**TimeOn User Guide**

1   Overview

TimeOn is one-to-one appointment and one-to-one or job timetabling software. The main features include:

- One-to-one appointment booking
- Monitoring of Initial contact
- Automatic Outlook email generation to staff and clients
- Automatic Outlook Calendar integration
- Automatic recording of session outcomes, cancellations and "Did Not Attend" (DNA's)
- Easily managed staff availability and booking of appointments
- Easy client appointment view
- Monthly and annual report generation
- Automatic invoice generation
- Automatic personalised text reminder generation
- Automatic one-to-one and job assignment timetabling based on client or job requirements and staff availability
- Automatic emailing of generated timetables

TimeOn is written in Visual Basic for Applications (VBA) and works in conjunction with Microsoft Office. Developed in Office 2016, it supports Microsoft Office 2007 onwards for Windows (Mac is not currently supported). TimeOn requires a locally installed copy of Microsoft Excel 2007 (or later) and preferably Outlook 2007 (or later) in order to function – it will not currently work with on-line only versions of Excel and Outlook. TimeOn can function with only Excel – but this will disable the emailing and calendar functions. TimeOn does not need any installation and does not require any changes to your computer system. The data is stored as Excel files within the directory structure of TimeOn. No data is sent or stored in any other location, other than the appointment information sent to staff and clients in the emails, and entered into the Outlook calendar appointments, which can be reviewed prior to being sent. It is therefore essential that regular backups of the directory are made, and that it is in a secure drive location that only the required people have access to.

After downloading the ZIP file, open the zip file and copy the files to any desired directory, keeping the supplied directory structure. If multiple people need access to

the same system, for example if multiple people perform bookings, then this should be a location accessible by those people, for example, a network drive. If there is only one user, this can instead be on a local hard drive, but ensure that regular back-ups are made in case of computer failure. This will create a "TimeOn" directory, in which the following directories and files will be visible:
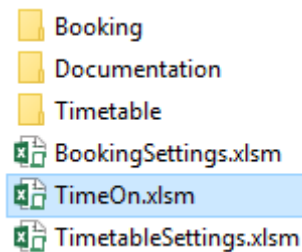

The "Booking" directory contains the files required for the Booking aspect of the software. The "Timetable" directory contains the files required for the Timetabling aspect of the software. "Documentation" contains this User Guide and a quick-start guide. BookingSettings.xlsm contains settings you can change to personalise the booking aspect of the system (this is an Excel file). TimetableSettings.xlsm contains settings you can change to personalise the timetabling aspect of the system (also an Excel file). TimeOn.xlsm is the actual TimeOn software (also an Excel file).

2   Booking Setup

Prior to initial use of TimeOn, the settings for either one-to-one bookings, timetabling or both need to be updated with your specific information. If you are intending to use the one-to-one booking function within TimeOn, open the BookingSettings.xlsm file to input your specific details. On first opening, enable macros to run:
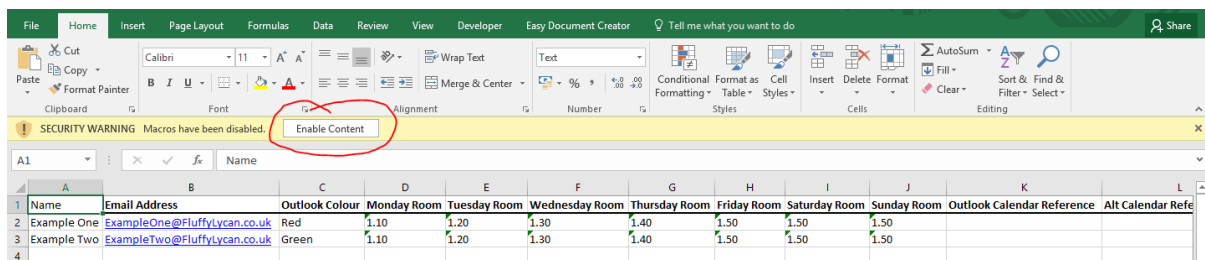
At the bottom of the workbook, there are 7 tabs:
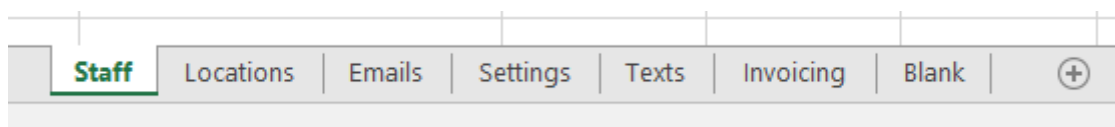
Staff – Contains details of each individual staff member to be available on the system.

Locations – Contains details of each separate building location to be available on the system.

Emails – Contains the email content for each of the automatically generated emails to the Staff and Clients. This is in HTML format. Just writing the text will work as well, but include <BR> for any paragraph returns.

Settings – Contains general settings for overall function, and some invoice settings

Texts – Contains the Text to be included in the personalised reminder texts. Once generated, these texts can be copied into any on-line texting program for sending.
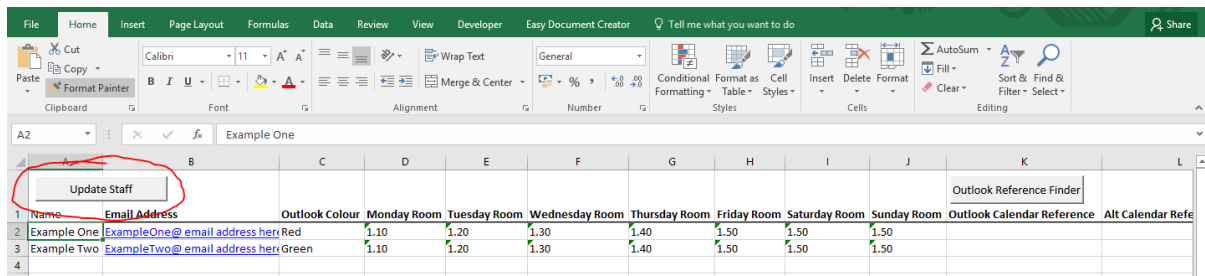
Invoicing – Contains the specific information for the organisations / companies to be invoiced.

Blank – Contains internal list information for the sheet, and has no information that needs changing so can be ignored.

2.1 Staff

In this tab, input the details of each staff member:

Column A – Enter the full name of the staff member. Once this has been performed, click the "Update Staff" button. This will add the staff member to the required files for TimeOn to function. By default, the staff member will be added to the Monday through Sunday template sheets in "Booking\Templates\" with "09:00" to "17:00" availability. Edit this sheet with times as required. This can be done by either placing "Unavailable" under the time, or by removing the time slot completely. The remaining times will need to run without any blank cells between them however, so may need repositioning.
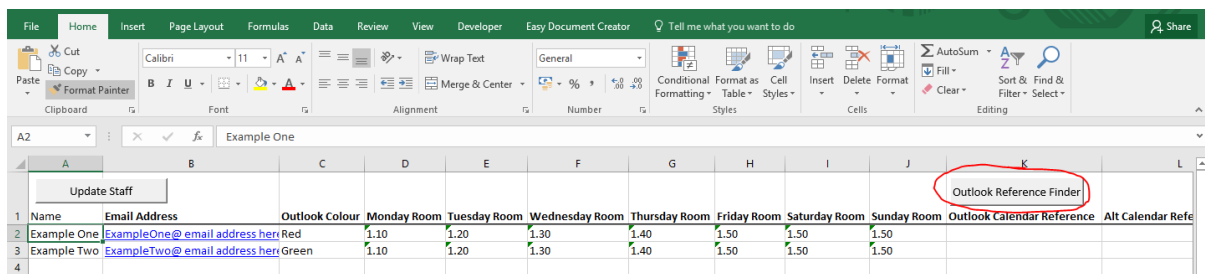
Column B – Enter the email address of the staff member.

Column C – Select the Outlook Calendar colour if there is a preference, from the drop-down menu. This must only be one of the standard 6 (Blue, Green, Orange, Purple, Red or Yellow).

