

# **Activity Planning Simplified®** *by Creative Forecasting Inc.*

## Activity & Recreation Program Manager

# **Users' Guide**

**Copyright 2001-2021 Creative Forecasting, Inc.**

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## **1.0 Program Information**

### **Activity Planning Simplified**

*by Creative Forecasting, Inc.*

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### **1.1 OVERVIEW**

What is "Activity Planning Simplified®"?

Activity Planning Simplified® is an activity & recreation program manager that is combined with a daily / monthly planning calendar with clip art. The program includes these features:

- \*12-month calendar - January – December (Annual updates will be available)
- \*Group & Individual Participation Reports
- \*Daily, Weekly, Monthly Activity & Participation Reports
- \*Print full-size monthly calendars 8 1/2" x 11", 8 1/2" x 14", and 11" x 17"
- \*Print Daily Activity Schedules
- \*Record & Print Participation Levels and Client Preferences
- \*Birthday Records, Birthday Calendar
- \*Daily Trivia Questions and Answers (always different)
- \*"This Day in History" Historical Dates
- \*Handy Click-n-Type Calendar, quickly creates Calendars with unrecorded events
- \***Place Clip Art Images and design your own unique Calendar**
- \*Designed Specifically for Activity & Recreational Programming

*Creative Forecasting, Inc.* has provided Activity & Recreational Programming ideas for over 20 years. *Creative Forecasting Inc.* currently produces the nation's number one monthly magazine for Activity and Recreation Professionals working in long term care, assisted living facilities, adult day

services, retirement communities, senior centers, mental health centers, hospice centers, and rehabilitation units. *Creative Forecasting*® is an Activity & Recreational planning magazine that also includes educational information and a wealth of resources. "**Activity Planning Simplified**®", **the software program for the professional, by the professionals.**

## 1.2 SYSTEM REQUIREMENTS

Activity Planning Simplified® requires the following:

PC or compatible with 30mb disk space, that meets the requirements of Microsoft Windows XP, Windows Vista, Windows 7, 8 or 10.

Minimum hardware requirements:

CD ROM, If you have the CD version and the file wasn't downloaded.

- Microsoft Windows XP, Windows Vista, Windows 7, 8 or 10 with current service packs & updates
- Mouse or other pointing device
- For printed output, a Windows-supported printer with current, updated printer drivers\*

\*NOTE: This includes most laser, dot matrix and ink jet printers

## 1.3 INSTALLATION

### 1.3.1 Installation Instructions

You must have Microsoft Windows XP, Windows Vista, Windows 7, 8 or 10 with current service packs & updates. If you downloaded the program, please disregard the references to the CD ROM & execute the downloaded file.

To install Activity Planning Simplified, perform the following steps:

1. Start Windows, if you haven't already done so and close all programs.
2. The program will Uninstall any previous versions of Activity Planning Simplified. Your existing Data will be converted to the new version.
3. Insert the CD ROM into the CD ROM drive. If the setup program does not automatically start, perform the following steps.
4. From the Start menu, select Run.
5. In the dialog box, enter: d:\setup (You will need to change the drive letter in the command line above to match your current CD ROM drive.)

6. Click on the OK button.
7. Follow the instructions given by the setup wizard for correct installation of the product.
8. After installation, remove program disk and keep in a safe place. Reactivate any Anti-virus software if you disabled it.
9. When the program is opened for the first time, you may be asked if you are restoring data from a previous installation. If you are, follow the instructions on the screen. Trial versions will display the time remaining in the trial period. All data entered in the trial version will be converted when you purchase a registered version of the program.

### **1.3.2 Installed Files, Access Requirements**

The program must be installed using administrative access and users must have access to the C:\Program Files\Activitycldr Folder. The program can be installed on the “D” as well, but share access must be given to the corresponding folders.

### **1.3.3 Uninstall Instructions**

The program includes an uninstaller. To uninstall, go to start-> programs-> creative forecasting-> uninstall calendar. Restart your computer and install the program again.

Alternate Uninstall- To uninstall, go to start-> programs-> settings-> control panel-> add/remove programs-> Select: “Activity Calendar”-> remove

## **1.4 KNOWN PROBLEMS OR LIMITATIONS**

### **1.4.1 Deleted**

### **1.4.2 Printing**

There may be some difficulty changing your default printer in the Printer Dialog box within the program. It is best to exit the program and select your default printer prior to opening the program. You must have a printer installed on your computer for the program to operate correctly, even if you do not have a printer connected.

### **1.4.3 Anti-virus / Anti-spam Software**

There are known issues with Install Shield® installer, Windows® Installer and some Anti-virus / Anti-spam Software. These issues are not the installers issues. It is strongly recommended that you temporarily disable any Anti-virus / Anti-spam Software prior to installation of this product. Be sure to enable your Anti-virus / Anti-spam Software after the installation.

### **1.4.4 Clip Art size, quantity and memory**

There are limitations on the size and quantity of images used. System memory is important. If you are experiencing problems ie; not all the clip art displayed, corrupt fonts, corrupt images etc. try decreasing the quantity of images and/or the size of the image file (use a different image). There may be other problems with an image not displaying or missing. Some images have a corrupt file and will display in some programs and not others. If this is a problem, use another image.

### **1.5 PRODUCT SUPPORT**

This program is designed for the end user to require little, if any assistance. Use of the help documentation files will resolve most issues. Be advised that the most effective and efficient way to obtain support is by e-mail or fax. Our Tech support personnel will be focused on your issue by e-mail or fax and may not be available for phone support at all times.

#### **Contact Technical Support in one of the following ways:**

E-mail: [support@cfactive.com](mailto:support@cfactive.com)

Fax: (719) 632-4721

Phone: (719) 633-3174, Monday – Friday, 9:00AM – 4:00PM Mountain Time

Mail:

Creative Forecasting, Inc.

