

Mathis Scheduling

User Guide

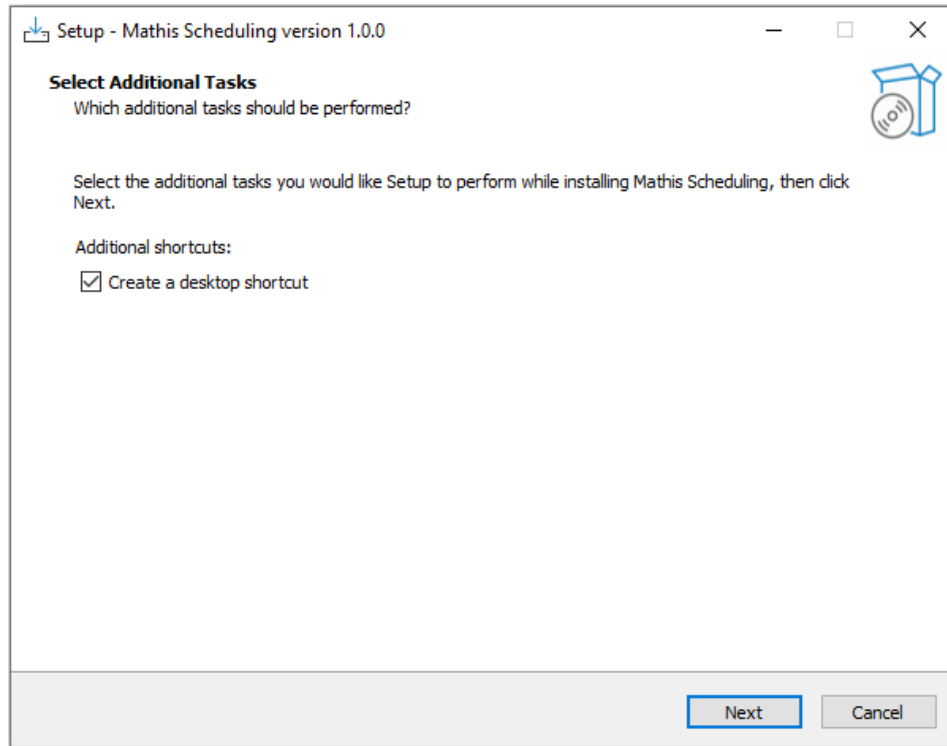
Introduction

This user guide will walk the user through installing and using the application. Although the deployment will be via Group Policy, these instructions allow manual installation. The following tasks are covered in detail:

- Installing the application
- Logging in to the application
- Creating, editing, and deleting customer records
- Creating, editing, and deleting appointment records
- Viewing generated reports

Installation and Using the Application

The application will be delivered as a single executable installer – simply run this file to begin the installation.



Application Login

When launching the application, the user will be presented with a login form requiring a username and password combination. Enter the user credentials provided by the network administrator and click the button labeled “Login”.

A screenshot of a login window titled "Login" with a close button (X) in the top right corner. The window has a black background. At the top, the text "Mathis Scheduling" is displayed in a stylized, outlined font, followed by "Please login to continue" in a smaller, similar font. Below this, the label "Username" is followed by a text input field containing the text "johnqsmith". Further down, the label "Password" is followed by a text input field where the password is masked with 15 black dots. At the bottom of the window is a large, light gray button with the word "Login" centered on it.

DEFAULT USER FOR EVALUATION PURPOSES:

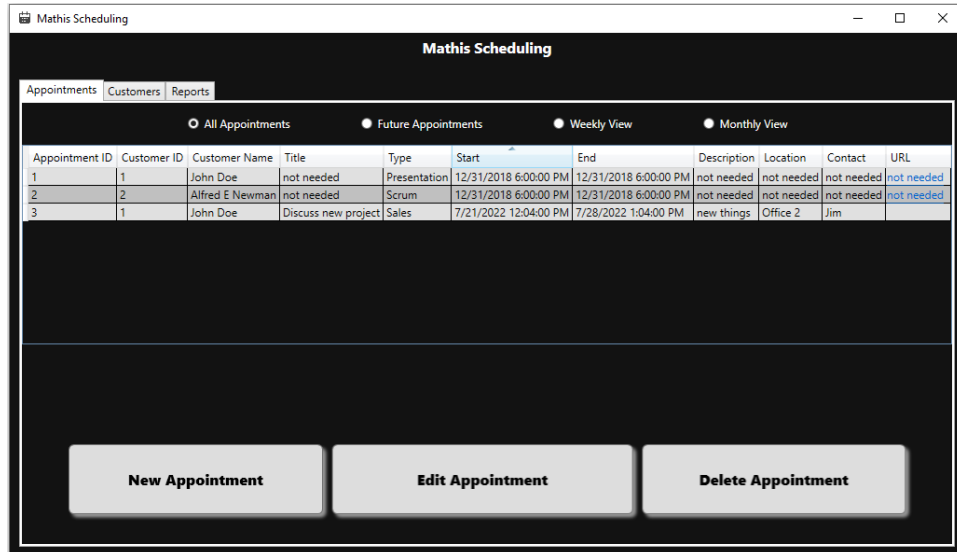
Username: test

Password: test

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Appointments

The first screen to appear after a successful login will be the Appointments List. This screen gives an overview of all scheduled appointments by default and can be filtered by weekly and monthly views.

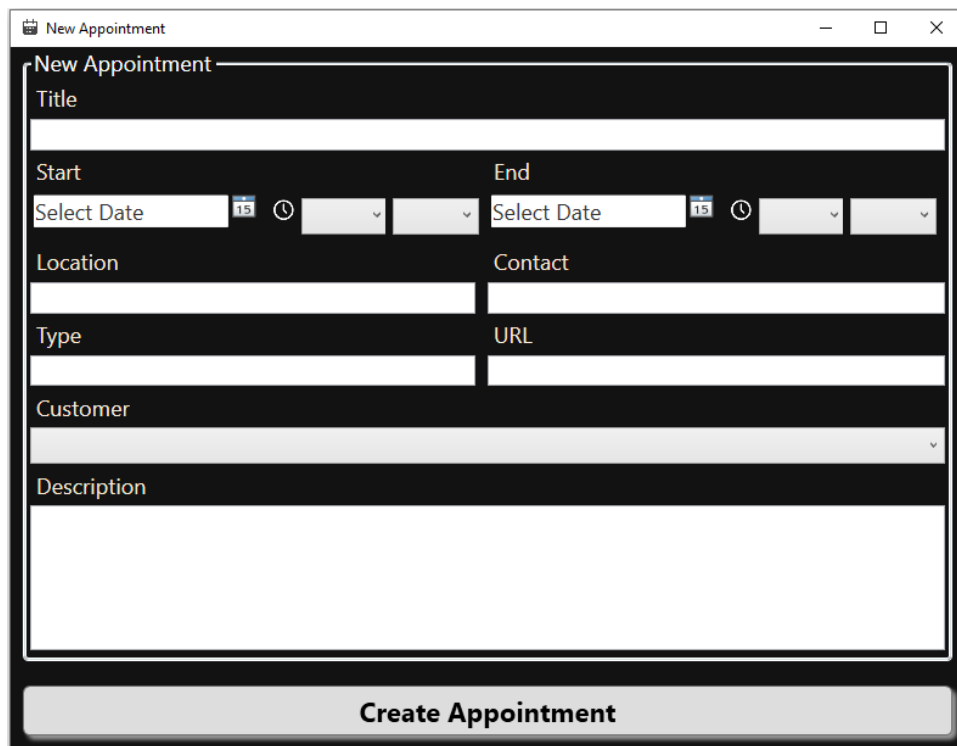


The screenshot shows the 'Mathis Scheduling' application window. At the top, there are tabs for 'Appointments', 'Customers', and 'Reports'. Below the tabs, there are four radio buttons for view selection: 'All Appointments' (selected), 'Future Appointments', 'Weekly View', and 'Monthly View'. A table displays a list of appointments with the following columns: Appointment ID, Customer ID, Customer Name, Title, Type, Start, End, Description, Location, Contact, and URL. The table contains three rows of data. Below the table, there are three buttons: 'New Appointment', 'Edit Appointment', and 'Delete Appointment'.