Columns D-J – If there is a specific room number that each staff member uses on a particular day, enter it here. This can be left blank. This will be included on the Outlook Calendar appointment for internal staff reference only.

Column K – This is the Outlook reference for the calendar you would like the appointment recorded in, if you are planning to use Outlook with TimeOn. This can be the same for all staff members if they all use the same calendar, with the different staff members differentiated by the colours, or different calendars if they each operate their own. The Outlook accounts of the users running TimeOn must have read/write permission for the calendars(s) to be used. To find the reference, Click on the "Outlook Reference Finder" button:

In the selection box that appears (it may initially be behind the Excel window, so click the Outlook icon on your bottom task bar, which will be flashing), select the calendar required. There will be a separate calendar icon for each calendar available:
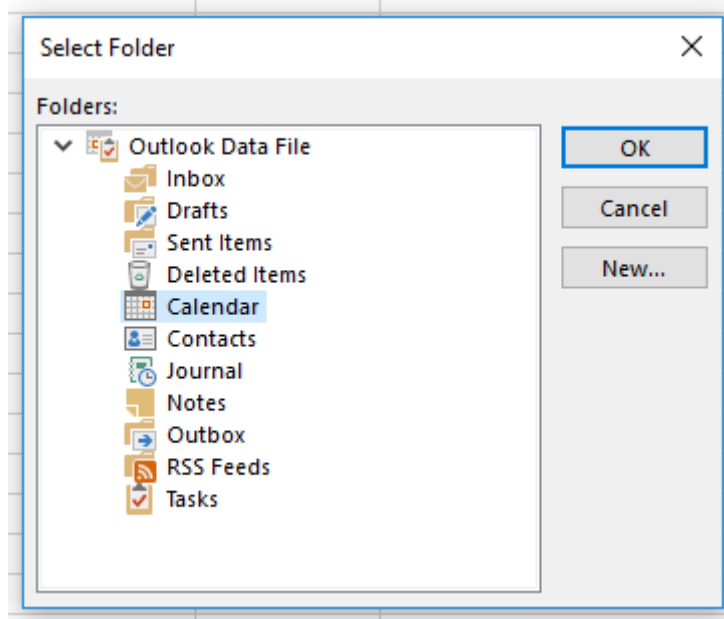
Select OK, and in the box that appears, (again this maybe behind, so select Excel from the bottom task bar) copy (ctrl-c) the 48 character reference. Close the window containing the code, and paste (ctrl-V) or right click, "paste" into Column K. If you company/organisation has a large I.T. infrastructure, different staff members who need to use TimeOn may have different references for the same calendar. Column J is for an alternative reference if one is found to exist. Under normal circumstances, the same reference can be pasted into both columns K and J.

2.2   Locations

In this tab, input the details of each Location one-to-one bookings need to be booked for:

Column A – Enter the full location name.

Column B - Enter a 2-character unique abbreviation for the location. TimeOn will use this for recording information.

Column C – Enter the full location details. This will be included on automated emails so clients know where to go.

2.3   Emails

The Emails tab includes the contents of the automated emails. This is in HTML format:

For line breaks use:

For an automatic link to an email, use:

Send mail

Replacing example@fluffylycan.co.uk with your required email address.

All other HTML text formatting can also be used.

A2 – Enter the email contents for the Initial contact email.

A4 – Enter the email contents for the Secondary contact email.

A6 – Enter the email contents for the Initial Appointment (IAp) confirmation email.

A8 – Enter the email contents for the Appointment confirmation email.

A10 – Enter the email contents for the cancellation email.

A12 – Enter the email contents for the Interim Support confirmation email.

2.4   Settings

In the Settings tab, specific information TimeOn needs to operate is recorded.

B1 – Enter the email address you would like automatic emails to be from. The Outlook accounts of the users running TimeOn will need to have permission to this email address.

B2 – Enter the amount charged per hour. Enter a number only, do not enter a currency symbol.

B3 – Enter the year that invoicing and reporting is being performed for. This will normally be the current year, but this option exists for example, if you need to invoice for December the previous year when it is now January.

B4 – Enter the Initial appointment (IAp) length in minutes.

B5 – Enter the appointment length in minutes.

B6 – Enter the drop-in length in minutes.

B7 – Enter the file name (Excel) which is the default template for invoicing. This should be an excel file, so either .xls, xlsx, or xlsm. This file should be saved in the "TimeOn\Booking\Templates\" directory.

B8 – Enter the name that will be displayed at the top of TimeOn when it is running and the "Booking" tab is displayed. Useful if multiple copies of TimeOn are in use for different booking / timetabling operations.

B9 – Enable Outlook. By default, this is set to "On", allowing emails to be sent and the Outlook Calendars to be used. Set this is "No" if you do not have Outlook installed, or if you do not want to use the email or calendar functions.

If you change the value in B2 (Invoicing Value), click the "Update Costs" button. This will update the value on all associated files needed for TimeOn to function.

2.5 Texts

In B3 and B4, update the values to alter how the automated personalised reminder texts will read.

2.6 Invoicing

The Invoicing tab contains details of the companies/organisations or individuals that are to be invoiced.

Column A – Enter the full company/organisation name to be invoiced.

Column B – Enter the abbreviated name of the company / organisation. This should be the same as the code used in the client's data to record who they are funded by, as TimeOn uses this information to match the clients with their funding bodies.

Column C – If you have a specific invoice template to use with a company/organisation to be invoiced, place a "Y" in this column, otherwise, enter a "N" (blank will be read as a "N"). "N" will mean that the default invoice template will be used (as entered in the "settings" tab in cell B7).

Column D – If a specific invoice template is to be used (as decided in column C), enter the invoice template file name here, complete with file extension (should be an excel file, so either .xls, xlsx, or xlsm). This file should be saved in the "TimeOn\Booking\Templates\" directory.

Column E – Enter the address of the company/organisation to be invoiced (optional).

Column F – Enter the name of the company/organisation to be invoiced, as you wish it to appear on the invoice (optional).

Column G – Enter the contact name at the company/organisation to be invoiced to whom you with the invoice to be addressed (optional).

Column H – Enter the contact phone number of the company/organisation to be invoiced (optional).

Column I – Enter the email address of the company/organisation to be invoiced (optional).

Column J – Enter the order number for the company/organisation (optional, if known).

Column K – Enter the Country/location of the company/organisation to be invoiced (optional).

Column L – Enter the VAT number of the company/organisation to be invoiced (optional, if known).

Column M – Enter the description of the service, as you wish it to appear on the invoice (required).

Column N – Enter the cell location you wish the date to appear in. Leave bank if you do not wish the date to appear.

Column O – Enter the cell location you wish the address to appear in. Leave bank if you do not wish the address to appear.

Column P – Enter the cell location you wish the company/organisation name to appear in. Leave bank if you do not wish the name to appear.

Column Q – Enter the cell location you wish the contact name to appear in. Leave bank if you do not wish the name to appear.

Column R – Enter the cell location you wish the contact phone number to appear in. Leave bank if you do not wish the number to appear.

Column S – Enter the cell location you wish the contact email address to appear in. Leave bank if you do not wish the email address to appear.

Column T – Enter the cell location you wish the order number to appear in. Leave bank if you do not wish the number to appear.

Column U – Enter the cell location you wish the country location of the company/organisation to appear in. Leave bank if you do not wish the country to appear.

Column V – Enter the cell location you wish the VAT number to appear in. Leave bank if you do not wish the VAT number to appear.

Column W – Enter the cell location you wish the Description of your service to appear in. This is required.

Column X – Enter the cell location you wish the invoice amount to appear in. This is required.

Column Y – Enter the cell location you wish the invoice Grand Total to appear in. Leave bank if you do not wish a Grand Total to appear.