Attn: Activity Calendar Support

P.O. Box 7789 Colorado Springs, CO 80933-7789

Please send any comments or suggestions via Postal mail, e-mail or fax Attn: Technical Support.

If you are reporting a problem with Activity Planning Simplified, please provide the following information:

- The product name and version number (Activity Planning Simplified version ???)
- Registered name, e-mail address, fax # and phone # with the best time to contact you
- The platform used, i.e. Windows 7, etc.
- The approximate age of the computer
- Type of Printer you are using, Brand and Model number
- A description of the problem, and what you were trying to do when the problem occurred and what programs were running when the problem occurred.

## 1.6 PURCHASING "ACTIVITY PLANNING SIMPLIFIED"

For ordering "Activity Planning Simplified®" please use the following contact information:

E-mail: [support@cfactive.com](mailto:support@cfactive.com)

Fax:(719) 632-4721

Phone: (719) 633-3174

1-800-373-0115 (Orders only)

Mail:

Creative Forecasting, Inc. Activity Planning Simplified

P.O. Box 7789

Colorado Springs, CO 80933-7789

To obtain a fax-in or mail-in order form, you can print it from the Help-About Menu, print the form from the CD ROM, call, fax, write, e-mail or go to [www.creativeforecasting.com](http://www.creativeforecasting.com) . We do not send "bills" or "invoices". All orders are shipped when payment is received.

## 2.0 File - Main Menu

### 2.01 New

At first use when you install the program, you will have an empty Calendar (with the exception of a sample Client and Sample Activity). After you have saved or backed up your working Calendar, you can create a new empty Calendar using this command. You will be required to name and save the new calendar before you can use it.

### 2.02 Open

This feature is used to open existing saved Activity Calendar Files with the .rd extension, i.e.; <filename>.rd. It is helpful to create a separate Folder on your computer to store your Activity Calendar Files. Always use unique names for your saved or backup calendars so they can be easily identified. Always backup your calendars to separate media.

### 2.03 Save As...

This feature allows you to save the calendar as you work or change the name or location and save the current Calendar that you are working on. The Activity Calendar will be saved with the .rd extension, i.e.; <filename>.rd. Again, it is helpful to create a separate Folder on your computer to store your Activity Calendar Files. The default folder location is C:\Program Files\ActivityClldr.

### 2.04 Last or Recent Files Opened

Displays the last files opened and allows the user to recall and open the last file in use.

### 2.05 Exit

Exits the program. Upon exiting, the program will provide you with a reminder message to backup your data. Backups are an essential part of any data management program. It is important to maintain more than one backup in different locations. See also “Backup Data”.

**For “View - Main Menu” please see section 11.0**



## 3.0 Options - Main Menu

### 3.01 Customize Heading

The Customized Heading will appear on the Main Menu screen as well as the Monthly Calendar, Daily Activities, and other reports.

To customize your own heading:

Select Options from the Main Menu.

Select Customize Heading.

You must enter a heading; it cannot be left blank. To change the heading, enter the desired title here and select OK. The new heading will then appear on the Main Menu screen as well as the Monthly Calendar, Daily Activities, and other reports. If you choose not to change the heading, select Cancel, and the previous heading will remain. Selecting a font that is too large may affect calendar printing.

### 3.02 Password Settings

You may set a Password to restrict or control access to the program. The default is the Password Disabled. Before conducting this operation, have a password chosen up to 16 numbers and/or characters total (case sensitive). You can always change or disable the password at a later date. **Be sure you remember the password!**

### 3.03 Enable Password

Select Options from the Main Menu.

Select Password Settings.

Select Enable Password.

Select Yes to continue.

Enter up to 16 alphanumeric characters for your password (case sensitive).

Re-enter the password again.

Select OK.

Select OK, and you will now be required to use the password to change the password and the next time the program is opened the password will be required.

### **3.04 Disable Password**

You can disable the password anytime it is enabled.

Select Options from the Main Menu.

Select Password Settings.

Select Disable Password.

Select OK, and the password will be disabled until the next time it is enabled.

### **3.05 Change Password**

You can change the password anytime if the password is enabled and you have access to the existing password:

Select Options from the Main Menu.

Select Change Password.

Select Yes to continue.

Enter up to 16 alphanumeric characters for your password (case sensitive).

Re-enter the new password, enter the old password.

Select OK, the new password is now active.

### **3.06 Settings**

There are three choices to select your personal settings. Change Background Color, Default File Location, and Prompt for "Save Records".

### **3.07 Change Background Color**

Select Options from the Main Menu.

Select Settings.

Select Change Background Color.

Move the cursor to the desired color / gradient and click the left mouse button. This will change the Main Menu color as you prefer. Select OK.

Selecting Default Color returns to the original yellow background.

### **3.08 Default File Location**

Default File Location allows you to set the location for your Activity Calendar files. Selecting this sets the “Open”, “Save As” and “Backup” commands to the folder of your choice. You must save your files to this default folder using the “Save As” command under File – Main Menu. You can verify the location of the current file in use by checking the “command line” in the upper right blue area of the Main Menu, (example: c:\your folder \ your filename).

Select Options from the Main Menu.

Select Settings.

Select Default File Locations.

Displays the current file location.

Select “Yes” to change the location.

Select the desired folder & OK.

You must do a “Save As” on your current file to this Folder to locate your file in the Folder.

### **3.09 Prompt for Save**

The Prompt for Save feature is a reminder that comes up after you enter or change data. If you want to enable / disable this feature use the Prompt for Save. The default is enabled.

Select Options from the Main Menu.

Select Settings.

Select / Deselect Prompt for Save. The check mark next to this feature indicates it is active and enabled.

Select Yes for the change to go into effect.

## 4.0 Data - Main Menu

### 4.01 Modify Participation Codes

Selecting Modify Participation Codes allows you to add or remove any participation codes. These can be any alphanumeric (letter or number) character but they cannot exceed seven alphanumeric characters. Participation Codes cannot be used if the box labeled “Participation Code” on the Activity Form is not checked. See Sections: 5.23 Participation Codes and 5.24 Edit Codes for more information on this subject.

