

# Upgrade guide

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## Welcome to ESP Version 5

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This guide is for experienced ThoughtWorks users who are upgrading from Version 4 for DOS to Version 5 for Windows. If you are a new ESP user, please refer to the *Getting Started* section of our full reference manual. All users may also refer to the full reference manual or our on-line resources for additional information about ESP.

This upgrade guide will walk you through installing ESP Version 5 on your computer and converting your existing Version 4 data. It also explains the differences between the two versions and discusses some new features that you'll find in Version 5.

## Upgrading to ESP Version 5

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Before upgrading to ESP Version 5, we recommend that you completely finish your current schedule.

There are two steps required to upgrade to version 5:

1. Install the ESP Version 5 software, and
2. Convert your existing Version 4 data.

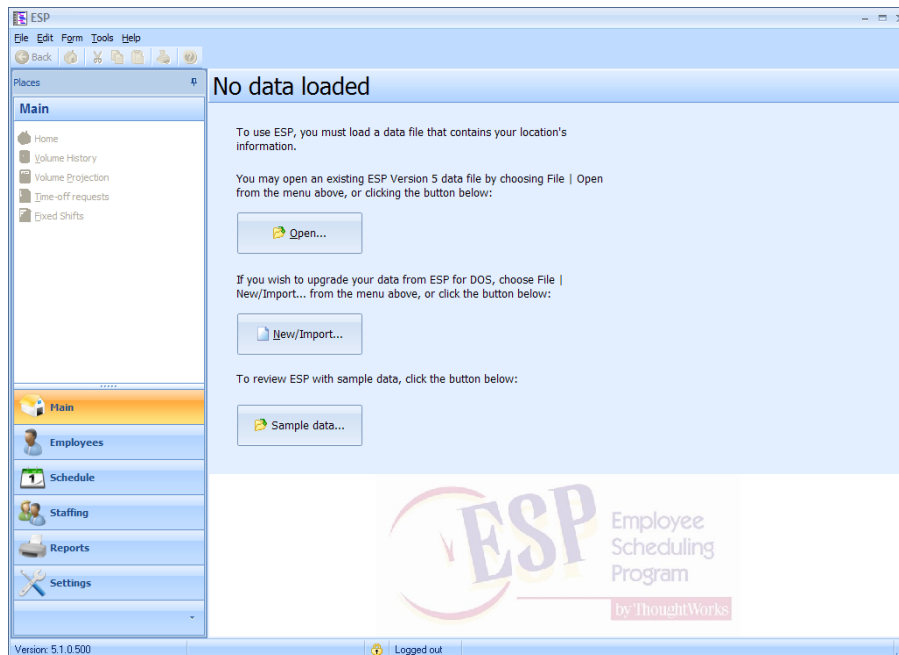
Note: Converting your Version 4 data to ESP Version 5 will not remove the Version 4 software or data from your computer; you will still have full access to Version 4 after converting, which will allow you some time to fully learn all the new features in ESP Version 5 before you have to prepare your first schedule.

## Installing ESP Version 5

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If you received ESP Version 5 on a CD, install the CD into your drive. Setup should begin automatically. If you downloaded ESP from the ThoughtWorks website, double-click on the installation file (SetupESP.exe) to begin the installation process. Follow the installation instructions on the screen.

Once installed, start ESP by clicking the *ESP* icon on your computer's desktop or select the ESP choice from *Start | Programs | ThoughtWorks | ESP for Windows*. When ESP starts, you will see the following screen:



## Importing your Version 4 data

ESP has a built-in *Import Wizard* to help you import your Version 4 data quickly and easily. To open the import wizard, select *File | New/Import* from the menu, or simply click the large *New/Import...* button as shown on the screen above. The wizard will guide you through the steps shown below to import your Version 4 data.

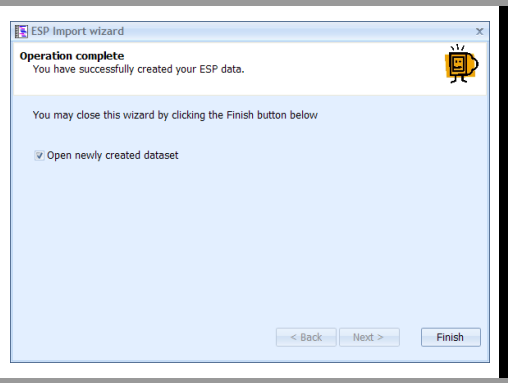
After importing, ESP will open your data file, ready to begin a new scheduling week. Your most recent schedule will be available for viewing, editing and printing.



