ADVICE USER GUIDE

Version 1.0 | 19/03/2019

Centre & Candidate No.

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1.0 Introduction

1.1 Description

The purpose of this system is to deliver specific improvements to enhance the business. The following document will provide guidance on using the system, currently for the only partially functional sub-system: advice booking. To aid in performing specific tasks on the system, the user guide is a comprehensive walk-through that will allow the system to be used properly and efficiently. Each important step is carefully narrated to help the user.

The system has several sub-facilities, imperative to the required daily-use of the business, briefly summarised below:

- Appointments
- Customers
- Timetable / Schedule
- Reports (Monthly Statistics / Receipts)

However, there are other functionalities which interlink the sub-facilities which would prove useful through daily-use.

1.2 System Requirements

| Hardware		
	Minimum Requirements	**Recommended Requirements**
Processor	500 MHz	1 GHz
Memory	1 GB RAM	4 GB RAM
Storage	100 MB available space	1 GB available space
Graphics	128 MB DirectX 9 graphics device	128 MB DirectX 9 graphics device

Software		
	Minimum Requirements	**Recommended Requirements**
Operating System	Windows XP SP3	Windows 10
.Net Environment	Visual Studio Express 2015	Visual Studio 2015 Professional

2.0 Form Navigation

2.1 Woodside Community Hub Menu

This menu is a hub to allow you to navigate to a selected sub-system; in this case, there is currently only one sub-system to venture to.

1. Click the button, named "Advice", to continue
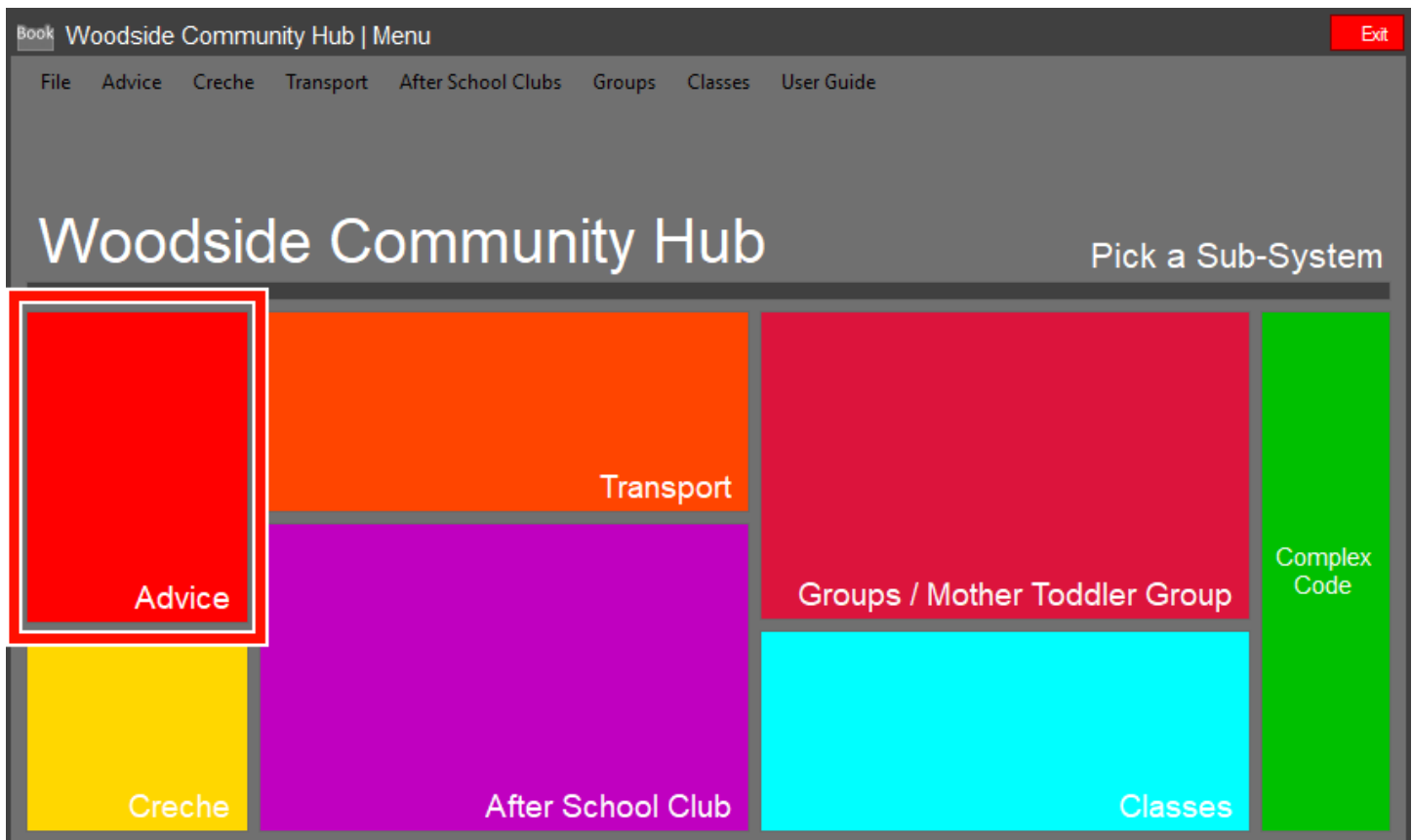
2.2 Advice Main Menu
The Advice Menu is a navigational form to branch off to all forms needed for the advice sub-system.