### 4.02 Preference Code Search

Under Main Menu > Data > Preference Code Search you can find a list of clients based upon a specific code. You can choose to search by a user entered Client Preference Code and print a report that will include the Apt./Room numbers as well. This feature is available under the Participation Records> View/Print Clients List.

The Preference Code box is a flexible, end-user specific, searchable, alphanumeric field. The field is located on the Client/Resident Information form. This field is limited to two alphanumeric characters. One could create a list of Preference Codes to indicate one or more of the clients' preferences. This field could be used to identify religious preference for the purpose of church attendance, etc. See Sections: 7.18 Preference Codes for more information on this subject.

### 4.03 Purge Old Activities

**It is highly recommended that this feature only be used by those who are familiar with this program as well as computer operations in general. This function will permanently remove data from your records. Always be sure that your data is backed up and secure prior to performing this operation.**

The Purge Old Activities feature allows you to purge unneeded records and clients prior to the date that you select. For example, if you select January 1, 2001, all data prior to January 1, 2001 will be permanently purged (deleted). The only way this data can be recovered is if you have a previous back-up (backup prior to this operation) that has not been overwritten.

Select Data from the Main Menu.

Select Purge Old Activities.

Select the date that you would like to purge all previous data from. **All data prior to the selected date will be deleted!**

Select Delete Records.

You will receive two more warnings before this operation is completed. Close, Cancel and No will stop the purge operation and return to the Main Menu.

#### **4.04 Search Clients by Interest**

Under Main Menu > Data > Search Clients by Interests,  
<OR>

Under Main Menu > Participation Records > Search Clients by Interests

This feature allows for searches of the client/resident database for interest(s) entered in the “Client’s Interests” field of the client/resident information form. This search allows the user to find a list of clients based upon specified interest(s), and then displays the client(s) name, room #, phone #, and interests on a printable form.

For a single interest search, enter the interest, and click search. A printable list of all clients, room/phone #, and the client interest field is displayed. This list can be printed as is or to eliminate the interest fields before printing; grab the right margin and resize the interest column to the room/phone number box. You can print the form as is, or select the search button again to restore the original search, as well as interest box.

For a two word (interest) search, check the two word search box, enter an interest in each box, and select either AND or OR. Choosing AND will provide a list for all clients who have both interests. Choosing OR will provide a list for all clients who have at least one of the interests being searched.

We suggest that religious preferences be included in the Client Interest field, making it easy to find all client/residents for a specific religious function. The data must be entered with a comma separating the interests for an effective search. Example: golf, knitting, baking, protestant etc.

#### **4.05 Simple Search**

This feature provides the ability to search the database for activities and client participation by a date range or by name.

Select Data from the Main Menu.

Select Simple Search.

The Simple Search screen will be displayed.

##### **4.05.1 Select Start Date**

Select the Date Range and you will be able to view a list of all the activities within the specified Date Range.

##### **4.05.2 Search by Name**

Select Search By Name.

Highlight a name and choose Select Name. This will display all the activities / events that the client participated in. Close will return to the Main Menu.

## 4.07 Backup Data

Select Data from the Main Menu.

Select Backup Data

Determine the backup media. Insert a disk in drive “A” if you are using Drive “A” for your Backup.

Provide a Filename and Location

Follow the instructions and select OK.

If you select drive “A” and don't have a disk in drive “A”, the drive “A” bay will remain active until a disk is inserted or cancel is selected. Insert a disk in drive “A”, Select Save. You may need more than one disk, depending on the size of your data file. Selecting Cancel will allow you choose an alternate path and destination for your backup file. Your files cannot be backed up to a network drive that is not “mapped” to your computer, (see your network administrator).

Backup Files are saved with a .zip extension, i.e.: <filename>.zip

When the backup is complete, select OK and return to the program. Store your backup file in a safe place. Any backup device can be used to copy your .RD file if you have access to the folder. (See Sec. 13.06 for Klik-n-Type backup instructions.)

## 4.08 Restore Data

The restore feature will replace the data on your computer with your most current backup. This feature should only be used if you have lost or damaged your existing data, reloading the program to a different computer or converting a previous version data file. **You must use the Restore Data function to restore data files with the .zip extension!**

The program should only be loaded on one computer at a time unless you have purchased other licensing arrangements.

Select Data from the Main Menu.

Select Restore Data.

Select the Location / Drive and File to be Restored

Select Open.

You must give the file a name and select the Folder location for the file.

Select Save.

If your backup is on a floppy disk, place your backup file disk into drive “A” and select Drive “A”. If it is in another location you must specify the path and destination of your restore file.

## **5.0 Activity / Event Form Overview**

New Activity/Event, Change Activity/Event, & Cancelled Activities/Events

### **5.01 Required fields Activity / Events**

**“Required fields” are used for all reports and calculations and must have an entry.**

### **5.02 Event Name (Required Field)**

The Event Name is the name of the activity or event that is being scheduled. It is a required field limited to 21 characters. The Event Name is printed on all activity-related reports.

Entering an asterisk (\*) at the beginning of the activity name will prevent the time from being displayed on the Monthly / Weekly / Daily Calendars. Only the activity name will be displayed at the time specified on the activity. You must enter a Start Time for the Event.

Entering an asterisk (\*) only, with no event description will leave a blank line on the Monthly / Weekly / Daily Calendars.