Following entry of these details, click the "save button" within Excel, to save the file. The file can now be closed.
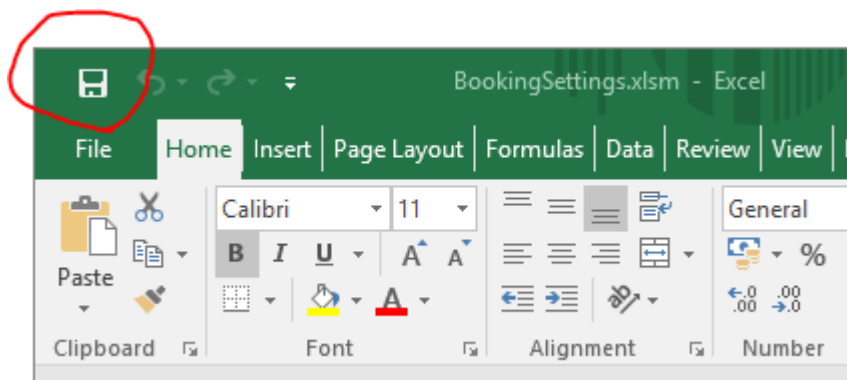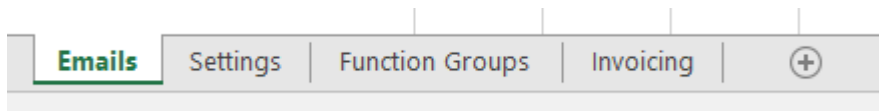
3 Timetabling Setup

If you are intending to use the timetabling function within TimeOn, open the TimetableSettings.xlsm file to input your specific details. On first opening, enable macros to run:
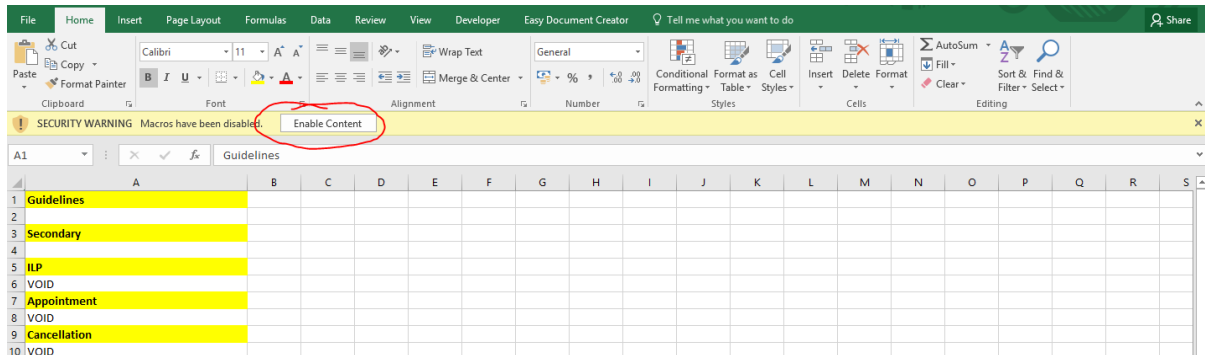
At the bottom of the workbook, there are 4 tabs:

Emails – Contains the email content for each of the automatically generated emails to the Staff and Clients. This is in HTML format. Just writing the text will work as well, but include <BR> for any paragraph returns.

Settings – Contains general settings for overall function, and some invoice settings

Function Groups – TimeOn Timetabling is able to timetable, record and invoice 10 individual services, each celled a "Function Group". Currently, Function Group 1-7 are invoiced at one rate (Band 1), where as Function group 8-10 are invoiced at a different rate (band 2). This tab allows you to define the services of each Function Group.

Invoicing – Contains the specific information for the organisations / companies to be invoiced.

3.1 Emails

The Emails tab includes the contents of the automated emails. This is in HTML format:

For line breaks use:

To create a linkable email address, use:

Send mail

Replacing example@fluffylycan.co.uk with your required email address.

All other HTML text formatting can also be used.

A2 – Enter the email contents for the initial contact email.

A4 – Enter the email contents for the Secondary contact email.

A14 – Enter the email contents for the Staff Timetable email.

A16 – Enter the email contents for the Client Timetable email.

3.2   Settings

In the Settings tab, specific information TimeOn needs to operate is recorded.

B1 – Enter the email address you would like automatic emails to be from. The computer(s) running TimeOn will need to have access to this email address through Outlook.

B2 – Enter the amount charged per hour for Band 1 (Function Groups 1-7). Enter a number only, do not enter a currency symbol.

B3 – Enter the amount charged per hour for Band 2 (Function Groups 8-10). Enter a number only, do not enter a currency symbol.

B4 – Enter the year that invoicing and reporting is being performed for. This will normally be the current year, but this option exists for example, if you need to invoice for December the previous year in January.

B5 – Enter the file name (Excel) which is the default template for invoicing. This should be an excel file, so either .xls, xlsx, or xlsm. This file should be saved in the "TimeOn\Timetable\Templates\" directory.

B6 – Enter the name that will be displayed at the top of TimeOn when it is running and the "Timetable" tab is displayed. Useful if multiple copies of TimeOn are in use for different booking / timetabling operations.

B7 – Enable Outlook. By default, this is set to "On", allowing emails to be sent and the Outlook Calendars to be used. Set this is "No" if you do not have Outlook installed, or if you do not want to use the email or calendar functions.

If you change the value in B2 or B3 (Invoicing Value B1 or B2), click the "Update Groups and Costs" button. This will update the value on all associated files needed for TimeOn to function.

3.3   Function Groups

Column B – Enter the title of the service to be assigned to that Group. Function Groups 1-7 are charged at Band 1 rates (as assigned by cell B2 on the "Settings" tab). Function Groups 8-10 are charged at Band 2 rates (as assigned by cell B3 on the "Settings" tab).

Once the Function Group titles have been updated, click the "Update Groups & Costs" Button. This will update the value on all associated files needed for TimeOn to function.

3.4   Invoicing

The Invoicing tab contains details of the companies/organisations or individuals that are to be invoiced.

Column A – Enter the full company/organisation name to be invoiced.

Column B – Enter the abbreviated name of the company / organisation or individal. This should be the same as the code used in the client's data to record who they are funded by, as TimeOn uses this information to match the clients with their funding bodies.

Column C – If you have a specific invoice template to use with a company/organisation to be invoiced, place a "Y" in this column, otherwise, enter a "N" (blank will be read as a "N"). "N" will mean that the default invoice template will be used (as entered in the "settings" tab in cell B5).

Column D – If a specific invoice template is to be used (as decided in column C), enter the invoice template file name here, complete with file extension (should be an excel file, so either .xls, xlsx, or xlsm). This file should be saved in the "TimeOn\Timetable\Templates\" directory.

Column E – Enter the address of the company/organisation to be invoiced (optional).

Column F – Enter the name of the company/organisation to be invoiced, as you wish it to appear on the invoice (optional).

Column G – Enter the contact name at the company/organisation to be invoiced to whom you with the invoice to be addressed (optional).

Column H – Enter the contact phone number of the company/organisation to be invoiced (optional).

Column I – Enter the email address of the company/organisation to be invoiced (optional).

Column J – Enter the order number for the company/organisation (optional, if known).

Column K – Enter the Country/location of the company/organisation to be invoiced (optional).

Column L – Enter the VAT number of the company/organisation to be invoiced (optional, if known).

Column M – Enter the description of the service, as you wish it to appear on the invoice (required).

Column N – Enter the cell location you wish the date to appear in. Leave bank if you do not wish the date to appear.

Column O – Enter the cell location you wish the address to appear in. Leave bank if you do not wish the address to appear.

Column P – Enter the cell location you wish the company/organisation name to appear in. Leave bank if you do not wish the name to appear.

Column Q – Enter the cell location you wish the contact name to appear in. Leave bank if you do not wish the name to appear.

Column R – Enter the cell location you wish the contact phone number to appear in. Leave bank if you do not wish the number to appear.

Column S – Enter the cell location you wish the contact email address to appear in. Leave bank if you do not wish the email address to appear.

Column T – Enter the cell location you wish the order number to appear in. Leave bank if you do not wish the number to appear.