- Appointments – allows you to View, Add, Edit and Delete bookings
- Customers – allows you to View, Add, Edit and Delete customers
- Schedule – allows you to view the daily timetable, check in and generate receipt
- Monthly Statistics – compiles required, monthly and useful statistical information

Among the highlighted buttons, the functionality associated to the "Staff / Services" button has not been added yet. *Due to skill repetition, I have decided to leave this functionality out*
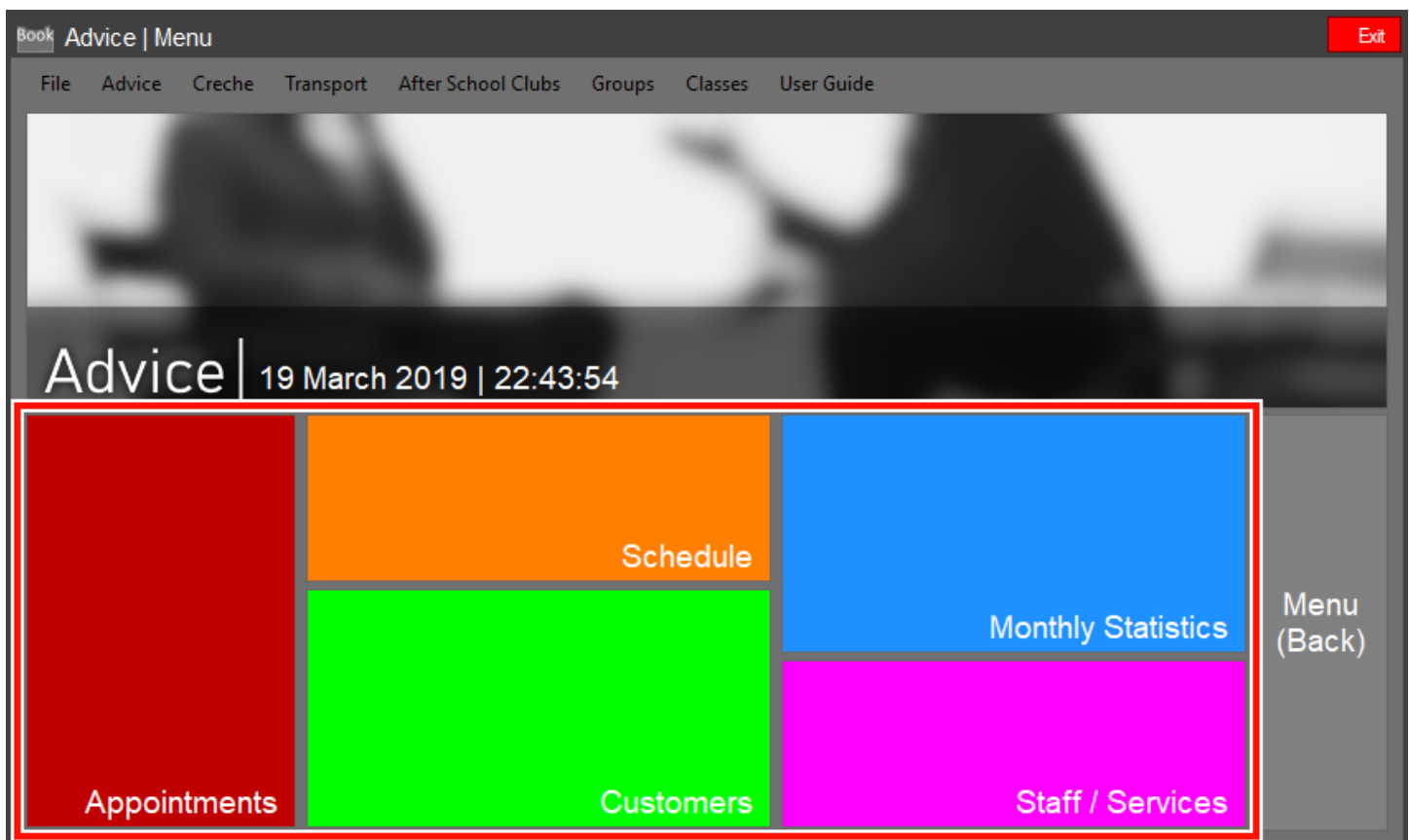
2.3 Navigation Bar