### **5.03 Event Description**

The Event Description is a field to add additional information about the event and only is displayed on the activity form and the individual activity printout

### **5.04 Start Date (Required Field)**

The Start Date is the date of the activity or event. The date must be entered in the format displayed i.e., 1/1/2003. Selecting the down arrow will display a user interface calendar in which the date may be selected with your pointer

### **5.05 Start Time (Required Field)**

The Start Time is the beginning time of the activity or event. The field uses a standard time format, i.e., 8:00am. Entering times on the hour can be accomplished by entering the hour and “a” or “p” and the time will auto fill after tabbing i.e., 8a will result in 8:00am. Other times may be entered by manually typing 8:30a and the “am” will auto fill. The Start Time will be used to order the activities on the Daily and Weekly Activity reports as well as the Monthly Calendar. The Start Time is printed on all activity-related reports. To hide the Start Time enter an \*asterisk at the beginning of the Event Name.

### **5.06 End Time**

The End Time is entered similar to the Start Time field. It is not a required field and is only displayed on the activity form and the individual activity printout.

### **5.07 Notes Field**

The Notes field is a text field for entering additional information for the specific activity, i.e., materials needed, people to contact, phone numbers, etc. The Notes field is limited to 250 characters and is only displayed on the activity form and the activity printout.

### **5.08 Location**

The Location field is a text field that is limited to 30 characters. It is displayed on the Daily Activity Print Preview and the Daily Monthly Print Preview form. The option to display the location field on a Daily print out is available under Options in the daily event viewer.

### **5.09 Available Spaces**

Available Spaces is a numeric field that only appears on the activity form and the individual activity printout. Alpha characters cannot be used.

### **5.10 Comments**

Comments field is a text field that is limited to approximately 30 characters. It is only displayed on the activity form, individual activity details, and the individual activity printout.

### **5.11 Add Names**

Select Add Names to view and choose clients to add as participants in an activity. While viewing the client list highlight the names you would like to add to the activity and select the flashing Add Names button. Selecting Cancel will return you to the previous activity form.

### **5.12 Remove Names**

Select Remove Names to view and choose clients to remove from the participant list in an activity. While viewing the client list highlight the names you would like to remove from the activity and select the flashing Remove Names button. Selecting Cancel will return you to the previous activity form.

### **5.13 Do Not Show On Calendars**

All recorded activities by default can be viewed and printed on the Daily, Weekly, and Monthly Calendar. By checking the Do Not Show On Calendars box the activity will be excluded from the view and print of the daily, weekly and monthly calendars. Selecting Weekly & Daily Views or Daily Views will only display / print the activity on the Weekly / Daily Calendar or the Daily Calendar respectively.



### **5.14 Individual Activity**

All recorded activities, by default, are assumed to be a group activity. Recorded Activities are included in the participation calculations for the “Client Activity Participation” reports. Selecting the Individual Activity box will remove this activity from any calculations. Marking an activity as an Individual Activity will be useful for an Individual (one-to-one) Activity, or for an Activity that is offered for a select group of clients but not offered to the entire group. Attendance at an Individual Activity will be reflected on all Individual Participation Reports

### **5.15 Save and Add New Activity**

Selecting Save and Add New saves the current record and opens a form for entering a new activity or event.

### **5.16 Save and Close Activity**

Selecting Save and Close saves the current record and returns to the “Main Menu”.

### **5.17 Close**

Selecting Close allows you to return to the “Main Menu”. Selecting Close will still give you the option to save the record if it is completed.

### **5.18 Add Activity**

Selecting Add Activity opens a form for entering a new activity or event.

### **5.19 Repeat Activity**

Selecting Repeat saves the current activity and allows you to Repeat the entered activity on one or more dates. You can Repeat a newly entered Activity as well as an existing Activity. You can Repeat an Activity on one day or on a weekly basis. Select Repeat, enter the new date then select either “Repeat Once” or “Repeat Weekly” the activity. Use caution on the Repeat Weekly function as you can easily add a considerable quantity of activities in error.

### **5.20 Cancel/Remove Activity (Delete Activity)**

Selecting Cancel/Remove Activity provides you with the option to Record Activity as Canceled or to Permanently Delete Activity from Records (Calendars). If you record an activity as canceled, it will be removed from all participation records as well as the daily, weekly, and monthly calendars. When you cancel an activity you'll be required to enter a “Reason for Cancellation” and this activity will then be recorded as a “Canceled Activity”.

“Delete Activity” is used when an error has been made while entering activities or the Activity is no longer needed for the purpose of recording or for the Calendar. This will permanently delete the Activity from all record enties!

To search for the specific activity select > Change Activity/Event from the Main Menu or Edit Activity from the monthly calendar. Find the activity to be Canceled or Removed / Deleted by selecting the “Find By Date Range”> specify date of activity (Start Date and End Date may be the same) select OK. All of the activities entered on that day or within that Date Range will then be displayed. Use the scroll bar on the right to view the activities. When the activity to be Canceled or Removed / Deleted is located select Cancel/Remove Activity, then select Cancel Activity or Delete Activity From Records. The activity will be removed from the calendar(s) when the Cancel or Remove / Delete function is saved and the Change Activity/Event window is closed

### **5.21 Find By Date Range**

Selecting Find By Date Range allows you to search/query the records. Specify the date or dates you would like to search and select OK. The quantity of activities found will then be displayed. Use the scroll bar on the right to view the activities within the specified search/query.

### **5.22 Activity - Event Printing**

It is best to exit the program and select your default printer prior to opening the program. Selecting Print will display the current activity record in the print preview. The option will be available to print the participating clients. Selecting Yes or No will include or exclude the participating clients. From the print preview you may print the record or select close to return to the client form.

### **5.23 Participation Codes**

If this box is checked you will be able to enter a unique code for each of the clients added to an activity. Under Main Menu> Data > “Modify Participation Codes” you can create unique codes up to seven alphanumeric characters. These participation codes can be used for level of participation, quality of participation, etc. You may also use words and/or abbreviations as long as you do not exceed seven characters. You must create or modify your participation code list under Main Menu Data > “Modify Participation Codes” for the codes to be available when you add your names/codes to an activity. Participation Codes cannot be used if the box labeled “Participation Code” on the Activity Form is not checked. Also see “Modify Participation Codes”.

