

Sharpschedule - Activity Planning and Progress Tracking

Clayton Harbour

Sharpschedule - Activity Planning and Progress Tracking

by Clayton Harbour

Published 2003

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Executive Summary

[<http://www.svdpvictoria.com>]



Sharpschedule replaces an existing scheduling system at St. Vincent de Paul, Ozanam in Victoria BC. The initial tracking system provided information on community outings and activities and was designed to increase the frequency and quality of these outings. A change in need has now put focus on the in house activity as well as the outings. It was also desirable to create a more integrated solution, where client information, planned activities and actuals could be reconciled in the same place. Sharpschedule provides this unified recording system in the form of client, staff and schedule information capture screens, schedule administration (exception) screens and reports generated online or in pdf format.

Sharpschedule is designed with a phased approach. The first phase of the project will provide detailed scheduling information and reconciliation, as well as reporting. Database tables will be provided for capture in a number of other areas, mostly centered around client goals and planning, but data entry and reporting for these sub-systems will be implemented in future revisions. The business needs that sharpschedule will satisfy today are:

1. Staff Data Management: Tracking of staff contact information, and staff photos.
2. Client Data Management: Tracking of client contact information, client photos, medical information, client goals and comments on client progress.
3. Consolidation of existing scheduling tools: Replace current word and excel documents with a pdf schedule report that is generated from current "live" data.
4. Auditability: Provide an electronic tracking system to account for changes made in the schedule, both before an activity would be completed and after/ during the activity has been completed in the form of an exception report. Exceptions would occur if a client was scheduled to perform an activity and was unable to perform the activity at that point in time (i.e. was sick).
5. Increase Accessibility: Web interface allows client information to be easily accessible by all staff members.
6. Security: Integrate with current Windows NT domain security, provides lockout of administrative only pages to non-administers.

Future functionality will include:

1. Client Data Management: Tracking of client medical information, client goals and automation of client quarterly reports.
2. Security: Role based security to allow view privileges to certain data while locking down edit privileges.

Sharpschedule uses open technologies in an effort to reduce the cost of licensing to the Ozanam agency, with the exception of Windows XP Professional all components are freely available (please see Appendix A, *Tools* for details). Future goals will be to deploy the application using mono and Linux to push all components into the free/ open source realm.

Chapter 1. Overview

[<http://www.svdpvictoria.com>]



Abstract

Intended audience and use of this document.

Introduction

Abstract

This guide will help users of the scheduling program identify the tasks necessary to generate a daily schedule.

This document will provide a step by step overview of how manage the various data domains available in the sharpschedule system. It provides a detailed description of the data fields, required fields and input masks.

The guide will also cover the generation of scheduling reports.

Chapter 2. Client Management

[<http://www.svdpvictoria.com>]



Abstract

Client management screens are used to add, update and view client data and information. Various information about a client is tracked such as the name, birthdate and healthcare, contact information, comments (with dates) and photos.

Overview

Abstract

Overview of fields available on the client management screens, whether the fields are required and any the format that is expected for the field.

Client management screens provide access to the following fields:

Table 2.1. Client

Name	Description	Required	Input Mask
First Name	First name of the client	true	
Last Name	Last name of the client	true	
Birthdate	Date of birth for the client if known	NO	valid date (i.e. YYYY/MM/DD or DD/MM/YYYY)
Health Care Number	Health care number if known	YES	#####
New Photo	Photograph of the client	NO	
Effective Date	The date the client joined the program	YES	valid date (i.e. YYYY/MM/DD or DD/MM/YYYY)
Expiry Date	The date the client left the program	NO	

Table 2.2. Client Contact

Name	Description	Required	Input Mask
Address	The street address of the client	YES	
City	City the client lives in	YES	
Province	The province the client currently lives in	YES	
Postal Code	Canadian postal code	YES	A#A #A#
Phone 1	Primary phone number	YES	(###) ###-####
Phone 2	Secondary phone number	YES	(###) ###-####
Email	Email address	NO	[username]@[server-name]

Add

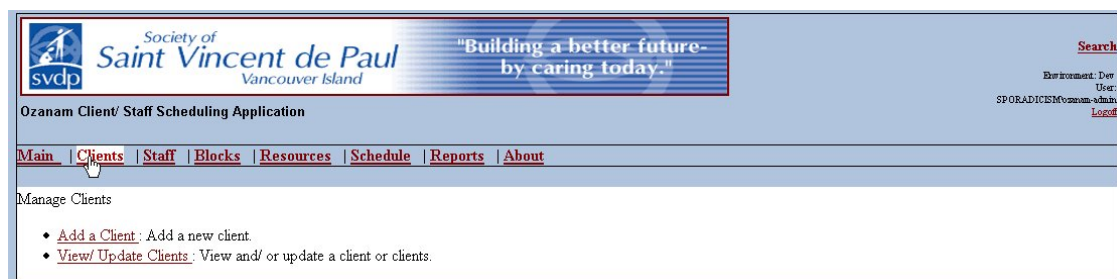
Abstract

Describes the steps to add a client.

To add a new client to the database the following steps must be performed (Figure 2.1, “Add client”):

1. Click on the Client tab.
2. Select the add link.
3. Enter the client information. Optionally expand the address section and enter the contact information.
4. Click on the add button on the bottom of the screen. If there are errors correct them and click add again.