The navigation bar is universally accessible on every form, near the top. At any point in time, the navigation bar gives quick access to important forms of the entire system.

- File – reveal options that affect the whole system
- Advice – reveal options related to the advice sub-system
- Creche – reveal options related to the creche sub-system
- Transport – reveal options related to the transport sub-system
- After School Clubs – reveal options related to the after-school club sub-system
- Groups – reveal options related to the groups sub-system
- Classes – reveal options related to the classes sub-system
- User Guide – open the PDF document to the user guide (this guide)

2.4 Quitting the Application
Like the navigation bar (2.3), the button is an ever-present functionality in each form that allows you to quit the application. When approached with the message box, answer as needed.

1. Click the top-right button, "Exit"
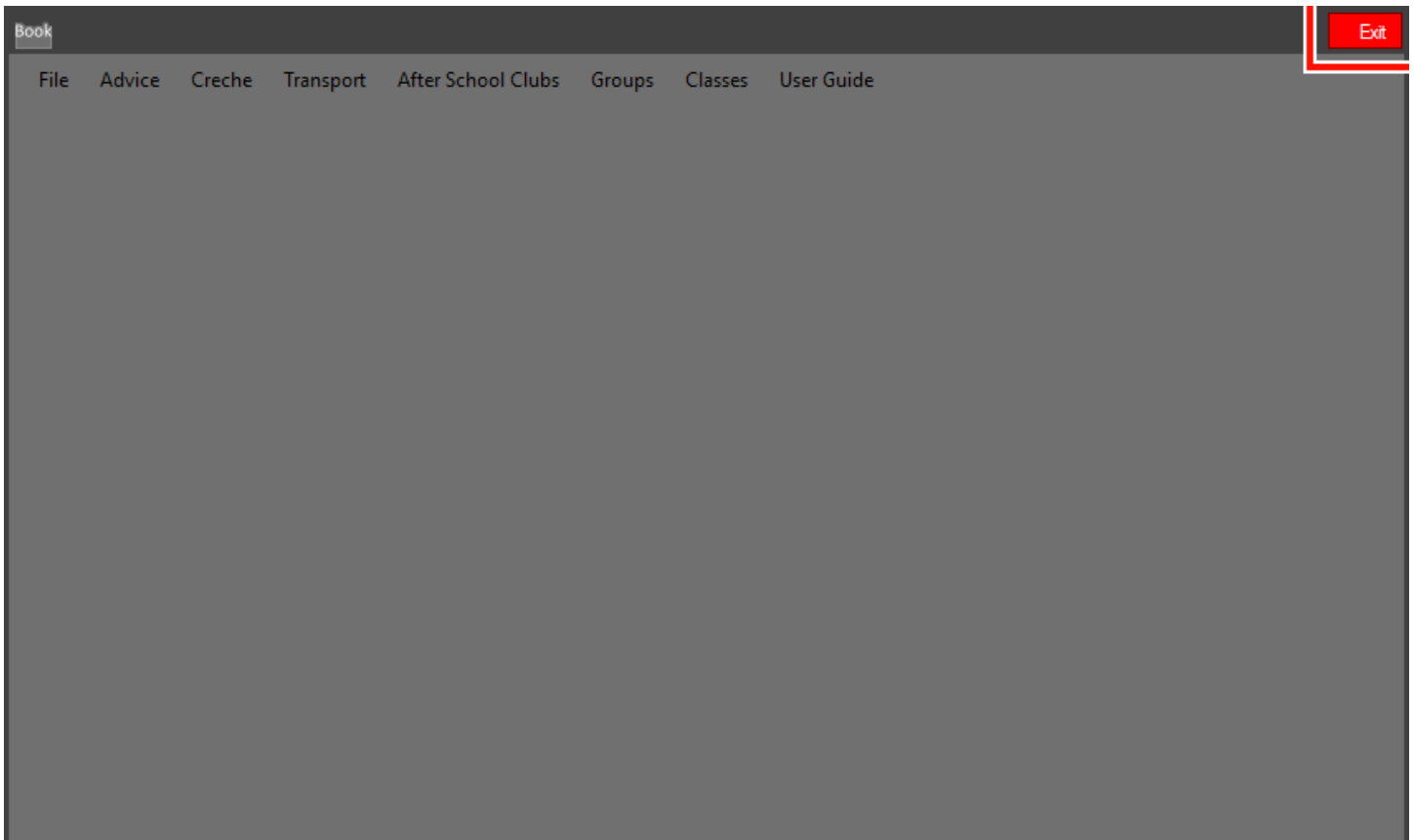
3.0 Appointments

3.1 Booking an Appointment

1. Click the "Appointments" button in the Advice Menu
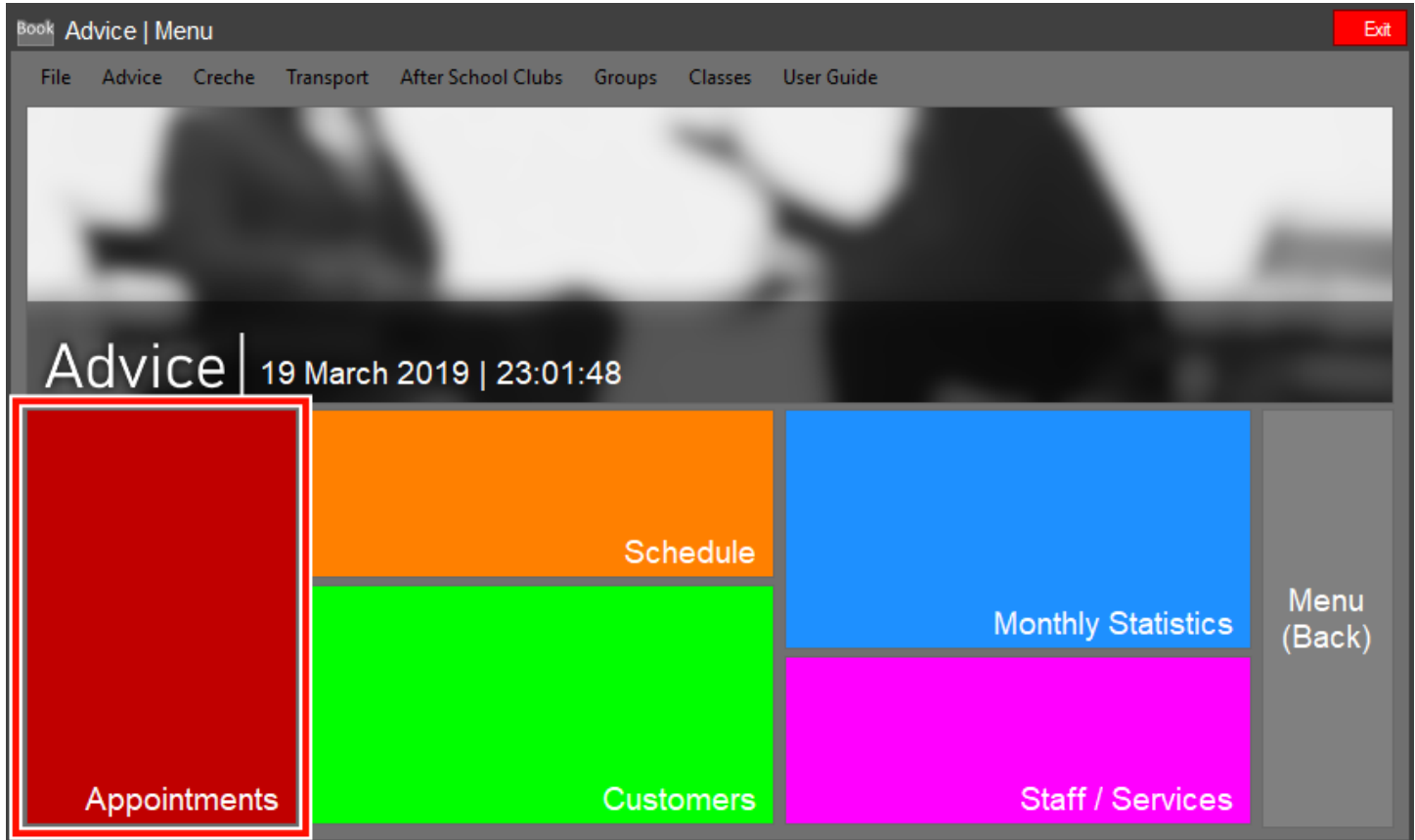
2. Ensuring that the add section panel is showing, select a date for the appointment booking. Then, click the "Book" button.

