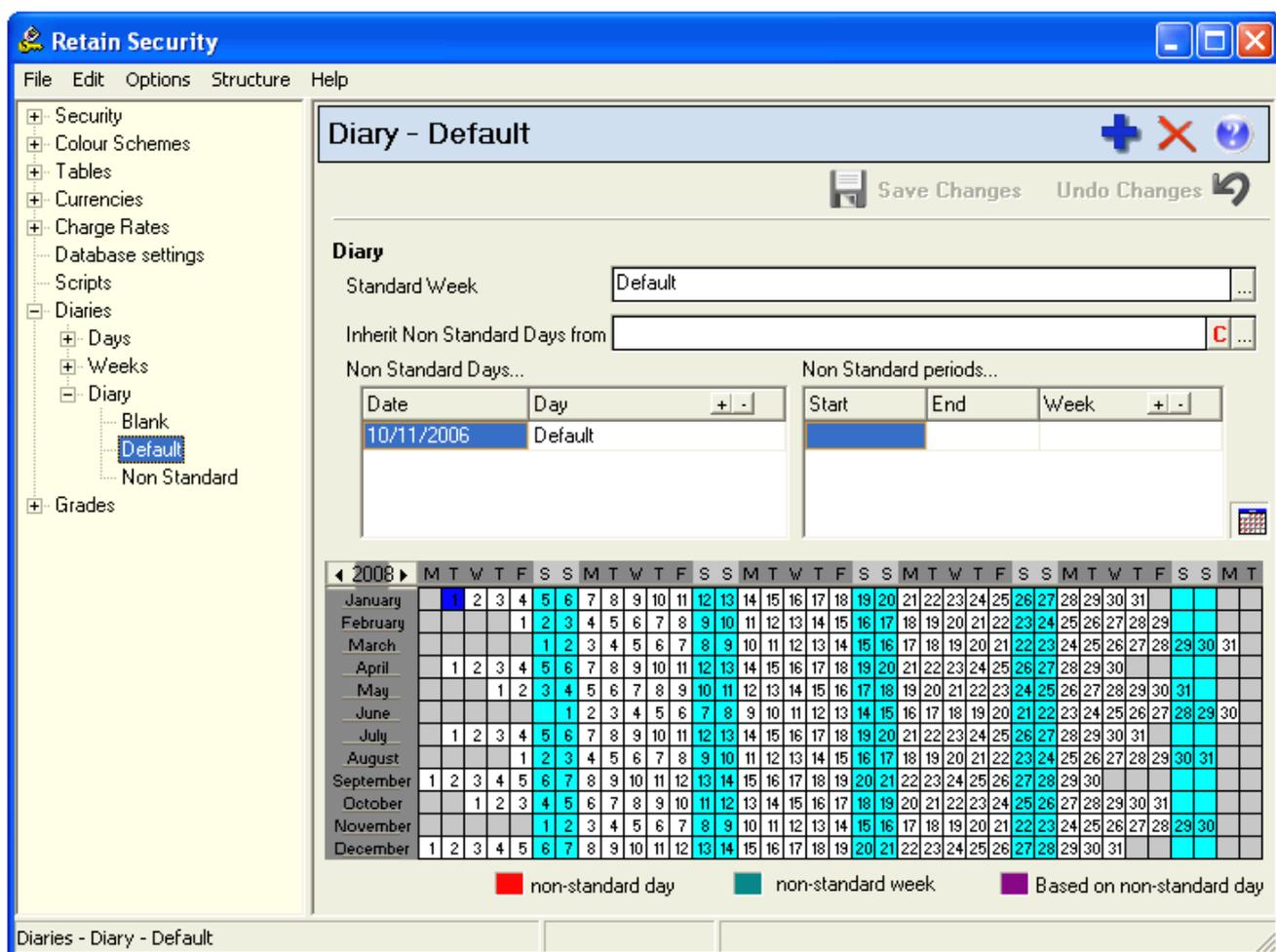
## 11.4 Diary

To create a new year diary:

- Right-click on the 'Diary' and choose 'Add' or click on the 'Diary' then click the  button.
- Enter a name for the new week and click 'OK'.

You can then set up the standards for that year.

To rename an item, right-click on the item and select 'Rename'. If you want to remove an item, right-click on the item and select 'Delete'. You will not be allowed to delete diaries that are in use.



- *Standard Week* – choose the standard week upon which the year diary is to be based by clicking on the  drop-down button and selecting the week from the list.
- *Inherit Non Standard Days from* – if you want the year to take on the characteristics of another (to which you will add the characteristics of this definition), click on the  drop-down button and selecting the year from the list. To clear the based on field, click on the  button.
  - ✔ You may want to define a base year with all the bank holidays in it upon which you will base all calendars which take account of bank holidays.
- *Non Standard Days* – to add a non-standard day, for example a bank holiday, click on the date field and either type in the date or click on the drop-down button and select the date from the calendar. Then click on the day field and the drop-down button and select the day type e.g. Bank Holiday.

To add a line to the non standard day list, click on the **+** button. To remove a line, select it and click on the **-** button. Non standard days will be marked in the display calendar in red.

