

# User Manual RegattaPlanner

for MacOS, Windows and iOS



# Content

## **Preface 4**

## **A brief view into REGATTAPLANNER 5**

### **REGATTAPLANNER on PC 6**

Installing REGATTAPLANNER on PC 6

Starting REGATTAPLANNER 6

Starting and Quitting the Software using macOS 6

Starting and Quitting the Software using Windows 7

Opening and Closing Files on the PC 7

Loading a new, empty File on PC 8

### **REGATTAPLANNER on iPhone and iPad 9**

Open, activate, close, and delete REGATTAPLANNER files on iOS 9

Open files 9

Switching files using the title bar 10

Closing files 10

Deleting files from REGATTAPLANNER 10

Loading a new, empty REGATTAPLANNER File 10

### **File Exchange between iOS and PC 11**

Dateien über iTunes mit dem PC austauschen 11

Exchange files with the Mac via the Finder 11

Saving files via cloud services and exchange with the PC 11

## **Get to Know: The User Interface 13**

The Buttons in the Control Bar 13

The interactive Timeline 14

Gestures in the timeline 14

Refresh the timeline 14

## **REGATTAPLANNER in Practice 15**

Events and Appointments—Your Appointments in REGATTAPLANNER 15

Creating a new event 15

Options when entering the date and time 16

Create the Crew for the Regatta 17

Adding persons to the crew list 17

Showing and editing person data 18

Deleting persons from the crew list 18

Creating a new appointment 18

Editing Events and Appointments 20

Editing and deleting appointments 20

Editing an event 20

Groups 21

Creating a new group 21

Editing or deleting a group 21

Moving groups 21

Settings for displaying the Timeline 22

**Customize REGATTAPLANNER: Settings and Lists 23**

The Dialog Default 23

Color Definitions and Color Palettes 24

Lists 24

Titles for appointments and levels for regattas 24

Zoom 25

**The Person List 26**

The List View 26

The Detail data of the Person 26

Create a new person 27

Delete a person 27

The Popover Settings for the Person List 27

**Import, Export and Sending Emails 29**

Importing Data from other REGATTAPLANNER files 29

Importing on PC 29

Importing on iPad and iPhone 29

Exporting Person Data 30

Sending Emails to Persons from REGATTAPLANNER 30

**Printing or creating a PDF in REGATTAPLANNER 31**

Print settings for the Timeline 31

Print settings for the Person List 31

Printing and saving PDF 32

Printing and PDF creation using MacOS 32

Printing and PDF creation using Windows 33

Printing and PDF creation using iOS 33

**Updates and Troubleshooting 35**

Updates 35

Error Report 35

## Preface

With the software REGATTAPLANNER 2K Yachting presents a visual personal planner for your regattas.

REGATTAPLANNER is a intuitive visual kind of calendar which presents all appointments arranged clearly structured on a timeline. The time slot which is shown can be moved and zoomed.

We thank Magnus Olausson for his the translation of REGATTAPLANNER into Swedish and Alex Voermans for the translation into Dutch.

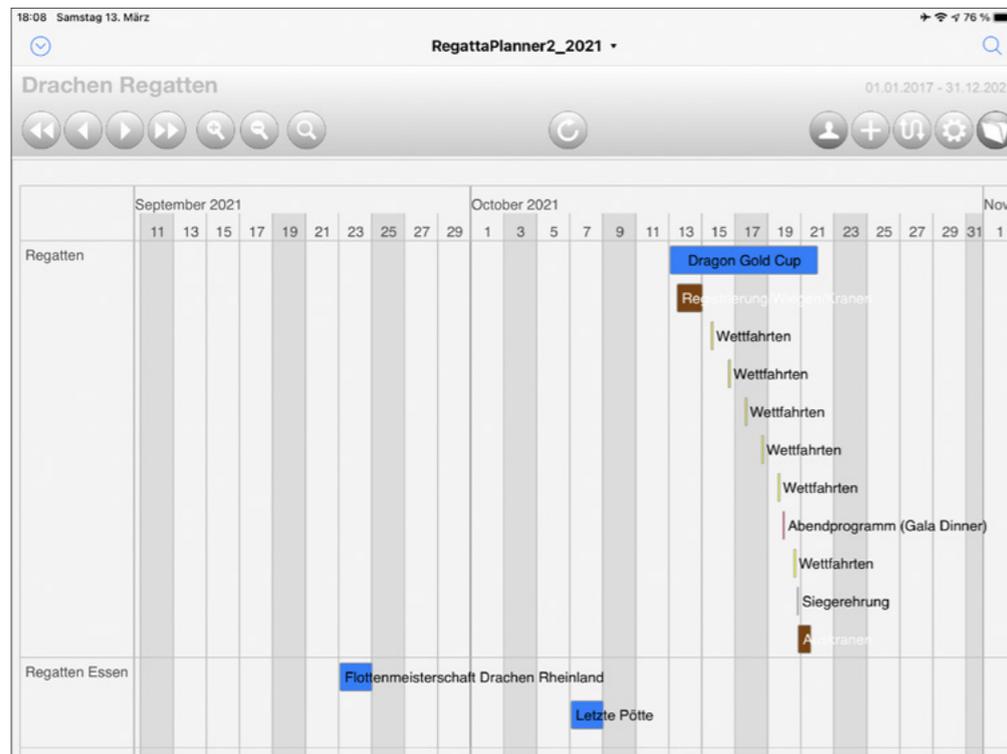
If you have any questions, please send an email to [support@2k-yachting.de](mailto:support@2k-yachting.de).