Note:

To meet the business requirements, you can only book on the following days:

- Monday
- Wednesday
- Friday

The relevant dates span from the systems current date to two weeks from current date. In addition, when selecting a date, the office space availability is shown below the book button.

3. Fill in the fields (certain options are removed due to unavailability)

Note: During this booking process, we will be making a normal booking. The urgent booking functionality is distinctively different in function.

The follow combo boxes have notable restrictions to aid in creating a solid booking system:

- Customers – only active customers are shown in the combo box
- Time – depending on the customer and date, the times available will be deducted if the customer has an appoint already for one of the times, as the customer cannot attend two appointments at the same time and date in different rooms
- Office – depending on the time and date, the office available will be deducted if the office is already in use in that time and date, as an office will be in use
- Services – the services available depend on the date. Depending on the day of the week, certain services will be unavailable
- Staff – if a staff is already in use depending on time and date, the staff will be deducted from the list

4. Click the "Confirm Booking" button and the booking is now booked

3.1.1 Booking an Urgent Appointment
1. Ensure that the toggle appointment priority button is: urgent

The urgency booking is a special use case, which overrides normal bookings. When a booking is made, the booking is either in conflict or not in conflict with a booking. When "not in conflict", the booking is made like normal, however the priority is set to "urgent" and therefore cannot be overridden by any other booking.

In the case of a conflicting booking with a normal priority booking, the booking will override the spot of the normal bookings and defer the normal booking two weeks from the original date. This linear system of deferral is a simple logic that just works.

