Self-Scheduling

User Guide

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Author: Tim Owen

Contents

Introduction

Not all jobs require full workflow scheduling (e.g. high volume tax jobs), but these jobs must still be planned and managed, especially in busy seasons.

Star's Self-Scheduling functionality enables relevant jobs to be flagged as available for Self-Scheduling. Staff are then responsible for the management of their own scheduled work.

- Staff are assigned to Pools, and work then allocated either to individual Staff members or to Staff Types in a Pool.
- Using the My Scheduled Work module - part of the StarPM suite of applications - Staff can manage schedules of the work already allocated to them, and update its status; allocate Pool work to themselves; return Pool work to the Pool if they cannot complete it for any reason.
- Self-Scheduling enables firm-level feedback from Staff to Planners and Administrators, and vice-versa.
- With fast-track Mini-Budgets, Staff requirements and target dates can be set and Schedules and Bookings automatically created in year one of a Job, with automation optimising job and schedule maintenance in subsequent years.
- Job Rollover can auto-generate Job, Budget and Scheduling data, with no need for manual maintenance.
- Administrators and planners have oversight of all Bookings in the system, using dynamic, editable Staff and Schedule Wallcharts in StarPM: Planners Wallcharts, and Review & Revise Wallcharts in Star Scheduling.

Prerequisites

Access to various functions within Self-Scheduling is dependent upon user permissions, which are defined in Star PDM.

If you do not see a particular menu option or screen as described in this document, then that is probably because you do not have the required user permission(s).

In addition, this document assumes that instances of each of the following entities have been created in Star PDM:

- Staff.
- Staff Privileges (Privilege Groups).
- Clients.
- Jobs.

Replace Terms

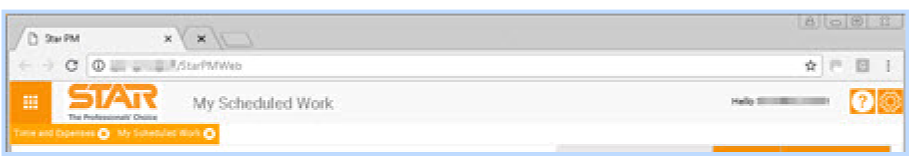
Many of the standard terms used throughout any 'vanilla' installation of StarPM can be replaced by synonyms. This is useful, for instance, when Star terminology does not reflect the standard lexicon of your organisation. Star refers to such synonyms as Replace Terms.

Replace Terms are defined in Star Practice Data Manager, in Firm Details.

This Help manual uses standard terms throughout.

If your organisation has defined any Replace Terms in Star, you can record them for future reference against the relevant Standard Terms in the Table of Replace Terms included at the end of this document.

In StarPM, each open module is represented by a tab in a tab row beneath the HTML Title header.



These open application tabs can be set either to be of fixed display, or to be hidden automatically when not in use. Fixed display prevents vertical interface shifts whenever the user moves their cursor over the header area, thus invoking the tabs' display.

The auto-hide behaviour is controlled by a setting, LauncherAutohide, in Star database table tblPersonalSettings.

To enable auto-hide, LauncherAutohide must be set to 1. The default value is 0 (auto-hide disabled).

Pooling and Mini-Budgets

Pooling allows Staff and work to be allocated to Pools, in order that Staff allocated to those Pools can pick work from the Pool to carry out.

There can be any number of Pools, and individual Staff members can be allocated to multiple Pools.

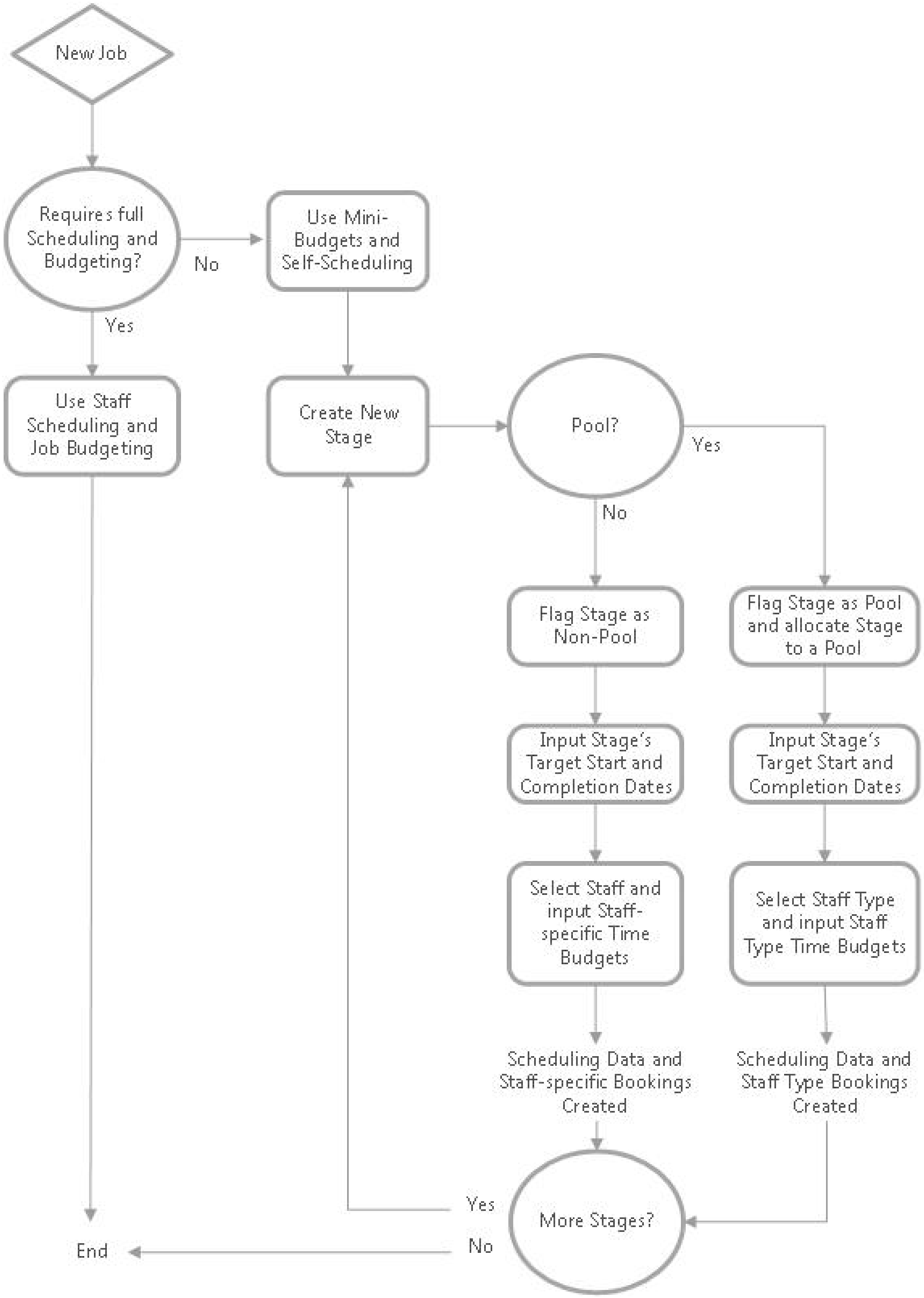
You can allocate as much work to a Pool as is necessary, and as much of that work can be allocated to any particular Staff member or Staff Type as is necessary.

Work for Self-Scheduling Jobs is allocated to Pools via Mini-Budgets, which are comprised of one or more lines for unique combinations of Stage and Staff Type. (There can be only one instance of any given Staff member assigned to a Stage, but any number of instances of a Staff Type.)

Mini-Budgets must be added to a Self-Scheduling Job before work for that Job can be assigned to Pools.

Stage, Job and Staff Pool maintenance are separate tasks, but all are undertaken in Star PDM.

Process Flow for New Jobs



Create Jobs for Mini-Budgets

In Job records, if a Job has not been set up for Mini-Budgets, then the Mini-Budget and Type tabs are inactive (read-only).

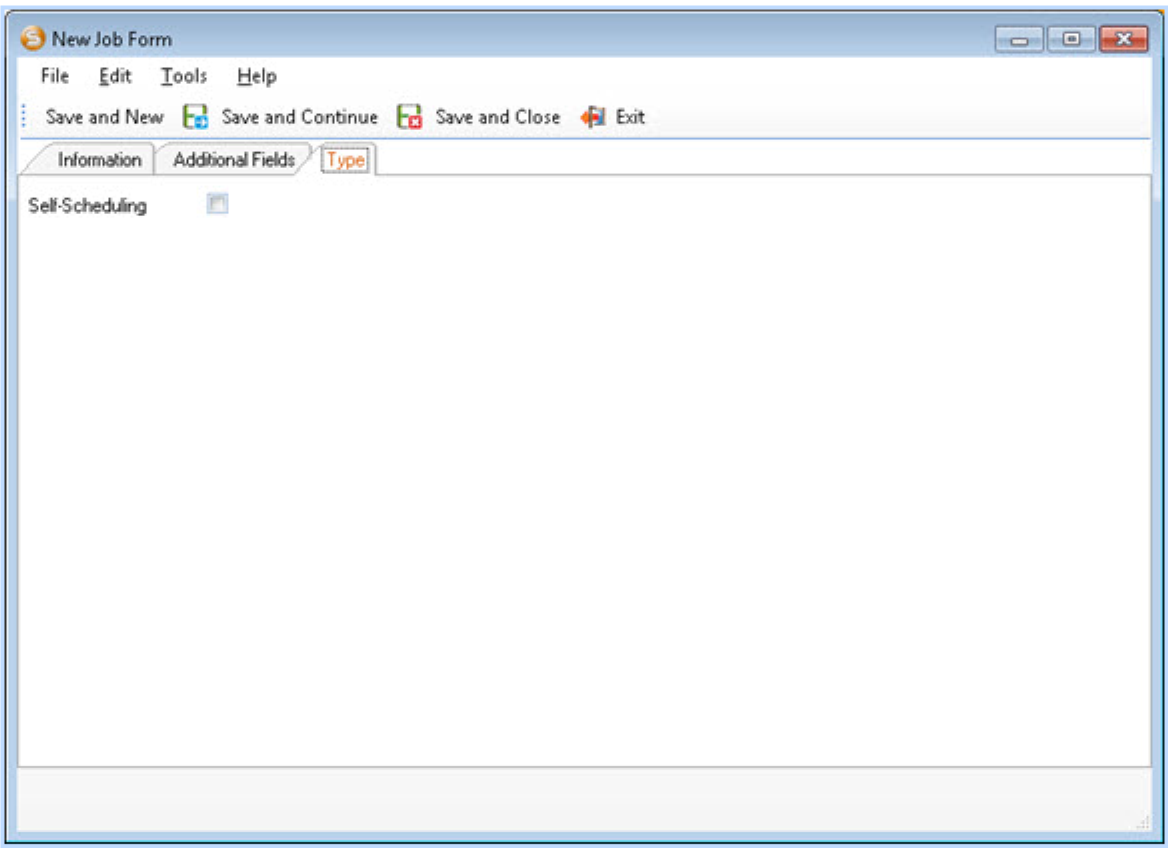
Mini-Budgets must be enabled on the relevant Job records when they are created: they cannot be retrospectively enabled on existing Job records. Likewise, enabling Mini-Budgets disables the option to create a standard Budget for the Job.