Column U – Enter the cell location you wish the country location of the company/organisation to appear in. Leave bank if you do not wish the country to appear.

Column V – Enter the cell location you wish the VAT number to appear in. Leave bank if you do not wish the VAT number to appear.

Column W – Enter the cell location you wish the Description of your service to appear in. This is required.

Column X – Enter the cell location you wish the invoice amount to appear in. This is required.

Column Y – Enter the cell location you wish the invoice Grand Total to appear in. Leave bank if you do not wish the Grand Total to appear.

Following entry of these details, click the "save button" within Excel, to save the file. The file can now be closed.
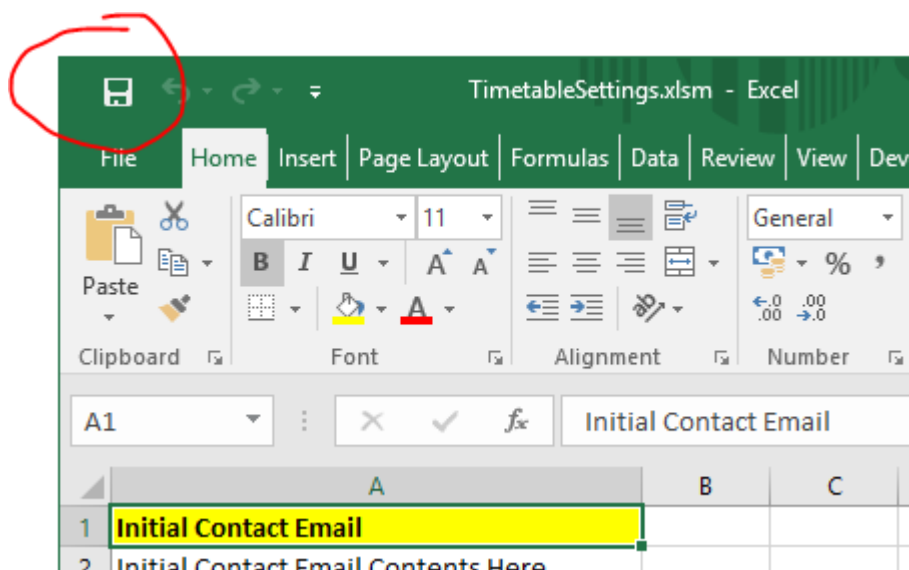
4   Keys and Limitations

Without a Key, TimeOn will be in "trial Mode". In this mode, you are limited to 2 clients and 2 staff members maximum. This will allow you to trial TimeOn and see the options and functionality. Following this, if you would like to try TimeOn fully functional for free, please contact Info@FluffyLycan.co.uk and you will receive a key that will allow unlimited use for 1 month. After this period, if you would like to continue using TimeOn, please purchase a key – see www.FluffyLycan.co.uk, or email Info@FluffyLycan.co.uk.

5   TimeOn – Booking

Upon launching TimeOn, the main screen will be displayed, defaulting to TimeOn – Booking. The first time you open TimeOn, you may have a security warning that

"Macros have been disabled", and will need to "Enable Content" in a similar manner to the settings files (See Section 2).

1 – This tab allows the selection of the TimeOn- Booking functions, or the TimeOn – Timetable functions.

2 – Client Search – All the Clients can be displayed (useful if you are unsure of a spelling), or searched for a particular Client by Surname. Select the option, enter the Surname (if applicable) and click "Search". Please note that the Surname search is case-sensitive and it does not do part-searches – the surname must be exactly as it exists in TimeOn. "Refresh Data" reloads all the data into TimeOn, to ensure the most up-to-date information is being used – useful if multiple users all use TimeOn simultaneously.

3 – Client Selection – Once a search has been performed, the client of interest can be selected in the drop-down menu. Once selected, click "retrieve" to bring up the Client's information and perform any additional functions with that client.

4 – Hide Button – When open, TimeOn will not allow other Excel files to be loaded. Click "Hide" to minimise TimeOn. This in turn will allow other Excel files to be loaded and other Window-based activities to be performed. TimeOn can be instantly maximised by clicking the TimeOn button, for instance when a client calls to make an appointment.

5 – Control Button – Clicking this button brings up the Control panel (covered in Section 5.1).

6 – Client Details – When the "Retrieve" button (see section 3 above) is pressed, the details of the selected client are displayed here. These can be edited with the "Update" button.

7 – Notes box – If any additional information or temporary notes need to be saved with the client, these can be added or amended in the "Notes" box and the "Update" button clicked.

8 – Initial Contact box – Once a client's details have been retrieved (See point 3 above), an automated initial email can be sent, the contents of which are defined in the BookingSettings.xlsm file under the "Emails" tab (see Section 2.3). If an initial contact email has previously been sent, the date of this is displayed in the box. If you would like to send an attachment with your email (for example, a terms and conditions file), this can be placed in the \Booking\Attachments\ directory. It will then be available for selection in the drop-down menu.

9 – Secondary Contact box – Once a client's details have been retrieved (See section 3 above), an automated Secondary email can be sent, the contents of which are defined in the BookingSettings.xlsm file under the "Emails" tab (see Section 2.3). If a Secondary contact email has previously been sent, the date of this is displayed in the box. If you would like to send an attachment with your email (for example, a terms and conditions file), this can be placed in the \Booking\Attachments\ directory. It will then be available for selection in the drop-down menu. A secondary email will only be allowed to be sent if an initial email (See section 8 above) has previously

been sent. This box may also be filled in if automatic Secondary Emails are sent from the "Control Panel" (See Section 5.1)

10 – Phone call box – If you would like to record whether a client has been contacted by means of a phone call, this can be recorded here by clicking the "Update" button and selecting the outcome. If Automatic Secondary Emails are being sent from the "Control Panel" (See Section 5.1), then a list of clients requiring a phone call can be found in \Booking\Booking\PhoneCall.xlsx.

11 – Accepted box – This box is used to record when a client has accepted your service. Click the "Update" box and select the outcome. The date will automatically be recorded when the service is accepted. This is also the point TimeOn will create the various client record sheets in the system files (See Section 7).

12 – Initial Appointment (IAp) box – If a client has previous had an Initial Appointment booked, the details will be displayed here, along with the outcome. To book an initial appointment, click the "Book IAp" button (see Section 5.3). From here, IAp's can also be cancelled (see Section 5.4). In additional, if a particular member of staff is preferred for this particular client, this information can be added for future reference by clicking "Assign Staff" and selecting the particular staff member from the drop-down box.

13 – Calculate and view appointments – By clicking this button, the appointments already booked for the client that have not yet occurred will be displayed.

14 – Appointment information – In this display, the number of appointments the client currently has booked, the number of drop-ins and the number of interim appointments used are displayed.

15 – Appointment buttons – The "Overview" button displays the available appointments for a staff member for any given week (See Section 5.5). Appointments and drop-in appointments can be booked from this section.

5.1   Booking - The Control Panel

1 – About Button – Clicking this button gives you the current version number and contact information for TimeOn, in addition to who purchased the current Key, and when this expires.

2 – Staff – This area allows you to quickly book out a session for a staff member if they become unavailable in addition to producing a summary report for each staff member. Select the staff member from the drop-down box. The booking out of a session functions in much the same fashion as booking a session (see section 5.3).

The summary report can be created by clicking the "Summary" button. The report will be saved in the "Booking\Staff Summary\" directory with the staff members name followed by today's date.

3 – Client – This button allows the addition of a new client to the TimeOn. See section 5.2.

