EZbooking

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Table of content

General

New theme – ArtMetro

In this version, we introduce a new theme – *ArtMetro*! This theme has a modern look with new colours, icons and buttons.
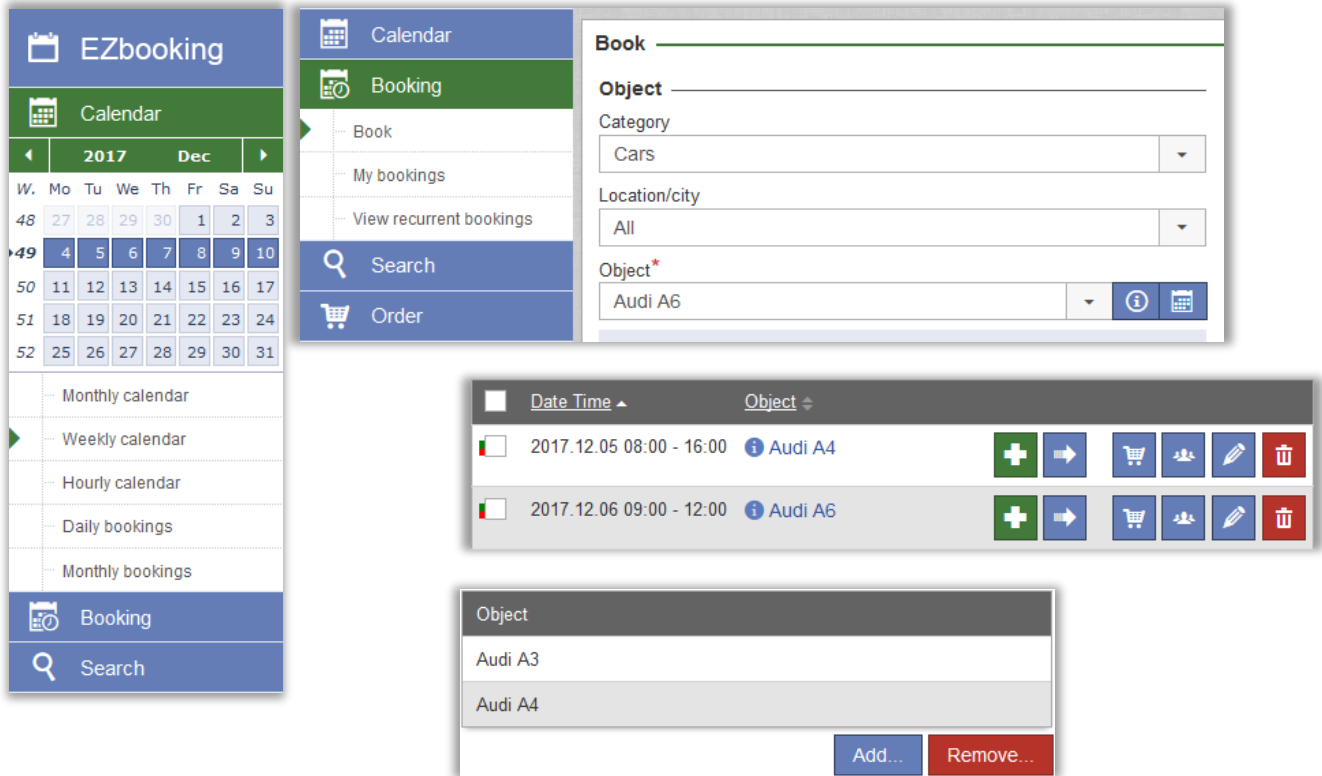
The old "classical" themes will no longer be available in the program. If you have been using one of these themes until now, your theme will automatically be changed to *ArtMetro* after the update. The *Office blue* theme will still be available, and it will still be selected for those who used it before. You can set *ArtMetro* as the default theme under *Administration > System settings > Advanced > General settings*. If the setting *Users can choose theme themselves* is activated, each user can change the theme in his/her user details.
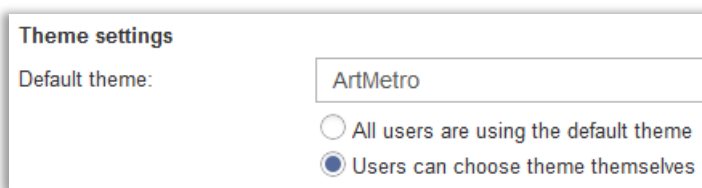
Interface for editing program texts

It is now possible to change program texts such as menus, buttons and terms. To do this, you go to *Administration > System settings > Languages* and click the tab *Edit program texts*.

The interface is divided into two halves. At the top of each half, you select the language whose program texts you want to show (the left half) or edit (the right half).

The texts are grouped under different headings which you can select in the list to the left of the page. If you are looking for a text that you want to change, it is recommended to use the *[Search]* option at the top of the list. Below the drop-down list where you select language, you will find a search field where you can search for the text you want to change.
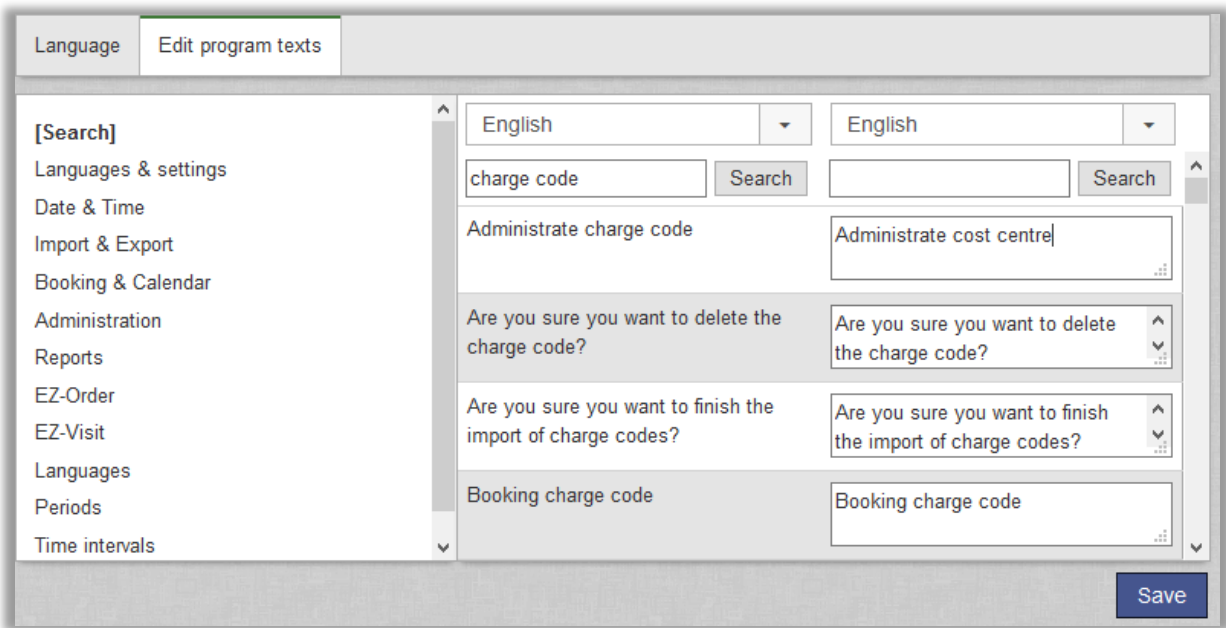
Improved user search