### **5.24 Edit Codes**

You must create or modify your participation code list under Main Menu Data > “Modify Participation Codes”. Enter your Participation Codes as you add your names (attendees) to an activity. Use Edit Codes if you desire to change or add Participation Codes after you have added the names. Once you have entered a Participation Code it can only be cleared by removing the name from the activity. You can then reenter the name and leave the Participation Code blank, if desired. One suggestion would be to use a character such as “0” when you create your Participation Code list. Then you can use the “0” as a non-code if you choose not to use a Participation Code for a client

### **5.25 Print - (Activity Form)**

Displays and Prints the current Activity. You will have the choice to include or exclude the Client Names to this one-page Activity Print Out.

## **6.0 Activities Displayed / Printed**

### **6.01 Printing – Sizing**

There are many factors that determine the quantity of the activities displayed on the calendars. These include the size of paper used as well as the type of printer you are printing with. Although we cannot determine the type and quality of the printer used or the paper size used (the bigger the better), we have included some features and tips to provide some flexibility.

### **6.02 Printing – Quantity Displayed, Typical**

The typical quantity of activities you can display without increasing the font size or bolding;

Daily Calendar = 20 +

Weekly Calendar = 12-15

Monthly Calendar = 8-10

Portrait Calendar = Depends on the size

If you choose to change the font attributes (bold or larger) it will decrease the quantity of activities you can display. For those with limited printer capability, one suggestion is to print to legal paper and have it enlarged at a copy or print shop. Another suggestion is to mark all the activities “Do Not Show on Calendars” that you don't need on the monthly calendar, print the monthly calendar and then unmark the activities for your weekly and daily calendars.

### **6.03 Character / Event Name Length**

The shorter the name for an activity / event, the less likely that it will word-wrap on the weekly / monthly calendars. Word-wrap causes the name to flow into two or more lines.

### **6.04 Font Sizing / Attributes**

The options are available to bold and to increase / decrease the font size on the weekly / monthly calendars. Using these options will determine the quantity of activities displayed. See the “Printing - Quantity Displayed, Typical” section of the Help Index.

## **7.0 Client / Resident Form Overview**

### **7.01 Required fields, Client / Resident**

Required fields in the Client/Resident form are used for all reports and calculations and cannot be duplicated or changed once the “New Client” entry has been saved. After Saving, if a required field needs to be changed, you must start over and enter a “New Client” with the correct data. All Participation Records (if any) will need to be re-entered. Print an Individual Client Participation Report before you delete the incorrect Client record.

### **7.02 First Name (Required Field)**

Enter Clients' First Name. The first and last name of the entry is used for the Displayed Name. Displayed Name is limited to a total of 28 characters combined. See Displayed Name.

### **7.03 Last Name (Required Field)**

Enter Clients' Last Name. The first and last name of the entry is used for the Displayed Name. Displayed Name is limited to a total of 28 characters combined. See Displayed Name.

### **7.04 Displayed Name (Required Field)**

Displayed Name is comprised of the first and last name. A duplicate Displayed Name is not allowed. You may need to enter a middle initial if you encounter this issue. Tabbing through the fields will automatically enter the Displayed Name. Displayed Name is limited to a total of 28 characters combined.

### **7.05 Month of Birth and Day of Birth**

The Month and Day fields are used to report the birthdays on the Daily Activities report (optional) as well as the Monthly Birthday Calendar. These are optional fields and do not need to be filled. If you choose to use these fields you must use numeric characters for the month and day.

### **7.06 Year of Birth**

Optional field and will only print on Individual Client Information.

### **7.07 Room / Apt. /Phone #**

Optional field and will print on Individual Client Information and Client List.

### **7.08 Client's Interest**

Optional, searchable text field for entering specific Client's Interests, limited to 256 characters. This field is searchable; meaning that you can search for clients by their interests, ie: you can find all the clients that like knitting etc. This field will print on Individual Client Information form as well as the Client Interest search form. The data must be entered with a comma separating the interests for an effective search. Example: golf, knitting, baking, protestant etc.

### **7.09 Remarks**

Optional text field for entering information, limited to 500 characters and will only print on Individual Client Information. This field can selectively be displayed on the Individual Participation Report.

### **7.10 Inactive, Checkbox**

Selecting the Inactive box will remove the client from all activity calculations and reports. This is a useful tool should a client leave for vacation or is unable to participate in the group activity program. You can always reactivate the client at a later date by removing the check from the checkbox in the client record.

### **7.11 Save & Add New Client**

Selecting Save & Add New saves the displayed record (if completed) and clears the record to enter a new client.

### **7.12 Save & Close Client / Resident**

Selecting Save & Close saves the displayed client record (if completed) and returns to the Main Menu.

### **7.13 Close**

Selecting Close gives you the option to save the displayed record and return to the Main Menu.

### **7.14 Add Client**

Selecting Add Client saves the displayed record (if completed) and clears the record to enter a new client.

### **7.15 Remove/Delete Client**

Selecting Remove/Delete will give you the option to Save the Client as Inactive or Delete Client from Record. Saving Client as Inactive will remove the client from all activity calculations and reports. Delete Client from Records will completely remove the client and participation records from the database.

## **7.16 Search Name**

Selecting Search Name allows you to view all clients. Highlighting a client and choosing the flashing Select button will display that client's information.

## **7.17 Client / Resident Printing**

It is best to exit the program and select your default printer prior to opening the program. Selecting Print will display the current record in the print preview. From the print preview you may print the record or select close to return to the client form.

## **7.18 Preference Code**

The Preference Code box is a flexible, end-user specific, searchable, alphanumeric field. The field is located on the Client/Resident Information form. This field is limited to two alphanumeric characters. One could create a list of Preference Codes to indicate one or more of the client's preferences. This field could be used to identify religious preference for the purpose of church attendance, etc. Under Main Menu > Data > Preference Code Search, you can find a list of clients based upon a specific code. We are confident that the end-user will find an unlimited number of creative applications for this field.

