

# ResManager Version 4 Help

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ResManager is an accommodation management software package designed specifically for the NHS. The first commercial version was launched in January 1997 and it is now used to manage accommodation at over forty NHS Trusts - from stand-alone PCs to multi-user networks over split sites. There are regular significant updates and users are encouraged to submit ideas/requests for further improvements.

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## Start ResManager

Start Microsoft Windows if it is not already running.

Double click on the ResManager icon (it should be in the Start Menu under Programs - ResManager)

If no icon can be found then open the file RESMANAGER.EXE which in the default installation is located in the C:\Program Files\ResManager folder.

A valid user name and password will be required before the program will start successfully.



## About ResManager Screen

This displays information about the version of the software and contact details for ResManager technical support.

## Accommodation details

This is the only screen where Accommodation Details may be changed.

### Main room details

All details except the Unit ID can be changed. There must always be at least a building name.

Either type in the relevant box or select an entry from the drop down list if there is one.

The field sizes for directly typed fields (ie not drop down lists) are:

Unit ID (or Accom) (15 characters)

Telephone no (20 characters)

Flat no, Room no, Floor no (5 characters).

Door key no (10 characters).

Addresses 1,2 and 3 (30 characters).

Report Notes (45 characters).

Detailed Notes (unlimited).

Information in the Report Notes box can be shown on reports and lists but the Detailed Notes can be viewed only in this screen.

### **Room Closure periods**

To add a new closure period click on the Add New button and enter the date it was or will be closed and (optionally) the day (the first night) it will be re-opened. A reason for the closure must be entered. The details may be changed subsequently if necessary. Multiple closures may be entered. When a room is re-opened enter the date in the 'Open On' box.

The program will automatically prevent a closure period from clashing with a resident's period of occupation so you may need to move a clashing resident in the Resident Details screen first. Similarly the program will prevent a resident's dates being entered or changed if the new dates would clash with a closure period.

A series of reports on closure periods are available via the [Closure Reports](#) button on the Main Menu.

### **Room Inventory**

Initially you will need to add items to the inventory list by typing them in directly. However these items will be added automatically to the Master Items list on the left so that in future one or more items can be selected from the Master Items list and added automatically to the room inventory by clicking on the 'Add Selected Items' button.

## Accommodation list

When first opened (or after the Reset button is pressed) this list shows all units of accommodation in alphabetical order together with the name of the current resident if there is one, the coloured Resident status flag `ResidentStatusFlag` - plus other data.

To see more detail of the highlighted room and/or resident either double click on the relevant row or click on the button *Show more detail*.

### Views tab

Use the drop down lists in the Selection Criteria to select only a particular site, building, floor, accommodation type and to show just current residents or booked residents as well. Selection criteria may be combined to show, for example, only accommodation of a particular type on a particular site.

Select or deselect column (fields) to be displayed or hidden. Three columns cannot be hidden: the room, the resident surname and the coloured status flag.

### Vacant search tab

Use this to find accommodation vacant continuously between two dates or vacant on just one date. See [Finding a vacant room](#).

### Print button

Data can be printed or [exported](#) as displayed together with details of the selection criteria and the totals as shown at the bottom of the screen. Note that only visible columns are printed - see the show tab above.

### Column widths

These can be widened or narrowed by clicking the mouse on the border to the right of the column title and dragging the border to the right (to widen) or left (to narrow).

### Column order

Any column may be moved left or right in the order by clicking and holding the mouse on the grey column header - the left hand column border will then be highlighted. As the mouse is dragged left or right a line between two columns will be highlighted - indicating where the column would be moved to if the mouse button was released. Release the mouse button to move the column to between these two columns.

### Standard letters button

Select this to display the [standard letters screen](#) and send a standard letter to the highlighted resident or residents. (see also [Select multiple residents in a list](#))

### Reset button

Displays the default data ie. all units of accommodation in alphabetical order together with the name of the current resident if there is one. It does not change the columns that are displayed or their width.



**Total figures**

Except when searching for vacant rooms the total at the bottom of the screen is for current residents. The total excludes residents who should have left and includes those who should have arrived.

# Accommodation planner

The Accommodation Planner is a graphical, spreadsheet like, day by day view of each room's usage. It provides the visual information that a holiday planner provides and is particularly useful for finding 'gaps' between residents to put a locum in for a week (say). It is also useful for selecting the best room to book a resident into to make sure that residents arrive and leave as near to 'back-to-back' as possible.

The default display (on opening and on clicking the *Reset button*) is all rooms for the next 60 days.

To see more detail of the highlighted room and/or resident either double click on the relevant row or click on the button *Show more detail*.

The status bar at the bottom of the screen displays the room, the residents's surname and the date for the cell the mouse is pointing at.

The Planner can be printed. All rows and all visible columns (days) will be printed.

## **Select tab**

Use the drop down lists in the Selection Criteria to select only a particular site, building or accommodation type. Selection criteria may be combined to show, for example, only accommodation of a particular type on a particular site.

## **Colours**

See Resident status flag.

## **Display settings**

Change the column width, row height and number of days to calculate the planner for.

## **Reset button**

Displays the default data ie. all units of accommodation.

## Batch receipts

Use the Batch Receipts screen to mark multiple charges as paid (ie without going to the individual resident's account and make a detailed Rent Receipt entry). This is useful, for example, where a list of salary deductions is received.

Select the month the charge was raised in and the screen will display all unpaid charges excluding those that are normally invoiced (ie where the 'Requires individual invoice' box is NOT ticked in the Automatic Charge Details in the Resident Details screen).

First enter a payment date in the Date of Receipt box. This is the date the batch payment was made (e.g. the date salary deductions were made).

Then double click each row where the receipt was on that date. (Double click again to un-receipt it.) This will enter the date already entered in the Date of Receipt box.

Alternatively click on the button 'Receipt ALL' to mark all items in the list as paid on that date.

You may change the date in the Date of Receipt box and repeat the double-clicking process if there are receipts to be entered from different dates.