*Note: When ESP imports your employees it will import their permanent availability only. Any temporary changes you have made will not be imported into the new ESP Version 5 database.*

<p><b>Step 1:</b> After you choose the Import choice from the menu or main screen, the Import Wizard will open. You will be presented with two options:</p> <p><b>1. Import DOS data</b></p> <ul style="list-style-type: none"><li>- <i>Standard import:</i> select this option to import data on a computer that already has a licensed copy of Version 4</li><li>- <i>Advanced import:</i> select this option to import data on an unlicensed computer</li></ul> <p><b>2. Create new, blank data</b></p> <p>To create data for a new location.</p> <p>Select the option that applies in your conversion and then select <i>Next</i>.</p> <p><i>For this example we are choosing Standard import.</i></p>	
<p><b>Step 2:</b> When you click <i>Next</i>, the Import Wizard will display the names of the store data that it has located. Choose the correct data set, and click <i>Next</i>.</p> <p>If you do not see the data you wish to convert, click <i>Back</i>. You may wish to use the <i>Advanced import</i> option in Step 1.</p>	
<p><b>Step 3:</b> Specify where you wish to store your new ESP Version 5 data. By default, the Import Wizard will place your data in your <i>My Documents</i> folder. If you wish to save your data elsewhere, click the <i>Browse</i> button and navigate to another location. When done, click <i>Next</i>.</p>	

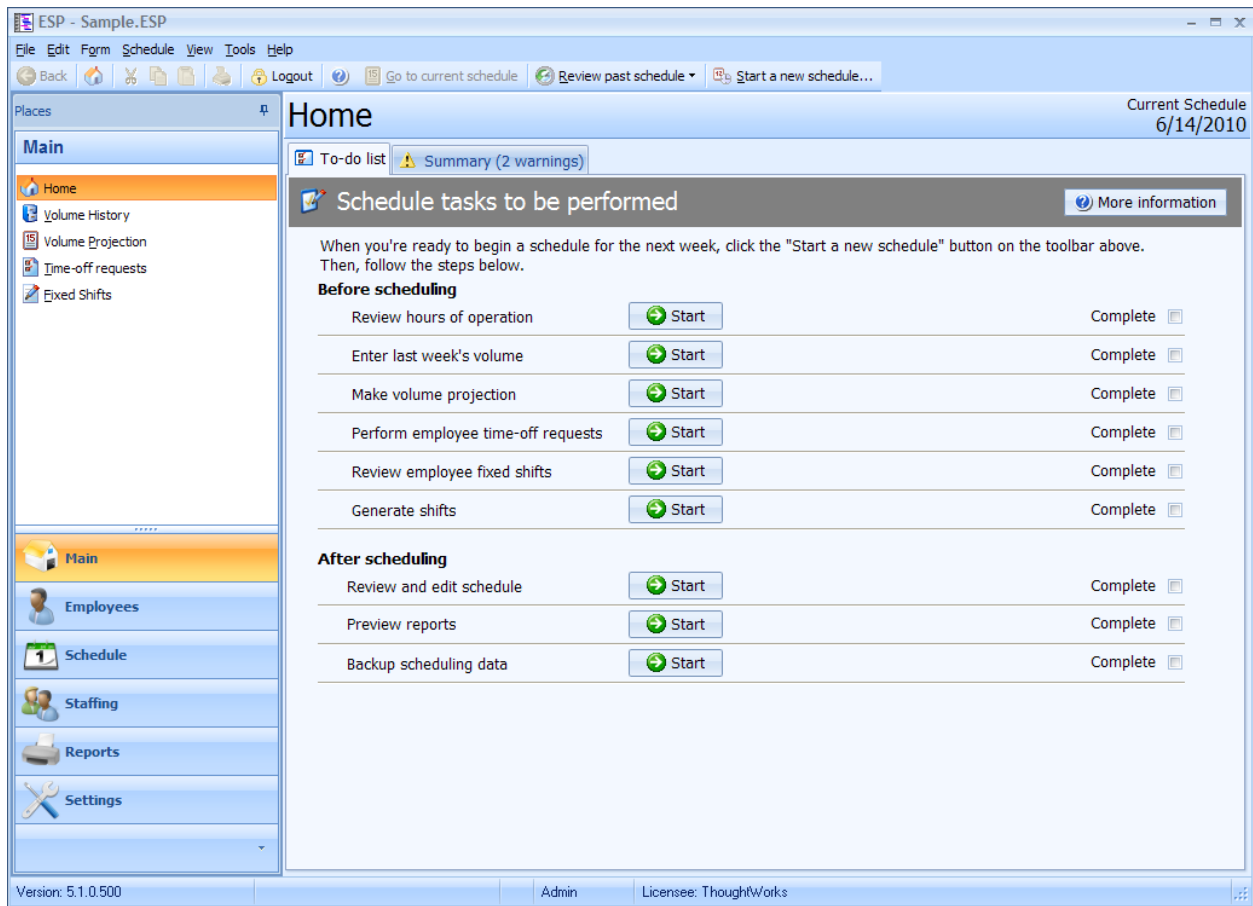
**STEP 4:** The Import Wizard will begin importing your data. The import process can take up to five minutes, so be patient. When finished, the Wizard will display the dialog box shown on the right. Click *Finish* to begin working with your converted data.