Add a Client: Used to enter new client data.

Figure 2.1. Add client

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Ozanam Client/ Staff Scheduling Application

[Main](#) | [Clients](#) | [Staff](#) | [Blocks](#) | [Resources](#) | [Schedule](#) | [Reports](#) | [About](#)

Add a Client

Client Id: 0

First Name: Clayton

Last Name: Harbour

Birthdate: 02/08/1975 [Calendar](#)

Health care number: 123456789

New Photo: [Browse...](#)

Effective Date: [Calendar](#) You must enter a valid date format (i.e. yyyy/mm/dd)

Expiry Date: [Calendar](#)

[Show/ Hide Address](#)

[Add](#) [Cancel](#)

Popup Calendar Control - Moz...

August 1975

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

View

Abstract

Describes the steps to view a client.

To view a client you must select the client you are interested in from a list of possible targets. Selection of a client is made easier through menu sorting and pagination of client data.

We will first sort the client by name for this example and then locate the client we are interested in by their name (Figure 2.2, "View Client"):

1. Click on the Client tab.
2. Select the view/update link.
3. Click on the Last Name link to sort all clients by last name.
4. Click on the edit link to open the client for viewing/ editing.
5. Make the appropriate changes, optionally expand and edit the contact information and then click the update link to save the changes.

Figure 2.2. View Client



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Manage Clients

- [Add a Client](#) : Add a new client.
- [View/ Update Clients](#) : View and/ or update a client or clients.



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Edit	Client Id	First Name	Last Name
Edit	1	Clayton	Harbour
Edit	2	Clayton	Harbour
Edit	19	Clayton	Harbour
Edit	20	Clayton	Harbour
Edit	21	Clayton	Harbour
Edit	22	Clayton	Harbour
Edit	23	Clayton	Harbour
Edit	24	Clayton	Harbour
Edit	41	Clayton	Harbour
Edit	42	Clayton	Harbour

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Ozanam Client/ Staff Scheduling Application

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Edit	Client Id	First Name	Last Name
Edit	1914	semsem	semsem
Edit	1	Clayton	Harbour
Edit	2	Clayton	Harbour
Edit	19	Clayton	Harbour
Edit	20	Clayton	Harbour
Edit	21	Clayton	Harbour
Edit	22	Clayton	Harbour
Edit	23	Clayton	Harbour
Edit	24	Clayton	Harbour
Edit	41	Clayton	Harbour

1 2 3 4 5 6 7 8 9 10 ...

[Back](#)

Update

Abstract

Describes the steps to update a client.

To update a client you must select the client you are interested in from a list of possible targets. Selection of a client is made easier through menu sorting and pagination of client data.

We will first sort the client by name for this example and then locate the client we are interested in by their name (Figure 2.3, "Update Client"):

1. Click on the Client tab.
2. Select the view/update link.
3. Click on the Last Name link to sort all clients by last name.
4. Click on the edit link to open the client for viewing/ editing.
5. Make the appropriate changes, optionally expand and edit the contact information and then click the update link to save the changes.

Figure 2.3. Update Client



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Manage Clients

- [Add a Client](#) : Add a new client.
- [View/ Update Clients](#) : View and/ or update a client or clients.



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Edit	Client Id	First Name	Last Name
Edit	1	Clayton	Harbour
Edit	2	Clayton	Harbour
Edit	19	Clayton	Harbour
Edit	20	Clayton	Harbour
Edit	21	Clayton	Harbour
Edit	22	Clayton	Harbour
Edit	23	Clayton	Harbour
Edit	24	Clayton	Harbour
Edit	41	Clayton	Harbour
Edit	42	Clayton	Harbour

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Edit	Client Id	First Name	Last Name
Edit	1914	semsem	semsem
Edit	1	Clayton	Harbour
Edit	2	Clayton	Harbour
Edit	19	Clayton	Harbour
Edit	20	Clayton	Harbour
Edit	21	Clayton	Harbour
Edit	22	Clayton	Harbour
Edit	23	Clayton	Harbour
Edit	24	Clayton	Harbour
Edit	41	Clayton	Harbour

1 2 3 4 5 6 7 8 9 10 ...

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Update a Client [Pdf](#)

Client Id: 1914

First Name:

Last Name:

Birthdate: [Calendar](#)

Health care number:

New Photo:

Effective Date: [Calendar](#)

Expiry Date: [Calendar](#)

[Show/ Hide Address](#)





Chapter 3. Staff Management

[<http://www.svdpvictoria.com>]



Abstract

Overview of components that are tracked for staff members, such as their contact information and photos and how these are updated.

Overview

Abstract

Overview of fields available on the staff management screens, whether the fields are required and any the format that is expected for the field.