In order to help administrators to find the desired user faster, we have extended and improved the user search functionality. The user search function is now available in most interfaces, where users can be selected. We have also added a feature that prevents users from being listed directly (for example in drop-down lists) when you have many users. This will help your administrators perform a search instead of scrolling through long user lists and it will also ensure that pages are loaded quickly.
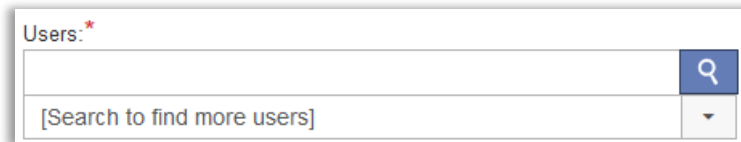
A search will now be automatically performed after you have typed three characters in this search field.
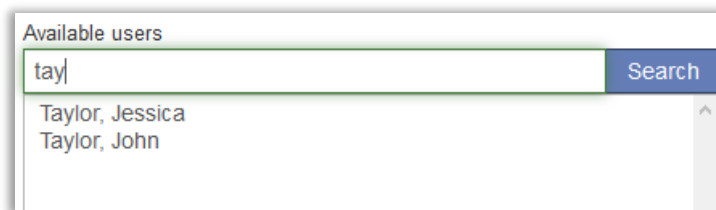
If you want to search for a full name it is possible to type a part of the first name and last name, respectively. To search for the user Jessica Taylor, you can type for example *jes tay* or *tay, jes*.
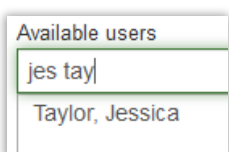
Defining welcome page per organisation

You can now define different welcome pages for different organisations. In this way, you can give specific information to the users depending on which organisation they belong to.

Activate this possibility by marking the check box *Welcome page per organisation* under *Administration > System settings > Advanced > General settings*. Please note that the setting gives organisation administrators the right to define the welcome page for their own organisation.

Basic settings in application

☐ Always show the welcome page when user logs in
☑ Welcome page per organisation

In the *Administration > System settings > Welcome page* menu you find the *Organisation* drop down list at the top of the page. Select an organisation and a language you want to define a welcome page for, or select *[General welcome page]* to define a welcome page that will be used for organisations for which you have not defined an organisation-specific welcome page.

Welcome page

Organisation:

[General welcome page] ▼

User's language:

English ▼

The first time you save a specific welcome page for an organisation, you click the button *Save new welcome page*.

Booking

Copy booking

In listings of bookings, we have added the [+] icon next to bookings you have the right to copy, i.e. bookings of an object that you have the right to book for the user the booking is made for.

By clicking the icon next to a booking, you begin the creation of a new booking. The following information will be copied from the existing booking:

- Object
- 'Booked for' user
- Information field content
- Charge code
- Connected accessories (EZ-Equip)
- Selected project (EZ-Project)

The icon is displayed in these pages:

- *Calendar > Daily bookings*
- *Calendar > Monthly bookings*
- *Booking > My bookings*
- *Booking > View recurrent bookings*
- *Search > Search bookings*

☐	Date Time ▲	Object ⇕	Booked for ⇕					
	2017.12.06 13:00 - 14:00	ⓘ Audi A3	ⓘ Jones, Mary	➕	➡	🛒	👥	✏
☐	2017.12.07 13:00 - 14:00	ⓘ Audi A4	ⓘ Smith, John	➕	➡	🛒	👥	✏	🗑

Show automatic calculated price

Under *Booking* > *Book*, the price will now always be displayed, even if you let the price be automatically calculated.
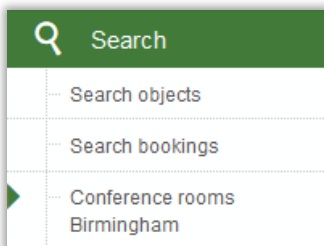

Search

Search pages

You can now create customized search pages to be displayed in the *Search* menu. These search pages can then be used as an alternative to the *Search objects* menu in cases where you want certain search fields and/or selections to have predefined values, or to be hidden.

Example: You have two object categories called *Conference rooms* and *Cars*, and an object field called *City* with the options *London* and *Birmingham*. You want your users to be able to quickly search for combinations of these, without having to make the selections themselves in the *Search objects* menu. You therefore create one search page for each combination. When defining each of these pages, you make the preferred combination of selections preselected, and give the search page a name that describes these selections. You can also hide the *Category* and *City* drop-down lists, since you have predefined these values to enable users to use different search pages instead of changing these selections. If a user wants to search for a conference room in Birmingham, he/she can then go to the *Search* menu and there use the search page you have named *Conference rooms Birmingham*.