## Using ESP Version 5 for the first time

Before generating your first schedule, you should explore all of ESP's new features, menus and toolbars.

The *Home* form, shown below, is the screen that you will see each time you start ESP. The *Places* panel, on the left, contains the main ESP task groups. This is where you quickly access any form you wish. You can also access the most common forms using the weekly checklist from the Home form.



The table on the next page shows where you will find all the menu choices from Version 4 in the new version.

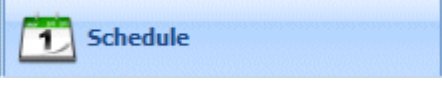
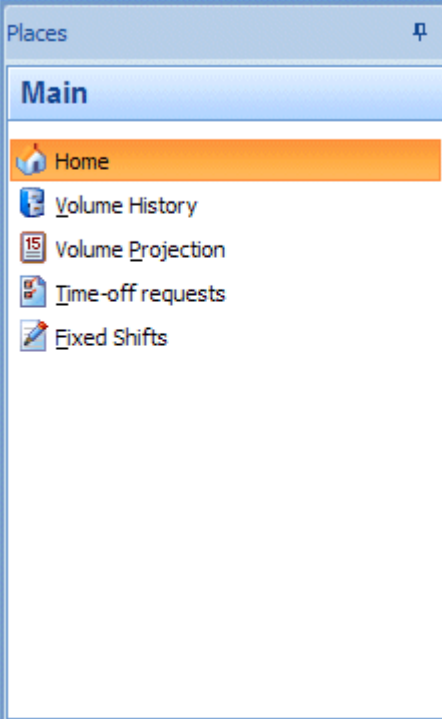
# Accessing and moving around forms

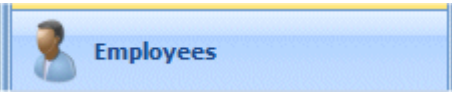
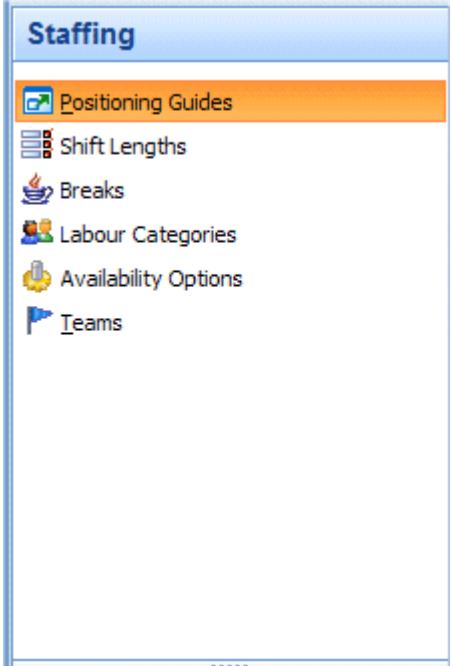
Although you will recognize many of ESP's forms, navigating and entering data is significantly different.