A running total of the value and number of receipts entered is displayed at the bottom of the screen.

Click Cancel to cancel ALL receipts entered and close the screen. Click OK to post all receipts and close the screen.

## Closure reports

For the month selected in the drop down box several reports can be displayed:

Detailed reports (closures listed by accommodation, by reason for closure, by date closed and by date opened).

Summary reports (closures summarised by the accommodation closed, by the reason for closure and by the number of days closed).

These reports may be printed or exported.

## Confirm arrivals and departures

This screen displays two lists.

Residents who should have arrived (according to their first night date) but whose Confirmed Arrived check box in the Resident Details is empty.

Residents who should have left (according to their last night date) but whose Confirmed Left check box in the Resident Details is empty.

## Council tax discounts

Council tax discounts are usually available when a taxable unit (e.g. flat or house) is empty (50% discount) or occupied by only one person (25% discount). When calculating the number of adults in a flat there are certain people who do not count for council tax purposes e.g.. student nurses. For this reason it is possible to classify a resident as Council Tax exempt in the Resident Details screen.

There are three different tabs:

### **Detailed list**

This displays a list of all residents during the month, the accommodation, their names and job titles, whether they have been classified as Council Tax Exempt and the dates they were resident between (not the same as arrival and leaving dates). This list can be printed or exported.

### **Planner view**

The planner view shows a graphical holiday planner type view of each day in the month for each unit of accommodation. Green means occupied for that day, green with an 'E' indicates occupied by an Council Tax exempt person and white/blank means empty. For each flat there is a summary line indicating if the flat was empty for council tax purposes ('0') or had only one occupant ('1'). Click the mouse on a square and hold to view the surname of the resident on that day. The Planner View cannot be printed.

### **Summary**

This shows only those flats which had one occupant or were empty for one day or more in the month. Against each flat is shown the number of days (and dates) a flat was empty for Council Tax purposes and the number of days (and dates) a flat had only one occupant for Council Tax purposes. The Summary can be printed but not exported.

### **Important**

Note that the Council Tax Discounts report relies on grouping rooms according to their flat number in Accommodation Details. If a room does not have a flat no it will NOT APPEAR in this report. It is obviously also important that the flat no is correct ! ResManager does not know whether the local council charges council tax separately for each flat covered by the report - in some cases a single council tax bill may cover a whole building which might include several flats - thus the Council Tax Discount report should be used as an aide only. It does not necessarily mean that these discounts are available or will be granted. Scanning down the left hand column in the Planner View is the easiest way to spot incorrect flat numbers and also to spot those flats for which the Council Tax Discount report is not relevant.

## Daily status screen

The Daily status screen provides summaries of residents on the specified date. Breakdowns are provided by Job title, Department, Staff Group, Employer/Organisation.

Breakdowns of rents being paid and details of booked residents are also displayed - but only for today's date.

A breakdown of buildings is provided showing the number of units in total and the number occupied. Note that the number of units in total is as at today's date regardless of which date has been selected. This is because ResManager does not keep a history of when rooms were added to or deleted from the system.

Select another date

The Daily status screen is automatically set for today but can be set for a different date (to look backwards or forwards in time) via the *Select a date* button. If a date is selected which is earlier than the most recent archiving date the system will display an error message *'Data not available prior to...'*

Printing

The data can be printed or exported.

## Deposit list

This lists all residents who have a deposit balance.

The columns displayed are: Surname, first name, accommodation and deposit balance.

The status bar at the bottom of the screen shows the grand total deposit balance.

This report can be printed or exported.



## Diary of arrivals and departures

This screen lists residents arriving and leaving in the period specified in the two date boxes.

Any period can be specified.

You can also select the Site, Building and Accommodation Type from the drop-down boxes.

Double click on a resident to jump direct to the [Resident Details](#).

## Diary reminders

This screen displays a list of each resident whose Reminder Date, if one has been entered in the Resident Details screen, falls in the next 30 days.

Double click on a name to display the Resident Details

Use the buttons to move forwards or backwards 30 days at a time. Once the reminded task has been completed click 'Confirmed dealt with' next to the Reminder date in the Resident details screen.

## Drop down lists

Drop down lists make it easy to enter data by selecting from a list rather than typing 'Physiotherapist' in every time. It also prevents proliferation of descriptions (e.g. Physiotherapist, Physio, Phys Th etc) as too many descriptions can make reports meaningless.

From the Main Menu select Drop Down Lists to display the many lists that are available from the user to select from when adding a new room or a new resident.

This screen is available to level one users only as renaming an item must be carried out only with great care - changing an item in a list changes ALL records with that item. Thus changing the job title Registrar to Nurse will give the title Nurse to all residents previously recorded as Registrar !

The lists are:

Accommodation types

Building names

Charge types

Departments

Employers/organisations

Grades (job titles)

Payment methods

Sites names

Staff groups

Tenancy types

Titles (Mr, Mrs etc)

Try not to use too many descriptions, if virtually each resident has a different job title then any reports that are produced will be difficult to analyse. For example it is better to use 'SHO' in *Job title* and 'A&E' in *Department* rather than 'SHO A&E' all in the job title as you will be able to find all SHOs easily, and all residents from A&E easily, and still be able to find all SHOs in A&E. In addition you won't end up with scores of different job titles to scroll through.

Under *Staff Group* a common breakdown is Medical, Nursing, Prof & Tech, Students or a similar short list. This makes it easy to answer questions like "how many nursing staff are there in residence?".

*Employer/Org* is meant for the name of the employing Trust or University or Ambulance Service. This also enables reports to show how many residents come from each organisation.

*Payment method* typically contains entries like Payroll, Invoice, Invoice College etc.

*Tenancy Agreement* might contain the type of agreement (Assured Shorthold or Licence).

## Financial report

For the month selected from the drop down list this report displays:

Total charges summarised by site.

Total charges summarised by accommodation type.

Total charges summarised by payment method.

Cash summary: receipts and refunds.

Deposit summary: deposits received, deposits refunded and deductions from deposits.