4 – Add Timetable – This section allows more weeks to be added to those available for booking appointments. TimeOn uses the MondayTimetableTemplate.xlsx file through to SundayTimetableTemplate.xlsx located in the "Booking\Templates\" directory. Before creating additional weeks, ensure all required staff members are added to the system (via the BookingSettings.xlsm file) and their usual availability has been recorded on the MondayTimetableTemplate.xlsx file through to SundayTimetableTemplate.xlsx files. Time slots can be made unavailable by writing "Unavailable" in the cell beneath the time (this is case-sensitive, so must start with a capital "U"), or by removing the time in question. A blank cell beneath indicates the staff member is available. Times can be corrected by writing the desired time in the cell, ensuring no blank cells exist between appointment times. An appointment can be marked as a shorter "Drop-in" appointment by adding a "*" after the time (for example, 10:00*). These appointments will only be available when booking a drop-in. Make sure that no time slots overlap. For example, if you have set your appointment times for 60 minutes, ensure you have got at least 60 minutes between appointments. Once the templates are correct, the date of the Monday of the week you wish to add can be written in the boxes. Selecting "Leap Year" will allow for 29 days in February when generating the booking sheets, whereas a "Standard Year" will allow for 28 days. The sheets can then be generated by clicking "Add". The new booking sheets are added to the "Booking\Bookings\" directory. Any one-off alterations to staff members availability (for example, an annual leave day) can be changed in the individual day file here. For example, by entering "Unavailable" in all time slots if a staff member is off that day.

5 – Archive Timetable – This section allows the booking sheets of past weeks to be archived. The sheets are moved from "Booking\Bookings\" to "Booking\Bookings\Archive\". This makes them invisible to TimeOn, so removed them from the list when booking new appointments. If past weeks are not archived, the operator will need to scroll through the past weeks in order to find the desired week.

6 – DNA check – This section allows the number of "Did Not Attend" (DNA's) to be reported. The dates between which the report is required can be entered and the "Check" button clicked. The report is saved in the "Booking\DNA Reports\" directory.

7 – Report & Invoice – By clicking the "Annual" button, a full annual summary report can be generated. In addition, a monthly report which allows checking and agreement with paperwork prior to generating the invoices, can also be created. Ensure that the "year" in the settings BookingSettings.xlsm file (See Section 2.4) corresponds to the year (or the year the month is in) that is required. The reports are saved in the "Booking\Report\" directory. Once the monthly report agrees with expectations, the invoices can be generated. These will be saved in the

"Booking\Invoice\" directory, with a sub-directory for each funding source. Any clients with an unrecognised funding source will be saved in "Booking\Invoice\Other\" as a blank invoice. In addition, any clients with an approved number of hours of 3 will be seen by TimeOn as "Interim" and will be saved in a directory under that heading. The invoices use the settings from the BookingSettings.xlsm file (See Section 2.6). The "Month Cancellation" button creates a report of the cancellations that have occurred that month, and is stored in the "Booking\Cancellations\" directory. Similarly. The "Month Occupancy" button creates a report of the number of occupied verses unoccupied appointments. Please note that the booking sheets must all be in the "\Booking\Bookings\Archive\" directory for this to function.

8 – Automatic Secondary Email – This section allows clients who have already been sent an Initial email, but not taken up the service, to be sent a secondary email. Those that have been sent a secondary email and still have not taken up the service can be added to a list in preparation for a follow-up phone call. The number of days since the sent Initial email in order for a secondary email to be sent, and the number of days since a sent Secondary email in order to be added to the phone list can be entered in the boxes. Secondary emails will be automatically generated based on the email content defined in the BookingSettings.xlsm file (See Section 2.3). The user will however need to click "send" on each one. The phone list file is located at "Booking\PhoneCall.xlsx".

9 – Texts – This section allows personalised texts to be generated to each client that has an appointment on a particular day. The text preferences entered in the BookingSettings.xlsm file are used (See Section 2.5). Enter the required day in the boxes and click "Get Numbers". The file containing the texts along with the corresponding phone numbers are saved in "Booking\Texts\". The phone numbers and text can then be copy/pasted into any texting software or on-line service as required.

10 – New Year. This button will create a new file called "Data-NextYear.xlsx" in the Booking\ directory. This has all the hours reset, and accepted support reset in preparation for a new year.

5.2   Adding a Client

When the "Add" button is clicked in the "Client" section of the control panel, a form for adding a new client will appear.

New Client   ✕

┌─ Client Details ──┐
│   │
│   First Name: [|]   │
│   │
│   Surname: [   ]   │
│   │
│   Client ID: [   ]   │
│   │
│   Funding   [   ]   │
│   │
│   Extra Info: [   ]   │
│   │
│   Year of Study: [   ]   │
│   │
│   Email Address: [   ]   │
│   │
│   Course: [   ]   │
│   │
│   Department: [   ]   │
│   │
│   Hours Approved: [   ]   Hours Remaining: [   ]   │
│   │
│   CRN: [   ]   │
│   │
│   Mobile: [   ]   │
│   │
│   Funding Body: [   ]   │
│   │
└──┘

   [Add Client]

Fill in the required information, adding NA or equivalent if the information is not known or required. Once the form is complete, clicking "Add Client" will update TimeOn. When a new client has been added, the information will need to be refreshed prior to any new functions being carried out, by clicking "Refresh Data" in the "search" section of the main page. These details can be edited in future by retrieving the client's information and clicking the "Update" button on the main page.

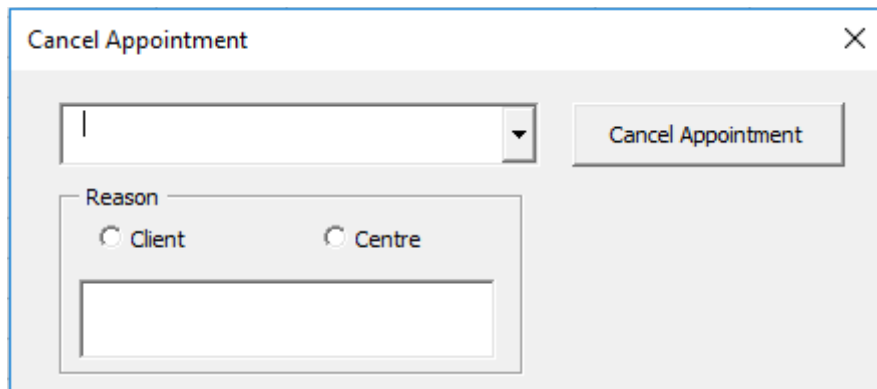## 5.3   Booking an Appointment / Drop-in

Once a client has been retrieved on the main screen, clicking "Book Appointment" will firstly bring up all currently booked appointments for that client. Once this has been closed, the appointment booking box will appear (as above). From this, the member of staff can be selected from the drop-down box, followed by the day, the time in the availability box and the location. An alternative location can be selected if it is not listed, for example, an appointment to be conducted over the internet, could be added as "NET". The "method of contact" can be selected from the drop down box. This will be mentioned, if wanted, in the reply email, by adding <CODE1> into the email content in the settings page. For example, if the contents read "thank you for contacting us <CODE1>". <CODE1> will then be replaced with "by telephone", "by email" or "in person". The date requested will automatically display that day's date, although this is amendable in case the appointment is being otherwise booked. If this is an interim session, this can be selected. If the user would like an overview of the staff members current availability, this can be obtained at any time by clicking the "Overview" button (See section 5.5). Upon clicking "Book", an automatic email will be generated to the client and staff member, using the email preferences defined in the BookingSettings.xlsm file (See Section 2.3), an appointment will be added to the Outlook calendar, again as defined in the staff settings in the BookingSettings.xlsm file. In addition, the appointment will be recorded in the clients file in "Booking\Schedule\<Client Name>\", and a staff appointment file for recording the result of the appointment is created in "Booking\Appointments\<Staff Name>\" (See Section 5.6).