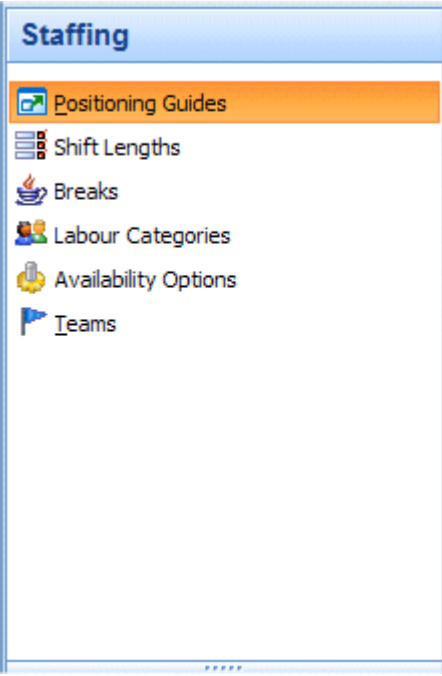
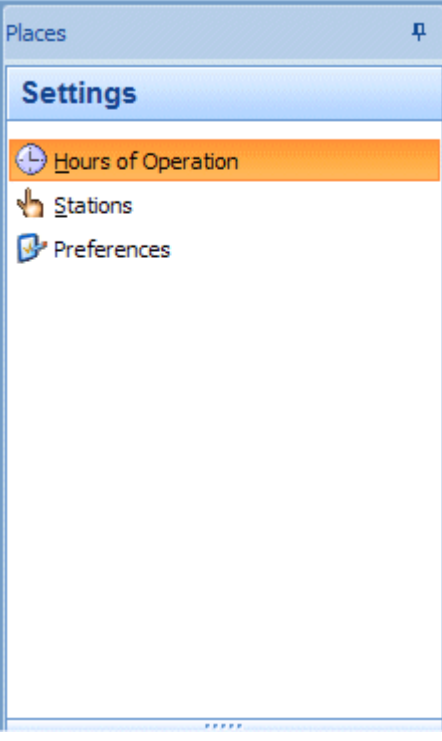
## Accessing forms

ESP Version 5 offers a number of ways to open a form:

- ✓ select the form from the *Home* form's checklist
- ✓ select the form from the task group on the *Places* panel, or
- ✓ use the *Form* option on the menu.

Version 4 Main Menu	Sub-menu	Found in Version 5 Task Group
A: Schedule employees	<ul style="list-style-type: none"> <li>▪ Generate new schedule</li> <li>▪ Edit current schedule</li> </ul>	
B: Projected Sales options	<ul style="list-style-type: none"> <li>▪ Print current schedule</li> <li>▪ Print previous schedule</li> </ul> <ul style="list-style-type: none"> <li>▪ Add weekly sales</li> <li>▪ Modify sales history</li> <li>▪ Remove sales history</li> <li>▪ Generate projected sales</li> <li>▪ View/Edit projected sales</li> </ul>	

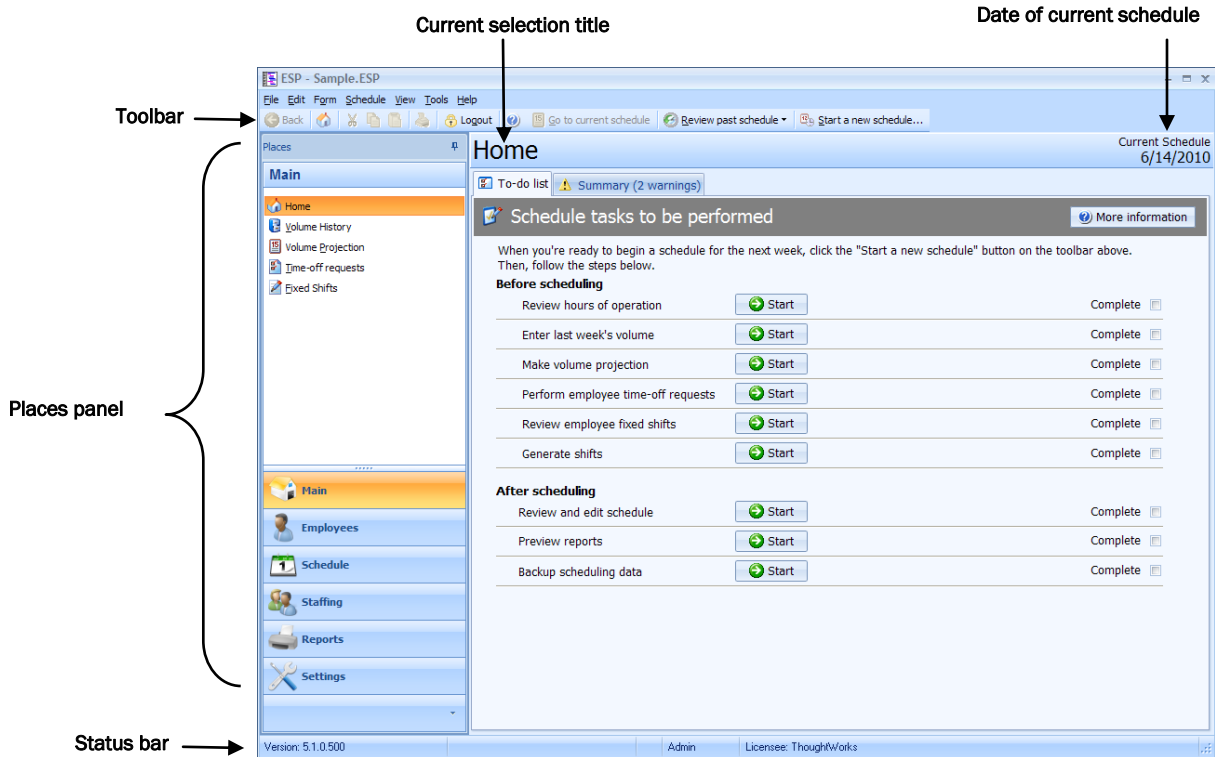
<p>C: Employee information</p>	<ul style="list-style-type: none"> <li>▪ Add Employee</li> <li>▪ Modify Employee Temporarily</li> <li>▪ Modify Employee Permanently</li> <li>▪ Remove Employee</li> <li>▪ Remove Temporary changes</li>   <li>▪ Employee Template (N/A)</li> <li>▪ Print Employee Information (REPORTS)</li> </ul>	
	<ul style="list-style-type: none"> <li>▪ Team Definitions</li> </ul>	