3.2 Viewing an Appointment

1. Select the required booking, disregarding status

Note: Make sure you show the manage section

2. Click the "View/Edit Booking" or "View Booking" button

4. View the appointment

3.3 Editing an Appointment
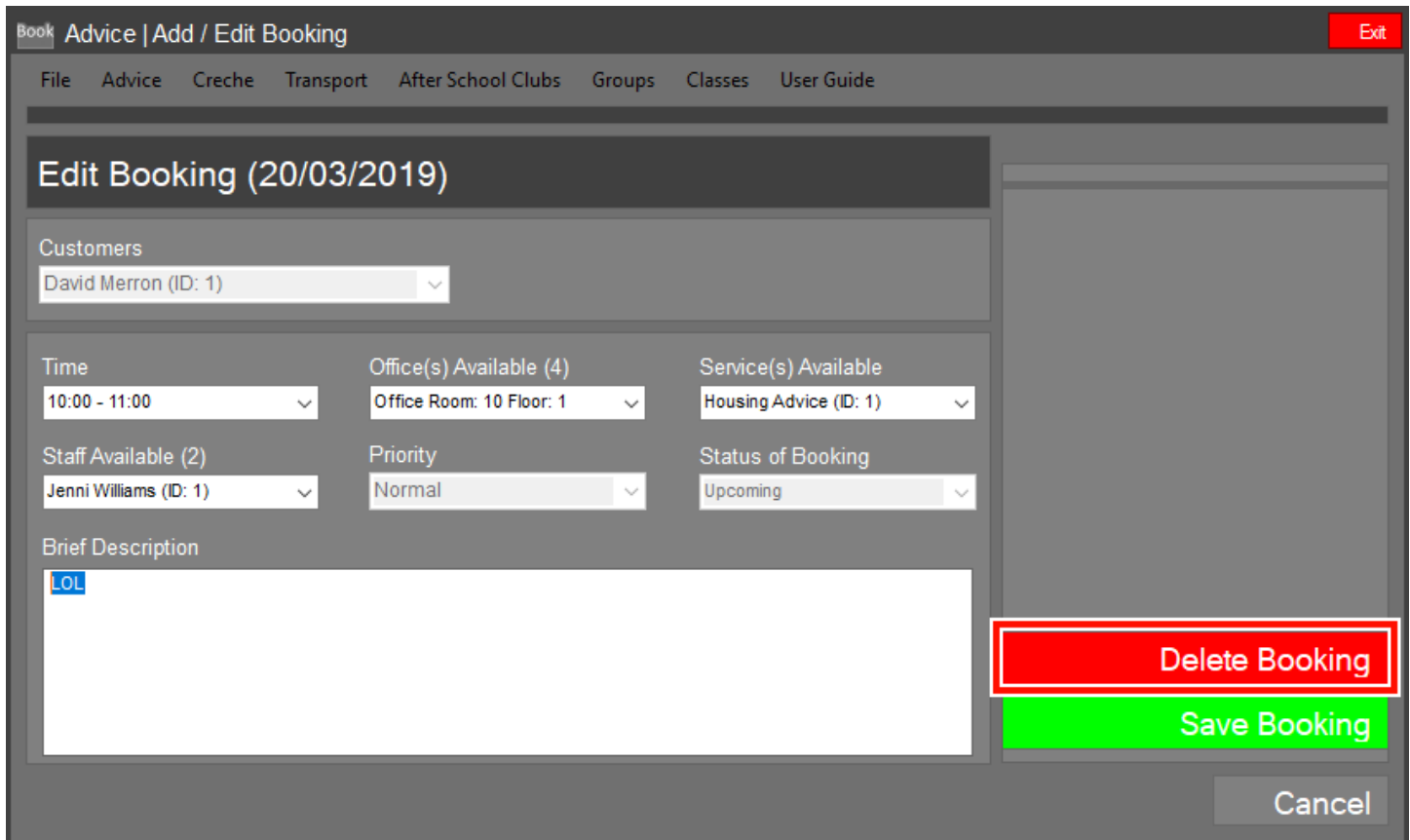
1. Change details to suit need and then click "Save Booking" button

Note: There are certain changes that aren't available due to business requirements. Also, only booking of status, "Waiting" and "Upcoming" may be edited. Other statuses cannot be edited and thus all the inputs will be disabled.

3.4 Deleting / Cancelling an Appointment

1. Click the "Delete Booking" button

Note: Due to the severity of deleting a booking, a message box will prompt you for confirmation, just in case

4.0 Customers

4.1 Adding a Customer

1. Click the "Add New Customer" button

2. Fill in fields

Validation:

- Name: the first name and last name must only contain letters and be filled
- Date of Birth: the date of birth must be 18+ years old
- Postcode: must be within UK regulation in terms of format, etc.
- Email: must contain letter before '@' and after
- Tele No: must be of length 11 and only contain numbers

3. Click "Add New Customer" button

Note: this button checks the validation, if not valid, you will be notified. However, if valid, the user will be added.

4.2 Viewing a Customer

1. Select a customer on the left. On the right, the details are shown

4.3 Editing a Customer

1. Select a customer and click "More Options" button

2. Change the details as need and click the "Save Customer Details" button, all validity from add booking applies

4.4 Deactivating a Customer

1. Click the "Deactivate Customer" button

Note: To avoid deception, I have titled this deactivation as the customer will still be saved in the database but not useable. Also, refer to 6.2.2 in the user guide, to further understand the consequence of deactivating a customer.

5.0 Schedule

5.1 Viewing the Schedule
1. Select the "Schedule" button in the Advice Menu (2.2)

Note: As reference in the top right of the form, each cell is colour coordinated to the status (a selected booking is grey). Also, when selecting a customer, at the bottom, specific information is shown.

6.0 Appointment Management

6.1 Manual Status Update: Checking In

1. Select a booking and click check-in

Note: You can only check in a booking with the same time and date of the selected booking. Also, as a perquisite to the step, you need to make sure that the manage section is shown.