The search pages are created under *Administration* > *System settings* > *Search pages*, where you click the *New search page* button, enter the values you want to be preselected, untick the checkbox under *View* next to the settings, selections and fields you want to be hidden, enter a name for the search page and click *Save*.
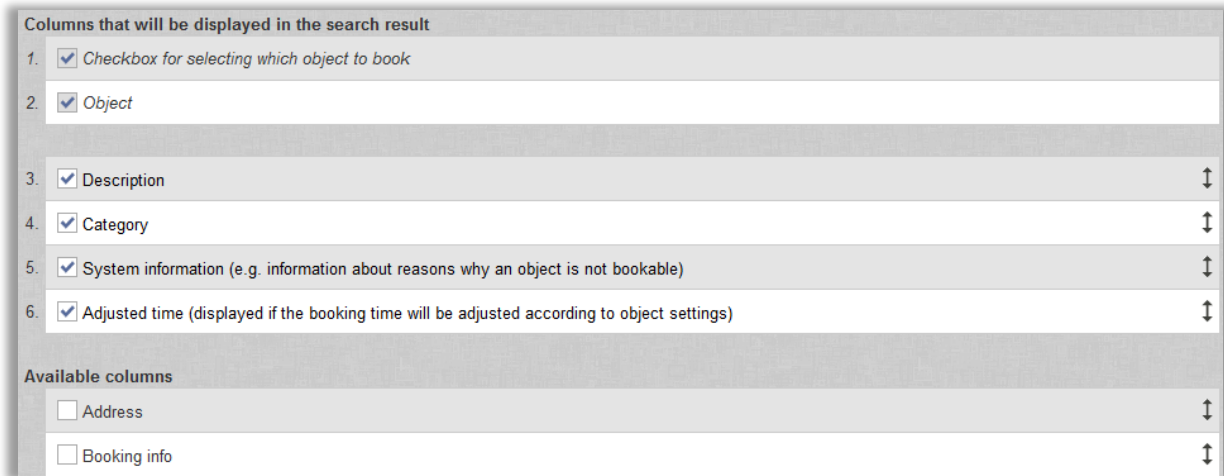
Search result columns

We have added the menu *Administration > System settings > Search result columns* where you can decide which columns to display in the search result, and in which order, when a search is made using the *Search > Search objects* menu. The settings also apply to any additional search pages (new function described in this document) created by system administrators.

Show a column by ticking its checkbox, or move it to the section *Columns that will be displayed in the search result* using drag and drop. To hide a column, untick its checkbox or drag it to the section *Available columns*.

Use drag and drop to decide in which order the columns will be displayed. The higher up in the list the column is, the further to the left it will appear in the search results.
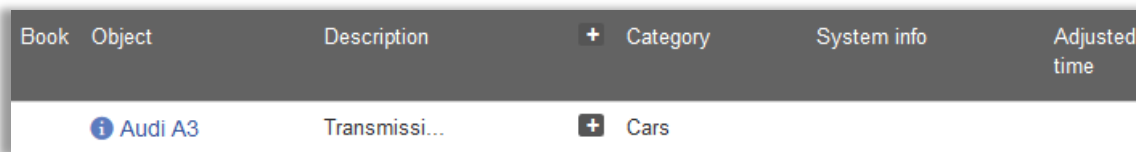
The *Description* and *Booking info* fields may contain a lot of text. In the search result, only the first characters will be displayed initially, but the user can click the ➕ icon to view the whole content.
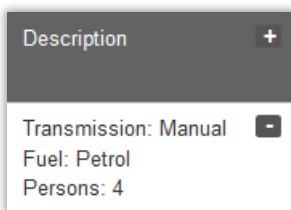
Full text search when searching for available objects

You have now access to the field *Free text* when making a search under *Search > Search available objects*. Use this field to search through the following fields in the object information for matching objects:

- Object name
- Category
- Description
- Object number
- Object field option (new function described in this document)
- Address

- Contact person
- E-mail of contact person
- Booking info

You can enter one or several words in the field. In the drop-down list to the right of the field, you select one of these options:

- *Search for any of the keywords*: At least one of the words you entered must be found in the object information.
- *Search for keywords exactly as entered*: The phrase you entered must be found in the object information
- *Search for all keywords (any order)*: All words you entered must be found in the object information

The option *Search for any of the keywords* is selected as default when you go to the search page. However, if you perform a search, and then click the *Back* button, the last selected option will still be selected.

Free text search:	
	Search for any of the keywords	▼

Possible to hide fields in the search
Under *Search available objects*, you can now decide whether the search fields *Object name* and *Object description* should be available. Since you can use the new field *Free text search* to search for matching object names and object descriptions, you might want to hide these fields. To do so, you go to *Administration > System settings > Select box settings* and unmark the check boxes at *Object name* and *Object description*.

Search available objects			
	Category	X	Last selected ▼
	Organisation	X	All ▼
	User category	X	Last selected ▼
	User	X	Last selected ▼
	Object name	☐	
	Object description	☐	

Search objects
Under the menu *Search objects* (previously called *Search available objects*), you now have access to the checkbox *Include not bookable objects*. Tick this checkbox if you want to use the page for searching among all objects you have the right to see, regardless of whether they are bookable or not.

Leave the checkbox unticked if you want to use the page for searching for objects which are available for the user and time period you specify.

Search objects ─────────────
☐ Book continuously for more than one day
☑ Include not bookable objects

Reports

Showing user categories and user groups in the Invoice details report
In the *Invoice details* report, it is now possible to use *User category* and *User group* as grouping criteria under *Grouping and summation*. If you group the report by *Booked for*, you can choose to show the 'booked for' user's *User category* and/or *User group* in the page header.

