

Sharing Resources and Calendars

If you wish to share a joint calendar, view other team member calendars, or be able to share WorkCenter resources, two or more users must be sharing a single database. WorkCenter Resources options boxes allow you to accomplish this task. Please keep in mind that WorkCenter Resources are not where you get loans, but where you share internal WorkCenter functions and calendars. You will also be able to assign individual team members with Action Plan calendar steps that need to be accomplished.

Programming your “Resources”:

Step #1: Each team member needs to have a contact record created for them in the database. For this flash video example, we will be using the following three contact records:

Money Bags, Pierce Brosnan and Sean Connery from our test database.

Step #2: We now need to mark each of these with the “Resource” option and we also recommend that you mark the contact record as “Locked”. To do that open each of the records by double clicking on the contact name and then click the drop down arrow next to Categories. Check the two boxes – Resource and Locked on each record and close the contact screen and save the changes.

Step #3: As you can see, our Calendar Tab now shows three calendars for the three team members sharing resources. Since all the team members are sharing resources in the same database, each person now opening their WorkCenter should show all three calendars.

Step #4: Each user or team member can choose the calendars they wish to display. To do that, right click into the calendar screen and select the option: Resource Layout Editor. You will see the Resource Layout Editor screen appear. Simply uncheck the name or names that you do not wish to display on your calendar. For this example, we will uncheck “Sean Connery” and you will now only see the two calendars remaining on the screen view.

Step #5: If you have multiple calendars appearing on your screen, you can schedule appointments or other calendar items for the other team members by right clicking into their calendar or using the drag and drop technology incorporated within WorkCenter.