Available staff fields are:

Table 3.1. Staff

Name	Description	Required	Input Mask
First Name	First name of the client	YES	
Last Name	Last name of the client	YES	
Birthdate	Date of birth for the client if known	NO	valid date (i.e. YYYY/MM/DD or DD/MM/YYYY)
Health Care Number	Health care number if known	YES	#####
New Photo	Photograph of the client	NO	
Effective Date	The date the client joined the program	YES	valid date (i.e. YYYY/MM/DD or DD/MM/YYYY)
Expiry Date	The date the client left the program	NO	

Table 3.2. Staff Contact

Name	Description	Required	Input Mask
Address	The street address of the client	YES	
City	City the client lives in	YES	
Province	The province the client currently lives in	YES	
Postal Code	Canadian postal code	YES	A#A #A#
Phone 1	Primary phone number	YES	(###) ###-####
Phone 2	Secondary phone number	YES	(###) ###-####
Email	Email address	NO	[username]@[server-name]

Add

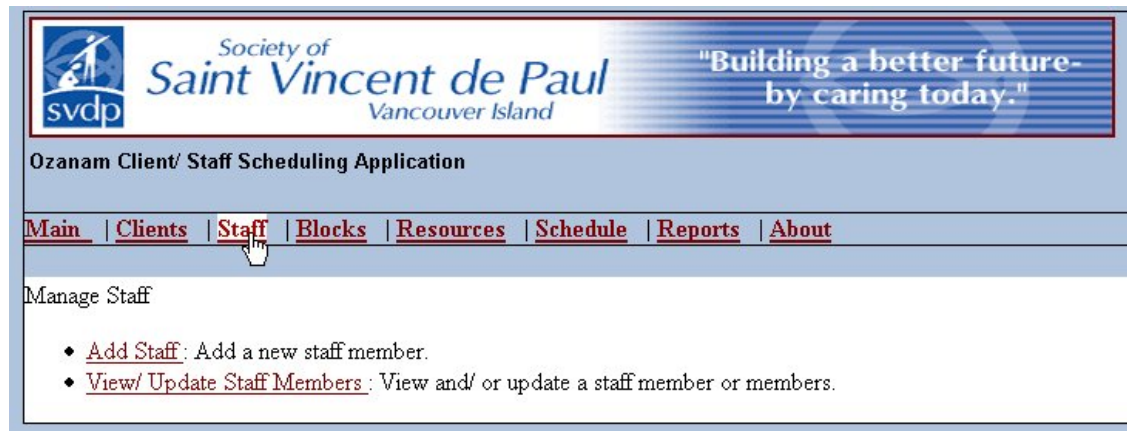
Abstract


Describes the steps to add a new staff member.

Add a Staff Member: Used to enter new staff data. The general steps to add a staff member are (Figure 3.1, "Add Staff"):

1. Click on the Staff tab.
2. Select the add link.
3. Enter the client information. Optionally expand the address section and enter the contact information.
4. Click on the add button on the bottom of the screen. If there are errors correct them and click add again.

Figure 3.1. Add Staff





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Manage Staff

- [Add Staff](#): Add a new staff member.
- [View/Update Staff Members](#): View and/ or update a staff member or members.



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Add a Staff Member

Staff Id: 0
First Name:
Last Name:
New Photo: [Browse...](#)
Effective Date: [Calendar](#)
Expiry Date: [Calendar](#)

[Show/Hide Address](#)
Address Id:
Address:
City:
Province:
Postal Code:
Phone 1:
Phone 2:

SOURCEFORGE
net

View

Abstract

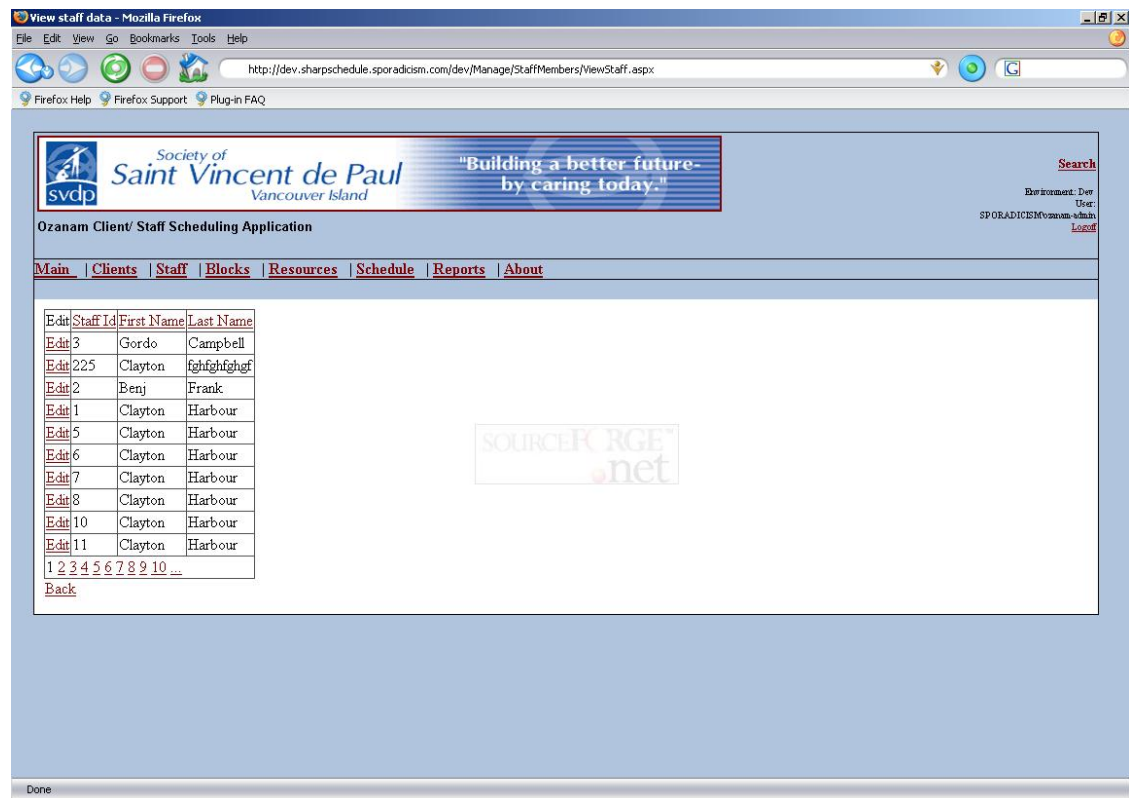
Describes the steps to view a staff member.