It is now also possible to display *User category* and *User group* in the report content in the *Invoice details* report.
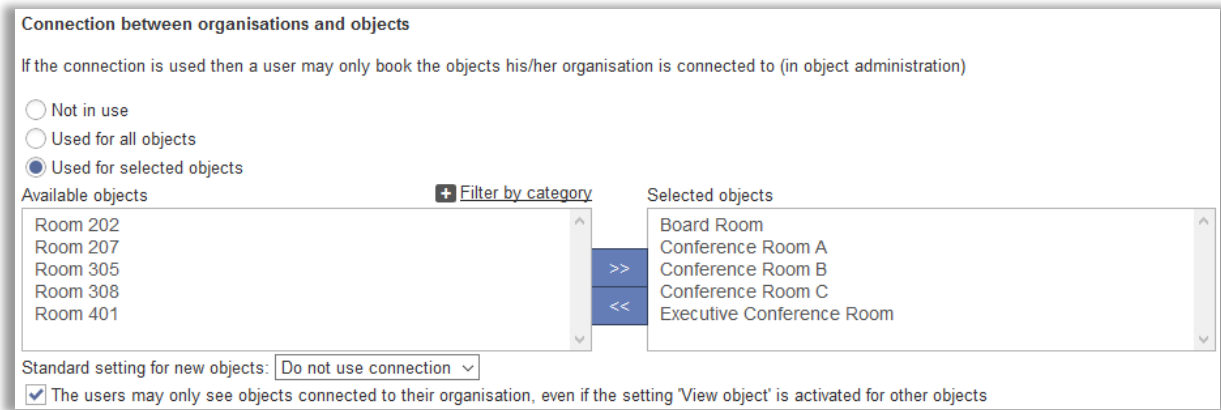

Administration

Connection between organisations/users and objects

Under *Administration > Users > User rights settings*, you can activate connections between organisations and objects, and between users and objects, meaning that organisations/users can only book objects they are connected to. We have now made it possible to use these connections only for selected objects. The description below illustrates how you use the connection between organisations and selected objects.

After selecting the option *Used for selected objects*, you can decide per object whether the connection to organisations shall be used. This can be decided both in the administration of each object and in the *User rights settings* menu where you transfer objects, for which you want to activate the connection, to the list of *Selected objects*. At *Standard setting for new objects*, you define the default value for new objects.

The connection can also be activated in the object administration. For each object you can choose between the following options:

- *All organisations may book this object*
- *Only following organisations may book this object*

If you have activated the connection for an object in the *User right settings* menu, then the option *Only following organisations may book this object* will be preselected in the object administration.

For each object, where the connection has been activated, you can transfer the organisations of your choice to the list *Organisations that may book this object*.
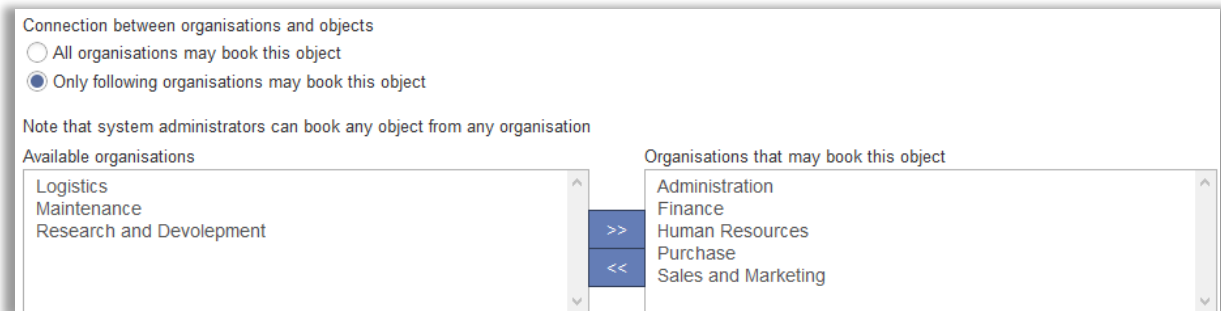
The connection can also be made from the organisation administration, where you can choose which objects an organisation you administer shall have the right to book. Only objects, for which the connection between objects and organisations have been activated, can be selected.

Filtering by category when connecting objects

If you have activated the settings which let you connect objects to organisations and to users, you find the interface below when you administer an organisation or a user. You select the objects of your choice in the list of available objects and transfer them to the right-hand list of connected objects. To make it easier to select the objects of a certain category we have now added the possibility to filter the objects by category. Click *Filter by category* above the list of available objects and mark the check box next to the desired category (or categories). The list of available objects will now contain only the objects of that category.
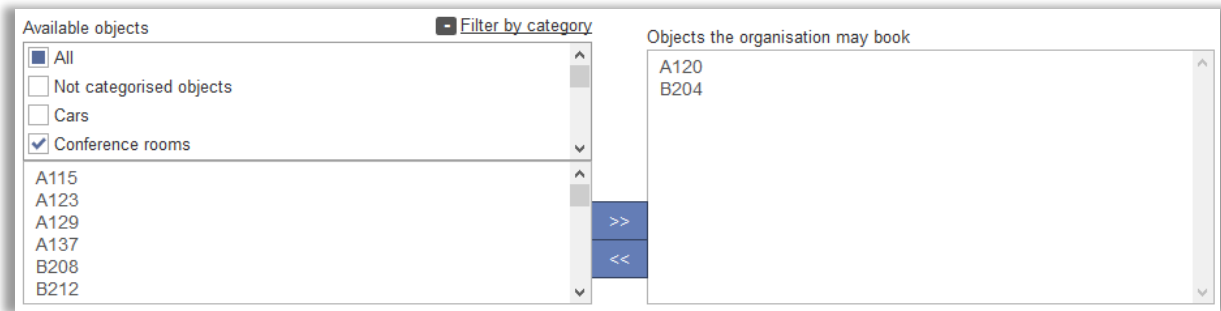
Charge codes for objects and validation of charge codes

We have made it possible to specify charge codes for objects. When a booking is made or updated, the charge code which is specified for the booking's object will be saved together with the booking. The object's charge code can also be displayed, together with each booking, in the *Invoice details* report. Activate charge codes for objects under *Administration > System settings > Advanced > Booking settings*. If you make charge codes mandatory for objects, you must enter a charge code when you create or edit an object, and it will not be possible to make bookings of objects which have no specified charge code.
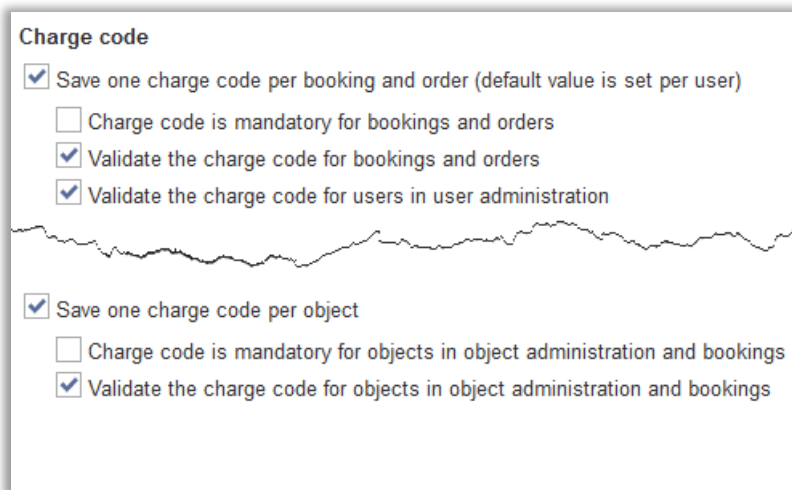
You can also activate a validation of charge codes for bookings and orders, users and/or objects. This means that a charge code you enter will be validated against a list of valid charge codes, added by a system administrator under *System settings > Charge codes*. This menu becomes available when you activate at least one of the validation settings, and here you can add the valid charge codes using the *New charge code* button, or import them via a file.