We hope that you like REGATTAPLANNER and may there always be enough water beneath your keel and we wish you much fun and success during your regattas.

Almute Kraus  
2K Yachting, in March 2021

## A brief view into REGATTAPLANNER

REGATTAPLANNER is an interactive visual personal organizer for regatta sailors. It differs from conventional schedulers mainly by its intuitive presentation of the time and the appointments in a continuous **timeline** - just as the real time runs.

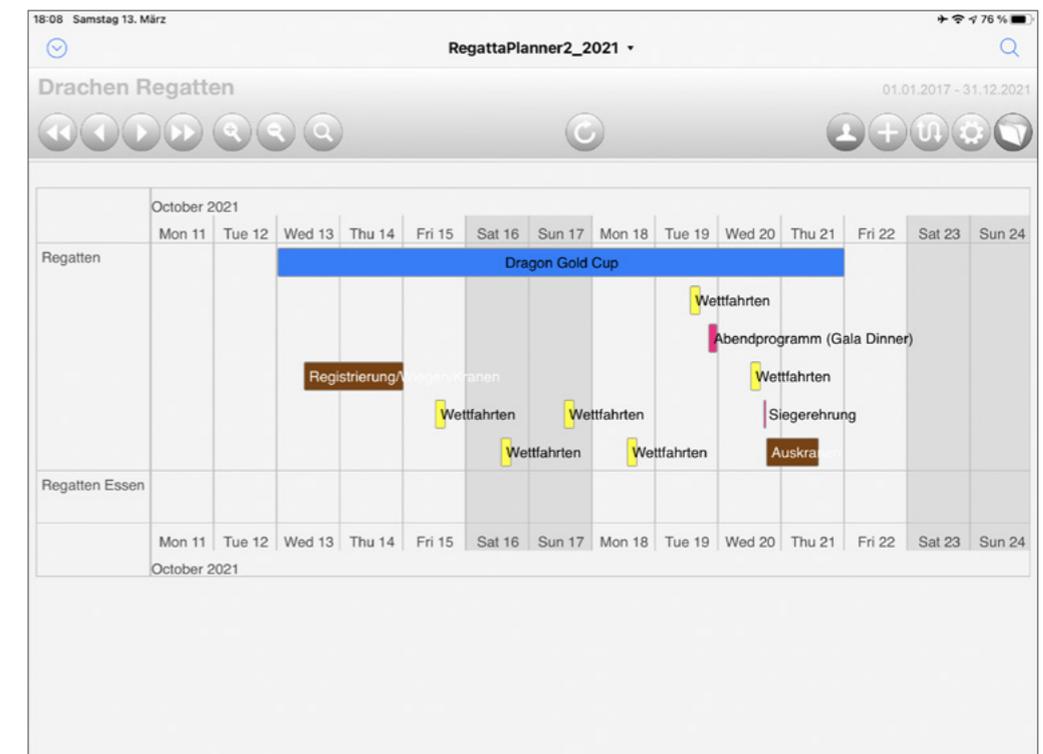


*In REGATTAPLANNER the appointments are shown in a timeline*

Your regattas are created in SCHEDULER as **events** and the project periods are marked in the timeline by color bars. Within an event you can enter as many **appointments** as you want. Appointments are linked to the event and are displayed in the timeline by color bars arranged below the event.

For each regatta you can choose the participants of the regatta and their functions on board from the crew list.

The section of the timeline which is displayed on the screen can be moved or zoomed by using buttons or gestures. You can show only a few days, several weeks or months or a whole year. With REGATTAPLANNER all your regatta events and appointments are clearly structured and displayed. In the top level of the structuring you will find the **groups** with which you group your regattas, for example by locations, boat classes or ships.