View Staff Members: In order to view a staff member you must first be able to locate the staff member.

This is currently accomplished by viewing a list of staff members and selecting the staff from that list. The steps to view a staff member are (Figure 3.2, "View Staff"):

1. Click on the Staff tab.
2. Select the view/ update link.
3. Select the staff member from the list, optionally sort or select a different "page" of data.
4. Click on the edit button to view the staff member.

Figure 3.2. View Staff



Update

Abstract

Describes the steps to update a staff member.

Update Staff Members: In order to update a staff member you must first be able to locate the staff that you wish to update. This is currently accomplished by viewing a list of staff members and selecting the staff to update from that list. The steps to update a staff member are (Figure 3.3, "Update Staff"):

1. Click on the Staff tab.
2. Select the view/ update link.
3. Select the staff member from the list, optionally sort or select a different "page" of data.
4. Click on the edit button to view the staff member.
5. Change the appropriate data.
6. Click update to commit the changes.

Figure 3.3. Update Staff

Update a Staff Member - Mozilla Firefox

http://dev.sharpschedule.sporadicism.com/dev/Manage/StaffMembers/UpdateStaff.aspx?StaffId=3

Firefox Help Firefox Support Plug-in FAQ

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Update a Staff Member

Staff Id: 3

First Name: Gordo

Last Name: Campbell

New Photo: [Browse...](#)

Effective Date: 2004/04/03 [Calendar](#)

Expiry Date: [Calendar](#)

[Show/ Hide Address](#)

Address Id: 0

Address:

City:

Province:

Postal Code:

Phone 1:

Phone 2:

Email:

[Update](#) [Cancel](#)

Done

Chapter 4. Resource Management

[<http://www.svdpvictoria.com>]



Abstract

Resources are physical locations that contain activities, such as outing sites, in house rooms, etc. These consist of physical places that are used to satisfy the outing or in house activity, examples include the crafts room at Ozanam, the swimming pool and soup kitchen. These are further categorized into two distinct "super groups", which help to define the need or goal that the activity is satisfying.

Overview

Abstract

Resource entry is currently directed through Resource page, found by clicking on the Resource tab item.

The following fields are available for a resource:

Table 4.1. Resource

Name	Description	Required	Input Mask
Description	Description of the resource	YES	
Contact	Name of the contact at the resource location.	YES	
Placement Type	Type of place that is being visited.	YES	lookup
Placement Category	Category of goal that resource satisfies.	YES	lookup

Add

Abstract

Describes the steps used to add a resource.

Add a Resource: To add a resource perform the following steps (Figure 4.1, “Add Resource”):

1. Click on the Resource tab.
2. Select the add Resource link.
3. Enter the appropriate data.
4. Click on the add link.

Figure 4.1. Add Resource

Add a new Resource - Mozilla Firefox

File Edit View Go Bookmarks Tools Help

http://dev.sharpschedule.sporadicism.com/dev/Manage/Resources/AddResource.aspx

Firefox Help Firefox Support Plug-in FAQ

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Add a Resource

Resource Id:

Description:

Contact:

Placement Category:

Placement Type:

[Add](#) [Cancel](#)

Search

Environment: Dev
User: SPORADICSM\ozanam-admin
[Logout](#)