User administration

Personal information consent

If you want people to be able to register themselves as users in EZbooking, you can activate *Allow users to register themselves* in the *Administration > Users > User rights settings* menu. After activating this possibility, you have now access to the setting *The users must consent to their personal information being stored*. This setting means that there will be a checkbox on the registration page which will be mandatory to tick before the registration can be completed. The text shown at this checkbox, you decide in the field *Text displayed on the user self-registration form next to the checkbox for giving consent*. Further down you have access to an editor where you can write a *Privacy policy*.

On the registration page, the checkbox and the policy (if stated) will be displayed at the bottom of the registration form.

Creating additional user fields and sorting user fields

If you need to enter specific information when creating or editing a user, you can now create additional user fields, i.e. text fields appearing in the user details. Information in additional user fields can be displayed in the *Invoice details* report.

You create the user fields in the *Administration > Users > User fields* menu by clicking the *New user field* button. After entering a field name and clicking *Save*, the new user field will appear in blue in the list of user fields. Like for all other user fields, you can tick its checkboxes to make it *Available* (in the user details), *Mandatory* and *Public* (displayed to all users in the user info popup).

Now, you can also decide in which order the user fields shall be displayed, in the user details and in the user info popup. You decide the sort order by entering a number in the *Order* column in the *Administration > Users > User fields* menu.

Order	User fields	Available	Mandatory	Public
1	First name	X	X	X
2	Family name	X	X	X
3	Department	✔	☐	✔
4	Faculty	✔	☐	✔

First name*:	John
Family name*:	Smith
Department:	Department of Cell Biology
Faculty:	Faculty of Medicine

Uploading documents to user

We have made it possible to upload documents to users. In the *Administration > Users > User fields* menu you tick the checkboxes next to *Document* to make it *Available* (possible to upload files in the user details), *Mandatory* (to upload at least one document to each user) and *Public* (the file(s) displayed to all users in the user info popup).

Document*:	User certification.pdf	🗑
	Browse... No file selected.	

Improved user import

We have made some improvements concerning the file import of users.

It is now possible to import users to different organisations at the same time. After selecting the option *To be defined in import file…* in the drop-down list *Select organisation*, you then enter the name of the organisation each user shall belong to, in the *Organisation* column in the import file.

Select organisation:

To be defined in import file...

We have also made it possible to import the users' *User category*, *User group*, *Department* and *Title*.

The structure the import file must have (shown on the page and in the example file) will now adapt to the settings made under *Administration > Users > User fields*, so that only the fields that have been set as *Available* will be necessary to include as columns in the import file.

In the *Administration > Users > User rights settings* menu, you can now decide whether the access level shall be updated according to the file when existing users are updated via file import.

User import from file

When importing users from a file, following shall apply for existing users:

◉ The access level is updated according to the file
◯ The access level is not updated

Finally, we have added a *Status* column where you can enter *1* (active) or *0* (inactive) to activate/inactivate users.

Object administration

New grouping of objects: Object fields

Previously, the only way you could group objects was using *Categories*. We have now added the possibility to create *Object fields* which give you the possibility to group the objects in other ways that you have need for.

Example:

You have grouped your objects into the categories "Conference rooms" and "Cars". The rooms and cars are located in two different cities, Manchester and Liverpool. When making a booking you want to be able to search for an object of a certain category and located in a certain city. Therefore, you create the object field "City" with the two options "Manchester" and "Liverpool". This object field will now appear in the details of each object, and you can make sure that the right city is selected for each object. When making a booking you can filter the list of objects by selecting the desired combination of category and city.

Under *Administration > Objects* you find the new menu option *Object fields*. There you can create an object field by clicking the *New object field* button. Enter a name for the object field in all active languages and click *Save*. Then click the name of the field to edit it. Click the button *New option*, enter the name of the first option and click *Add*. Repeat for all other options and finish by clicking *Close*. Mark the check box at *Active* to make it appear in the objects' details.

Mark the checkbox *Available for filtering* to make it appear in the different places in the program where it can be used for filtering. These include the following menus:

- *Calendar*: all calendars which let you filter on objects
- *Booking > Book*

- *Booking > View recurring bookings*
- *Search > Search available objects*
- *Search > Search bookings*
- *Reports > Invoice details*

Importing objects

It is now possible to import objects to EZbooking, using an import file.

From the *Administration > Objects* menu, you click the *Import* button. On the page, you can see how the import file should be structured, and also a link to an example file structured in that way. The * symbol next to a column heading indicates that this information is mandatory. Use the codes below the table to specify each object's *Category*, *Access level*, setting for *View object*, and object field options (if object fields have been created).

Category	Access level *	View *
1 = Cars	1-9	1=No
2 = Conference rooms		2=Yes

By expanding the *Settings* section at the bottom of the page, you can specify object settings to be applied to all objects you import.

Save the file as a tab delimited text file, browse for it using the *Choose file…* button, and click the *Upload text file* button.

All objects that are about to be imported are displayed. If you try to import an object with exactly the same name as an existing object, it will be listed under the heading *Following object names already exist in the system*. Click *Delete* next to the object if you do not want to import it. If you do import it, the existing object will not be updated, instead a new one will be added.

If any row in the import file contains an invalid value, e.g. an invalid code for *Category*, you will get an error message with the incorrect rows listed.

Click the *Finish import* button to complete the import.