## **7.19 Group Code**

The Group Code box works together with the Daily Attendance Chart under the "View Calendar" mode from the Main Menu. Entering a single alpha-character a-z only (no numbers) gives you the flexibility to select a group of Clients for the Daily Attendance Chart. See also 10.02.1

## **8.0 Participation Menu**

### **8.01 Add Clients to Activities**

Adding Clients to Activities allows you to take attendance and track participation in various events and activities. Select Add Names to view a list of clients. Highlight the names of the participants that you would like to add and select the flashing Add Names button. This will add the clients for purposes of activity participation in a group as well as individual activities. If you need to remove names from the activity select the Remove Names button and highlight the clients in the list that you would like to remove from the activity. Selecting the Delete Names button will remove the clients from the displayed activity.

### **8.02 All Client Participation**

All Client Participation allows you to select overall participation in all activities. Select the date range desired. After you have selected your date range, selecting OK on the date range form will display a comprehensive report of all clients, attendance, activities offered, and percentage of participation in all activities within the specified date range. You also have the option to view and print the report by selecting the print preview button. Selecting close will return you to the Main Menu.

### **8.03 Individual Participation**

Individual Participation allows you to view or print a report within a specified date range for individual clients. Specify the date range and press OK. Highlight the client's name. Choose the flashing Select Name button. All activities (Group or Individual) the client participated in within the specified date range will be displayed. This report will display any Participation Codes that have been entered for the client related to the specific activity. You have the option to view and print the report by selecting the print preview button. Selecting close will return you to the Main Menu.

### **8.04 View/Print Clients**

View/Print Clients allows you to view and print a report of all clients. You can view/print all active clients as well as inactive clients or both. You also have the option to view and print the report by selecting the print preview button. Selecting close will return you to the Participation Menu. It is best to exit the program and select your default printer prior to opening the program.

### **8.05 Search Clients by Interest**

See Sections 4.04 and 7.08.

## 9.0 Daily Activities

The Daily Activities report will display the desired heading, date, scheduled activities and times, Birthdays, Trivia of the Day, the prior day's Trivia Answer, This Day in History, and any special information you may have entered for the day.

Daily Activities is a unique feature that allows you to view and print all scheduled activities chosen for display on the specified day. Select Daily Activities, select the date you would like displayed and you will be able to view and print a selected day.

Prior to displaying a selected day you will have the opportunity to enter **Special Information** (up to 250 characters) that you would like displayed or printed on the report. Select Daily Activities, check the box to add or modify unique information. Select the date you would like to view and enter the desired Special Information. Select Save and Close. You will return to Date Selection Menu. The next time you select the chosen date the Special Information will be displayed.

While viewing the Daily Activities in the Daily Event Viewer you will have the option to display yesterday's Trivia Answer and print the Daily Activities if desired. Selecting Close in the Daily Event viewer will return to the Date Selection Menu. It is best to exit the program and select your default printer prior to opening the program.

### 9.01 Daily-Month Activities

The Daily-Month Activities reports the same information as the "Daily Activity" report with the following exceptions: You are able to print an entire range of reports by date and the numerical date is printed in the upper left corner of the page. This report is to facilitate creating large wall calendars or weekly wall calendars. This feature would enable you change or update each individual date as needed.



## **10.0 View Calendar**

Selecting View Calendar will display a full screen monthly calendar of the current month. By selecting Next Month, Last Month, or the down arrow you can easily display your desired month. Clicking on a specific day on the calendar, you can quickly display the Daily Viewer or Add / Edit Activity for the selected day, depending on the Option selected: “Edit Daily Enabled” or “View Daily Enabled”.

### **10.01 View Calendar – View Selection**

Under the View button you will have a choice of the Birthday Calendar, Daily, Weekly or Monthly Print Preview. Selecting Print Preview allows you to change paper size and view the calendar before it is printed. In the Print Preview you can zoom in and out on the calendar to view the appearance prior to printing. It is best to exit the program and select your default printer prior to opening the program.

### **10.02 Print Preview – Daily**

Selecting Daily Print Preview will allow you to view and print the current day selected.

#### **10.02.1 Daily Attendance Chart**

The Daily Attendance Chart provides a method to print a chart of the days activities and selected Clients. This is useful for manually entering attendance for the various daily activities. When utilizing the Group Code on the Client information you can assign a letter to certain clients and group them together on the Daily Attendance Chart. This will save you time in individually selecting clients that may attend an activity on a given day.

Select> Daily Attendance Chart

Select> Date

A list of Clients will appear. Select the clients you want on the Chart for that day. If you have used the grouping for the Clients, you can then select the “Group Header” and it will sort the Clients by Group Codes. You can select Clients as well using the Control key and your left mouse button. Another way to select multiple Clients is to hold your left mouse button down and sweep over the desired Clients, highlighting them as you go. See also 7.19

#### **10.02.2 Print Preview – Daily-Month**

Selecting Daily-Month Print Preview will allow you to view and print same information as the “Daily Activity” report with the following exceptions: You are able to print an entire range of reports by date and the numerical date is printed in the upper left corner of the page. This report is to facilitate creating large wall calendars or weekly wall calendars. This feature would enable you change or update each individual date as needed.

### **10.03 Print Preview – Weekly**

Selecting Weekly Print Preview will allow you to view and print the current week. You also have the ability to scroll through the weeks of the current month in the Weekly Print Preview.

### **10.04 Print Preview – Monthly**

Selecting Monthly Print Preview will allow you view and print the current month displayed.

### **10.05 Print Preview – Two Page**

The two page Monthly calendar offers the option of printing a large calendar on two pieces of “letter” size, “legal” size, or “tabloid” size paper, depending on printer capability. From a standard legal size printer you can now print a calendar 17”x 14”. From a letter size printer you can print a 11”x 17” calendar and from a tabloid size printer you can create calendar that is a whopping 17”x 22” in size.