Enable Mini-Budgets on a New Job

This functionality must first be enabled in Star PDM Custom Forms Management.

To create a Job with Mini-Budgets enabled:

1. Open the Client record in Star PDM.
2. On the Jobs tab, click **Add**.
3. In the New Job Form, select the **Type** tab.



4. Select the **Self-Scheduling** checkbox.

   Once the new Job form is saved with **Self-Scheduling** selected, the option to create a standard Budget for the Job is disabled. This setting cannot then be reversed.

5. Complete the remaining fields to create the Job.
6. When you have finished, click **Save and Close**.

You can click **Save and Continue** at any time to save your changes while keeping the New Job Form open.

On clicking **Save and Close** you are returned to the Client record, where the new Job will be listed.

If you check the Job record (see below), you will see that the read-only checkbox on the **Type** tab is now selected.

Create a Mini-Budget

Mini-Budgets can be created with multiple budget lines for Pool work, and there may be multiple budget lines for each Stage and/or Staff Type in the Mini-Budget tab on the Job record.

For non-Pool budget lines, a given Staff member can be assigned to only one budget line for each Stage.

Add budget lines in the order in which Stages should be actioned.

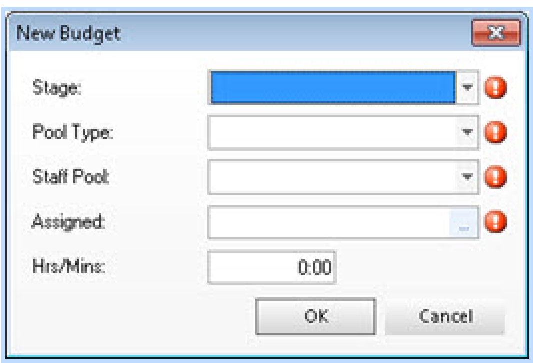
To add a budget line to the Mini-Budget on the Job record:

1. Open the Job Record in Star PDM.

   Optionally, select the **Type** tab, and check that the read-only **Self-Scheduling** checkbox is selected. If it isn't, Mini-Budgets cannot be used on the Job.

2. Select the **Mini-Budget** tab.
3. Click **Add**.

   This displays the New Budget window.



4. Enter the budget details.

   Mandatory selections are indicated by a warning icon

   - **Stage** - Select the appropriate Job Stage for the Mini-Budget .
   - **Pool Type** -

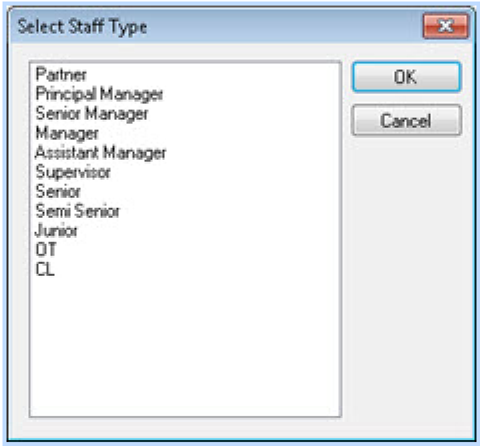
     If this work is to go to a Staff Pool, select **Pool**.

     If this work is intended for assignment to an individual Staff member or Staff Type, select **Non-Pool**.
   - **Staff Pool** -

     If you selected **Pool** above, select the Staff Pool to which this work will be assigned.

     If you selected **Non-Pool**, accept the default of **<N/A>**.)
   - **Assigned** -

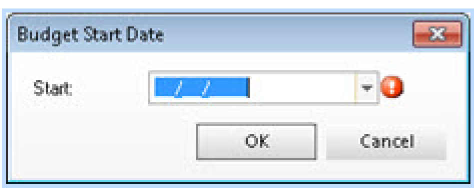
     If you selected **Pool** above, click the ellipsis button to display the Select Staff Type window, and make a Staff Type selection.



If you selected **Non-Pool**, click the ellipsis button to display the Staff Search utility, and select the Staff member to whom the work will be assigned.

- **Hrs/Mins** - Enter the hours and/or minutes that have been budgeted for this work.

5. Click **OK**.
6. When creating the first Stage only, the Budget Start Date dialog is displayed. (Dates for subsequent stages are calculated automatically.)
   a. Click the drop-down calendar control to select the start date for the Stage.



   b. Click **OK**.

On some Stages, depending on Stage Type, the Start Date and duration might be calculated according to Stage rules defined in the setup of Master Stages for Mini-Budgets.

The new budget line is added to the grid in the **Mini-Budget** tab on the Job record.

Add other budget lines to the Mini-Budget, as required.

New lines can be appended at a later date (see Append Budget Lines to an existing Mini-Budget), but bear in mind the requirement to create lines with Stages in the sequence in which the Stages should be actoned.

This completes 'Year One' setup for the Mini-Budget. Job Rollover functionality can be set up to carry over Job, Budgeting and Schedule data in subsequent years.

Create a Schedule and Create Bookings

Having set up a Mini-Budget with Stages and budgeted hours, you can proceed to create a Schedule and create Bookings.

All unscheduled Stages in the Mini-Budget are scheduled together. There is no option to exclude any Stages defined in the Mini-Budget tab from the Schedule. You can, however, append additional Stages once the Schedule has been created (see below).

On the Job record Mini-Budget tab:

1. Click **Schedule**.

   The application displays a warning dialog:

   "*Once Budget items have been added to the schedule, editing of them will be restricted. Are you sure?*"

2. To proceed, click **Yes**.

   The Schedule and associated Bookings are created.

   Note that all of the checkboxes in the **Schedule** column are now selected, and that the **Schedule** button has been replaced by an **Append to Schedule** button.

   Schedule data can be reviewed, either in Star Scheduling or in StarPM: Planners Wallcharts.

Append Budget Lines to an Existing Mini-Budget

New lines (and Stages) can be appended to an existing Mini-Budget.

To append a new line, on the Job record Mini-Budget tab:

1. Click **Append to Schedule**.

   The application displays a warning message:

   "*Once Budget items have been added to the Schedule editing of them will be restricted. Are you sure?*"

   If you click **Append to Schedule** when there are no new Stages to append, the application displays a message to that effect:

   "*There is nothing awaiting adding to the Schedule.*"

2. To proceed, click **Yes**.

   The additional Stages are appended to the Schedule. Note that all of the checkboxes in the **Schedule** column are now selected.

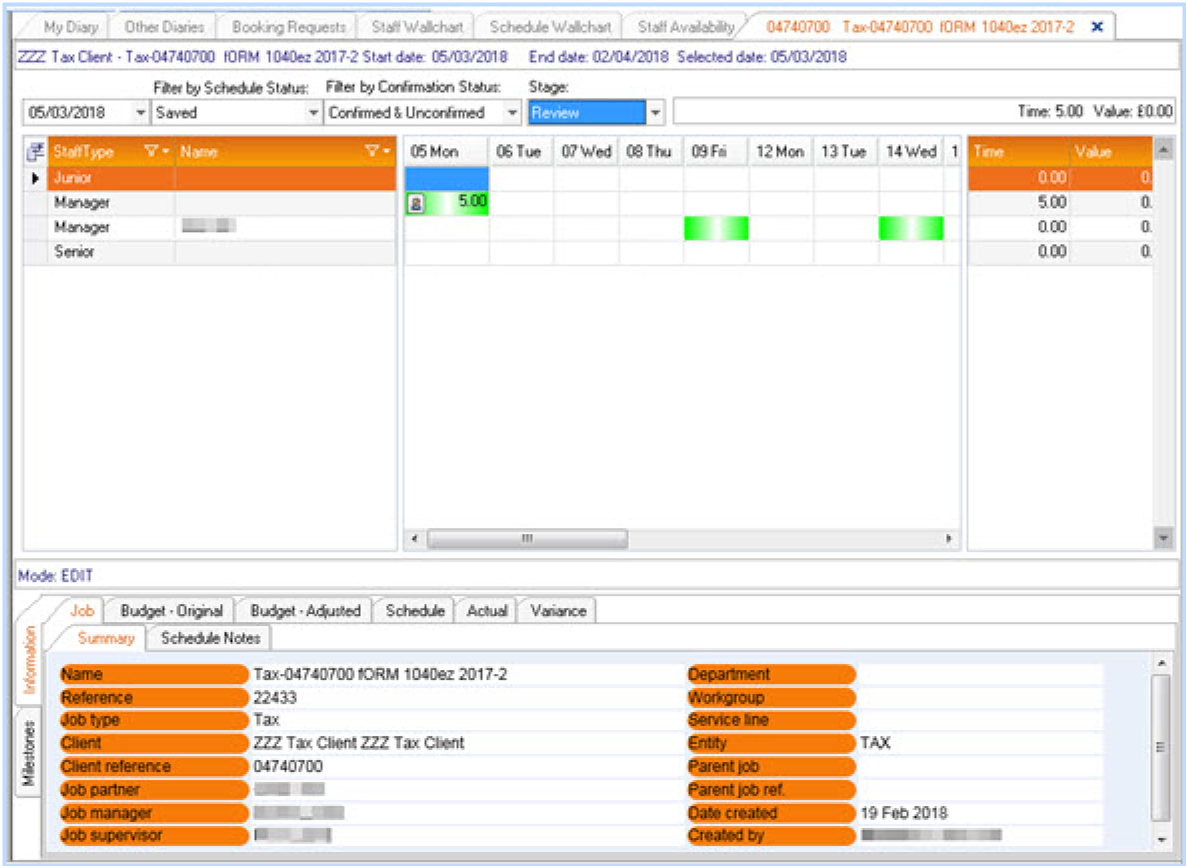
Review the Schedule in Star Scheduling

To review schedule data:

1. Log in to Star Scheduling.

2. Locate and open the relevant Schedule using the Schedule List Builder.

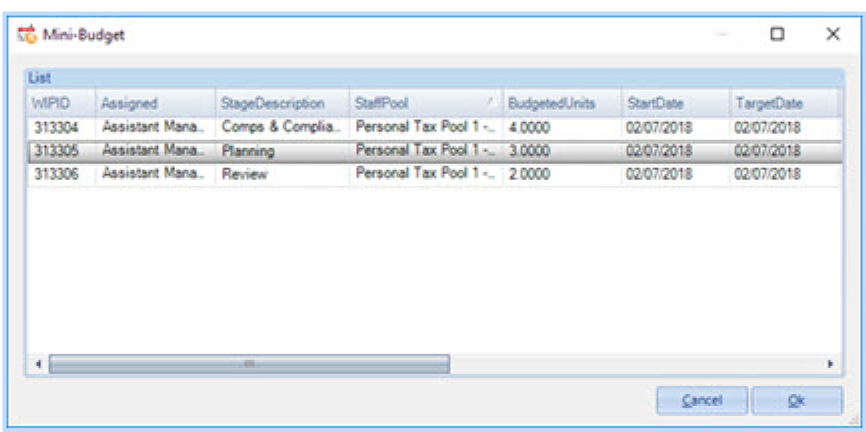
You will see that the Schedule and Bookings have been created automatically by the Mini-Budget process.



By default, with the **Stage** filter set to **All**, Scheduling displays all of the Bookings generated for each Staff Type and individual Staff member on every Stage.

3. To view the Bookings created for a particular Stage, simply select that Stage from the **Stage** filter.

When creating new Bookings for Self-Scheduling Jobs, if more than one budget is found for the Stage/Staff Type combination you must allocate each Booking to an existing Mini-Budget line and Stage.



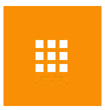
Schedule Management (My Scheduled Work)

The StarPM: My Scheduled Work module is designed to give users with scheduled Bookings both visibility and control over Bookings that have been allocated to them and require their attention in the current week and/or the immediate future.

Here Staff can manage their own Self-Scheduling work, and can also view, but cannot edit, any other scheduled work.

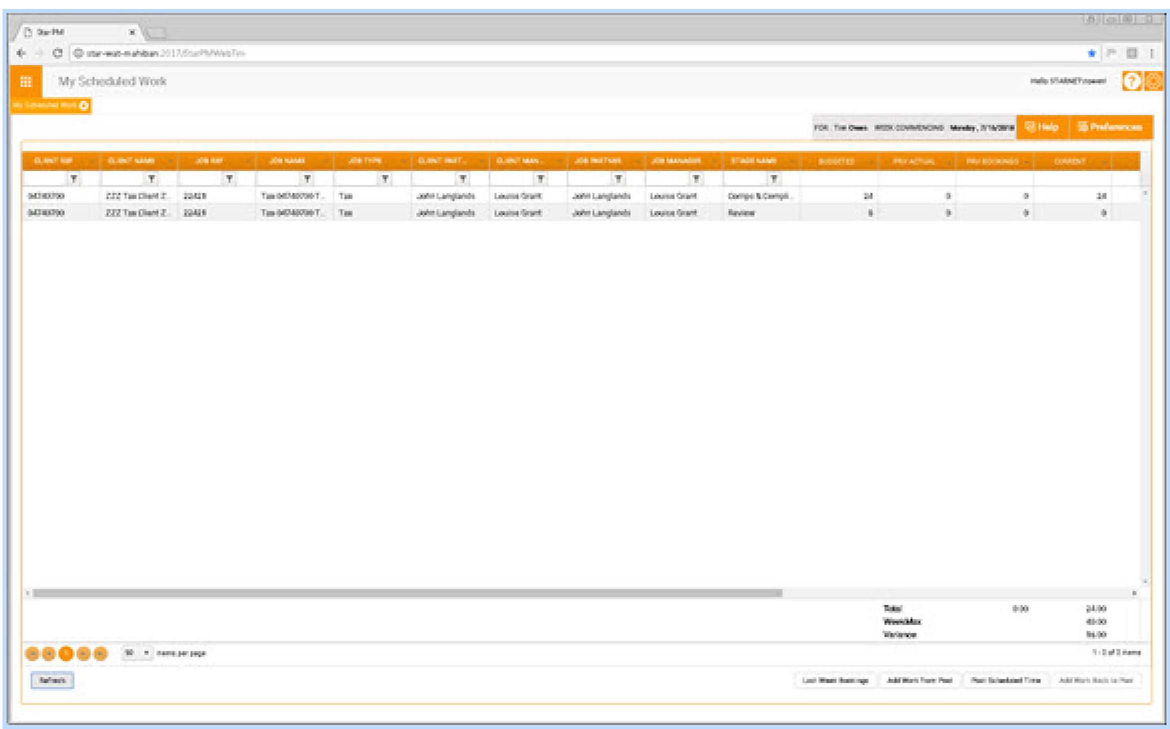
To access My Scheduled Work:

1. Launch StarPM.
2. Click the module menu icon.



3. Click the My Scheduled Work button.

This displays the module.



The My Scheduled Work view includes any Pool or Non-Pool work allocated using fast-track Mini-Budgets. This might include:

- Any work allocated directly to the member of Staff in question.
- Any work allocated to them from a Staff Pool, either by themselves or by any other Staff member.

Any scheduled work that the user cannot reschedule or change in any way, i.e. any work generated in Star Scheduling - will be grayed-out and read only. These hours are included in the various Totals at the foot of the grid.

The My Scheduled Work grid displays, for each Job and Stage:

- Budgeted hours (**Budgeted**).
- Previous actual work, i.e. approved timesheet postings (**Prv Actual**) up to the start of the current week.
- The number of Bookings prior to the current week (**Prv Bookings**).
- Work allocated:
  - for the current week (**Current**),
  - for the next week (**Next**),
  - for the week after next (**Next + 1**), and
  - for all subsequent weeks (**Later**).

The table beneath the grid displays totals for each period: the **Total** hours of time booked , the set weekly maximum (**WeekMax**), and the **Variance** between the two. Only the **Total** is displayed for the Later period.

The button set beneath the grid presents the following options:

- **Refresh** - Refreshes the data displayed in the grid.
- **Last Week Bookings** - Displays the Last Week Bookings window, from which you can add last week's unfinished work (if any) to the current week.
- **Add Work from Pool** - Displays the Pool Jobs window, from which you can add work from a Pool to your Sched-ule.
- **Post Scheduled Time** - Displays the StarPM: Time and Expenses module, where you can post scheduled time into your timesheet, saving yourself time.
- **Add Work Back to Pool** - Active only if the currently selected work was previously added to your Schedule from a Pool.

My Scheduled Work Preferences

To set preferences:

1. Click **Preferences** (button located above the My Scheduled Work grid).

   This displays the Preference window.

2. In this window:
   - **Ignore Weekly Maximum** - If you select **Yes** in this Yes/No toggle control, then when editing a row you will be able to enter booking hours that exceed the **Week Max** limit. If you select **No**, then if you enter booking hours which exceed the **Week Max** those hours are automatically rounded down to the **Week Max** value.
   - **Start Date Variant** - To vary the **Start Date**, plus or minus *n* days from the current date, either use the increment control or simply enter a new value.
   - **End Date Variant** - To extend the **End Date**, plus or minus *n* days, either use the increment control or simply enter a new value.

   The **Start** and **End Date Variant**s are applied only in the Pool Work window. Their default values are +/- 10 days.

3. Click **Save**.

   If you made changes, the system displays a notification dialogue:

   "*Changes will not be applied until the application is reloaded again.*"

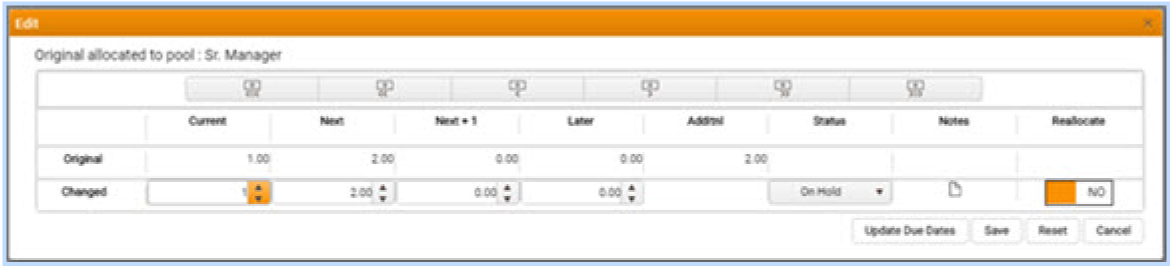
4. Click **OK**.
5. Close and reload the module to apply your changes.

Edit Bookings

To edit your Bookings, either:

- Click the **Edit** button beneath the My Scheduled Work grid, or
- Double-click the relevant row in the My Scheduled Work grid.

Either option displays the Edit window.



The columns in the Edit grid reflect those in the My Scheduled Work grid. The first row (**Original**) is read-only. It displays the original values in My Scheduled Work or - if any bookings have been changed since you last loaded the module - from the Star database. The second row (**Changed**) is editable, allowing you to update those values.

To edit booked time values in any given cell, either use the increment control within that cell, or simply enter a new value.

If you have **Ignore Max** set to **No** in Preferences, then if you enter booking hours which exceed the **Week Max** those hours are automatically rounded down to the **Week Max** value. No notification is displayed.