Min and max length for booking of object

If you want to limit how short or how long bookings of an object can be, you can now use a new setting that you find on object level.

Kortaste tid per bokning (tt.tt)

2.00 (tom = ingen begränsning)

Längsta tid per bokning (tt.tt)

4.00 (tom = ingen begränsning)

If you want the limitation to apply only to common users, you can give system administrators and object administrators (for the objects they administer) the right to exceed this limitation. You find this setting under *Administration > Users > User right settings*.

Defining calendar colours for information field options

In EZbooking, you can let bookings be displayed in different colours in the calendars. Previously, it has been possible to define colours per user, per organisation and per period of a schedule. Now we have added the possibility to define colours per information field option. You activate this setting under *Administration > System settings > Advanced*.

Please note that if you choose to make exceptions from the default colour setting on more than one level, only one of the exceptions will apply, according to this priority order:

1. User
2. Organisation
3. Period of a schedule
4. Information field option

In the administration of the information fields, you can make colour definitions for the two field types which contain answer options, *Yes/no* and *Selectbox*.

You specify a colour for an answer option by unmarking the checkbox at *Use the default colour*, and then clicking the *Select colour* button.

For the field type *Yes/no*, you make the setting at *Calendar colour (Yes)* and *Calendar colour (No)*.

For the field type *Selectbox*, you specify the colour when you create or edit an answer option.

If answer options (from different information fields) with different colour definitions have been selected on the same booking, the booking will be displayed in the colour of the answer option whose information field comes first in the sort order.

Maximum price per booking

Depending on which price model is used, you might have access to a field in the object administration where you can specify a *Maximum price per booking*. The maximum price will be applied if the calculated price is higher than the maximum price. The price of accessories (if you have the plug-in EZ-Equip) will be included in the maximum price, see example below, while the price of orders connected to the booking (if you have the plug-in EZ-Order) will be added to the maximum price). If you have the plug-in EZ-Project and use project prices, the calculated project price will be applied when a project is connected to the booking, even if it is higher than the maximum price.

Example: An object has a price of €50 per hour and a maximum price of €200. An accessory connected to the object has a price of €25 per hour.
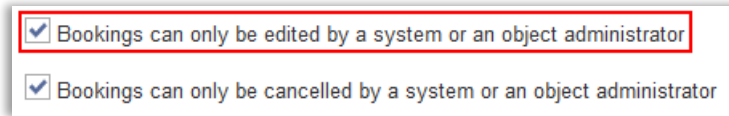
- The price of a 3 hour booking without the accessory will be €150. The calculated price is applied: $3 \times 50 = 150$.

- The price of a 3 hour booking with the accessory will be €200. The maximum price is applied instead of the calculated price: $(3 \times 50) + (3 \times 25) = 225$.

- The price of a 5 hour booking without the accessory will be €200. The maximum price is applied instead of the calculated price: $5 \times 50 = 250$.

Hiding the fields Price/half day and Price/full day when using the price model Price/hour

If you are using the price model *Price/hour is used for calculating the price of a booking*, you specify, for each object, a price per hour to be applied for bookings of the object, irrespective of the booking's length. Previously, the two fields *Price/half day* and *Price/full day* were always displayed next to the field *Price/hour* in the object administration. Since these fields are only informative, we have now made it possible to decide whether they shall be displayed or not. If you want to hide the fields, make sure the checkbox *Show Price/half day and Price/full day as informative fields* is unchecked in the *Administration > Objects > Price settings* menu.

Bookings of an object can only be edited by administrators

We have added a new setting on object level which means that a booking of the object can only be edited by a system administrator, or by an object administrator who has the right to administer the object.
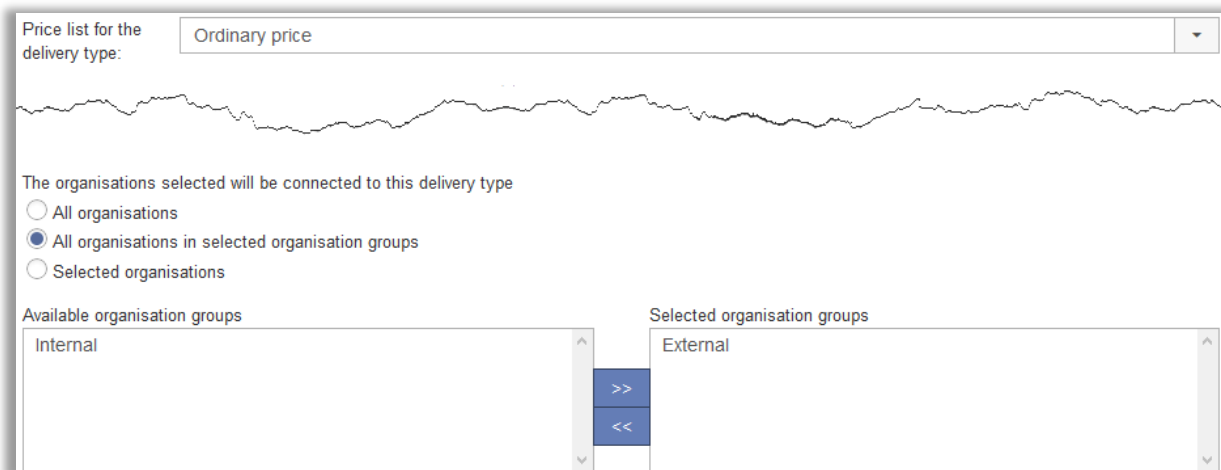
Users who book the object will be notified of this when they make the booking.

EZ-Order

Connecting organisations to types of delivery

If you use EZ-Order, you might want to have different prices for different organisations. This is now possible since we have made it possible to connect organisations or organisation groups to delivery types, and each delivery type is, as you know, connected to a price list.

In the *Administration* > *Orders* > *Types of delivery* menu, you select the option of your choice under the heading *The organisations selected will be connected to this delivery type*.

- *All organisations*
- *All organisations in selected organisation groups* (if you have activated organisations groups)
- *Selected organisations* (to be able to select an organisation, you must first select its organisation group in the list above the organisations)

Search for orders and delete multiple orders

Under the menus *Order* > *Edit* and *Reports* > *Placed orders*, you can now find orders by searching for the name of *Ordered by* or *Ordered for*. In the *Placed orders* report, your search will also result in orders where the name of registered guests matches your search. In the field *Search orders connected to following user (name)*, you can type the whole or partial name of a user. The search will be automatically performed after you have typed at least three characters, and the list of orders is filtered according to your search.