- *Non Standard Periods* – to add a non-standard period, for example a plant shutdown, you need to define the start and end of the period which is to be specified. This can be either a single week or a number of consecutive weeks.

Click on the start field, then type in the date or click on the drop-down button and select the date from the calendar. Then click on the end field and either type in the date or click on the drop-down button and select the date from the calendar. This defines the non standard week period. Click on the week field and the drop-down button and select the week type.

To add a line to the non standard week list to define further periods, click on the **+** button. To remove a line, select it and click on the **-** button. Non standard weeks will be marked in the display calendar in green.

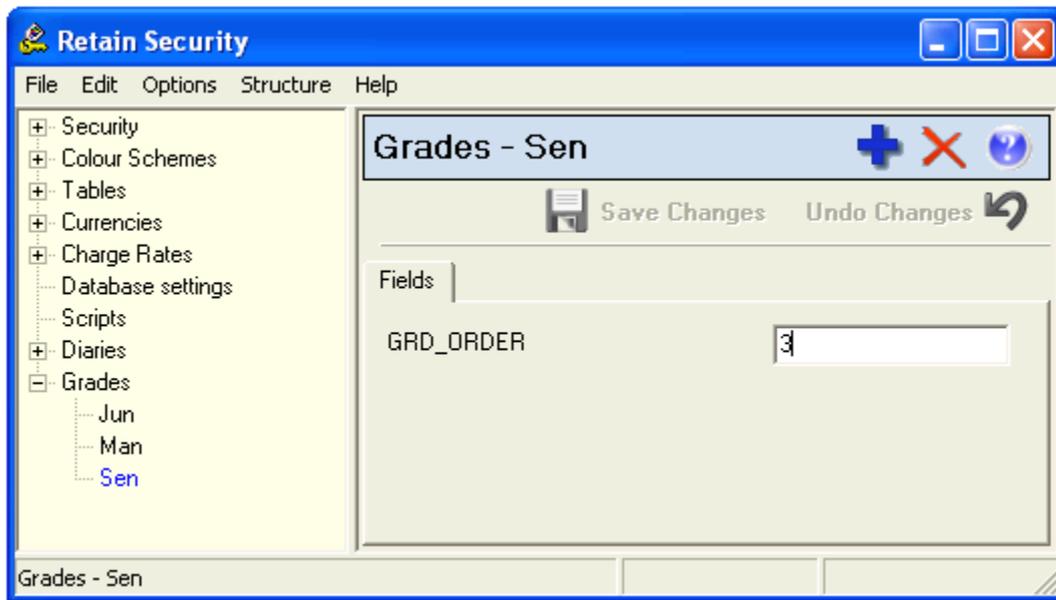
## 12 Grades

### 12.1 Grade options

Grades are used in Retain to describe what people's grades are, reflecting the public description of a person's seniority.

To add a grade:

- Right-click on 'Grades' and select add or click on 'Grades' then click the  button.
- Enter a name for the grade and click 'OK'.



The field ORDER is used to reflect the seniority of the grades. This relates to the calculated field 'Current Grade Order', which allows you to sort on it.

 Notes:

- You can sort grades in different ways. Right-click on 'Grades' and choose 'Group by'. Choose the sort field from the list. Choosing '[None]' will sort all grades alphabetically. Otherwise, grades will be sorted alphabetically within the groups chosen.

## 13 Appendix

### 13.1 Additional components

The components of the software available are:

#### Server

- Retain Server – server application that provides an interface to the database platform chosen.
- Retain Remote Server – manage several servers running across a network in a central location

#### Client

##### Core modules

- Retain – main resource planning application for viewing and manipulating resource and job allocations. It also has an internal reporting tool through which you can print wallcharts and calendars displayed on the screen, as well as writing and running simple reports.
- Retain Security – administration tool for defining user security, access rights, initial set-up of colour schemes, currencies, charge rates etc. and general management functions.

##### Optional modules

- Booking Request – provides a full request and approval system, including amendments, notification and what-if functions.
- Enterprise Reports – reporting module with full report designer and the capability both to design complex reports and to report across several databases.
- Retain Time - provides a time sheet system used for recording and managing time sheets.
- Retain Skills - captures and manages the skills within your organisation.
- Retain Importer - transfers or updates data from an external source into a Retain Enterprise database.
- Retain Notify – a companion module to booking requests for sending email notifications of changes in booking requests to resources and requesters.

## 14 Support

### 14.1 Support services

Support for Retain is available worldwide. This topic is linked to your support provider's information: [Support Service Provider](#)

**retain** nt nat na

USA: 1 877 819 8820 (toll free)  
UK: 0845 458 8660  
Australia: +61 8 8346 2333  
World: +44 20 7538 4774

USA fax: 1 928 563 5137  
Australia fax: +61 8 8346 2133  
World fax: +44 (0)845 458 8661

E-mail: [info@retaininternational.com](mailto:info@retaininternational.com)

Support: [support@retaininternational.com](mailto:support@retaininternational.com)

Address: 33 Beaufort Court  
Admirals Way  
London  
E14 9XL  
United Kingdom

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