## Increase charges

From the Main Menu select User Options and then the Automatic Charges page.

Double click on each charge that is to be increased and type the new charge in the 'Change to' box and then the date it is to apply from in the 'from' date box.

## Main menu

The Main Menu is the point of entry into ResManager (after the log on with user name and password) and is also the point of exit.

- Day to day lists
- Accommodation List
- Accommodation Planner
- Resident List
- T Card View
- Waiting List
- Diary (Arrivals / Departures)
- Diary Reminders
- Confirm Arrivals Departures
- Standard Reports
- Occupancy Rates
- Closure Reports
- Occupancy Chart
- Daily Status
- Telephone List
- Rent Ledger
- Council Tax Discounts
- Maintenance
- User Options
- Add New Accom
- Backup Data
- Drop Down Lists
- Log On New User

- Financial
- Rent Ledger
- Batch Receipts
- Financial Report
- Residents' Rents
- Deposit List
- Help
- Online Help
- About ResManager

- Exit ResManager

## Move a resident

A resident may be moved at the click of a few buttons. (There is no limit to the number of times a resident may be moved).

In the Resident details screen click on the *Move resident* button (note that this button will be unavailable if the resident has left).

Select a move date using the popup calendar.

Select a Unit ID from the drop down list. (All units of accommodation are listed not just the empty ones).

Click OK to move the resident.

The program checks the dates are valid (see below) and makes sure the move won't create a double booking) and won't clash with a room closure. If everything is OK then the name and all other details such as job title, department, rent etc are copied to the new record. After the move the residents details in the new room will be displayed. Check that the old rent is still applicable. A note will be left in the *Detailed Notes* box in both the old and the new records stating when the move was and where from/to.

### **Treatment of dates**

The move date will not be accepted if it is before the first night or after the last night. An invalid move date message will be displayed. If the move date is the same as the first night then the whole booking will be moved whereas if the move date is part way through a tenancy then there will be two records: one in the old room for the period [original first night up to the night before the move date] and one in the new room for the period [move date up to the original last night].

Date example

Original tenancy: J Bloggs, Room A, 1st to 31st January

Move details entered: Room B, 15th January

Result: J Bloggs, Room A, 1st to 14th January.

J Bloggs, Room B, 15th to 31st January.

### **Rents**

If the resident pays rent then a new automatic charge will need to be added for the new tenancy.



## Occupancy charts

A range of charts is available.

**Occupancy (no.)** A daily bar chart of occupied rooms, any out of use rooms and vacant rooms. By default this is for last month and this month but using the date boxes any period can be shown. The daily number of arrivals and departures is also represented at the bottom.

**Occupancy (%)** Similar to above except that the y axis shows percentage of the total instead of numbers of rooms.

**Ave length of stay (leavers)** Each bar represents the average length of stay of residents leaving on that day.

**Movements per day** Each bar represents the total number of arrivals and departures on that day.

**Arrivals vs departures** For each day the number of arrivals is represented by a bar above the horizontal zero line and the number of departures is represented by a bar below the horizontal zero line.

**Length of occupation** This chart shows the total number of current residents who arrived on or before the relevant date on the x axis. Thus the far lefthand bar represents the number of oldest residents whereas the far righthand bar represents the total number of all residents (clearly all current residents arrived on or before today !)

Click on the button *Redraw Chart Now* after changing any details.

The colours can be changed by clicking on the relevant buttons in the chart legend on the right hand side.

The chart can be printed. There is no print dialog box and a single copy of the chart is printed landscape, filling an A4 page. It is printed in colour on a colour printer.

## Occupancy rates

The occupancy rates calculated here are average rates for each day in the calendar month or quarter selected from the drop-down box. (For a snapshot, single day view see the [Daily Status screen](#) the figures can be printed.

Analyse by

From this drop down box select the type of occupancy calculation:

Room: For each room the no of days occupied, the no of days closed and the no of days available (and the percentages for each).

Building: For each building the percentage occupied, closed and available - plus totals for each site, and total for all sites.

Job title: Average number of residents of each job title, and average total residents.

Staff group: Average number of residents of each staff group, and average total residents.

Accom type: Average percentage occupancy for each type of accommodation on each site, the total for each site, and total for all sites.

NHS Target Report: A report covering the last year for each accommodation type. Nett voids equals Gross voids less the Out of Use figures - ie Nett voids represents the percentage actually lettable taking into account rooms out of use.

Month

From this drop down box select the calendar month to calculate for. The last 12 months and the next two months are available.

## Reports Menu

There are two standard fully formatted rent reports that may be viewed or printed. Each is available for any of the three previous complete months.

### **By Building**

For each Building the report lists residents alphabetically by surname, showing the room they are/were in, their job title and payroll number. Each charge debited during the month is listed with the debit date, the charge description, charge rate (eg £400 pm), period of occupation during that month, and the calculated charge. The total of all charges for the month is also shown. At the end of the list a total is shown for that building.

### **By Payment Method**

For each Payment Method (eg Payroll or Standing Order) the report lists residents alphabetically by surname, showing the room they are/were in, their job title and payroll number. Each charge debited during the month is listed with the debit date, the charge description, charge rate (eg £400 pm), period of occupation during that month, and the calculated charge. The total of all charges for the month is also shown. At the end of the list a total is shown for that payment method.

User the toolbar at the top of the window to move from page to page, print, 'shrink to fit' the screen image etc.

# Rent ledger

## **Aged debtors list**

This lists all debtors with their balances aged (four separate months plus fifth month and older).

The radio buttons enable the list to be reduced to show only those debtors who owe amounts more than x months old.

The status bar at the bottom of the screen shows the grand total and the totals for each period.

Double clicking on a row, or clicking on the *Details* button, will display the selected resident's Account page in the Resident Details screen where the detailed account may be viewed and entries posted to the account.

The aged debtors report may be printed or exported.

## **Transaction lists**

Select from a range of standard reports by clicking on one of the buttons or

Create a user defined report selecting from the following criteria:

When posted Today, last 7 days, this month, last month.