If you want to delete a number of orders you have listed, you can tick the checkbox next to them. By ticking the checkbox in the heading row, you select all orders in the list. Then click the *Delete selected orders* button.

Hide guest information

If you do not have the need to enter the number and names of the guests when placing an order, you can now hide the guest information fields. You find this setting under *Administration > System settings > Advanced > EZ-Order*.

Guest information

☐ Show fields for entering number and names of guests in orders

EZ-Visit

Check-in and check-out visitors

If you want to keep track of who are visiting you right now, or who were in the building during a certain period of time, you can use the new check-in/check-out function. You activate this function in the *Administration > System settings > Advanced* menu. There, you can also make some settings concerning the function.

Check-in and check-out of visitors

☑ Activate functions for check-in and check-out
　☐ Checked-in visits cannot be deleted
　☑ Check-ins can be undone
　　○ as long as the visit is not checked-out
　　◉ up to: [10 ▼] minutes after registration
　☐ If the check-in and check-out times are outside the planned visiting hours, the planned visit will be automatically adjusted
☑ Automatic check-out of visitors
　○ at the planned end time of the visit
　◉ at the specified time: [17 ▼] [00 ▼] (only if the visit's planned end time is before this time of day)

After activating the function, you find the column *Check-in – Check-out* in the *Visits > Search* and *Visits > Reception* menus. When a visitor arrives, you tick the checkbox under *Check-in* and click the button *Save check-ins and -outs*.

☐	Time ⇕	Recipient ⇕	Visitor ⇕	Check-in - Check-out			
☐	10:30 - 11:30	Jessica Taylor 502	Thomas Jackson	☑	🖨	✏	🗑

Print selected visits　Save check-ins and -outs　Update

The check-in time is registered. When the visitor is leaving, tick the checkbox under *Check-out* and click the *Save check-ins and -outs* button.

☐	Time ⇕	Recipient ⇕	Visitor ⇕	Check-in - Check-out			
☐	10:30 - 11:30	Jessica Taylor 502	Thomas Jackson	2018.01.26 10:35 - ☑	🖨	✏	🗑

Print selected visits　Save check-ins and -outs　Update

When the check-in/check-out function is activated, you also find the option *Checked-in visitors* in the *Visits* menu. Use this menu to show visitors that were checked-in at a specified time (for example right now), or at some point within a specified period.

Search for visits and delete multiple visits

Under the menus *Visits > Search*, *Visits > Reception* and *Visits > Checked-in visitors*, you can now find visitor registrations by searching for the name of the visitor or recipient. In the field *Search visits connected to following visitor/recipient*, you can type the whole or partial name of a visitor or a recipient. The search will be automatically performed after you have typed at least three characters, and the list of visits is filtered according to your search.

If you want to delete a number of visits you have listed, you can tick the checkbox next to them. By ticking the checkbox in the heading row, you select all visits in the list. Then click the *Delete selected visits* button.

Personal information consent

If you want people to be able to register themselves as visitors in EZbooking, you can activate *Allow users to register visits without having to log in* in the *Administration > Users > User rights settings* menu. After activating this possibility, you have now access to the setting *The users must consent to their personal information being stored*. This setting means that there will be a checkbox on the registration page which will be mandatory to tick before the registration can be completed. The text shown at this checkbox, you decide in the field *Text displayed on the visit registration form next to the checkbox for giving consent*. Further down you have access to an editor where you can write a *Privacy policy*.

On the registration page, the checkbox and the policy (if stated) will be displayed at the bottom of the registration form.

EZ-Project

Creating additional project fields and sorting project fields

If you need to enter specific information when creating or editing a project, you can now create additional project fields. Information in additional project fields can be displayed in the *Invoice details* report.

In the *Administration > Projects > Project fields* menu, you click the *New project field* button. Enter *Name, Description* (optional) and select *Field type*. You can choose from the following types:

- *Text* (decide number of *Rows in textbox*)
- *Numeric* (decide *Number of decimals*)
- *Checkbox* (multiple-choice, create the options by clicking the *New option* button)
- *Yes/No*
- *Date*
- *Time*
- *Selectbox* (single-choice, create the options by clicking the *New option* button)

Name:	
English:*	Project type
Description:	
English:	[Description]
Field type:	Selectbox
Options:	Clinical
	Pre-clinical

The new project field will appear in the list of project fields. Like for all other project fields, you can tick its checkboxes to make it *Available to Project administrators, Available to All users* and *Mandatory*.

After updating to this version, the existing *Extra info* fields will work in the same way as the additional fields you create yourself. This means that you will be able to change their field type (provided that they have not been filled on any project) or delete them.

Now, you can also decide in which order the project fields shall be displayed in the project administration. You decide the sort order by entering a number in the *Order* column in the *Administration > Projects > Project fields* menu.

		Available to		
Order	Project field	Project administrators	All users	Mandatory
1	Project no.	✔	☐	✔
2	Project name	X	X	X
3	Project category	✔	✔	✔
4	[Project type] [Description]	✔	☐	✔

Project category *	Medicine
Project type * ⓘ	Clinical

Connecting projects to objects

If you want a project to be available for selection only on bookings for certain objects, you can now connect the project to these objects. For this to be possible, you make the field *Connection to selected objects* available under *Administration > Projects > Project fields*.