As the size of the calendar expands, the font capability changes, and space for additional activities increases, offering flexibility when “building” monthly calendars. By utilizing legal size paper you can effectively place 12 activities per day in large-bold font size and 16-17 activities per day in standard font size. This feature should allow users enough extra room to include holidays and/or additional activities in the Monthly calendar. Be advised that 12 – 17 activities will only print on the Daily Calendar and legal size Two-Page Calendar output or larger. Once you enter that many activities you would have to remove some in order to print them all on a smaller Calendar.

Select the paper size at Print Setup. You can view one half of the calendar at a time; using the arrows under the “Zoom” box will allow you to switch between page one and two. After printing the two-page calendar, match the pages, tape, add clip art or decorate if desired. Users are encouraged to experiment with paper size.

### **10.06 View Calendar - Options**

The options are available to Add a New Activity, Edit an Activity, add a footer, and Enable the one click Daily View on the Calendar.

### **10.07 Activity Director Info**

You have the option of adding a footer to the Calendar up to 40 characters. This will display on all Monthly Calendar print outputs.

### **10.08 Enable Daily View**

Enable Daily View allows for one click viewing of a selected day. When this is enabled you can click on the desired day and print preview the Daily View of that day. When this is not enabled, clicking on a given day will allow you to edit / change / add an activity for the selected day. Right click on any day to have the option for viewing or modifying activities.

## 10.09 Options – Print Preview

Options are available while in the Print Preview (Daily Event Viewer) for the following:

Show Birthdays... (Daily Event Viewer only)

Show Special Information (see Section 9.0)... (Daily Event Viewer only)

Show Yesterday's Trivia Answer... (Daily Event Viewer only)

Show Trivia... (Daily Event Viewer only)

Show This-Day-In-History... (Daily Event Viewer only)

Show Location... (Daily Event Viewer only)

Configure image options

Resize/Reposition images

Some of these features are not available on the Klik-n-type Calendar.

## 10.10 Clip Art / Images

A Clip Art / Images feature has been added to the 2009 version of Activity Planning Simplified. The Image feature can only be accessed through the Main Menu> View Calendar> View> Birthday Calendar, Daily Print Preview, Daily-Month Preview, Weekly Print Preview, Monthly Print Preview, and Two-Page Monthly. Selecting Options from any of these previews will display "Configure image settings" & "Resize/Reposition images". Allowable formats for Clip Art Images; .bmp .gif .jpg and .wmf formats. If an incompatible or corrupt image is used an error will occur, "Invalid Image".

**Borders are not recommended as we use the maximum margin for the Calendar program. Images cannot be used outside of the preset lines on the calendar. The exception would be the header or title area of the calendar.**

Many people have their own electronic Clip Art / Image libraries. Images are available from software retailers, scanning, Microsoft® and other websites, etc. We have included some sample images to get you started.

### 10.10.1 Configure image options

Selecting Configure image options opens the Image menu. The Image Options menu has ten windows for selecting electronic Clip Art / Images.

There is a limitation of ten Images for the current Calendar. The Images are not stored within the Calendars. The Images are displayed on the Preview screen. If a new or different Calendar is opened the images can be cleared or changed by the right click of the mouse on the image window. To keep the image and just not show it, deselect the Show Image check box.

There are limitations on the size and quantity of images used. System memory is important. If you are experiencing problems ie; not all the clip art displayed, corrupt fonts, corrupt images etc. try decreasing the quantity of images and/or the size of the image file (use a different image). There may be other problems with an image not displaying or missing. Some images have a corrupt file and will display in some programs and not others. If this is a problem, use another image.

The sample images are located in the default folder c:\Program Files\ActivityCldr\Sample Images\. To change the image right click on one of the ten image windows and select “Change Image”. Select a sample image from the default folder or browse to the folder that contains your compatible images.

Images that are selected on the calendar are not stored in the program or calendar data file. If the image file is deleted or moved from the original location you will get an error. Select ok. Holding your cursor over the missing image will show the original location of the image file. Changing or clearing the image will correct this error. Should you use the file on another computer the images will not appear on that computer because they are no longer available to the program.

### **10.10.2 Reset Image Locations**

Selecting Reset Image Locations on the Image menu resets the images to the upper left corner of the calendar. This is helpful if the orientation or size of the calendar is changed

### **10.10.3 Resize/Reposition images**

When the images are selected to be “shown” on the calendar the images default to the upper left corner of the calendar. Selecting Resize/Reposition images allows the manipulation of existing images on the calendar. The image can be dragged and resized to the chosen location. Selecting Options> Done Resize/Reposition places the images in the new location.

## **10.11 Blank Days - Days without Dates**

Text can be entered directly into the blank days of the Weekly / Monthly Calendar. By selecting the square, a text cursor will appear. Type in the desired text and it will appear on the space. The formatting of the text is going to be determined by the size of the paper selected for printing

## **11.0 View– Main Menu**

### **11.01 View Activity Calendar**

Selecting View Activity Calendar will display a full screen monthly calendar of the current month. By selecting Next Month, Last Month, or the down arrow you can easily display your desired month. Clicking on a specific day on the calendar, you can quickly display the Daily Viewer for the selected day. The options are available to Add a New Activity, Edit an Activity, and Print Preview the entire calendar.

Selecting Print Preview allows you to change paper size and view the calendar before it is printed. In the Print Preview you can zoom in and out on the calendar to view the appearance prior to printing. It is best to exit the program and select your default printer prior to opening the program.

### **11.02 View Birthday Calendar**

Selecting View Birthday Calendar will display a full screen monthly calendar of the current month. This will only display clients on their associated birthday. The clients will only be displayed if birthdays are entered in the Client Information Form. By selecting Next Month, Last Month, or the

down arrow you can easily display your desired month. When this is selected your printer driver will be displayed and you must choose the paper size at this time. Now you can view the calendar before it is printed. In the Print Preview you can zoom in and out on the calendar to view the appearance prior to printing. It is always best to exit the program and select your default printer prior to opening the program.