SOURCE RGE net

Done

View

Abstract

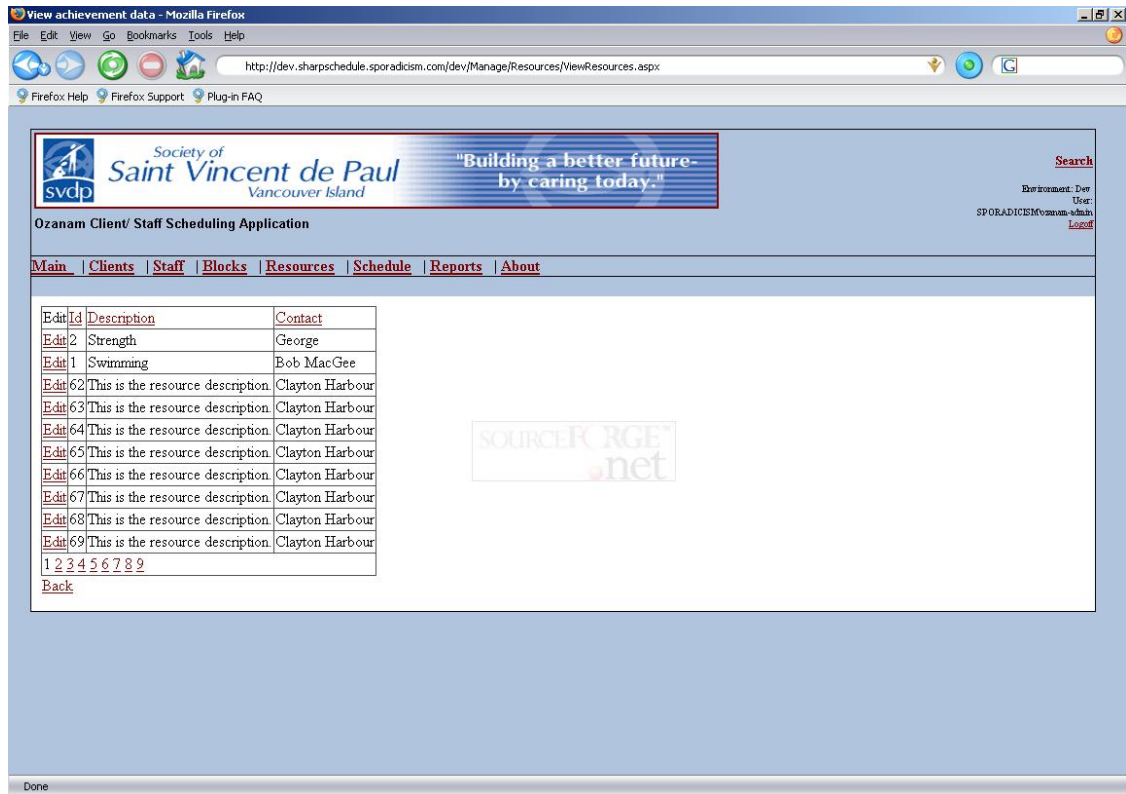
Describes the steps to view a resource.

View Resource: In order to view a resource you must first be able to locate it. This is currently accomplished by viewing a list of resources and then selecting the resource from that list (Figure 4.2, “View Resource”):

1. Click on the Resource tab.

2. Select the view/update resource link.
3. Select the resource you wish to view from the list.
4. Click on the edit link.

Figure 4.2. View Resource



Update

Abstract

Describes the steps to update a resource.

Update Resource: In order to update a resource you must first be able to locate it. This is currently accomplished by viewing a list of resources and then selecting the resource that you wish to update from that list (Figure 4.3, "Update Resource"):

1. Click on the Resource tab.
2. Select the view/update resource link.
3. Select the appropriate resource from the list.

4. Click on the edit link.
5. Make the appropriate data changes to the resource.
6. Click on the update link to commit the changes.

Figure 4.3. Update Resource

Update a Resource - Mozilla Firefox

File Edit View Go Bookmarks Tools Help

http://dev.sharpschedule.sporadicism.com/dev/Manage/Resources/UpdateResource.aspx?ResourceId=1

Firefox Help Firefox Support Plug-in FAQ

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[Search](#)

Environment: Dev
User: SPORADICISM\mason-admin
[Logout](#)

Ozanam Client/ Staff Scheduling Application

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Update a Resource

Resource Id: 1

Description:

Contact:

Placement Category:

Placement Type:

[Update](#) [Cancel](#)

SOURCEFORGE.net

Done

Chapter 5. Placement Management

[<http://www.svdpvictoria.com>]



Abstract

Overview of the concrete purpose of the placement; this is the function the client will be performing. This is usually a Community Outing however it can encompass things such as a job site visit, work or volunteer experience or employment.

Overview

Abstract

Overview of fields available on the placement type screens, whether the fields are required and any the format that is expected for the field.

The following fields are available:

Table 5.1. Placement Type

Name	Description	Required	Input Mask
Name	Common name for the placement type.	YES	
Description	Short description of the placement type.	YES	

Add

Abstract

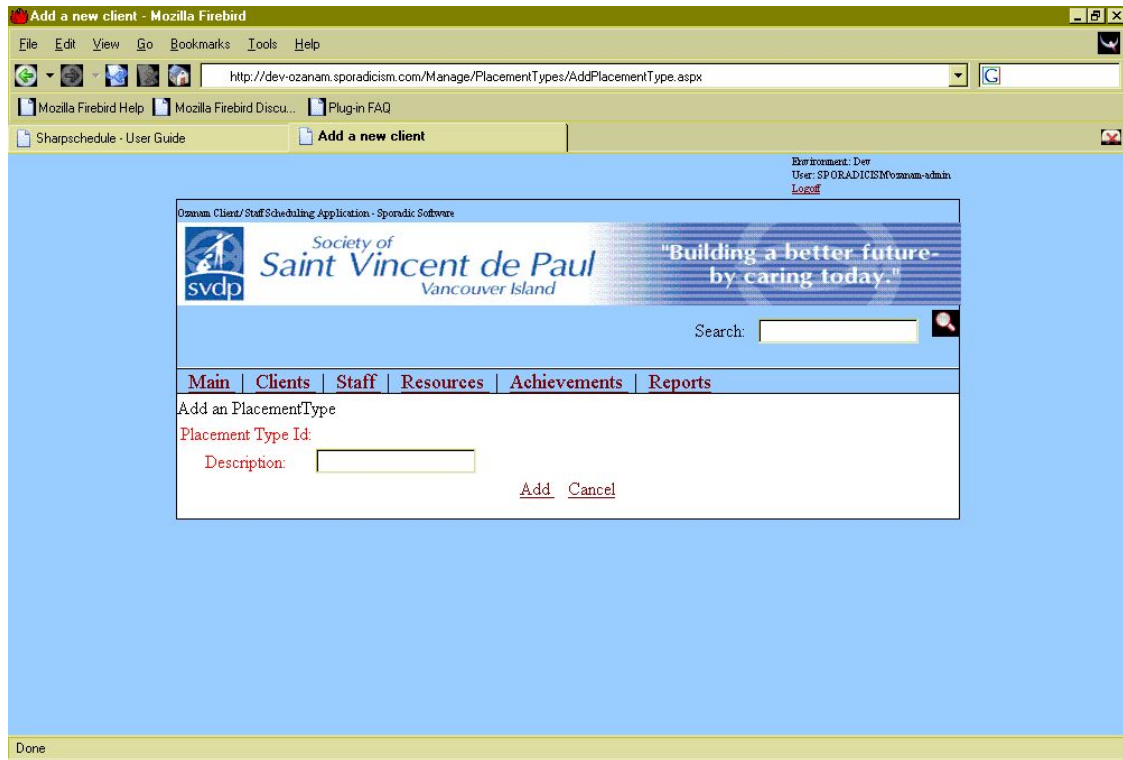
Describes the steps to add a placement type.