Entry type Rent, council tax, service charge, deposits, rent receipts, rent refunds, invoiced, need invoicing, unpaid invoices, unpaid other (ie not invoiced but unpaid).

Collection method

Site

The report may be sorted by date of transaction, surname or accommodation.

A selection of columns may be added or removed as required.

## Resident details

The Resident details screen is one of the most important screens in ResManager. It is the screen where a resident's details are originally entered and the only place where changes to them may be made (with the exception of the [Batch Receipts](#) facility).

There are four pages: Main details, Addresses, Automatic charges and Account

### **Main details (Resident details screen)**

Here the essential details such as name, job title, dates etc. are entered for the first time and subsequently changed if necessary. In this screen a resident may be [moved](#) or [deleted](#) or sent a [standard letter](#). All the resident's details may be printed by clicking the *Print details* button.

Most fields are self explanatory and most can be entered using drop down lists.

The minimum amount of information required for each resident is: *surname* (max 20 characters), *first night* and *last night*.

In *Payroll number* there is space for 12 alphanumeric characters. *Room deposit* and *Key deposit* contain any amounts received.

*Council Tax Exempt?* enables certain residents (such as student nurses) to be classified as exempt from paying council tax. Exempt residents are not counted when adding up the number of residents in a flat (for council tax discount purposes). 'Y' means exempt, 'N' or blank/empty means not exempt. See also [Council Tax Discount](#) report.

*Ref 1* and *Ref 2* are optional fields of 20 alphanumeric characters each which might be used to hold data which is not provided for elsewhere, e.g.. ethnic group, bank account number etc.

*No rent increases until* allows the user to set a date before which no rent increases may be applied. This may be of use if the resident's tenancy agreement or terms of employment do not allow increases for (say) the first six months.

There is unlimited space in the *Detailed notes* box, e.g. for forwarding addresses. The *Report notes* box can contain up to 45 characters for showing on reports, lists.

For information on how to enter dates into the First night, Last night and Reminder date boxes see [Entering and changing dates](#). Note: If the resident's dates of arrival or departure are changed then any existing charges will be automatically adjusted by credit or debit as necessary.

For information on which date to enter (particularly into the Last night box) see [Which date to enter](#)

For information on using the *Confirm Arrived* and *Confirm Left* check boxes see [Confirm arrivals and departures](#).

For information on Reminders see [Diary of Reminders](#)

#### Validity check

Before any data is posted the program, ensures that minimum data is present (surname and first night and last night) and that the last night is not before the first night.

Finally it checks to make sure that two residents are not being double booked and that the booking does not clash with a Closure period if they are the changes will not be accepted.

#### Audit Log

Additions and changes to the surname, any dates, any rent amounts and the payment method are posted to the [Audit log](#).

### **Addresses (Resident details screen)**

Click on the relevant button to edit the following data:

Address arriving from.

Next of kin details.

Forwarding address.

Bank details.

Any of this data can be used in [Standard Letters](#).

### **Automatic charges (Resident details screen)**

Most residents will pay rent on a regular basis. The ResManager program calculates rents and debits them automatically on the required day - for example at the end of the month. When a new resident is booked in the user will typically apply an automatic charge to the resident's account via the *Automatic charges* screen (it can be more than one charge).

The appropriate automatic charge is selected by name (e.g 'Nurse - single room') from a list of automatic charges which will have been set up in the [User Options](#) screen. See also [Automatic Charges](#).

To add a new charge:

- Click the button *Add a charge* to display the Automatic Charge Details screen.
- Select the appropriate automatic charge by name from the drop down list.
- The charge details are automatically displayed.

- *The Debit charge when* field will be automatically filled in (e.g. 'monthly in arrears'). However you can change this if the resident will paying on a different basis.
- Select a *Collection method* from the drop down list.
- If an individual invoice is required each time for this resident (ie not paying by salary deduction for example) then tick the box *Requires individual invoice*. If this box is ticked then each time the program raises a rent charge for this resident it will appear automatically in the Rent Ledger screen under *Transaction lists - Standard Reports - Needs Invoice*.
- The *Charge applies from / until* date boxes enable the user to force the charge to apply from and to dates other than the Arrival and Departure dates. This is unusual but may apply for example if a resident arrives late or leaves without sufficient notice and it is decided to make a charge for the period even though the resident is not in occupation. In almost all cases these fields will be left as *Arrival* and *Departure*.
- Click *OK*.

The charge will be automatically posted on the basis set (e.g. monthly 1st of the month) (but see Accounting options in User Options) until departure or until the *Charge applies until* date if one is set. If the resident's dates of arrival or departure are changed then any existing charges will be automatically adjusted by credit or debit as necessary.

To terminate a charge before departure

Typically this may be necessary if a resident moves onto a different rate - e.g. a student becomes a qualified nurse or a doctor's abatement changes.

Use the *Charge applies until* date box to enter the last day that this charge should be applied. Then add a new charge - as explained above.

### **Account tab (Resident details screen)**

By default the Account report shows only outstanding and unallocated amounts. Once amounts are paid and receipts are allocated they are automatically archived (although still viewable by clicking on the Archive radio button).

Using the buttons the user may do the following:

Post a

Rent receipt (or as a shortcut double-click on an unpaid charge). The user is invited to print a receipt.

Receipts are user designed via User Options.

Rent refund

Manual charge

Manual credit

Deposit receipt

Deposit deduction

Deposit refund

In addition a receipt or credit may be allocated to an invoice. Once one or more several receipts match an invoice amount all the items will be archived automatically.

Note: An amount may not be allocated to an invoice of a lesser amount. For example if £1000 is received to pay two invoices of £500, this must be entered as two separate receipts of £500.

Invoices and statements may be may be printed, or the report as viewed on screen may be printed. Use Ctrl - click to select multiple invoices for printing. Invoice numbers are raised automatically at the time of printing. Invoices are user designed via [User Options](#).



## Resident list

When first opened (or after the Reset button is pressed) this list shows all current residents in alphabetical order by surname, the room, the coloured Resident status flag - plus other data.