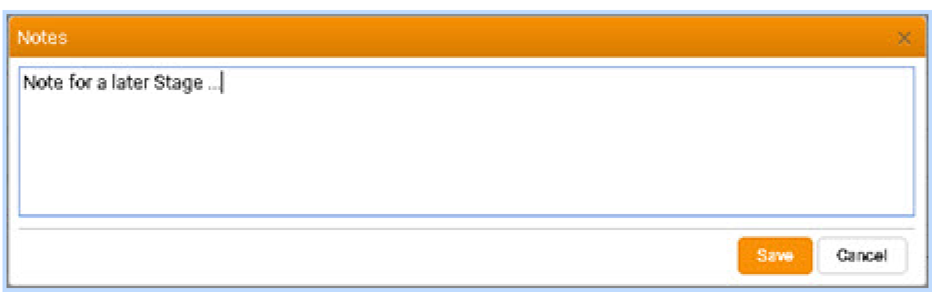
To move time between weeks, use the active toolbar functions (only those options relevant to the currently selected column/period will be active at any time; each click moves a single hour):

- If the **Current** week is selected: **Add to Next Week** / **Add to Next Week + 1** / **Add to Later**.
- If the **Next + 1** is selected: **Add to Current Week** / **Add to Next Week** / **Add to Later**.

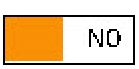
  etc.

Controls on each row offer the following functionality:

- **Status** - Click to activate a drop-down selection of Statuses relevant to the Stage in question, e.g. On Hold, In Progress.
- **Notes** - Click to display the Notes window, in which you can record any notes against the work, perhaps for consultation at a later Stage.



- **Reallocate** - Click to toggle **Yes** / **No**.



The button set beneath the grid presents the following options:

- **Update Due Dates** - Displays the Due Date Processes window. Here you can update Due Dates records to reflect work carried out on the Active Step (functionality as in Star Time and Expenses).
- **Save** - Saves your changes and closes the Edit window.
- **Reset** - Resets all values to the **Original** values.
- **Cancel** - Closes the Edit window without saving any changes.

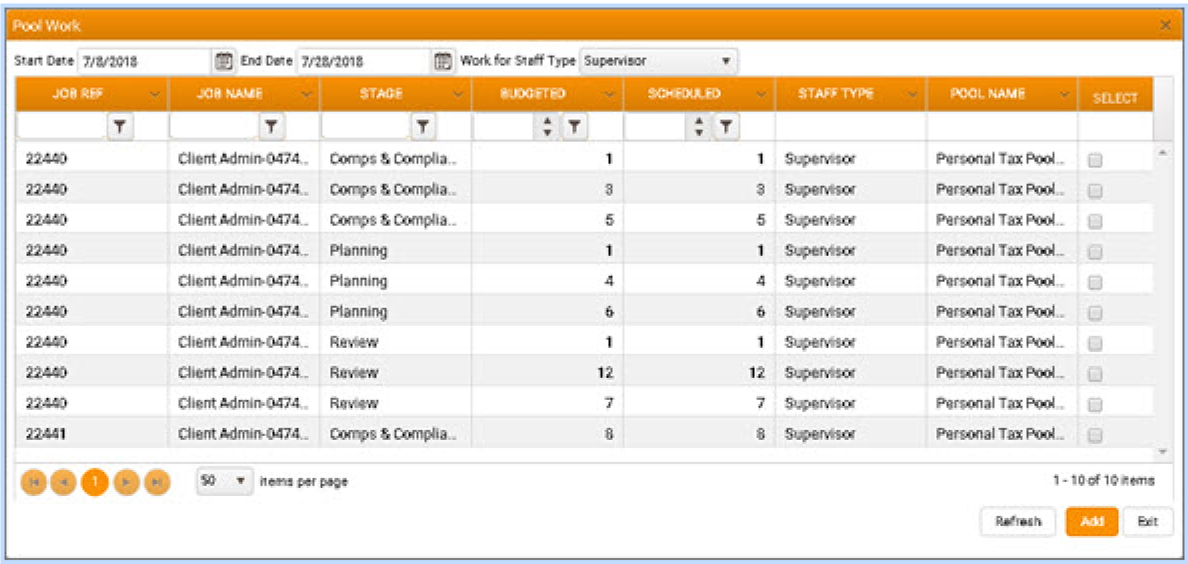
Add Work from a Pool to Your Schedule

You can take work from a Pool or Pools and add it to your current schedule.

To do this, in My Scheduled Work:

1. Click **Add Work from Pool**.

   This displays the Pool Work window.



   By default, the Pool Work window is filtered to display only work for the current week that has been allocated to the logged-in user's current Staff Type. You can, however, select work allocated over a wider time period and/or to an alternative Staff Type.

   You can also set default **Start Date** and **End Date** variants in My Scheduled Work Preferences.

2. Optional. Amend the filter settings by
   a. selecting an alternative **Start Date** and/or **End Date**, and/or
   b. selecting an alternative Staff Type from the **Work for Staff Type** drop-down.
3. For any work you want to pick from the Pool, select the checkbox in the **Select** column.
4. Click **Add**.

   The Pool Work window is closed automatically.

   You are returned to My Scheduled Work, where any selected work will have been added to the grid.

Return Work to a Pool

You can return any previously pooled work to the Pool. This will remove from your Schedule any current and future Bookings for that work.

The option to return work from your Schedule to a Pool is available only if that work was previously added to your Schedule from a Pool.

To do this, in My Scheduled Work:

1. Select the row representing the work you want to return to the Pool.
2. Click **Add Work Back to Pool**.

   The application displays the Add Work Back to Pool Confirmation dialogue:

"Adding work back to the Pool will remove all current and future bookings for this Work from your Schedule."

3. Click **Yes**

   The work is returned to the Pool and any associated Bookings are removed from your Schedule.

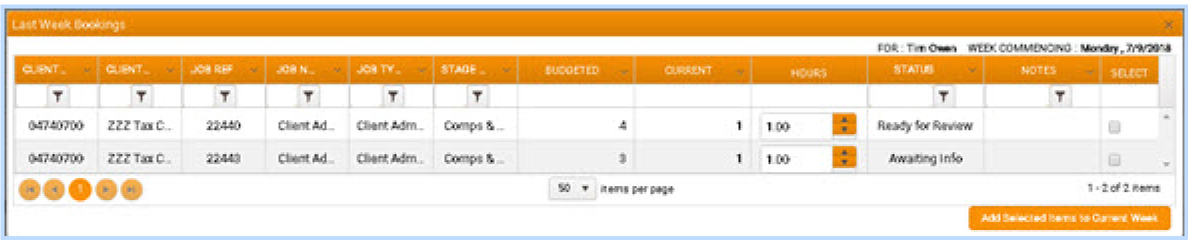
Add Last Week Bookings to the Current Week

When rolling over from one week to the next, any unfinished work that was represented in the **Current** column in My Scheduled Work one week will have disappeared the next week unless carried over.

To add unfinished work from last week to the current week's Bookings:

1. In My Scheduled Work, click **Last Week Bookings**.

   This display the Last Week Bookings window.



   If it is appropriate to carry any Booking over to the current week:

2. Select the **Select** checkbox on the relevant Job/Stage row(s).
3. In the **Hours** column on each selected row, enter the number of unfinished hours that you want to carry over to the next week.

   The number of **Hours** you can carry over cannot exceed the **Current** hours for the same Job/Stage.

4. Click **Add Selected Items to Current Week**.

   The Last week Bookings window is closed automatically.

   You are returned to My Scheduled Work, where any selected Bookings have been added to the grid.

Post Scheduled Time into a Timesheet

Connectivity between the various modules in StarPM allows you to post bookings from My Scheduled Work into your current week's timesheet in Time and Expenses.

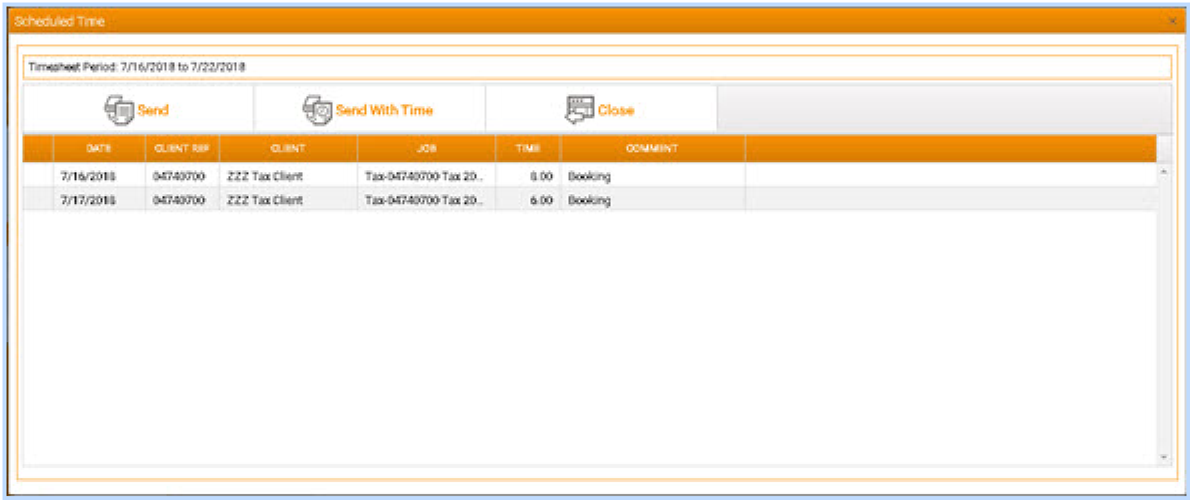
To post Scheduled time into a timesheet:

1. In My Scheduled Work, click **Post Scheduled Time**.

   This displays the StarPM: Time and Expenses module.

2. Click **Scheduled Time**.

   This displays the Scheduled Time window.



3. Select any time entries (rows) that you want to add to your current timesheet.
4. Choose one of the following options:
   - To add the Scheduled Time with no Time values, click **Send**.
   - To add the Scheduled Time with Time values, click **Send with Time**.

   Send with Time is dependent on a Firm-level switch setting in Star PDM, Firm Switches (T&E/ASTEE switch AllowScheduledTimeSendWithTime), and may not be available in your instance of the application.

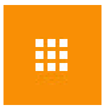
   The scheduled time you selected is added to your current timesheet.
5. In the timesheet, for each entry, select the appropriate **Task**, enter explanatory **Notes**, and complete any other fields required for validation.
6. Click **Save**.

Planners Wallcharts

Planners and Schedulers can review Schedule data, and add, delete or move bookings, using the dynamic Staff and Schedule Wallcharts in StarPM: Planners Wallcharts.