When you administer a project, you decide whether the project can be selected for bookings of *All objects* or *Selected objects*.
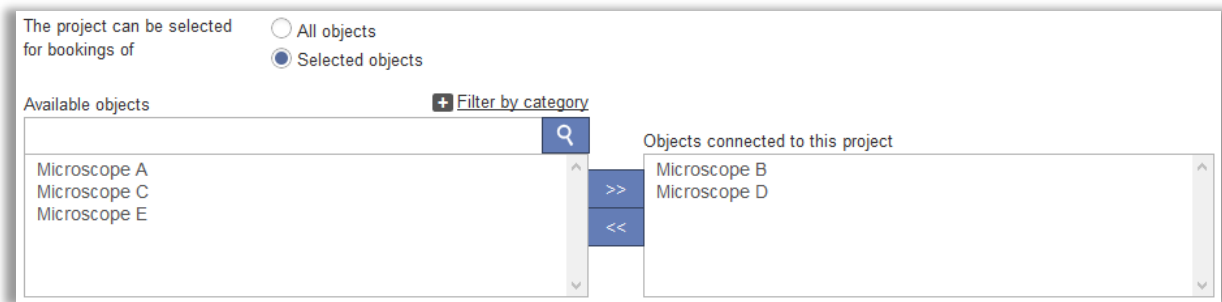
After selecting the latter, move the desired objects to the list *Objects connected to this project*. The project can then only be selected on bookings of the objects you selected.

In the list of available objects, only objects for which it is possible or mandatory to select a project when making a booking, are displayed. Project administrators, and regular users (if they have the right to create projects), will only be able to select objects they have the right to see.

To easier find an object to connect to the project, use one of the following methods:

- Filter the objects by category. Click *Filter by category* above the list of available objects and mark the check box next to the desired category (or categories). The list of available objects will now contain only the objects of that category.
- Type a search text in the field above the list of available objects. The search will be performed automatically when you stop typing, provided that you have entered at least three characters. The search will result in objects whose name, category, description or object field options match your search.

Copying projects

If you have the plug-in EZ-Project and want to create a project which has much in common with an existing project, you can now copy this project. Go to the project you want to copy and click the *Copy...* button. Select one of the following options concerning the project leader for the new project:

- *Project leader of original project* (only available if the original project has a specified project leader, other than yourself)
- *Myself* (you will be selected as project leader yourself)
- *None* (the project will have no specified project leader)

Click the *Copy* button to confirm the creation of the new project. The project will be created with the status *Inactive*. All information will be copied from the original project, except for *Project ID*, *Start date* and *End date*.

The name of the new project will be *Copy of [the original project's name]*. Edit the name, specify *Start date* and *End date*, edit any other information if necessary, and click *Save* or *Save and activate*.

Maximum number of hours per project

We have added the possibility to specify the *Maximum number of hours* a project can be booked. For this to be possible, you make the field *Maximum number of hours* available under *Administration > Projects > Project fields*.

This can be useful, for example, if you have customers who pay for the usage of your objects, and who want to buy a number of prepaid hours. As long as there are remaining prepaid hours, the booking price shall be = 0. When the prepaid hours have been used up, the regular price shall be used. Here is how you can achieve this:

- Create a project to be selected when a user wants to use the prepaid hours for a booking.
- Connect the users, who shall be able to use the prepaid hours, as members in the project.

- Select a project price level with the price = 0 for the project.
- Enter the number of prepaid hours at *Maximum number of hours*.
- Set an end date for the project corresponding to the last date the prepaid hours can be used.

When a user makes a booking, he/she can now select this "prepaid hours project" on the booking to indicate that the booking time shall be deducted from the prepaid hours. This requires that the user is connected to the project, and that the project's end date has not expired. If the project's maximum number of hours has been reached, the project will still be possible to select but when saving the booking the user will get a message saying that the booking cannot be completed since the maximum number of project hours would be exceeded. The user can, if he wants, choose to make the booking to the regular price, by saving the booking without the "prepaid hours project" selected.

In the project administration, where you enter the *Maximum number of hours* for the project, you can also see the number of booked hours for the project, as well as the number of hours remaining.

Maximum number of hours	60:00
Number of hours booked	53:00
Number of hours remaining	7:00

Inactive projects can be listed, and project names are clickable, in user administration

To make it easier to find a project a certain user is connected to, irrespective of the project's status, we have made it possible to also show inactive projects in the list of projects in the user administration.

In that list, you can now also click a project's name to open the project in a new window and edit its information. The project name is clickable only if you have the right to administer the project.

Project administrator				Also show: ☑ inactive projects ☐ past projects	
Project	Project category	Start date	End date	Project role	Remaining project time
5533	Medicine	2018-04-01	2018-06-30	Project member	-

Users' right to see projects they are connected to

Users can now always see projects they are connected to, as project member or as any other project role, in the *Administration > My profile* menu.

				Also show: ☐ inactive projects ☐ past projects	
Project	Project category	Start date	End date	Project role	Remaining project time
6606	Medicine	2018-01-18	2018-06-30	Supervisor	-
				Project member	

If regular users have the right to create projects, they will have access to the *Administration > Projects* menu. In that menu, they will also have access to the list of projects they are connected to.

Uploading documents to project

We have made it possible to upload documents to projects. In the *Administration > Projects > Project fields* menu you make the field *Document* available to *All users* or only to *Project administrators*. There, you can also make it mandatory to upload at least one document to each project.

Document *	ProjectPlan.pdf	🗑
	Browse... No file selected.	

More information in "new project" e-mails

Under the *Administration > Projects > Settings* menu, you can allow regular users to create (inactive) projects. Under this menu, you can also activate an e-mail function which sends an e-mail to a specified e-mail address every time a new inactive project is created. The content of this message, you define in a template. In the *Subject* and the *Message* fields of the template, you can type your own text but also insert "tags" which will generate information from the project that was created. We have here added the possibility to insert tags for:

- *Project ID*: The ID of the created project
- *Category*: The category of the created project (only if the *Category* field is available for all users)
- *Registered by: e-mail*: The e-mail address of the user who created the project (only in the *Message* field)

Including accessory price in project price

In EZ-Project, you can activate project price levels. This means that the project price, instead of the object price, will apply when a project is connected to a booking. If you have the plug-in EZ-Equip, you can connect accessories to a booking. We have now added a setting on project level that lets you decide whether the price of accessories connected to the booking will be added to the booking price (select *No*) or not (select *Yes*).

Please note that you make this setting available, to project administrators only or to all users, under the *Administration > Projects > Project fields* menu.

Searching within all project fields

In the *Administration > Projects* page you have a search field at the top of the page where you can enter a text matching the project you are looking for. This search is now made in all fields in the project information including *Project name*, *Category*, *Project fields* and *Project no*. The search will also result in projects where the name of a user connected to the project (as project leader, project member or other project roles) is matching your search.