To see more detail of the highlighted resident either double click on the relevant row or click on the button *Show more detail*.

Use the drop down lists to select only those residents who satisfy specified criteria. Selection criteria may be combined to show, for example: only current residents whose Job title is SHO and whose Department is Medicine. The Res Status dropdown box allows for residents who are current, booked, left, left this month, left last month, arrived this month, arrived last month, have been in residence longer than 3/6/9/12 months. The list may be refined by selecting only a certain job title, department, employer or staff group and may be sorted by surname, first night, last night, ref 1, ref 2 or accom (room).

### **Surname selection**

The letters of the alphabet at the bottom of the Resident list may be selected individually to display only those residents whose surname begins with the selected letter. This makes it easy to find a resident called 'Jones' without scrolling down the list. Surname selection may be used in combination with other selection criteria.

Use the check boxes to select or deselect column (fields) to be displayed or hidden. Three columns cannot be hidden: the room, the resident surname and the coloured status flag.

### **Print button**

Data can be printed or exported as displayed together with details of the selection criteria and the totals as shown at the bottom of the screen. Note that only visible columns are printed - see the show tab above.

### **Column widths**

These can be widened or narrowed by clicking the mouse on the border to the right of the column title and dragging the border to the right (to widen) or left (to narrow).

### **Column order**

Any column may be moved left or right in the order by clicking and holding the mouse on the grey column header - the left hand column border will then be highlighted. As the mouse is dragged left or right a line between two columns will be highlighted - indicating where the column would be moved to if the mouse button was released. Release the mouse button to move the column to between these two columns.

### **Standard letters button**

Select this to display the Standard letters screen and send a standard letter to the highlighted resident/s. (see also Select multiple residents in a list)

**Reset button**

Displays the default data ie. all current residents in alphabetical order. It does not change the columns that are displayed or their width.

## Residents' rents

Depending on which radio button at the top of the screen is selected this report shows either:

All current and booked residents

or

Current and booked residents without auto charges

This report lists the residents and the rents they are paying, when the next charge is due and how their payment method. It is useful for checking that residents are paying the correct rents and that there are no residents paying nothing who should not be.

It may be sorted by room, surname, date of arrival, charge name or payment method.

This report can be printed or exported.

## Room summary screen

This is the intermediate screen between the four lists/views

(Accommodation list, Accommodation planner, T Card view and Resident list) and the two detail screens (Accommodation details and Resident details).

The Room summary screen provides a single, quick view of the most important information about the room and current and booked residents. It is the point at which the user makes a final decision whether to add a resident or not.

### **Accommodation info**

The top section shows some of the more important accommodation details. Double click anywhere here, or click the *Accom Details* button to display the Accommodation Details screen.

### **Resident history**

The bottom section shows the resident history with all past present and booked residents shown. Double click on a resident in this list, or click the *Resident Details* button to display the Resident Details screen.

### **Add a resident**

To allocate a resident to this unit of accommodation click on the Add Resident button with the green cross. This will display a blank Resident Details screen

## Standard letters

The Standard Letters screen provides an easy to use mail merge facility.

### **Preview**

When a letter is selected from the drop down list the resident/room details will be automatically entered into the letter. It is not possible to type into the Preview screen. Select the Print button to print the letter as it appears.

### **Edit**

Type the standard text as required. To insert a mail merge field, place the cursor where the merged data (such as surname) is required, then double click on <<surname>> in the *Insert a field at cursor* dropdown box. To have the current date inserted place the cursor where the date is required then click on *Insert Date* button.

The typeface, font size and style may be changed via the toolbar.

Text and images may be cut and pasted from other applications.

Standard letters may be saved, renamed, deleted or created using the buttons provided.

To see the changes or to print the letter click on the *Preview* tab.

## T Card view

The T Card view is a graphical view of the rooms as they would appear on a T Card board.

Only the Room and Surname is shown so that many more rooms can be displayed at the same time.

The Resident Status colours are used for easy identification of occupied, booked or empty rooms.

Double click on a room or resident to show the Room Summary Screen

The T Card view can be printed. All rooms will be printed even those not currently visible.

## Telephone list

This screen displays a list of all residents whose accommodation has a telephone number entered in the Accommodation Details screen and who will be in residence at some point over the next 45 days (ie. it includes residents who may not yet have arrived). The printed list ( possibly for switchboard) therefore does not become out-of-date quite so quickly).

The data included is title, first name, surname, Unit ID, telephone no and job title.

# Change user options

Only users with level 0 access may display User options.

## **Archive & compress. Help.**

Before using the archive or compress facility on a network make sure that you are the only user using ResManager at the time.

Archive data allows the archiving of residents who left more than X months ago. The number of months may be selected from 6,12,18,24,30 and 36 months. Click the *Archive now* button to archive all residents who left more than X months ago. The archived data may be viewed in the Resident List by selecting Archiv01 from the Res Status dropdown box (Note: selecting ALL in the Res Status dropdown box does not include archived residents). Each batch of archived records is added to the previous archive file unless it is already over 0.5Mb in which case a new archive file is created. Thus additional archives may be listed in the dropdown box (numbered Archiv02 etc). The archive process also compresses the databases.

Compress data. The *Compress data now* button compresses databases to remove wasted space left by deleted records and improve speed.

Rebuild Indices fixes the 'Index Out of Date' error reported by the system - typically caused by power cuts or ResManager not being shut down before the PC is switched off.

Help Check the box (the default) to show flyover help, un-check the box to hide it. Check the 'Warnings when confirm arr/dep' box to warn users that confirming dates is irrevocable and may not be changed later.

## Data Network Path

Indicates the location of all data files. The data files should not be moved unless absolutely necessary. If they are moved then the path to them will need to be changed here.

## **Passwords**

Change, delete and add new user names, passwords and levels.

See About user names and passwords and How to change user names and passwords

## **Accounting options**

Raise first automatic charge before arrival.