To access Planners Wallcharts:

1. Launch StarPM.
2. Click the module menu icon.



3. Click the Planners Wallcharts button.

This displays the Planners Wallcharts screen.

Within this screen there are two Wallchart tabs, each of which presents a toolbar and a different view of current Schedule data:

- **Staff** Wallchart - A list view of all Staff and the Schedules they are working on.
- **Schedule** Wallchart – A list view of all Schedules and all of the Staff who are working on them.

Both Wallcharts are described below.

Planners Wallcharts Toolbar

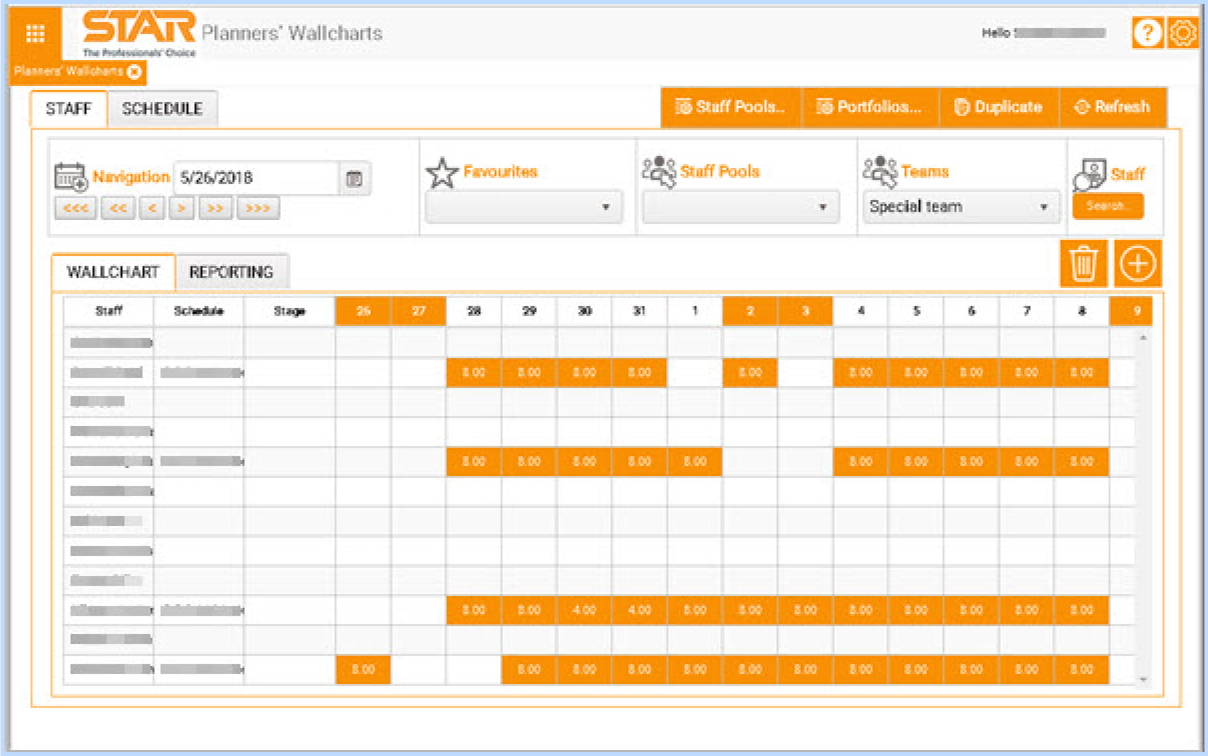
The toolbar above the Wallchart tabs presents the following options.

- **Staff Pools** - Displays the Staff Pool Maintenance window, in which you can create Staff Pools with which to populate the Wallchart.
- **Portfolios** - Displays the Portfolio Maintenance window, in which you can create Schedule Portfolios with which to populate the Wallchart.
- **Duplicate** - Opens a duplicate view of the Planners Wallcharts in a new tab. One tab can then be floated, enabling you to view both Wallcharts simultaneously.
- **Refresh** - Refreshes the data in the Wallchart.
- **Help** (if implemented) - Displays application Help documentation.

Staff Wallchart

To view the Staff Wallchart:

1. Open Planners Wallcharts.
2. Select the **Staff** tab.



Note the secondary **Reporting** tab, which is described below.

Toolbar

The Staff Wallchart toolbar presents the following options.

- **Navigation** - Click the calendar icon to select an alternative start date for the Wallchart view from a drop-down calendar.

  Having selected the start date, use the chevron buttons to shift the calendar view back one day <, one week << or one month <<<; or forward one day >, one week >> or one month >>>.

- **Favourites** - Select a pre-defined Staff selection to populate the Wallchart.

  Favourites are defined in Star Scheduling.

- **Staff Pools** - Select a Staff Pool to populate the Wallchart.

  Staff Pools must be created either within StarPDM or within the Planners Wallchart (see Staff Pool Maintenance).

- **Teams** - Select a pre-defined Team to populate the Wallchart.

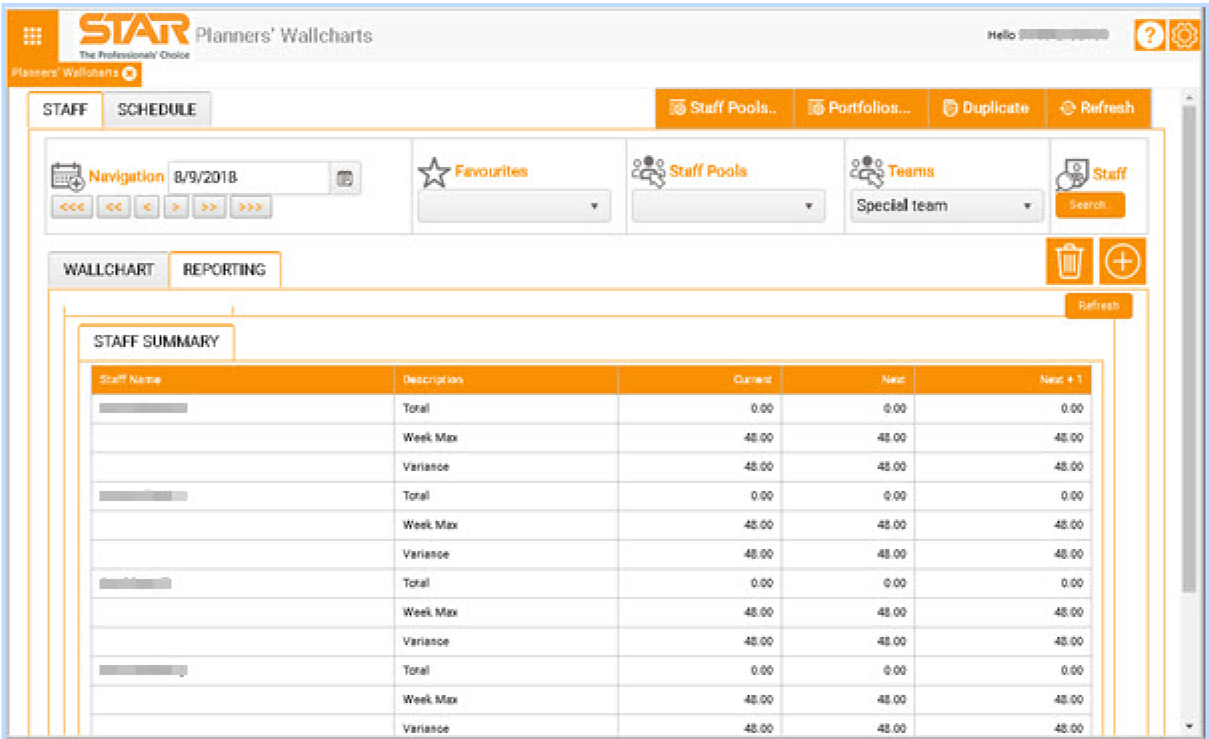
  Teams are defined in Star Scheduling.

  Only one option - either **Favourites**, **Staff Pools** or **Teams** - can be used to populate the Wallchart at any time.

- **Staff** - Click the **Search** button to display the Staff Selector, in which you can select individual Staff schedules to populate the Staff Wallchart.

Reporting

The **Reporting** tab displays any Pool or Non-Pool work allocated to the Staff currently populating the Staff Wallchart.



The **Reporting** tab includes any Pool or Non-Pool work allocated using fast-track Mini-Budgets. This might include:

- Any work allocated directly to the Staff in question.
- Any work allocated to them from a Staff Pool, either by themselves or by any other Staff member.

The grid displays, for each Staff, the **Total**, **Week Max** and **Variance** in hours of work scheduled:

- for the current week (**Current**),
- for the next week (**Next**),
- for the week after next (**Next + 1**).

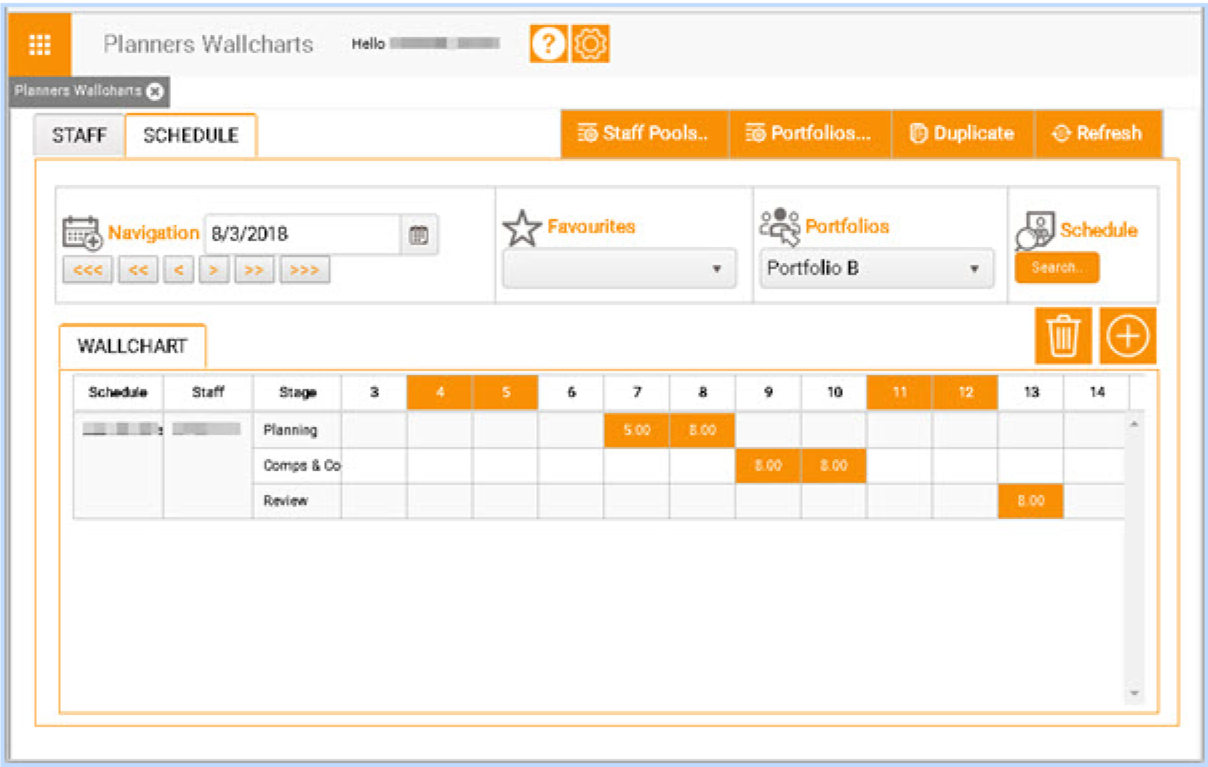
In this tab:

- **Refresh** - Refreshes the data in the Reporting tab.