Appointment ID	Customer ID	Customer Name	Title	Type	Start	End	Description	Location	Contact	URL
1	1	John Doe	not needed	Presentation	12/31/2018 6:00:00 PM	12/31/2018 6:00:00 PM	not needed	not needed	not needed	not needed
2	2	Alfred E Newman	not needed	Scrum	12/31/2018 6:00:00 PM	12/31/2018 6:00:00 PM	not needed	not needed	not needed	not needed
3	1	John Doe	Discuss new project	Sales	7/21/2022 12:04:00 PM	7/28/2022 1:04:00 PM	new things	Office 2	Jim	not needed

Create a New Appointment

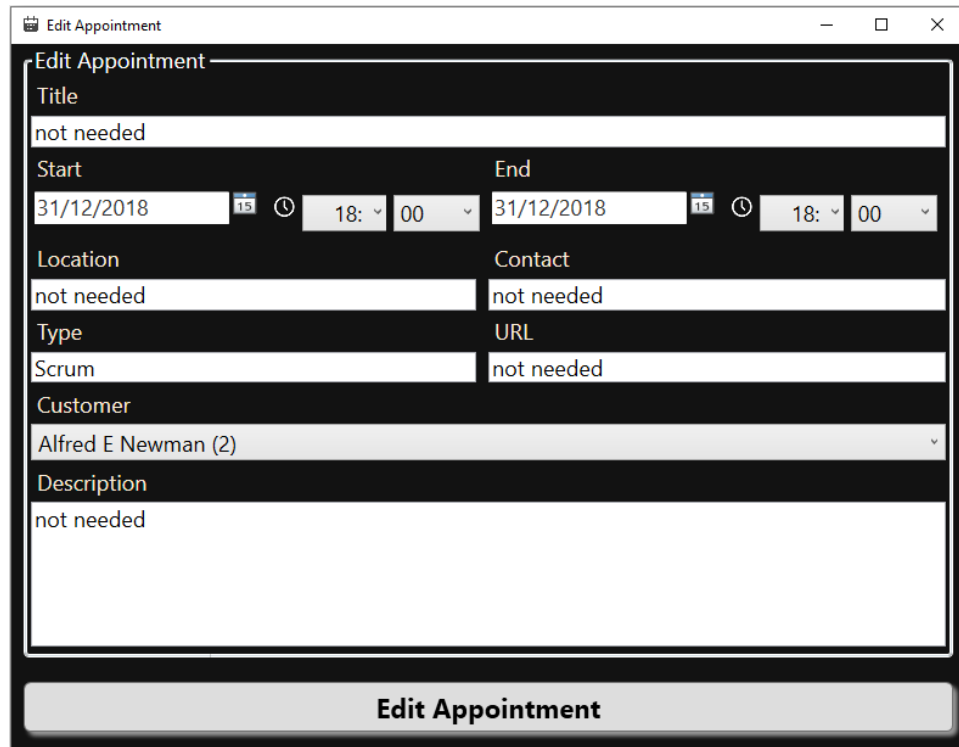
To create a new appointment, click the “Appointments” tab, and then click the “New Appointment” button to open the dialog to create a new appointment.



The screenshot shows the 'New Appointment' dialog box. It has a title bar 'New Appointment' and a close button. The form contains the following fields: 'Title' (text input), 'Start' (date and time picker), 'End' (date and time picker), 'Location' (text input), 'Contact' (text input), 'Type' (text input), 'URL' (text input), 'Customer' (dropdown menu), and 'Description' (text area). At the bottom, there is a 'Create Appointment' button.

Edit an Appointment

To edit an appointment, click the “Appointments” tab, select the desired appointment, and then click the “Edit Appointment” button to open the dialog to edit the appointment.



The screenshot shows a window titled "Edit Appointment" with a standard Windows-style title bar (minimize, maximize, close buttons). The dialog contains several input fields and a large text area, all with the placeholder text "not needed". The fields are arranged in a two-column layout:

- Title:** A single-line text field.
- Start:** A date and time picker showing "31/12/2018" and "18:00".
- End:** A date and time picker showing "31/12/2018" and "18:00".
- Location:** A single-line text field.
- Contact:** A single-line text field.
- Type:** A single-line text field with the value "Scrum".
- URL:** A single-line text field with the value "not needed".
- Customer:** A dropdown menu showing "Alfred E Newman (2)".
- Description:** A large multi-line text area.