6.2 Automatic Status Update

6.2.1 Updating Passed Bookings

1. This function executes every time the program is loaded up

Note: Based on the likelihood the computer the system is used on will be rebooted every day, when the program loads, the program will check if there are bookings that are upcoming / waiting that have passed the systems "todays" date. If so, the booking will be marked missed. This is because the booking was not checked-in in time and therefore it will ensure bookings have the correct status.

6.2.2 Deletion of Future Bookings after Customer Deactivation
1. When a customer is deactivated, future bookings will be deleted

Note: The highlighted bookings are all bookings associated to David Merron in the current month. As you can see, the bookings for this person have varying statuses. If, for example, the customer: David Merron was deactivated, the bookings of status Upcoming and Waiting will be deleted. In this case, only three bookings will be deleted.
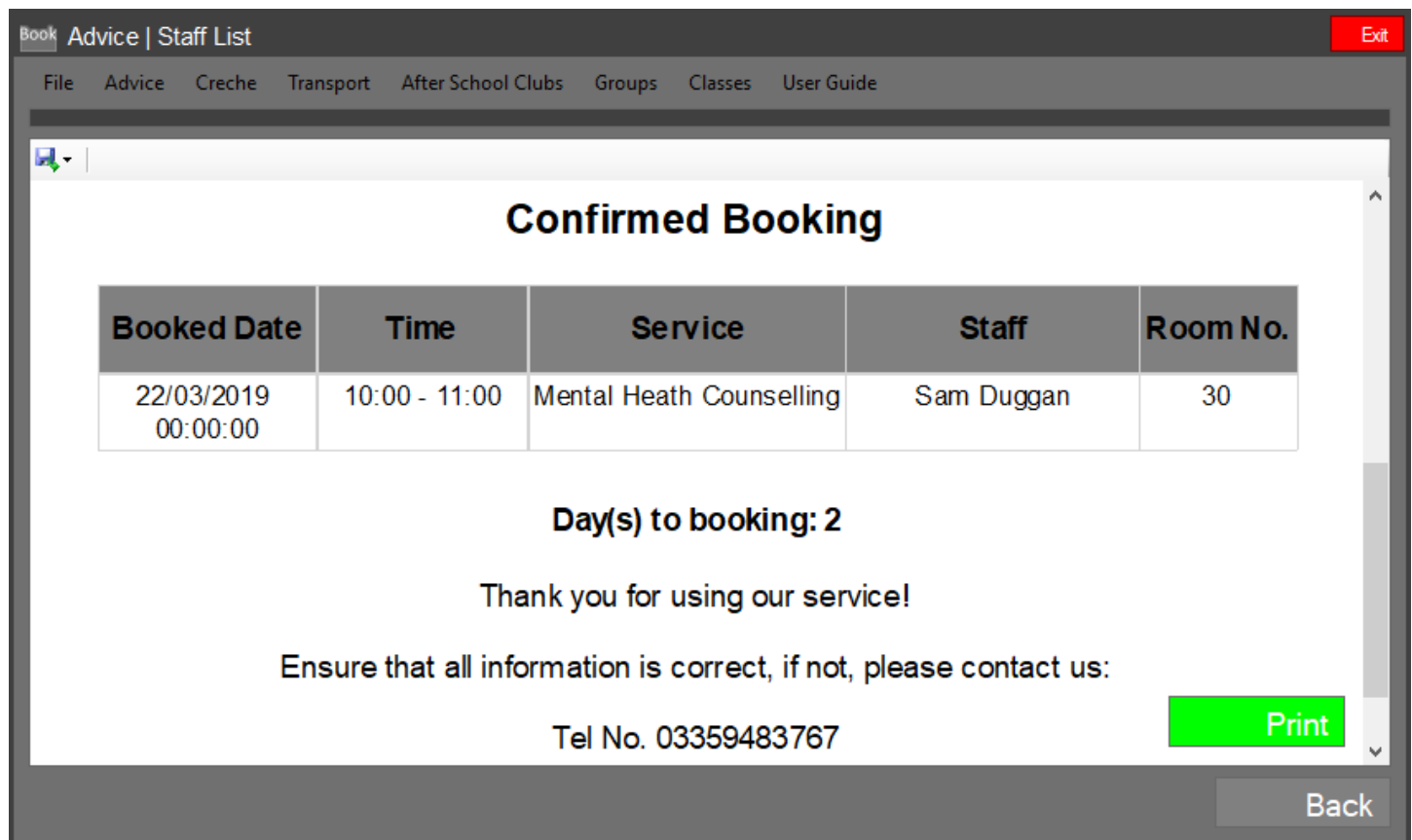
7.0 Reports