Schedule Wallchart

To view the Schedule Wallchart:

1. Open Planners Wallcharts.
2. Select the **Schedule** tab.



Toolbar

The Schedule Wallchart toolbar presents the following options.

- **Navigation** - Click the calendar icon to select an alternative start date for the Wallchart view from a drop-down calendar.

  Having selected the start date, use the chevron buttons to shift the calendar view back one day <, one week << or one month <<<; or forward one day >, one week >> or one month >>>.

- **Favourites** - Select a pre-defined Schedule selection to populate the Wallchart.

  Favourites are defined in Star Scheduling.

- **Portfolios** - Select a pre-defined Schedule Portfolio to populate the Wallchart.

  Only one option - either **Favourites** or **Portfolios** - can be used to populate the Wallchart at any time.

- **Schedule** - Click the **Search** button to display the Schedule Selector, in which you can select a schedule to populate the Schedule Wallchart.

Adding, Editing and Deleting Bookings

The following functionality is common to both the Staff Wallchart and Schedule Wallchart views in StarPM: Planners Wallcharts.

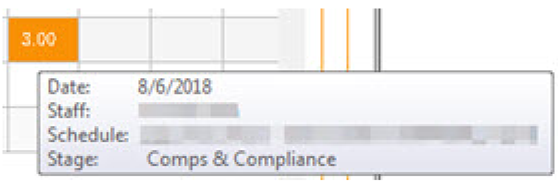
Add a Booking

To add a booking:

1. Click and hold to 'grab' the Add Booking icon.
2. Drag-and-drop it into the desired timeslot in the grid.

View Booking Details

To view the details of any booking, simply rest your cursor over the relevant cell to view its details in a tool-tip.



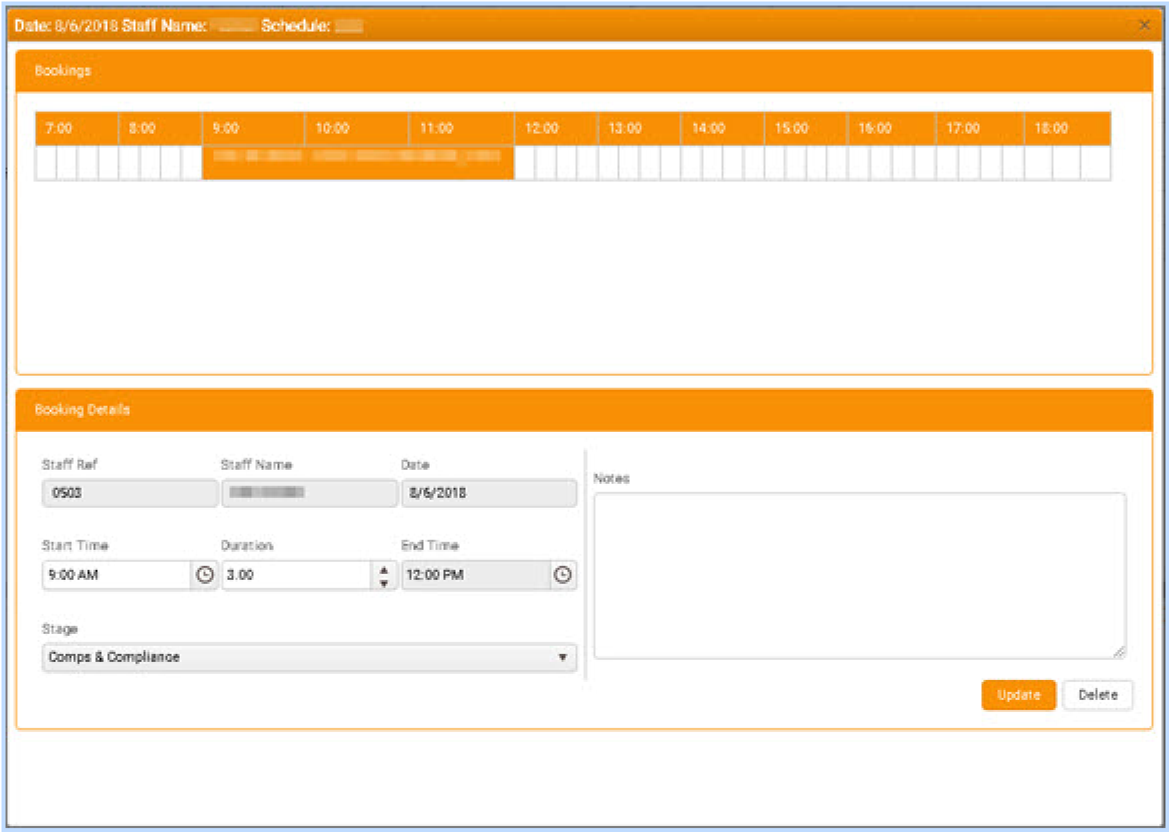
Edit a Booking

To edit the **Start Time**, **Duration**, or **Stage** of a booking, to enter or edit any Notes recorded against it, or to delete it altogether, either:

- Double-click the relevant cell to display booking details in a new window.

  > Not supported in some browsers.

- Use right-click context menu option **Booking / Edit**.



There might be multiple Bookings on any given day. The **Bookings** grid above provides an overview, while the **Booking Details** grid below displays only the selected Booking.

To update the Booking, make the required changes and click **Update**. Note that any read-only values are then updated accordingly.

The **Date**, **Staff** details and **Date** values, as confirmed in the window's title bar, are greyed-out (read-only) in the **Booking Details** region, and cannot be edited in this window.

To delete the Booking from within the Booking Details window, simply click **Delete**.

Delete a Booking

To delete a booking:

1. Click and hold to 'grab' the cell that represents the booking.
2. Drag-and-drop it onto the waste-basket icon.

   You are prompted to confirm the deletion.

Alternatively, use right-click context menu option **Booking** / **Delete**.

Move a Booking

To move a booking:

1. Click and hold to 'grab' the cell that represents the booking.
2. Drag-and-drop it into the desired timeslot in the grid.

If a Booking has been modified by any other user since the last view Refresh, then before the result of any drag-and-drop operation is written to the database the following warning prompt is displayed:

The selected booking(s) have been modified. Would you like to refresh the wallchart?

If you get this message, click **OK** to proceed.

Drag-and-Drop Operations

Drag-and-drop operations are deliberately limited in effect.

The following points apply to both Staff and Schedule Wallcharts, and to drag-and-drop between Wallcharts (see Move a Booking Between Schedules / Time Periods immediately below).

Standard multiple-selection of Bookings is supported.

To change a Date:

- Drag Booking(s) from one Wallchart date cell into another.

  Only the Date of the Booking is changed, regardless of which Wallchart row the Booking is dropped into.

For each of the following operations you must initially drag-and-drop onto the intended Staff, Schedule, or Stage cell in the **Staff**, **Schedule**, or **Stage** column, not into any booking cell in the calendar grid, as described below. The booking date can then can then be changed, if necessary, as described above.

To re-allocate Staff:

- Drag Booking(s) from Wallchart date cell and drop onto the target Staff name in the **Staff** column.

  Only the Booking Staff Member is changed.

To re-allocate a Booking to another Schedule:

- Drag Booking(s) from Wallchart date cell and drop onto the target Schedule name in the **Schedule** column.

  Only the Booking Schedule is modified.

To change Stage:

- Drag Booking(s) from Wallchart date cell and drop onto the target Stage name in the **Stage** column.

  Only the Booking Stage is modified.

Move a Booking Between Schedules / Time Periods

The easiest way to move Bookings from one Schedule or time period to another is to drag-and-drop between multiple Wallchart views across multiple browser windows or monitor displays.

There is no need to open a second browser session. To duplicate the current Wallchart view:

1. Click **Duplicate** (at top right).

   This opens a new tab within your Web browser, which displays a duplicate of the browser tab containing the Wallchart view.

2. Drag the duplicate tab out of the original browser window.

   This creates a new browser window.

3. Arrange the two browser windows side-by-side.

   You can now drag-and-drop Bookings between the two browser windows.