	<ul style="list-style-type: none"> <li>▪ Fixed shifts (moved to MAIN group)</li> <li>▪ Manning charts (renamed Positioning Guides)</li> <li>▪ Shift Definitions <ul style="list-style-type: none"> <li>- Shift priority charts</li> <li>- Busy periods</li> <li>- Break lengths</li> </ul> </li> <li>▪ Labor classes</li> </ul>	
<p>D: Setup charts</p>	<ul style="list-style-type: none"> <li>▪ Hours of operation</li> <li>▪ Labor chart (N/A)</li> <li>▪ Job codes and ratings</li> <li>▪ Exception ratings</li> <li>▪ Schedule preferences</li> </ul>	



## Moving around forms

Many screen elements are common to all forms.



### Toolbar

The toolbar on each form is divided into two areas.

1. The options on the left side of the toolbar will appear on all forms, and include the standard cut, copy and paste commands, along with the *Help* command. Clicking the *Help* icon opens the *Help and Support* window on the right side of ESP's screen, and displays helpful information about the current form. If you're connected to the internet, the *Help* panel also links you directly to our on-line help resources.
2. The options on the right side of the *toolbar* are relevant to the form that you are viewing. This side will be different on each form.

### Places panel

The *Places* panel appears on the left side of your screen, and is your main navigation tool for working with ESP. You may select any of ESP's forms from the *Places* panel.

### Task groups

Click on the name of any of the task groups to open that group and see the options in it; open a form directly from the task group by selecting it.