At the bottom of the dialog is a large, light-colored button labeled "Edit Appointment".

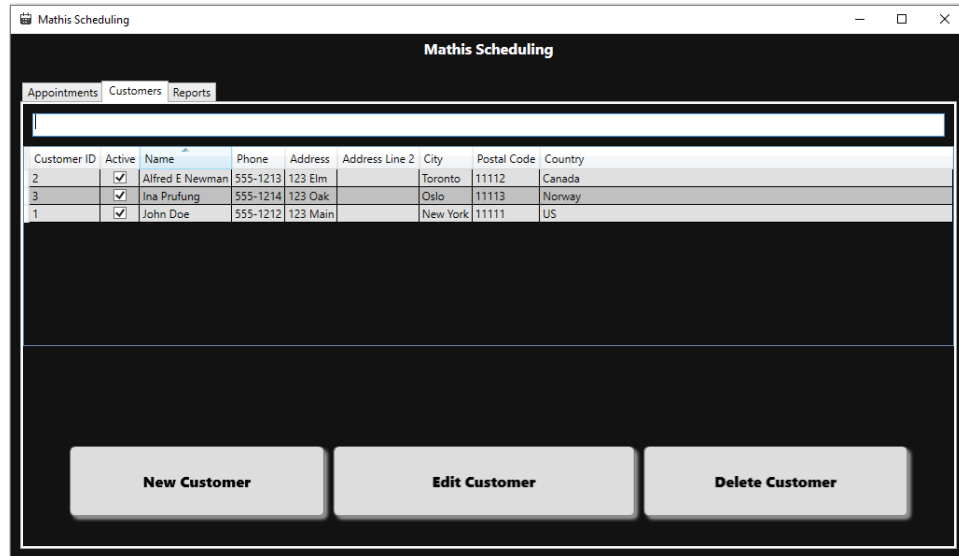
Delete an Appointment

To delete an appointment, click the “Appointments” tab, select the desired appointment, and then click the “Delete Appointment” button.

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Customers

To view the customer list and access other customer-related functionality, click the “Customers” tab at the top of the window.

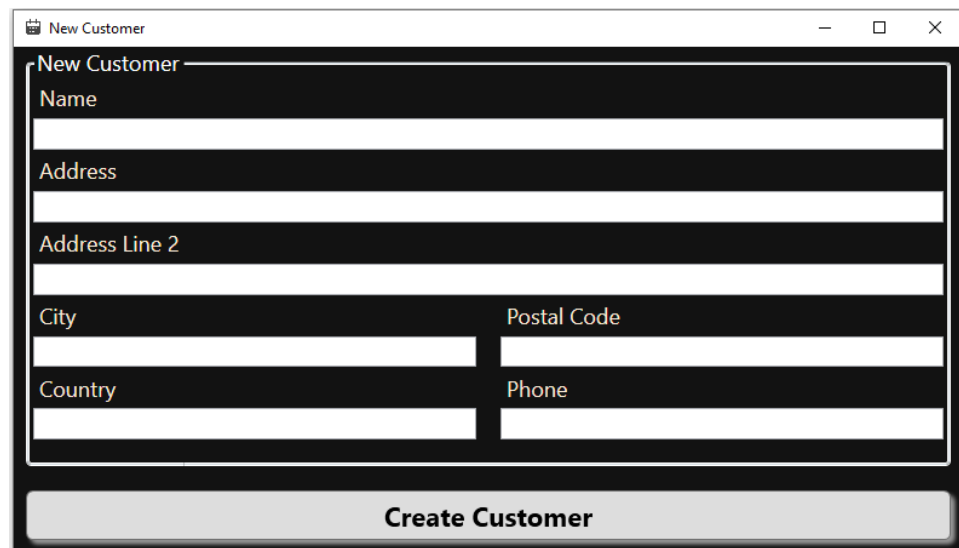


The screenshot shows the Mathis Scheduling application window with the "Customers" tab selected. The window has a title bar "Mathis Scheduling" and three tabs: "Appointments", "Customers", and "Reports". Below the tabs is a search bar. A table displays the customer list with columns: Customer ID, Active, Name, Phone, Address, Address Line 2, City, Postal Code, and Country. The table contains three rows of data. Below the table are three buttons: "New Customer", "Edit Customer", and "Delete Customer".