Choose whether to allow the program to debit the first automatic charge *before* confirmed arrival of the resident if the automatic charge is normally raised in advance. This affects whether, for example, an automatic charge normally raised monthly in advance on the first of the month is actually raised for the first time *only once arrival is confirmed* or on the first of the month regardless of the fact that the resident hasn't arrived yet.



### **Edit Invoice Layout/ Edit Receipt Layout**

The design process is virtually identical to designing Standard Letters. However the fields available in the drop down box in each case are different. A logo may be copied and pasted from another program.

### **Automatic charges setup**

The master list of automatic charges is displayed and may be added to or edited here. For full details see [Automatic Charges](#).

## Waiting list

The Waiting list is intended for people waiting for accommodation to become vacant - for example married accommodation where the supply may be limited.

The list displaying title, first name, surname, first night required, last night required and comments may be sorted by input date, surname or first night using the drop down box.

Click on the *Add new* button to add a new person to the list. Click on the *Show more detail* button to display the [Waiting list detail](#) screen for the highlighted resident, or double click on the required row.

The list may be printed or exported as displayed.

### **Waiting list detail**

The Waiting List Detail consists of title, first name, surname, first night, last night, comments (45 characters for display on the [Waiting Lists](#) screen) and an unlimited notes box.

The minimum data required is a surname.

Click the *delete* button to remove the person from the waiting list.

# ACTIONS

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## Finding vacant accommodation

To find a room which is empty tonight

Scroll down the [Accommodation List](#) to find an empty room (an empty row), or scan the [Accommodation Planner](#) or [T Card View](#). Optionally, change *Residents: Current only* to *Residents: Current & Booked* to show booked residents as well.

To find a room which is empty on a specified date or continuously empty between two dates

First select the *Vacant* tab in the [Accommodation List](#)

Then enter dates in the First Night and Last Night boxes. To search for accommodation vacant for one night only enter the same date in both boxes. (By default the boxes contain today's date so clicking on the Search button without changing any dates will find all rooms vacant tonight.

Optionally, select the required site or a specific type of accommodation if you wish to restrict the search.

Now click on the Search button. The resulting list will show a list of rooms vacant for the period together with the current and/or booked residents for those rooms if there are any. This type of search takes into account projected leaving dates for current residents leaving and projected arrival dates for booked residents.

## Add a new resident

To add a new resident - whether they have arrived yet or not - do the following:

First find a suitable vacant room - using the [Accommodation List](#) or the [Accommodation Planner](#) for example. (For further information see also [Finding Vacant Accommodation.](#)) Select a row and double click (or click on the button *Show more detail*) to display the [Room Summary Screen](#)

In the Room Summary screen click on the button at the bottom with a green cross marked Add Resident. This will display a blank [Resident Details Screen](#).

Add the details of the new resident (minimum surname plus first night and last night). If the resident is going to be paying rent then click on the 'Automatic Charges' tab to add an automatic charge (see [Resident details - automatic charges](#)). If the resident has paid a deposit go to the 'Account' tab and click the 'Deposit Receipt' button and type in the amount received (see [Resident details - account](#)).

The arrival departure dates will always be checked to make sure they do not clash with another current or booked resident for that room.

Note that the details can be changed later and the resident can also be moved to a different room later - even before he has arrived, see [Moving a resident](#).

## Change a resident's details

A resident's details can be changed only in the Resident Details screen.

For example, first find the resident's name in either the Accommodation List or the Resident list.

Double click on the relevant row or click on the button marked *Show More Detail*. This will display the Room Summary Screen.

In the Room Summary Screen select the resident's name in the Resident History list. Double click on the relevant row or click on the button marked Resident Details. This will display the Resident Details Screen.

Make the necessary changes then click OK to accept the changes or click Cancel to abandon any changes and keep the details as they were before.

## Entering and changing dates

Using the calendar

Click on the calendar icon to the right of the date box.

Change the month and year with the up and down arrows. Select a day with the mouse and click on the OK button. The selected date will be inserted into the relevant date box.

Typing dates

Dates may be typed directly into the date box. They should be entered in the format dd/mm or dd/mm/yy or dd/mm/yyyy. Leading zeros for days and months are not necessary. 01/03 is the same as 1/3. The century is not necessary. Thus 1/3/98 is interpreted as 01/03/1998 and 1/3/01 is interpreted as 01/03/2001.

### **Keyboard shortcuts in the Resident Details screen.**

When the cursor is in the date box the following keyboard shortcuts are available:

Ctrl + space bar - inserts today's date

Ctrl + left arrow - changes the date to 1 day earlier

Ctrl + right arrow - changes the date to 1 day later

Ctrl + up arrow - changes the date to 1 month earlier

Ctrl + down arrow - changes the date to 1 month later

Additionally the following shortcuts apply to the Last Night and Reminder Date boxes:

Ctrl + F6 - inserts a date 6 months after the First Night

Ctrl + F12 - inserts a date 12 months after the First Night

See also Which date to enter

## Delete a resident

This facility is not available once a resident has been confirmed as arrived.

If the resident did not occupy this unit of accommodation at all, in the Resident Details screen click on the button marked Cancel Booking. Confirmation will be required before proceeding.

Note: The current user must have a security level of 1 to do this.



## How to confirm arrivals and departures

### **Via the Accommodation List, Resident list or Accommodation planner**

A yellow background or yellow Resident status flag in one of these screens indicates that according to the First Night and Last Night dates the resident should have arrived or departed - but that his arrival or departure has yet to be confirmed. Double click on the resident to show more detail, displaying the Room Summary Screen, then double click on the resident's name in the resident history to display his Resident details then check the relevant confirm arrived/confirm left check box next to the date, or change the date.

### **Via the flashing button on the Main Menu**

When the "Confirm Arr/Dep" button flashes on the Main Menu this indicates that according to the First Night and Last Night dates one or more residents should have arrived or departed - but that their arrival or departure has yet to be confirmed. When they have all been confirmed arrived or left, or their dates postponed, when you return to the Main Menu the button will stop flashing.