7.1 Viewing the Monthly Statistics

1. Select a month with bookings
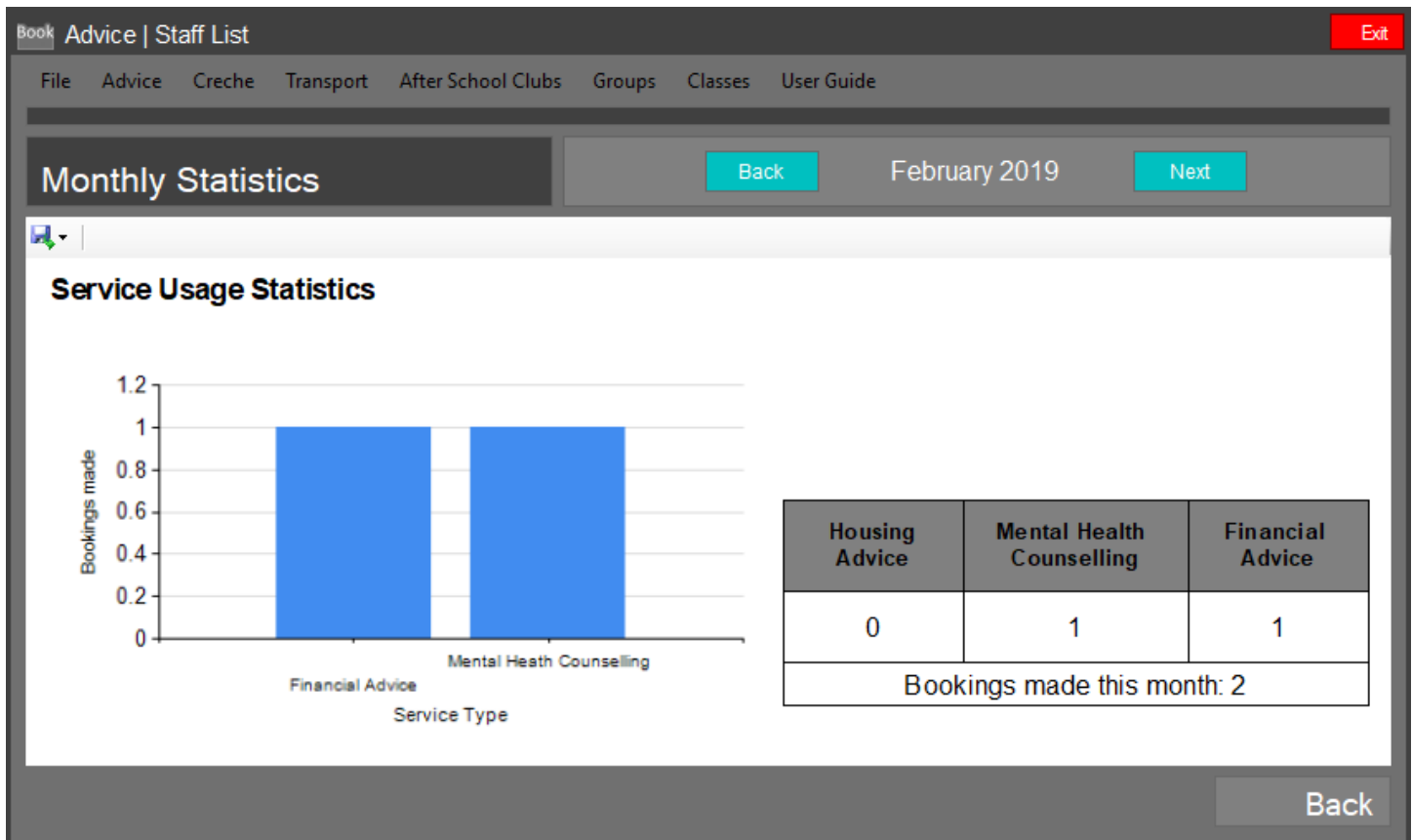
Note: You can only view past months; not the current month as it has not passed yet

7.2 Generating the Receipt

1. Select a booking (3.2 / 5.1) and click the "Generate Receipt" button

Note: In the bottom-right, there is a "print" button which allows you to physically print a copy of the receipt