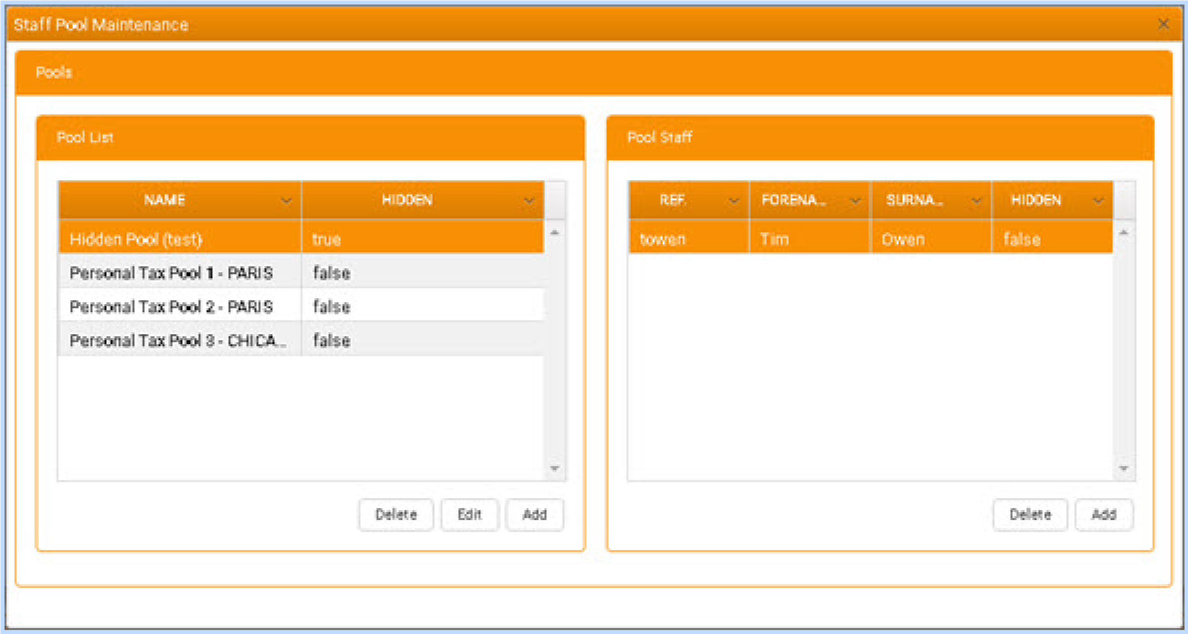
Any operations carried out by the same user will be replicated automatically across all browsers that are running the Planners Wallchart; i.e. a move in browser 1 Wallchart will cause browser 2 Wallchart to refresh.

Staff Pool Maintenance in StarPM: Planners Wallcharts

Staff Pools can be maintained within StarPM: Planners Wallcharts.

To display the Staff Pool Maintenance window:

- Click **Staff Pools** in the Planners Wallcharts toolbar.



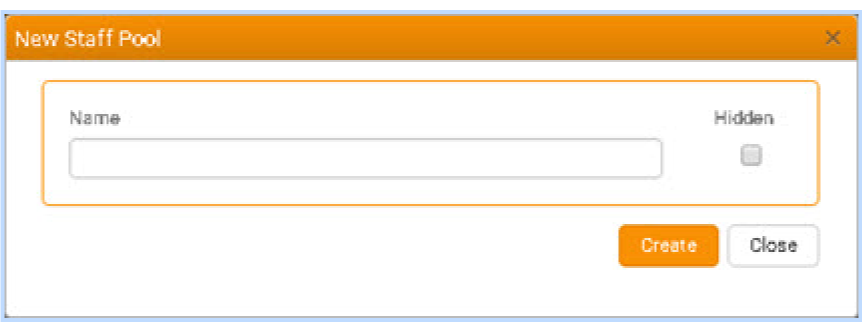
Here you can perform the following tasks.

Add a Staff Pool

To add a Staff Pool:

1. Beneath the **Pool List**, click **Add**.

   This displays the New Staff Pool window.



2. In this window:
   - **Name** - Enter a short, descriptive name for the new Staff Pool.
   - **Hidden** - Select this checkbox only if you want the Pool to be excluded from pick lists.

   A Pool cannot be deleted once it is referenced in existing data, but the **Hidden** setting allows it to be excluded from usage once it is no longer appropriate.

3. Click **Create**.

The new Pool is added to the list in the Pool List.

4. Optionally, if you are adding more than one Pools, repeat steps 2 and 3 for each new Pool.
5. When you have finished adding Pools, click **Close** to close the New Staff Pool window.

Add Staff to a Pool

To add Staff to a Pool:

1. Select the Pool in the **Pool List**.

   Any Staff currently allocated to the Pool are listed in the Pool Staff grid.

2. Beneath the Pool Staff grid, click **Add**.

   This displays the Staff Selector, where you can make your Staff selection.

Remove Staff from a Pool

To remove Staff from a Pool:

1. Select the Pool in the **Pool List**.
2. Select the Staff for removal in the **Pool Staff** grid.
3. Beneath the **Pool Staff** grid, click **Delete**.

   The selected Staff is removed from the Pool.

   There is no prompt for confirmation.

Edit Staff Pool Settings

To edit a Staff Pool:

1. Select the Pool in the **Pool List**.
2. Beneath the **Pool List**, click **Edit**.

   This displays the Edit Staff Pool window, which is identical to the New Staff Pool window (see above) in all but name.

   In this window:

3. Edit the Pool **Name** or **Hidden** checkbox state as required.

   A Pool cannot be deleted once it is referenced in existing data, but the **Hidden** setting allows it to be excluded from usage once it is no longer appropriate.

4. Click **Update**.

   The details in the Pool List are updated to reflect your changes, but the Edit Staff Pool window remains open.

5. Click **Close**.

   The Edit Staff Pool window is closed.

Delete a Staff Pool

A Staff Pool can be deleted only if it is not associated with any existing Budget.

A Pool can then be deleted without having first to remove any Staff currently allocated to it. Neither Staff records nor Staff allocations to other Pools are affected by the deletion.

To delete a Staff Pool:

1. In the **Pool List**, select the relevant Pool.
2. Beneath the **Pool List**, click **Delete**.
3. If the Pool is not associated with a budget it is deleted and removed from the list in the **Pools** grid.

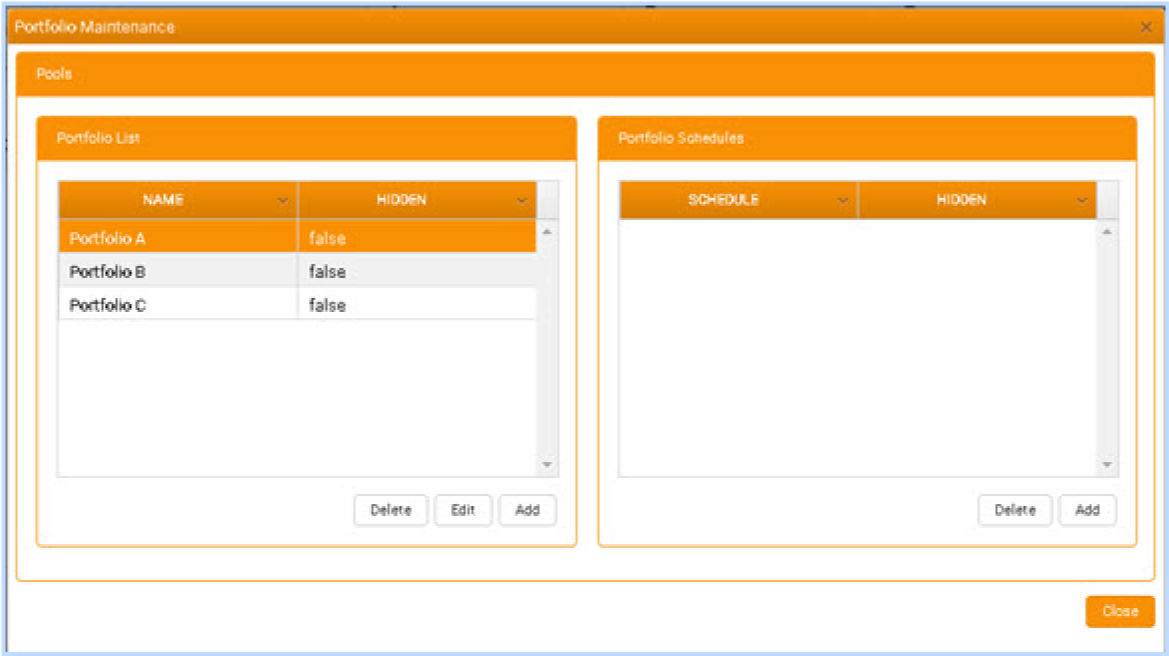
   There is no prompt for confirmation.

   If the Pool is associated with a budget, then a system message is displayed to that effect. The Pool cannot be deleted.

Schedule Portfolio Maintenance in StarPM: Planners Wallcharts

To display the Portfolio Maintenance window:

- Click **Portfolios** in the Planners Wallcharts toolbar.



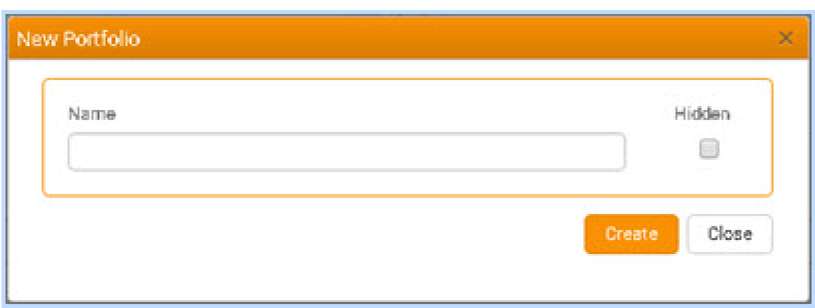
Here you can perform the following tasks.

Add Portfolios

To add one or more Schedule Portfolios to the **Portfolio List**:

1. Beneath the **Portfolio List**, click **Add**.

   This displays the New Portfolio window.



2. In this window:
   - **Name** - Enter a short, descriptive name for the new Portfolio.
   - **Hidden** - Select this checkbox only if you want the Portfolio to be excluded from pick lists.

   A Portfolio cannot be deleted once it is referenced in existing data, but the **Hidden** setting allows it to be excluded from usage once it is no longer appropriate.

3. Click **Create**.

The new Portfolio is added to the **Portfolio List**.

4. Optionally, if you are adding more than one Portfolio, repeat steps 2 and 3 for each new Portfolio.
5. When you have finished adding Portfolios, click **Close** to close the New Portfolio window.

Add Schedules to a Portfolio

To add Schedules to a Portfolio:

1. Select the Portfolio in the **Portfolio List**.

   Any Schedules currently allocated to the Portfolio are listed in the **Portfolio Schedules** grid.

2. Beneath the **Portfolio Schedules** grid, click **Add**.

   This displays the Schedule Selector, where you can make your Schedule selection.

Remove Schedules from a Portfolio

To remove Schedules from a Portfolio:

1. Select the Portfolio in the **Portfolios List**.
2. Select the Schedule for removal in the **Portfolio Schedules** grid.
3. Beneath the **Portfolio Schedules** grid, click **Delete**.