5.4   Cancelling an appointment / Drop-in

Once a client has been retrieved on the main screen, clicking "Cancel Appointment" or "Cancel Drop-in" will bring up the cancellation form.
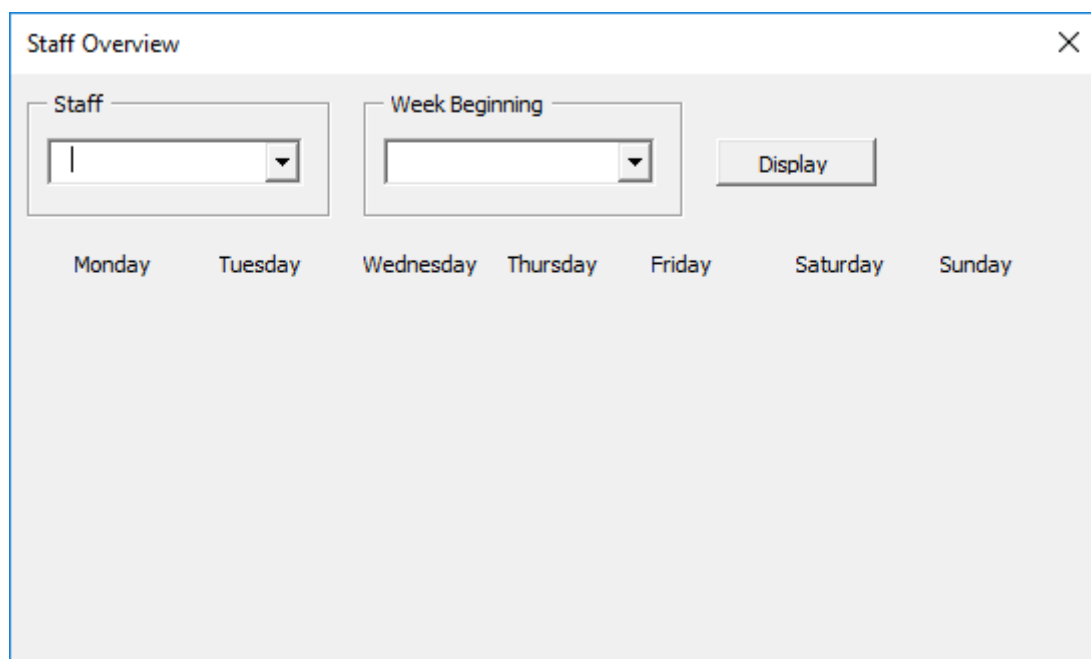

Select the appointment that requires cancellation from the drop-down menu. Select whether the cancellation is the decision of the Client or Centre, and enter a reason for the cancellation in the box. Clicking "Cancel Appointment" sends an automated email to the client and staff member, as defined in the email settings of the BookingSettings.xlsm fil, records that the appointment was cancelled in the client's schedule file in "Booking\Schedule\<Client Name>\", deletes the appointment from the Outlook calendar and deletes the Staff Appointment sheet from "Booking\Appointments\<Staff Name>\".

5.5   Overview button

The "Overview" button is available at any time on the main "Booking" screen, in addition to being available while booking an appointment or drop-in.


The "Overview" displays the available (not booked) appointment slots for each staff member within a selected week. This allows an overview of availability to be seen

when discussing availability with a client. Select the staff member of interest from the drop-down menu, followed by the week of interest. Click the "Display" button and the availability of that staff member for the selected week is displayed. Appointments with an asterisk "*" by them are short drop-in appointments.

5.6   Staff Appointment Sheets

Once an appointment has been booked, a Staff Appointment Sheet will be created in "Booking\Appointments\<Staff Name>\". Once the appointment has taken place, a staff member can use the file to record the result of the appointment within TimeOn. This allows instant viewing of the client's appointment outcomes, hours remaining and inclusion in the reporting and invoicing.
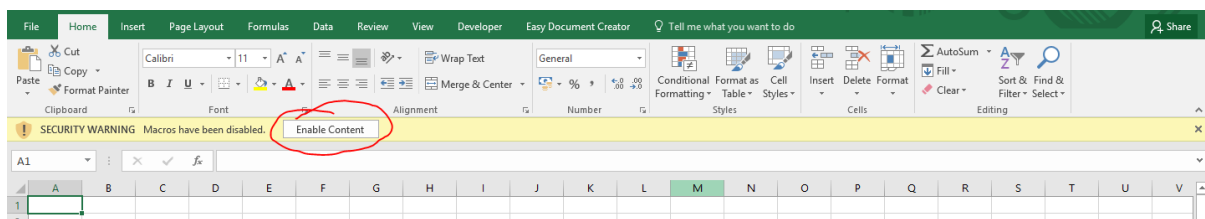
The files are saves in the format of YYMMDD <Client Name> <Time>.xlsm. Therefore, all files for a particular day should be together at the top of the list, if the list is sorted by filename.

Once the file for the correct client has been identified and opened, click to enable the content. Once the details have been identified and are correct, click on "Submission Form"

The first section of the form will have been auto-completed. The duration of the session (how long is chargeable) can then be entered in decimal format, so for one hour and thirty minutes, enter 1.5. The outcome of the attendance can be entered along with any additional comments. Once the "Submit" button has been clicked, the session will be recorded in the Clients file at "Booking\Current Clients\", the available hours will be updated, and the session outcome will be recorded in the schedule file located in "Booking\Schedule\<Client Name>\".

Every 6 appointments, TimeOn will automatically add the students to a list located at "\Booking\Review.xsx". This allows tracking if review sessions are required.

6   TimeOn – Timetable

The timetable section of TimeOn matches staff on a one-to-one basis with pre-existing client's timetables or job roles that needs covering within an organisation. This maybe where supervisory work needs to be accomplished, or the "Clients" could be job descriptions within your own company or organisation.
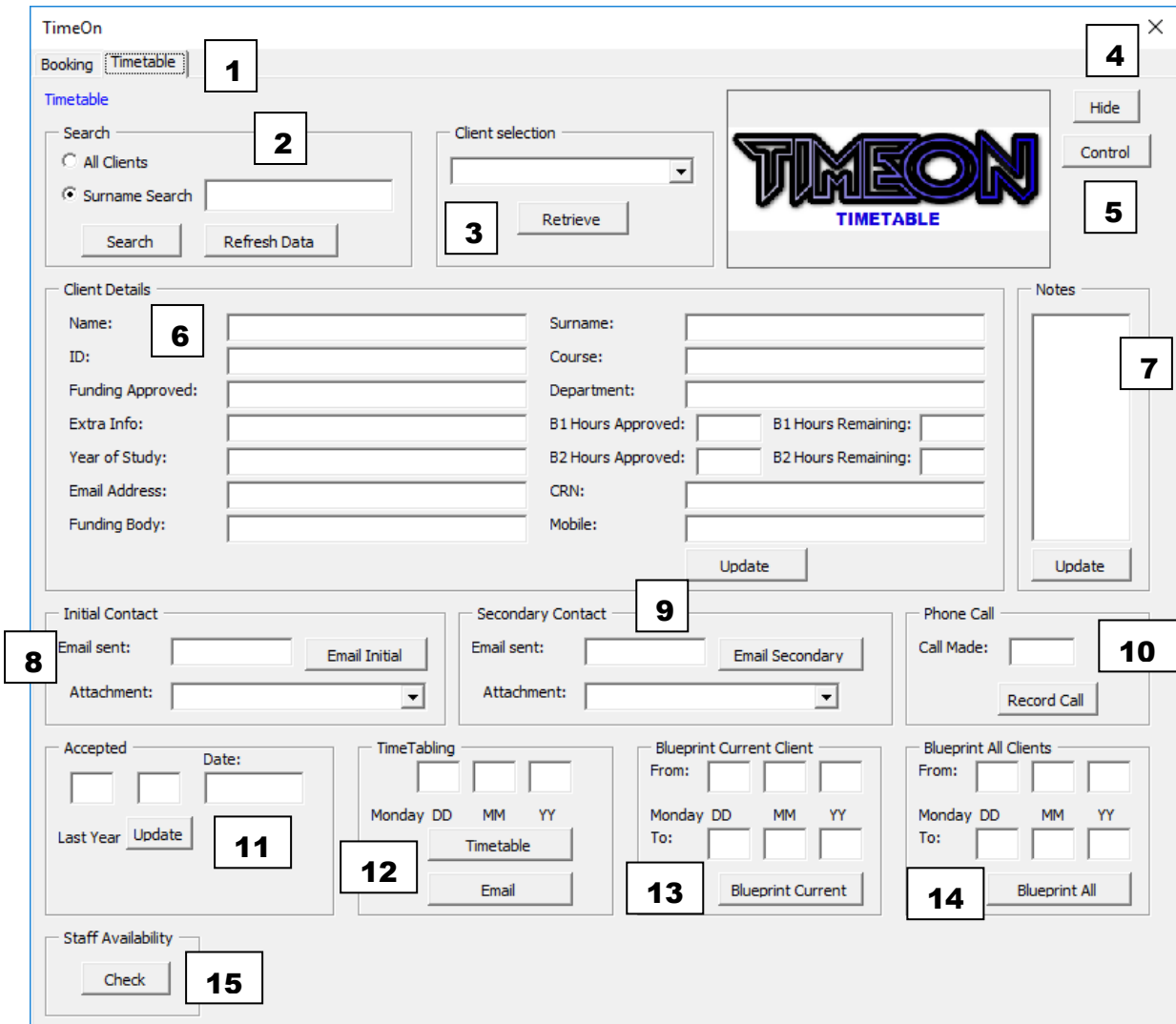
Upon launching TimeOn, the main screen will be displayed, defaulting to TimeOn – Booking. Click on the Timetable tab to change to TimeOn Timetable.