### **11.03 Clik-n-Type Calendar**

The Clik-n-Type Calendar is an added bonus that allows you to create and save calendars outside of your normal record keeping. Each day has a large text field that you can enter and edit text to be displayed on each day of the month. See Section 13.0.

### **11.04 Individual Participation**

Individual Participation allows you to view or print a report within a specified date range for individual clients. You will have the option to print the Client Participation Information with or without the Participation Codes. Specify the date range and press OK. Highlight the client's name and choose the flashing Select Name button. All activities the client participated in within the specified date range will be displayed. You also have the option to view and print the report by selecting the print preview button. Selecting close will return you to the Main Menu.

### **11.05 Canceled Activity List**

This unique feature allows you to view and print a listing, by date range, of all canceled activities. Whenever you mark an activity / event as canceled it is placed in this list.

Select View from the Main Menu-> Canceled Activity List-> Date Range (month and year)-> OK. The screen will display a listing all of the Canceled Activities within the specified date range. Print Preview will then allow you to view and then print the report. Close will return you to the Main Menu.

## **12.0 Portable Document Files (PDF Output)**

Portable Document Format (PDF) is the de facto standard for the secure and reliable distribution and exchange of electronic documents and forms around the world, with a ten-year track record. PDF is a universal file format that preserves the fonts, images, graphics, and layout of any source document, regardless of the application and platform used to create it. PDF files are compact and complete, and can be shared, viewed, and printed by anyone with free Adobe Reader® software. You can convert any document to PDF using the available software products, enabling business, engineering, and creative professionals to create, distribute, PDF documents.

We have included a PDF export tool with the Print Preview for output to file. The benefits of this tool are considerable. You can load your printing or copying company's printer driver onto your computer and print it to file. You can then take the file to your printer and have them output it to their printer to their maximum paper size.

In other words: If you don't have a large size output printer you can load another printer driver that does have the paper size you like, have that printer "print to file" then use the PDF Export to output to your disk and take it to your printer. Ask your local printer or copy house and they can guide you through this procedure.

## 13.0 Clik-n-Type Calendar

The Clik-n-Type Calendar is an added bonus that allows you to create and save calendars outside of your normal record keeping. Each day has a large text field that you can enter and edit text to be displayed on each day of the month. The Clik-n-Type Calendar can be printed and output just like the normal calendar. The Clik-n-Type Calendar must be backed up and saved independently of the Planning Calendar. Use "My Computer" or "Windows® Explorer" to copy the Clik-n-Type files: save all the files in this location (c:\program files\activityldr\ ) with the .cal extension to another folder etc.

### 13.01 Clik-n-Type - File

**Open Data File:** This feature is similar to the Main Menu File functions. At first use when you install the program, you will have an empty Clik-n-Type Calendar. After you have Saved your first working Calendar, you can create a new empty Calendar using this command. You will be required to name and save the new calendar before you can use it.

**Open Data File:** This feature is similar to the Main Menu File functions. It is highly advisable that you create a separate folder to save your Clik-n-Type calendars. Always use unique names for your saved calendars so they can be easily identified. The file extension must be "yourfilename".cal. Always backup your Clik-n-Type calendars to separate removable disks and label the disks.

**Save Data File As:** This feature allows you to save the calendar as you work or change the name or location and save the current Calendar that you are working on. The Clik-n-Type Calendar must saved independently of the Planning Calendar.

### 13.02 Clik-n-Type – View

Under the View button you will have a choice of the Monthly Print Preview or the Two Page Monthly Preview. Selecting Print Preview allows you to change paper size and view the calendar before it is printed. In the Print Preview you can zoom in and out on the calendar to view the appearance prior to printing. It is best to exit the program and select your default printer prior to opening the program.

### 13.03 Klik-n-Type – Options

**Klik-n-Type Heading:** The customized Heading will appear on the Monthly Calendar, Two Page Calendar and Daily Activities. You must enter a heading; it cannot be left blank. To change the heading, enter the desired title here and select OK. The new heading will then appear on the Klik-n-Type Calendar. If you choose not to change the heading, select Cancel, and the previous heading will remain

**Enable Daily View:** Enable Daily View allows for left click viewing of a selected day. When this is enabled you can click on the desired day and print preview the Daily View of that day. When this is not enabled, clicking on a given day will allow you to edit / change / add activities for the selected day. Right click on any day to have the option for viewing or modifying activities.

### 13.04 Klik-n-Type Purge Old Data

**The command to purge data in the Klik-n-Type Calendar does not affect the Activity Planning Calendar. This command only purges the data from the Klik-n-Type Calendar. It is highly recommended that this feature only be used by those who are familiar with this program as well as computer operations in general. This function will permanently remove data from your records. Always be sure that your data is backed up and secure prior to performing this operation.**

The Purge Old Data feature allows you to purge unneeded records prior to the date that you select. For example, if you select January 1, 2001, all data prior to January 1, 2001 will be permanently purged (deleted). The only way this data can be recovered is if you have a previous back-up (backup prior to this operation) that has not been overwritten.

Select the date that you would like to purge all previous data from. **All data prior to the selected date will be deleted!** Select Delete Records. You will receive two more warnings before this operation is completed. Close, Cancel and No will stop the purge operation and return to the Klik-n-type Calendar.

### 13.05 Klik-n-Type Options – Print Preview

Options are available while in the Print Preview (Daily Event Viewer) for the following:

Show Yesterday's Trivia Answer

Show Trivia

Show This-Day-In-History

These are self-explanatory

### 13.06 Klik-n-Type Backup

The Klik-n-Type files are not backed up in the calendar backup procedure. These files have a .cal extension & must be physically saved to a different location or copied to a different device to back them up.

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