   The selected Schedule is removed from the Portfolio.

   There is no prompt for confirmation.

Edit Portfolio Settings

To edit a Portfolio:

1. Select the Portfolio in the **Portfolio List**.
2. Beneath the **Portfolio List**, click **Edit**.

   This displays the Edit Portfolio window, which is identical to the New Portfolio window (see above) in all but name.

   In this window:

3. Edit the Portfolio **Name** or **Hidden** checkbox state as required.

   A Portfolio cannot be deleted once it is referenced in existing data, but the **Hidden** setting allows it to be excluded from usage once it is no longer appropriate.

4. Click **Update**.

   The details in the Portfolio List are updated to reflect your changes.

5. Optionally, if you are editing more than one Portfolio, repeat steps 2 and 3 for each Portfolio.
6. Click **Close**.

   The Edit Portfolio window is closed.

Delete a Portfolio

A Schedule Portfolio can be deleted only if it is not associated with any existing Budget.

A Portfolio can then be deleted without having first to remove any Schedules currently allocated to it. Neither Schedules nor Schedule allocations to other Portfolios are affected by the deletion.

To delete a Portfolio:

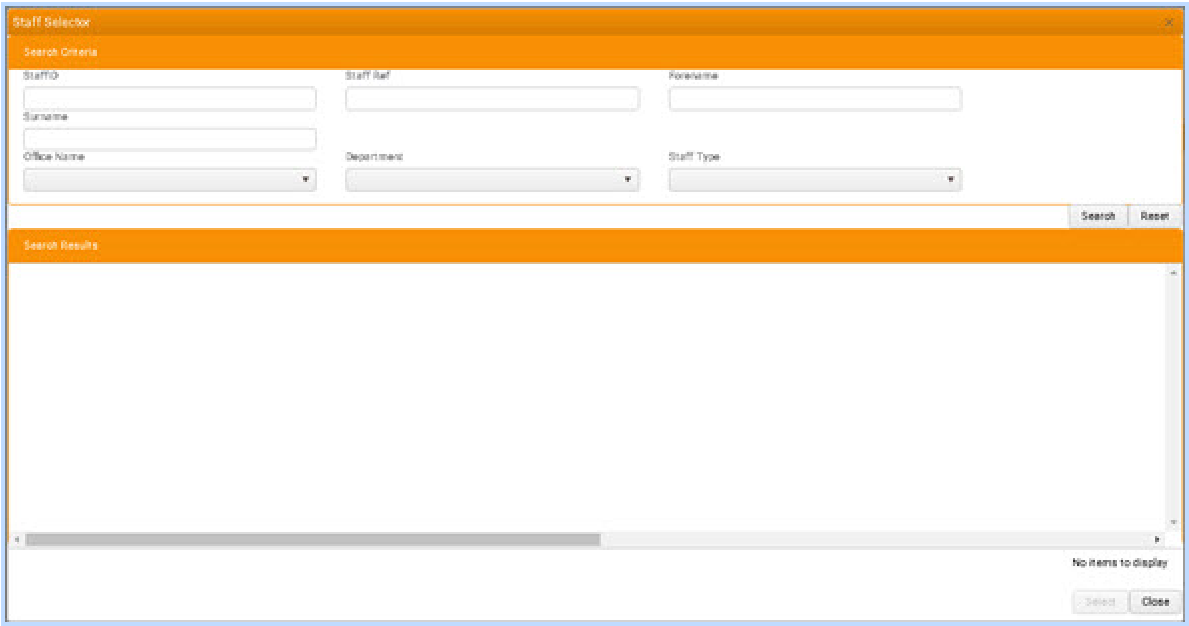
1. In the **Portfolio List**, select the relevant Portfolio.
2. Beneath the **Portfolio List**, click **Delete**.
3. If the Portfolio is not associated with a budget it is deleted and removed from the list in the **Portfolios** grid.

   There is no prompt for confirmation.

   If the Portfolio is associated with a budget, then a system message is displayed to that effect. The Portfolio cannot be deleted.

The Staff Selector

The Staff Selector fulfils different functions, according to the screen from which it is accessed.



To enter a Staff search:

1. Enter any appropriate **Search Criteria** that would help to narrow the search.
2. Click **Search**.

   Any matching Staff records that match the Search Criteria you entered are displayed in the Search Results.

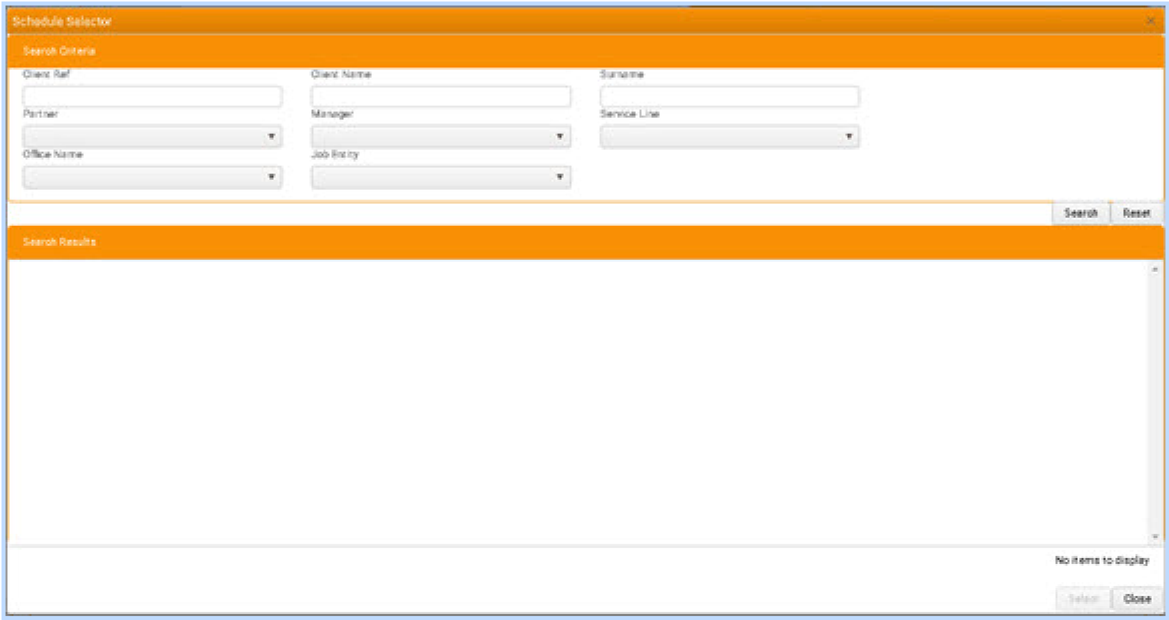
   If you need to narrow your search, enter additional **Search Criteria** and click **Search** again.

   You can also clear individual Search Criteria, or click **Reset** to clear them all and begin again.
3. Select the Staff from the **Search Results**.
4. Click **Select**.

   The Staff Selector is closed and you are returned to the screen from which you initiated the search, now populated with the relevant Staff details.

The Schedule Selector

The Schedule Selector fulfils different functions, according to the screen from which it is accessed.



To enter a Schedule search:

1. Enter any appropriate **Search Criteria** that would help to narrow the search.
2. Click **Search**.

   Any Schedules that match the Search Criteria you entered are displayed in the Search Results.

   If you need to narrow your search, enter additional **Search Criteria** and click **Search** again.

   You can also clear individual Search Criteria, or click **Reset** to clear them all and begin again.
3. Select the Schedule from the **Search Results**.
4. Click **Select**.

   The Schedule Selector is closed and you are returned to the screen from which you initiated the search, now populated with the relevant Schedule details.

Appendix: Table of Replace Terms

The following standard terms, as used throughout any 'vanilla' installation of [[[Undefined variable Document Variable Set.ProductName]]], can all be replaced by synonyms. This is useful when Star terminology does not reflect the standard lexicon of your organisation.Star refers to such synonyms as Replace Terms.

Replace Terms are defined in Star PDM, in Firm Details.

This Help manual uses standard terms. If your organisation has defined any Replace Terms, you can print the following table and record them for future reference against the relevant Standard Terms.

Standard Term	Replace Term	Standard Term	Replace Term
AddressDetail		GrossWIP	
AdvancedBill		Holiday	
AdvancedReportLink		Interest	
AllowancePremium		Interfunction	
ApprBill		InternalContact	
BadDebt		Job	
BillsInProgressFor		JobAssistant1	
BillsReadyFor		JobReference	
BillTemplate		LastActivity	
BillType		LastBill	
Campaign		LeaveDate	
ChargeAccount		Loss	
Child		Manager	
Children		Nominal	
Claim		NominalAdjustment	
Client		Office	
ClientFirstName		Officer	
ClientGroup		OrigRateAmt	
ClientMobile		Parent	
ClientReference		Partner	
ClientSearchName		PlanningColour	
ClientTelephone1		PopBalancesDate	
ClientTelephone2		PORef	
ClientType		Portfolio	
Clone		Postcode	
Cloning		Profit	
Contact		QuickBill	
ContactFirstName		RevisedFee	
ContactMobile		SecondContact	
ContactReference		SecondPeriodClose	
ContactSecondName		ServiceLine	
ContactTelephone1		ServiceLineGroup	
ContactTelephone2		StaffDepartment	

Standard Term	Replace Term	Standard Term	Replace Term
ContractType		StaffForename	
County		StaffMobile	
CurrentDisb		StaffReference	
CurrentFees		StaffSurname	
CurrentPreBill		StaffTelephone1	
CurrentWIP		StaffTelephone2	
DepartmentsJobs		StaffType	
Disbursement		Stage	
DraftBillsFees		StandardBill	
DraftBillsWIP		StdRateAmt	
Enquiry		Supervisor	
Enrolment		Supplier	
EOMBills		SupplierRef	
EOMDisb		TargetRealisation	
EOMPreBill		Tickler	
EOMWIP		TimeStampField	
Expense		TotalAppr	
ExpenseRepaid		UnapprovedDisb	
Favourite		UnapprovedWIP	
Fee		UnderQuery	
FeeReceipt		VAT	
Fees		VatNumber	
FinanceCharge		WIPatCost	
FixedFee		Workgroup	
GeneralAdjustment			