1 – This tab allows the selection of the TimeOn- Booking functions, or the TimeOn – Timetabling functions.

2 – Client Search – All the Clients can be displayed (useful if you are unsure of a spelling), or searched for a particular Client by Surname. Select the option, enter the Surname (if applicable) and click "Search". Please note that the Surname search is case-sensitive and it does not do part-searches – the surname must be exactly as it exists in TimeOn. "Refresh Data" reloads all the data into TimeOn, to ensure the most up-to-date information is being used – useful if multiple users all use TimeOn simultaneously.

3 – Client Selection – Once a search has been performed, the client of interest can be selected in the drop-down menu. Once selected, click "retrieve" to bring up the Client's information and perform any additional functions with that client.

4 – Hide Button – When open, TimeOn will not allow other Excel files to be loaded. Click "Hide" to minimise TimeOn. This in turn will allow other Excel files to be loaded

and other Window-based activities to be performed. TimeOn can be instantly maximised by clicking the TimeOn button, for instance when a client calls to make an appointment.

5 – Control Button – Clicking this button brings up the Control panel (covered in Section 6.1).

6 – Client Details – When the "Retrieve" button (see section 3 above) is pressed, the details of the selected client are displayed here. These can be edited by clicking the "Update" button

7 – Notes box – If any additional information or temporary notes need to be saved with the client, these can be added or amended in the "Notes" box and the "Update" button clicked.

8 – Initial Contact box – Once a client's details have been retrieved (See point 3 above), an automated initial email can be sent, the contents of which are defined in the TimetableSettings.xlsm file under the "Emails" tab (see Section 3.1). If an initial contact email has previously been sent, the date of this is displayed in the box. If you would like to send an attachment with your email (for example, a terms and conditions file), this can be placed in the \Timetable\Attachments\ directory. They will then be available for selection in the drop-down menu.

9 – Secondary Contact box – Once a client's details have been retrieved (See section 3 above), an automated Secondary email can be sent, the contents of which are defined in the TimetableSettings.xlsm file under the "Emails" tab (see Section 3.1). If a Secondary contact email has previously been sent, the date of this is displayed in the box. If you would like to send an attachment with your email (for example, a terms and conditions file), this can be placed in the \Timetable\Attachments\ directory. This will then be available for selection in the drop-down menu. A secondary email will only be allowed to be sent if an initial email (See point 8 above) has previously been sent. This box may also be filled in if automatic Secondary Emails are sent from the "Control Panel" (See section 6.1)

10 – Phone call box – If you would like to record whether a client has been contacted by means of a phone call, this can be recorded here by clicking the "Update" button and selecting the outcome. If Automatic Secondary Emails are being sent from the "Control Panel" (See Section 6.1), then a list of clients requiring a phone call can be found in \Booking\Booking\PhoneCall.xlsx.

11 – Accepted box – This box is used to record when a client has accepted your service. Click the "Update" box and select the outcome. The date will automatically be recorded when the service is accepted. This is also the point TimeOn will create the various client record sheets in the system files (See Section 7).

12 – Timetabling – Once the staff and client's timetables have been obtained, this section performs the one-to-one timetable pairing. Enter the date of the Monday of the week of interest and click "Timetable". Timetabling is covered in Section 6.4. Once the timetables have been produced and checked, they can be sent by clicking "Email".

This will bring up the email form, where the timetables can be emailed to the staff or clients. The content of the email will be the email defined in the TimetableSettings.xlsm file (See Section 3.1). Attached to the email will be the individual timetable for each staff member of client and an additional attachment, if one has been selected.

13 – Blueprint Current Client – Once a satisfactory timetable has been created for a previous week, and a specific client has been retrieved within TimeOn, that timetable can be "Blueprinted" to a future week. This means that where possible, TimeOn will try and copy it, however, will make changes and amendments if necessary. This would include when a specific staff member is not available, or already assigned to a different client. Enter the date of the Monday of the week that is to be copied, and the date of the Monday of the week it is to be copied to.

14 – Blueprint All Clients – This section performs the same function as above, but for all clients rather than just one specific client.

15 – Staff Availability – Clicking the "Check" button will open a form to search the free slots of the staff for the past, current and future weeks based on their availability.

Enter the date of the Monday of the week of interest, then select the day of interest from that week from the drop-down menu, followed by the time of day. Click the "Display" button. The left box (Potentially available to work) displays all staff who are either available to work (unassigned), or already assigned to a client. The right box (Assigned to Clients) displays staff who are already assigned to clients, if the timetables have already been produced for that week. Therefore:

Staff who do not appear on wither list are not available at all.

Staff who appear on the left box but not the right box are available to work and are currently unassigned.

Staff who appear in both boxes are available to work but have already been assigned.

If the timetables for the week of interest have not yet been produced, the right box will be blank, as no staff have yet been assigned to clients.

6.1   Timetable - The Control Panel

1 – About Button – Clicking this button gives you the contact information for TimeOn, in addition to who purchased the current Key, and when this expires.

2 – Staff – This area allows you to produce a summary report for each staff member. Type in the staff member's name as it appears in TimeOn and click "Summary". The report will be saved in the "Timetable\Staff Summary\" directory with the staff members name followed by today's date.

3 – Add – This button allows the addition of a new client or staff member to TimeOn. See Section 6.2.

4 – Report & Invoice – By clicking the "Annual" button, a full annual summary report can be generated. In addition, a monthly report to which allows checking and agreement with paperwork prior to generating the invoices, can also be created. Ensure that the "year" in the settings TimetableSettings.xlsm file (See Section 3.2) corresponds to the year (or the year the month is in) that is required. The reports are saved in the "Timetable\Report\" directory. Once the monthly report agrees with

expectations, the invoices can be generated. These will be saved in the "Timetable\Invoice\" directory, with a sub-directory for each funding source. Any clients with an unrecognised funding source will be saved in Timetable\Invoice\Other\". In addition, any clients with an approved number of hours of 3 will be seen by TimeOn as "Interim" and will be saved in a directory under that heading. The invoices use the settings from the TimetableSettings.xlsm file (See section 3.4).

5 – Automatic Secondary Email – This section allows clients who have already been sent an Initial email, but not taken up the service, to be sent a secondary email. Those that have been sent a secondary email and still have not taken up the service can be added to a list in preparation for a follow-up phone call. The number of days since the sent primary email in order for a secondary email to be sent, and the number of days since a sent secondary email in order to be added to the phone list can be entered in the boxes. Secondary emails will be automatically generated based on the email content defined in the TimetableSettings.xlsm file (See Section 3.1). The user will however need to click "send" on each one. The phone list file is located at "Timetable\PhoneCall.xlsx".