Add Placement Type: The following steps will add a new placement type (Figure 5.1, “Add Placement Type”):

1. Click on the Resource tab.

2. Select the add placement type link.
3. Enter the appropriate fields.
4. Click on the add link.

Figure 5.1. Add Placement Type



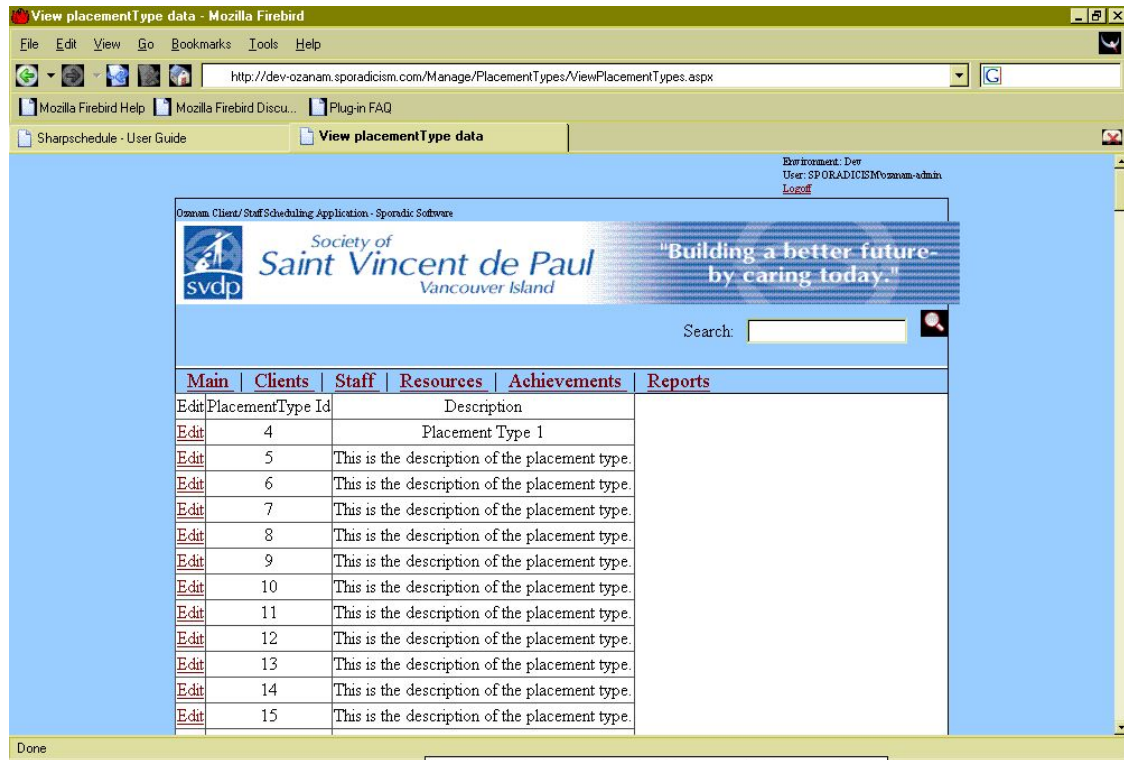
View

Abstract

Describes the steps to view a placement type.

View Placement Type: In order to view a placement type you must first be able to locate it. This is currently accomplished by viewing a list of placement types and then selecting the one you are interested in from that list (Figure 5.2, “View Placement Type”):

1. Click on the Resource tab.
2. Select the view/update placement type link.
3. Select the placement type you wish to view from the list.
4. Click on the edit link.

Figure 5.2. View Placement Type

Update

Abstract

Describes the steps to update a placement type.

Update Placement Type: In order to update a placement type you must first be able to locate it. This is currently accomplished by viewing a list of placement types and then selecting the one you are interested in from that list (Figure 5.2, “View Placement Type”):

1. Click on the Resource tab.
2. Select the view/update placement type link.
3. Select the placement type you wish to update from the list by clicking the edit button.
4. Edit the placement type.
5. Click the update button.