Click on the flashing button to display the Confirm Arrivals and Departures screen which will list the names of the residents to whom this applies.

The arrival or departure should be confirmed or the resident's dates changed as soon as possible. In some cases you may not be in a position to be certain for a day or two and the button will continue to flash as a reminder.

Confirming, or changing dates, can only be done in the Resident Details screen. It is possible to jump from this screen direct to the Resident Detailsscreen - simply double click on the relevant name - then check the relevant confirm arrived/confirm left check box next to the date, or change the date.

# Common Reports

## **Alphabetical list of current residents**

In the [Resident List](#) click on the Reset button. This will produce the default view which is a list of current residents.

## **Alphabetical list of rooms showing names of current and booked residents**

In the [Accommodation List](#) click on the Reset button. This will produce the default view which is a list of units of accommodation - and against each room the name of the current/booked resident if there is one.

## **Rent report for last month**

From the Main Menu select the 'Rent Ledger' button. Select the 'Transactions Lists' page and on the 'Std Reports' page on the right hand side click the button 'Charges Last Month'. See [Rent Ledger](#).

## **Aged debtors list**

From the Main Menu select the 'Rent Ledger' button. Select the Aged Debtors page (this is the default report). See [Rent Ledger](#)

## **Percentage occupancy rates for each building for last month**

From the Main Menu select the [Occupancy Rates](#) button (this is the default report).

## Add a new unit of accommodation

In the Main Menu select the button marked Add New Accom. This will display a blank Accommodation Details screen.

Enter details in the relevant boxes, selecting where possible from the drop down lists. You must enter at least a Unit ID (also called 'Accom' ) and a Building name, the other boxes are optional. The Unit ID must be unique and can contain up to 15 characters including spaces.

Note that the Accommodation List automatically sorts alphabetically by the Unit ID starting with the left hand most characters. Lower case 'p' comes before upper case 'P', numbers before letters, spaces before everything. 'Willow 6' comes *after* 'Willow 10' (because 6 is greater than 1) so use 'Willow 06' then it will come before 'Willow 10'.

Copy existing Unit ID styles where possible to ensure that the new room fits in the list where you want it to. If it doesn't, delete the room immediately and try again (Unit IDs cannot be altered).

## Delete accommodation

In the Accommodation Details screen select the button marked Delete. Confirmation will be required before proceeding.

Accommodation cannot be deleted if there is a current or booked resident.

Deleting a unit of accommodation does not remove details of previous residents.

Note: The current user must have a security level of 1 to do this.

## Change a room's details

A unit of accommodation details can be changed only in the Accommodation Details screen. The current user must have a security level of 1 to 4 to do this.

First find the unit of accommodation in the Accommodation List.

Double click on the relevant row or click on the button marked Show More Detail. This will display the Occupancy Screen.

In the Room Summary Screen double click anywhere in the left hand box or click on the button below it marked Show More Detail. This will display the Accommodation Details Screen.

Make the necessary changes then click OK to accept the changes or click Cancel to abandon any changes and keep the details as they were before.

## Changing rents & charges

From the Main Menu click on User Options

Select the Automatic Charges page.

From the list of Automatic Charges select the charge you wish to change and then double-click on the row or click on the Edit Charge button. This will display the Automatic Charge Details screen.

To change the rent, type a new amount in the 'Change to' box, and then enter a date the new rent is to apply from in the 'from' box. Click OK.

## Export data

Any list/report which can be printed can also be exported in tab delimited text format. A file in this format can be imported by many applications including word processors and spreadsheets.

In an appropriate list or report select the rows (records) you require and the columns (fields) to show.

Select the *Print* button and in the Print dialog box check the *Print to File* box. Click OK and in the *File Save* dialog box type a file name and select a directory in which to save the export file. Although a TXT file extension is suggested any file extension, or none, can be used. Click OK.

# User names and passwords

Viewing and changing data can be made only by authorised users.

When logging on a user needs a user name and password. Associated with each user is also a security level. The highest security level is 0, the lowest is 5. A user with a security level of 0 can do anything whereas a level 5 user can view the data but not change anything.

New users can be added and existing ones deleted and all passwords, user names and security levels may be changed at any time. See [Change User Options](#) The current user may be changed without Exiting ResManager. See [Log on new user](#). User names and passwords are not case sensitive.

## Level 0

View/edit User Options (including User Names and Passwords,Data Path, Auto Charges)

## Level 1

Level 2 actions plus . . .

Delete a Standard Letter

View/edit Drop Down Lists (job titles etc)

## Level 2

Level 3 actions plus . . .

Use the Bulk Rent Receipts

Enter a Manual Credit

Enter a Manual Charge (Debit)

Enter a Rent Receipt

Enter a Deposit Deduction

Enter a Deposit Refund

Enter a Rent Refund

Allocate a Receipt to an Invoice

Delete an Auto Charge from a Resident's Details

Add/edit or delete Room Closure Periods

Add or delete a room

Edit Auto Charge for a Resident

## Level 3

Level 4 actions plus . . .

Add Auto Charge to a resident

Enter a Deposit Receipt

## Level 4

Add/edit a Resident's Details (incl booking dates)

Add/edit Room Details (incl Inventory but not Closure Periods)

Add a Deposit Receipt

Print Invoices

Add/edit Waiting List

Cancel a Booking before confirmed arrived

## Level 5

Read only access. Make no changes.



## Change user names and passwords

Passwords, user names and security levels can be changed. New ones can be added and existing ones deleted. However only a user with a security level of 0 can do this.

Select User Options from the Main Menu and then select the Passwords tab.

To delete the highlighted row press Ctrl + Del on the keyboard

To add a new User Name press the Ins key.

User names and passwords may be 1 to 10 characters long, they are not case sensitive. The Level field requires a number from 0 to 5.

## Miscellaneous

### **The Confirm Arr/Dep button flashes on the Main Menu**

Click the button and in the Confirm Arrivals and Departures screen double click on each name and in the Resident Details screen check the relevant confirm arrived/confirm left check box next to the date.