Customer ID	Active	Name	Phone	Address	Address Line 2	City	Postal Code	Country
2	<input checked="" type="checkbox"/>	Alfred E Newman	555-1213	123 Elm		Toronto	11112	Canada
3	<input checked="" type="checkbox"/>	Ina Prufung	555-1214	123 Oak		Oslo	11113	Norway
1	<input checked="" type="checkbox"/>	John Doe	555-1212	123 Main		New York	11111	US

Create a New Customer

To create a new customer, click the “Customers” tab, and then click the “New Customer” button to open the dialog to create a new customer.



The screenshot shows the "New Customer" dialog box. It has a title bar "New Customer" and a close button. The dialog contains several input fields for customer information: Name, Address, Address Line 2, City, Postal Code, Country, and Phone. At the bottom is a "Create Customer" button.

Edit a Customer

To edit a customer, click the “Customers” tab, select the desired customer, and then click the “Edit Customer” button to open the dialog to edit the customer.

Edit Customer

Name
John Doe

Address
123 Main

Address Line 2

City
New York

Postal Code
11111

Country
US

Phone
555-1212

☒ **Customer Active**

Edit Customer

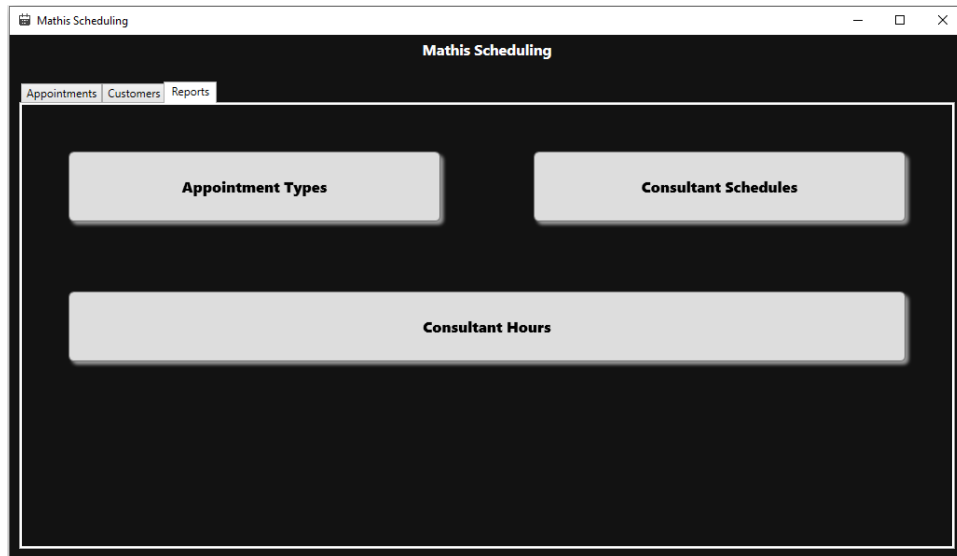
Delete a Customer

To delete a customer, click the “Customers” tab, select the desired customer, and then click the “Delete Customer” button.

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Reports

To access and generate the available types of reports, click the “Reports” tab and click the appropriate report button to generate the report.



Report: Appointment Types

The screenshot shows the 'Appointment Types' report window. It contains a table with the following data:

Month	Presentation	Scrum	Sales
January			
February			
March			
April			
May			
June			
July			1
August			
September			
October			
November			
December	1	1	

Below the table is a large empty space, and at the bottom is a 'Print' button.

Report: Consultant Schedules

Consultant Schedules				
Start	End	Username	Customer	Type
12/31/2018 6:00:00 PM	12/31/2018 6:00:00 PM	test	John Doe	Presentation
12/31/2018 6:00:00 PM	12/31/2018 6:00:00 PM	test	Alfred E Newman	Scrum
7/21/2022 12:04:00 PM	7/28/2022 1:04:00 PM	test	John Doe	Sales

Print

Report: Consultant Hours

Consultant Hours	
Date	test
21/07/2022	169

Print