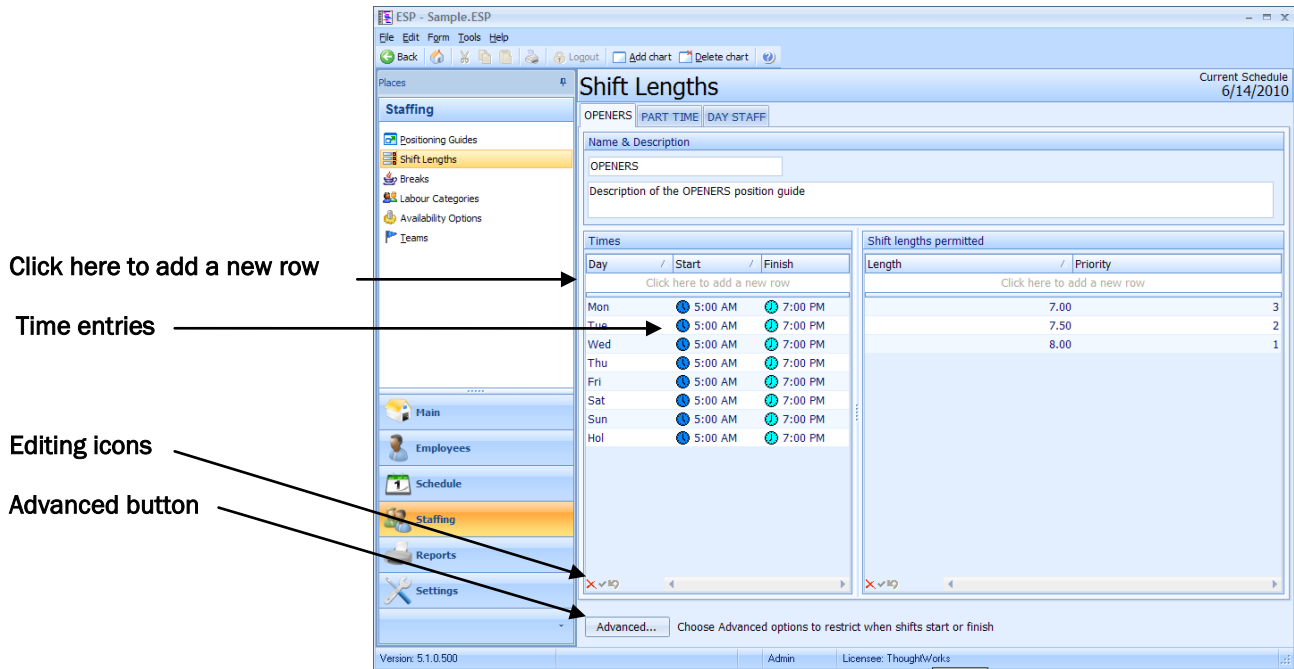
### Title bar

The title of the form that you are viewing is displayed in the *title bar*.

### Date

The date of the schedule you are viewing. When you are viewing the current schedule the title bar is displayed in blue; when you are viewing a past schedule the title bar appears red.

In addition to the options above, you will find other choices to help you use the forms in ESP.






### Click here to add new row

To add a new entry to a chart click inside the row that is labeled *Click here to add a new row* and enter the new information. Save the entry by clicking off the row or by selecting the *Post* icon at the bottom of the screen or by pressing the *Tab* key until you have moved past the last column.





### Editing icons

The three icons at the bottom of most forms will help you modify the form:

-  **Post:** Posts (adds) the current entry into ESP's files
-  **Delete:** Deletes the line the cursor is on
-  **Undo:** Cancels any change made to the current line **before** it has been posted

### Time entries

A color coded clock will appear beside any time entry to make it easier to identify the time of day:

-  Yellow indicates morning hours from 6:00am to 12:00pm (noon)
-  Orange indicates afternoon hours from 12:00pm (noon) to 6:00pm
-  Light blue indicates evening hours from 6:00pm to 12:00am (midnight)
-  Dark blue indicates late night hours from 12:00am (midnight) to 6:00am

When working with time fields, you can use your mouse wheel (if available) to scroll forward or backward through time entries. Alternatively you can use the drop-down list that appears when you

click the time, or use a keyboard shortcut. When using the keyboard, as you begin to type ESP will select the earliest time that matches your first keystroke ,with each additional keystroke further refining the time. For example:

If you type	The following time will be selected
1	12:00 AM because this is the earliest time that starts with the number 1
11	11:00 AM
4	4:00 AM
4:00	4:00 AM (note that the colon is required)
4:00 P	4:00 PM (note that the space and letter P is required)

### Advanced button

Many forms have an *Advanced* button that displays further options for the form. In general, you will only need to use the advanced options in rare occasions when ESP's standard settings aren't applicable.

## Producing your weekly schedule

Each week, you begin a new schedule by selecting the *Start a new schedule* option on the toolbar. Specify the date of the new schedule, and press the OK button. Then, simply follow the checklist of tasks on the *Home* form, checking them off as you complete them. Some of the tasks will be grayed out when you start a new schedule: You should complete any preceding steps before selecting any such task.

Home form task	Description
➊ Review hours of operation	Review your hours of operation. Ensure you take any holidays or special events into consideration.
➋ Enter last week's volume	Manually enter last week's sales, or verify that they transferred from your POS accurately.
➌ Make volume projection	Create a new volume projection for the upcoming week. It can be based on sales or transactions.
➍ Perform employee time-off requests	Enter all employee time off requests, changes to availability and job qualifications.
➎ Review employee fixed shifts	Review all the fixed shifts, managers schedules etc.
➏ Generate shifts	Create and assign all the shifts for the week
After Scheduling	
➐ Review and edit schedule	Review each day for accuracy and make any editing changes before posting your schedule.
➑ Preview reports	Preview and print your final copies.
➒ Backup scheduling data	Backup your schedule to CD, DVD or other device.