Figure 5.3. Update Placement Type

Update a client - Mozilla Firebird

File Edit View Go Bookmarks Tools Help


http://dev-ozanam.sporadicism.com/Manage/PlacementTypes/UpdatePlacementType.aspx?PlacementTypeId=5

Mozilla Firebird Help Mozilla Firebird Discu... Plug-in FAQ

Sharpschedule - User Guide Update a client

Environment: Dev
User: SPORADICISM\ozanam-admin
[Logout](#)

Ozanam Client/Staff Scheduling Application - Sporadic Software

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Search:

[Main](#) | [Clients](#) | [Staff](#) | [Resources](#) | [Achievements](#) | [Reports](#)

Update a Placement Type

Placement Type Id: 5

Description:

[Update](#) [Cancel](#)

Done

Chapter 6. Placement Category Management

[<http://www.svdpvictoria.com>]



Abstract

Overview of the underlying "soft return" on the outing and provides a closer relation to client goals and sponsor expectations. Items in this field can consist of exercise, education, nature appreciation, etc.

Overview

Abstract

Overview of fields available on the placement category management screens, whether the fields are required and any the format that is expected for the field.

Placement Category entry is currently directed through Resource page, found by clicking on the Resource tab.

The following fields are available:

Table 6.1. Placement Category

Name	Description	Required	Input Mask
Name	Common name for the placement category.	YES	
Description	Short description of the placement category.	YES	

Add

Abstract

Describes the steps to add a placement category.

Add a Placement Category: Used to enter new placement category data (Figure 6.1, “Add Placement Category”):

1. Click on the Resource tab.
2. Select the add placement category link.
3. Enter the appropriate data.
4. Click the add button.

Figure 6.1. Add Placement Category

The screenshot shows the 'Add an Placement Category' form within the 'Ozanam Client/ Staff Scheduling Application'. The header features the Society of Saint Vincent de Paul logo and the tagline 'Building a better future- by caring today.' The navigation menu includes links for Main, Clients, Staff, Blocks, Resources, Schedule, Reports, and About. The form itself has three input fields: 'Placement Category Id', 'Name', and 'Description'. Below these fields are 'Add' and 'Cancel' buttons. A 'Search' button is located in the top right corner. The user information in the top right corner indicates the user is 'SPORADICEM/ozanam-admin' with the role 'User'.

View

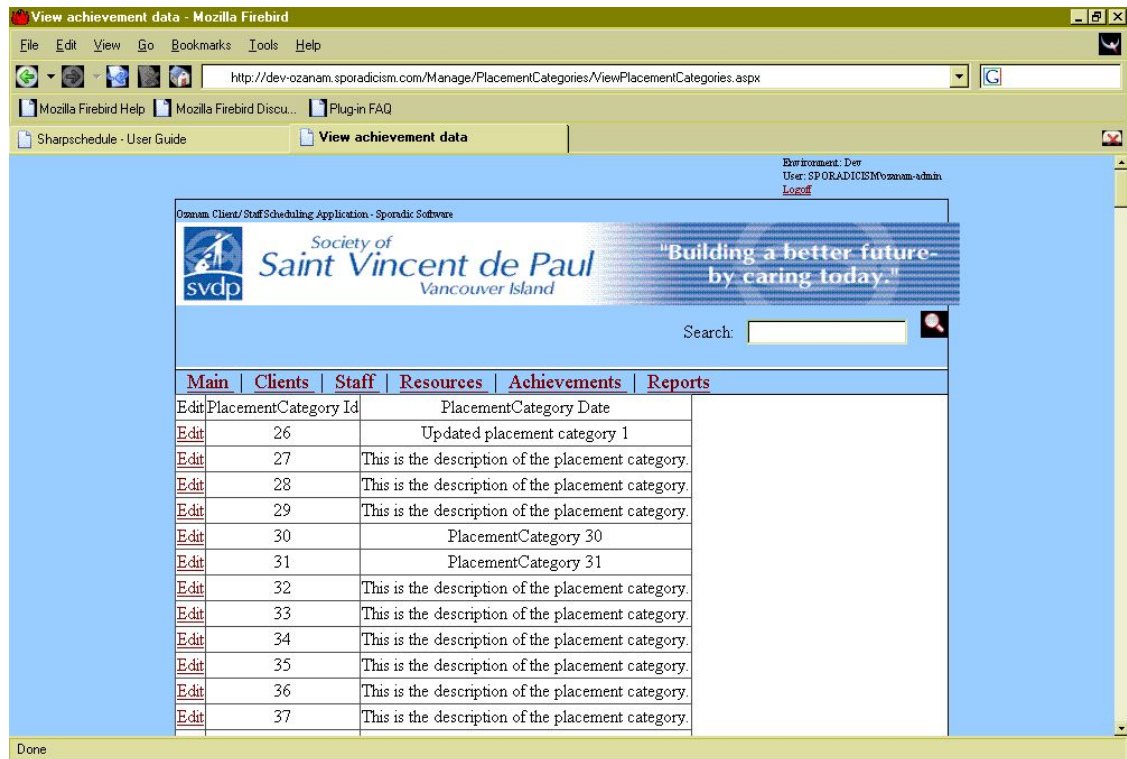
Abstract

Steps to view a placement category.