### **A booked resident cancels or doesn't arrive**

Delete the resident in the Resident Details screen

### **A resident moves room**

Click on the Move button in the Resident Details screen

### **A booked resident needs to be allocated a different room**

Click on the Move button in the Resident Details screen

### **A resident arrives**

In the Resident Details screen makes sure the first night date is correct and then 'check' the *Confirm Arrived* check box

### **A resident leaves**

In the Resident Details screen makes sure the last night date is correct and then 'check' the *Confirm Left* check box

### **A resident arrives or leaves earlier/later than expected (or is expected to arrive/leave earlier/later)**

Change the first night or last night in the Resident Details

### **Which date to enter**

The program requires a projected arrival and leaving date to be entered for every resident - the *actual* dates are confirmed only after the event. The purpose of the leaving dates is to try to help with planning ahead and as dates can always be changed a best guess is good enough.

Although most arrival dates are known with reasonable accuracy most leaving dates are not. A guess is therefore required, for example for a short stay locum (so guess say 3 weeks) or an SHO on a six month contract (so guess say 6 months) or a staff nurse (so guess say 1 year). These dates will probably have to be changed later, possibly several times as contracts are extended, staff leave, and students decide to share a house with friends, and as residents change their plans.

## Automatic charges

Most residents will pay rent on a regular basis. The ResManager program calculates rents and debits them automatically on the required day - for example at the end of the month. When a new resident is booked in the user will typically apply an automatic charge (or it may be more than one) to the resident's account. The appropriate automatic charge is selected by name (e.g. 'Nurse - single room') from a list of automatic charges.

In the User Options screen new automatic charges can be setup and existing ones can be edited. There is no restriction on the number of automatic charges that can be setup for the user to choose from.

Each automatic charge contains the following details:

Name (e.g. 'Nurse - single room')

Type (rent, council tax or service charge - purely for reporting purposes)

Amount and period (e.g. £300 per month, or £60 per week).

Change to and date from (for rent increases) contain the increased rent and the date it is to apply from (this date may be any day during the month).

When to debit.

This offers virtually unlimited options:

whole amount on booking/arrival/departure

weekly in advance/arrears

monthly in advance/arrears

x days before arrival

xth day of the month

x days before the start of the month

x days before the end of the month

Finally the tick box This charge available to users in drop down lists prevents obsolete charge types from being selected for new residents even if they still apply to some existing residents.

# Invoicing

Invoices may be printed from either

Resident Details (Account page)

or

Rent Ledger (Transaction Lists page) - Under Std Reports click on the 'Need to Invoice' button to display a list containing each Auto Charge which has NOT yet been invoiced and that was marked as 'Requires Individual Invoice' when the Auto Charge was added to the resident.

Select one or several rows and click the 'Invoice' or 'Print Invoice/s' button.

The invoice layout can be set up and modified in the User Options screen (via the button on the Main Menu). In the Accounting Options page click on the 'Edit Invoice Layout' button. Edit the layout in the same way as Standard Letters are edited - selecting fields from the drop-down list, typing and formatting text and pasting an image (such as a logo or letterhead) from another application such as MS Word.

## Rent calculation for part months

If a resident is normally charged on a per night basis (e.g. £7.00 per night) then the basis of calculation of rent (or other charge) is the same whether he stays a full or part month ie. number of nights x rent per night.

However if a resident has a monthly rent and arrives or leaves during a month then the rent (or other charge) will have to be apportioned.

A daily rate is calculated by dividing the annual rent by 365.

$$12 \times \text{monthly rent} / 365$$

Example:

A resident paying £200pm and staying 15 days (regardless of which month it was) would be charged as follows:

$\text{£}200 \times 12 / 365 = 6.575$  pence per day which rounds to 6.58 pence per day. 15 days times 6.58p equals  $\text{£}98.70$

# Printing

## Print dialog box

In most cases once the print button has been pressed a standard Windows dialog box will be displayed. Depending on the data to be printed various options may be available:

- selecting a page range
- printing more than one copy
- collating multiple copies
- printing to file (see also [Exporting data](#))

In addition clicking on the *Setup* button will present further options:

- choosing between portrait or landscape.

Depending on your printer you may also be able to select:

- page size
- print quality
- other printer settings.

See Microsoft Windows Help for more information.

## Portrait or Landscape

Most reports are programmed automatically to print portrait, other data to print landscape. This can be changed at the time of printing in the Print Dialog box, usually under Printer Setup.

## Report is wider than page

If the data you have selected is too wide for the paper you are using you will be asked whether you want the report to be shrunk to fit the page or whether you want to cancel printing. If you choose the latter try reducing some column widths or printing fewer columns by deselecting them in the *Show tab* which is available on many screens. Alternatively changing from Portrait to Landscape may help - click on the Print button again and see what the current setting is.

## Printing problems

If you experience problems trying switching the printer off and on again. If this fails try exiting ResManager and starting it again.

## Converting flats to rooms and rooms to flats

A flat may sometimes be let as separate bedrooms and sometimes as a self contained family flat.

Example 1: Flat becomes separate lettable bedrooms

Delete the flat and add four new rooms

Example 2: Several bedrooms become one lettable flat

Delete the bedrooms and add one new flat

Note: The history of previous residents will not be lost.

## Resident status flag

The yellow? flag indicates one of the following:

The resident should have arrived (according to his first night date) but the Confirmed Arrived check box in the Resident Details is empty.

The resident should have left (according to his last night date) but the Confirmed Left check box in the Resident Details is empty.

See also Confirm arrivals and departures



## Select multiple residents in a list

Use Ctrl - Click

or Shift - Arrow Up/Down

to select multiple residents for sending Standard Letters

## Audit log

This is a text file called Log.txt and is located with the data files (see [User options](#)).

The Audit Log can be opened in any word processor. It contains the surname, Unit ID and date and the new, changed or deleted data where this is surname or date in/date out together with the User Name of the person making the change.

Each surname has a unique number next to it which does not change even though the surname might, this enables reliable tracking of a resident.