6 – Update Client / Staff timetable template – This section is for use at the beginning of the year. Enter the date of the first Monday you would like the system to start from. This maybe the first Monday in January, after April 6th, or the beginning of an academic year. Select whether the year is a leap year or not (which will account for the extra day in February), and click "Update". TimeOn will then update the ClientTimetable.xlsx and StaffTimetable.xlsx files in the "Timetable/Templates/" directory so that all staff and clients that are subsequently added will have a correctly dated timetable for the coming year. Please note this does not update clients or staff who have already been added to the system.

7 – Update Session start time – The timetable system operates off 1 hour session length, and by default, is on the hour. If sessions begin and end at a different time each hour within the organisation, enter this here. For example, if the sessions begin and end at a quarter past the hour, enter "15" in the box and click "update". This will update all current and future clients and staff. It will not affect any timetables that have already been automatically generated.

6.2   Add Staff Member

Clicking the "Staff" button under "Add" in the timetable Control Panel will bring up the dialogue box to add a new staff member.

Enter the details as required. The "maximum Hours" is the maximum number of hours the staff member is wanting / is assigned to work in a week. When the timetables are created, once a member of staff reaches their maximum hours, no further work will be assigned to them. The "Status" has two options from the drop-down menu. "FT" stands for "Full Time". These members of staff will be assigned work as highest priority. "S" stands for "Sessional". These members of staff will only be assigned work the Full-time (FT) members of staff are unable to cover.

6.3   Add Client

Clicking the "Client" button under "Add" in the timetable Control Panel will bring up the dialogue box to add a new client.

The information can be filled in. B1 (Band 1) are Function Groups 1-7 (See Section 3.3) and are charge at the rate as determined in the TimetableSettings.xlsm file (See Section 3.2). B2 (Band 2) are Function Groups 8-10 and are charged at the Band 2 rate. If TimeOn is required to pair your staff up with roles that need covering (such as Front Desk), enter the role as First name "Front", Surname "Desk", for example. The cover required can than been entered on the timetable that is produced for "Front Desk", which will be matched with your staff. If there is a generic email address within your organisation for the Front Desk, this can be entered, and a copy of the staff timetable will be sent when the timetables are sent out via email. These details can be edited by clicking the "Update" button on the main screen.

6.4   Timetabling

Once a new staff member is added or a client is added and they have accepted the service on TimeOn, a timetable sheet is created in the "Timetable\Current Staff\" and "Timetable\Current Clients\" directories respectively. The weeks on the timetable are based on those added via the "Control Panel" and the "Update Client / Staff timetable template" option. Make sure that this has been done prior to adding any staff or clients to TimeOn.

Once the timetable sheets are created, these can be filled in electronically by the staff or clients. It is fine to email them out, and then replace with the completed copy

once it has been returned. The contents of identical or similar weeks can be copy/pasted from one week to the next and any minor adjustments made.

For the Client sheets, if a session exists, the "Title" cell must have some contents, as this is the cell TimeOn uses to determine if there is a session which required timetabling. The "Location" and "Additional" boxes are optional. If two weeks are identical, or very similar, the contents can be copied/pasted from one sheet to another, and any adjustments made.

6.5   Preferences

If a specific staff member is preferred for a certain client or session, write the staff member's name (exactly as it is saved within TimeOn, case sensitive) under the particular session in the "Assignment" row. TimeOn will try and assign that staff member to that session. If this is not possible, an alternative staff member will be assigned (if possible), and a warning will be placed in the "Timetable\Timetables\YY-MM-DD\warnings.xlsx" file.

If a specific staff member is not wanted for a certain client or session, write "NOT" followed by the staff member's name (exactly as it is saved within TimeOn) in the cell immediately below the "Additional" cell. Time On will not assign that staff member to that session. For example, write "NOT John Doe" without the quotes in the "Assignment" row immediately below the session to ensure staff member John Doe does not cover that session.

For the staff sheets, leave the cell blank if the staff member is available to work, or write (or copy/paste) "Unavailable" (Capital "U") into the cell if the staff member is not available.

6.6   Order of Assignment

TimeOn will initially look through the timetables and try and assign any specifically requested staff first. TimeOn will then preferentially fill the full-time (FT) staff's hours, followed by the Sessional (S) staff, up to the maximum number of hours for each staff member.

Once the timetables are generated, they are located in the "Timetable\Timetable\<YY-MM-DD>\" directory, you can make manual amendments to the them as required, ensuring any changes are made to both the staff and client timetables. If the following week's timetable is similar, these changes will be included in any Blueprinting (see Section 6), so TimeOn's timetabling will improve week on week.

6.7   Recording session outcomes

Timetabled sessions are manually recorded in the client sheet located at "\Timetable\Client Records\<Client Name>.xlsx". Once these sheets have been filled out, the invoicing function within TimeOn can use this data to generate the invoices.

7   Files and directories

The main files and directories used by TimeOn are listed below for reference.

Booking

Staff appointment record sheet, used to report appointment outcomes:

\TimeOn\Booking\Appointments\<Staff>\YYMMDD <Client> <time>.xlsm

Directory were Booking attachments for emails can be placed:

\TimeOn\Booking\Attachments\

Current booking sheets indicating which clients are booked and staff availability:

\TimeOn\Booking\Bookings\YY-MM-DD-DAY.xlsx

Directory where Booking Cancellation Reports are saved:

\TimeOn\Booking\Cancellations\

Record of appointments of clients who have accepted the service. Recorded by the staff appointment record sheets, and used by the invoicing:

\TimeOn\Booking\Current Clients\<Client Name>.xlsx

Directory where Booking DNA (Did Not Attend) Reports are saved:

\TimeOn\Booking\DNA Reports\

Directory where Booking Invoices are saved:

\TimeOn\Booking\Invoice\

Directory where Booking annual reports and monthly reports are saved:

\TimeOn\Booking\Reports\

Record of appointment outcomes, and booked appointments of clients who have accepted the service and made a booking:

\TimeOn\Booking\Schedules\<Client Name>\<Client Name>-<Staff Name>.xlsx

Directory where Staff summary reports are saved:

\TimeOn\Booking\Staff Summary\

Directory where all templates used by TimeOn (Booking) are saved – including the normal daily availability of staff:

\TimeOn\Booking\Templates\

Directory where personalised texts are saved:

\TimeOn\Booking\Texts\

Main client (Booking) data file:

\TimeOn\Booking\Data.xlsx

IAps with recorded outcome file:

\TimeOn\Booking\IAp.xlsx

Clients who are due a phone call due to not accepting the service list:

\TimeOn\Booking\PhoneCall.xlsx

Clients who are due a six-session review list:

\TimeOn\Booking\Review.xlsx

Clients who DNA'ed an appointment, so maybe required for a signature list:

\TimeOn\Booking\Signature.xlsx

Timetable

Directory were Timetable attachments for emails can be placed:

\TimeOn\Timetable\Attachments\

Record of appointments of clients who have accepted the service. Recorded manually and used by the invoicing:

\TimeOn\Timetable\Client Records\<Client Name>.xlsx

Timetable sheets to be filled in of clients who have accepted the service:

\TimeOn\Timetable\Current Clients\<Client Name>.xlsx

Timetable sheets to be filled in of staff:

\TimeOn\Timetable\Current Staff\<Staff Name>.xlsx

Directory where Timetable Invoices are saved:

\TimeOn\Booking\Invoice\

Directory where Timetable annual reports and monthly reports are saved:

\TimeOn\Timetable\Reports\

Directory where Staff summary reports are saved:

\TimeOn\Timetable\Staff Summary\

Directory where all templates used by TimeOn (Timetable) are saved:

\TimeOn\Timetable\Templates\

Directory where all matched timetables generated by TimeOn are saved:

\TimeOn\Timetable\Timetables\

Main client (Timetable) data file:

\TimeOn\Timetable\Data.xlsx

8   Data and liability

Use of TimeOn is at your own risk. FluffyLycan.co.uk is not responsible for any data loss or issues resulting from the use of TimeOn. By using TimeOn you are accepting these terms. All data is stored on your drive/server and so as such, you are

responsible for the security and backup. It is recommended you back up the entire TimeOn directory regularly.