View: In order to view a placement category you must first be able to identify it. This is currently accomplished by viewing a list of placement categories and selecting the category that you wish to update from that list (Figure 6.2, “View Placement Category”):

1. Click on the Resource tab.
2. Select the view/update placement category link.
3. Select the placement category you wish to update from the list by clicking the edit button.
4. Edit the placement category.
5. Click the update button.

Figure 6.2. View Placement Category



View

Abstract

Steps to update a placement category.

Figure 6.3. Update Placement Category

Placement Category Management

Update a placement category - Mozilla Firebird

File Edit View Go Bookmarks Tools Help


http://dev-ozanam.sporadicism.com/Manage/PlacementCategories/UpdatePlacementCategory.aspx?PlacementCategoryId=30

Mozilla Firebird Help Mozilla Firebird Discu... Plug-in FAQ

Sharpschedule - User Guide Update a placement category

Environment: Dev
User: SPORADICISM\ozanam-admin
[Logout](#)

Ozanam Client/Staff Scheduling Application - Sporadic Software

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Update an Placement Category

Placement Category Id: 30

Description:

[Update](#) [Cancel](#)

Done

Chapter 7. Schedule Management

[<http://www.svdpvictoria.com>]



Abstract

Manage schedule data

Overview

Abstract

Overview of fields available on the schedule management screens, whether the fields are required and any the format that is expected for the filed.

Schedule generation is currently accessed through the Schedule tab.

The following fields are available:

Table 7.1. Schedule

Name	Description	Required	Input Mask
Effective Date	Date that the scheduled event begins on.	YES	valid date (i.e. YYYY/MM/DD or DD/MM/YYYY)
Expiry Date	Date that the scheduled event ends on.	NO	valid date (i.e. YYYY/MM/DD or DD/MM/YYYY)
Plans	Plan that is associated with this scheduled event.	YES	lookup
Blocks	Time block that the scheduled event occurs in.	YES	lookup
Repeat Type	Number of times per week that the scheduled event repeats.	YES	lookup

TODO: Enter add, view and update sections.

Chapter 8. Schedule Exception Management

[<http://www.svdpvictoria.com>]



Abstract

Manage schedule exception data

Overview

Abstract

Overview of fields available on the schedule exception management screens, whether the fields are required and any the format that is expected for the field.

The following fields are available:

Table 8.1. Schedule Exception

Name	Description	Required	Input Mask
Effective Date	Date that the scheduled event begins on.	YES	valid date (i.e. YYYY/MM/DD or DD/MM/YYYY)
Expiry Date	Date that the scheduled event ends on.	NO	valid date (i.e. YYYY/MM/DD or DD/MM/YYYY)
Plans	Plan that is associated with this scheduled event.	YES	lookup
Blocks	Time block that the scheduled event occurs in.	YES	lookup
Repeat Type	Number of times per week that the scheduled event repeats.	YES	lookup

TODO: Do add, view and update sections.

Chapter 9. Repeat Type Management

[<http://www.svdpvictoria.com>]



Abstract

Manage schedule data

Overview

Abstract

Overview of fields available on the repeat type management screens, whether the fields are required and any the format that is expected for the field.

The following fields are available:

Table 9.1. Repeat Type

Name	Description	Required	Input Mask
Name	Name of the repeat type.	YES	
Description	Short description of the repeat type.	YES	

TODO: Do add, view and update sections.

Chapter 10. Plan Management

[<http://www.svdpvictoria.com>]



Abstract

Manage schedule data

Overview

Abstract

Overview of fields available on the plan management screens, whether the fields are required and any the format that is expected for the field.

The following fields are available:

Table 10.1. Plans

Name	Description	Required	Input Mask
Name	Name of the repeat type.	YES	
Description	Short description of the repeat type.	YES	
Placement Type	Type of activity that will be performed.	YES	lookup
Clients	List of clients that will participate in the activity.	YES	lookup
Staff	List of staff members that will supervise the activity.	YES	lookup

TODO: Do add, view and update sections.

Appendix A. Tools

Abstract

Overview of tools that were used on the sharpschedule project.

The following tools are used on the sharpschedule system:

1. NAnt [<http://nant.sourceforge.net>]: Build automation.
2. NAntContrib [<http://nantcontrib.sourceforge.net>]: Build automation.
3. Log4net [<http://logging.apache.org/log4net>]: Logging.
4. NUnit [<http://nunit.org>]: Unit testing framework.
5. NUnitAsp [<http://nunitasp.sourceforge.net>]: Unit testing framework for asp pages.
6. Gentle .Net [<http://www.mertner.com/confluence/homepage.action>]: Persistence framework with configurable database targets.
7. Mono [<http://mono-project.com/about/index.html>]: .net framework for Linux/ Win32.
8. MS.Net Framework: .net framework for Win32. [<http://asp.net>]
9. DbDesigner [<http://www.fabforce.net/dbdesigner4/>]: MySql database modelling.
10. MySql [<http://www.mysql.com/products/mysql/>]: Primary database target.
11. MySql Admin [<http://www.mysql.com/products/administrator/>]: Database administration tool.
12. MySql Control Center [<http://www.mysql.com/products/mysqlcc/>]: Database Client tool.
13. Apache FOP [<http://xml.apache.org/fop/>]: Generation of pdf reports and user documentation.
14. MSDE [<http://www.microsoft.com/sql/msde/default.asp>]: Alternate database...not updated recently :-)