*After zooming in the timeline shows a shorter time slot*

Of course, it is also possible to print any section of the REGATTAPLANNER timeline in different resolutions or to save them in a PDF. So that you can share your planning with your crew.



## REGATTAPLANNER on PC

You can install the software REGATTAPLANNER on a PC with MacOS (min MacOS 10.11) or Windows (min Windows 7).

### Installing REGATTAPLANNER on PC

On the PC the software REGATTAPLANNER is installed on the computer using an installation software. Download the installation file for REGATTAPLANNER for your operating system (macOS or Windows) to your PC and then run the installation.



#### Note to the installation of REGATTAPLANNER for Windows

On Windows computers you only can make entries in database software from accounts with administrator's right. Therefore it is necessary that you install REGATTAPLANNER with an account with all administrator privileges. Nevertheless, with some Windows installations the administrator account hasn't got all rights that are required for the use of a database software. In this case there is a rather simple solution:

Start REGATTAPLANNER using the context menu of the program and select **Run as administrator**.

Alternatively you can set up the link to the program file **RegattaPlanner** thus the software automatically gets always the administrator privileges. In the context menu choose the entry **Properties**, click the **Shortcut** tab, then on **Advanced** and activate the **Run as Administrator** check box. To finish click **OK**.

## Starting REGATTAPLANNER

The software is based on a FileMaker Pro database application. Therefore there are a few special features which are important to know when starting the software REGATTAPLANNER and when opening and closing additional files. All files used by REGATTAPLANNER have the file name extension .fmp12



### Starting and Quitting the Software using macOS

First start the software REGATTAPLANNER which is in your program folder.

**Changed in Version 2**

During the first start the software automatically copies all provided data files into the REGATTAPLANNER data folder (the folder "RegattaPlanner" within your user folder). If you already had version 1 installed, the old data folder will be moved to the new location. After finished you will get to the window **RegattaPlanner Start**.



*The program icon of REGATTAPLANNER*

In order to quit the software REGATTAPLANNER all windows need to be closed. This can be done easily using the close button of the window **RegattaPlanner Start**. Or choose **Quit RegattaPlanner** from the **RegattaPlanner** menu, or—as usual on the Mac—use the key shortcut  $\text{⌘}Q$ . Closing the window **RegattaPlanner Start** quits the software.



## Starting and Quitting the Software using Windows

First start the software REGATTAPLANNER which is inside of the folder “RegattaPLANNER” in your program folder. A link is located in the Windows Start menu.

During the first start the software automatically copies all provided data files into the REGATTAPLANNER data folder (the folder “[system drive letter]:/RegattaPlanner”).

After finished you will get to the window **RegattaPlanner Start**.



The start window **RegattaPlanner Start** (shown for Mac)

In order to quit the software REGATTAPLANNER all windows need to be closed. This can be done easily using the close button of the window **RegattaPlanner Start**. Alternatively, you can choose **Quit** from the **File** menu of the **RegattaPlanner Start** window. Closing the start window **RegattaPlanner Start** quits the software.



## Opening and Closing Files on the PC

The window **RegattaPlanner Start**, which is opened after starting the program, is the control center of REGATTAPLANNER, where all necessary file operations can be done.

- The three buttons showing the REGATTAPLANNER icon in the upper row open a **Planner** file prepared for the specified year.
- The button at the top right with the person symbol opens the **Person List**.
- If your REGATTAPLANNER file uses a different file name than the standard file name, you can open the file using the button **Open another file**.
- The button  on the right of the window of each file, will always lead you back to the window **RegattaPlanner Start**.



#### **Please note**

If you remove or rename one of the files which REGATTAPLANNER stores in its data folder, the next time you start REGATTAPLANNER a new clean file will be copied into the folder and linked to the buttons in the start window

#### **RegattaPlanner Start.**

Therefore you should not move or rename the standard data files stored in the data folder. The file, newly copied into the data folder doesn't contain an activation code and therefore runs in demo mode.

Of course you can store your personal data files at any other place on your hard disk.

#### **Tip**

The best way to work with REGATTAPLANNER is to keep the default file names.



### **Loading a new, empty File on PC**

New empty default files for REGATTAPLANNER can be loaded using the button **Download new empty file**.

This function requires an internet connection, because the file is loaded directly from the website of 2K Yachting.

## iOS REGATTAPLANNER on iPhone and iPad

On the iPhone and the iPad REGATTAPLANNER comes as an iOS app that can be loaded from Apple App Store.



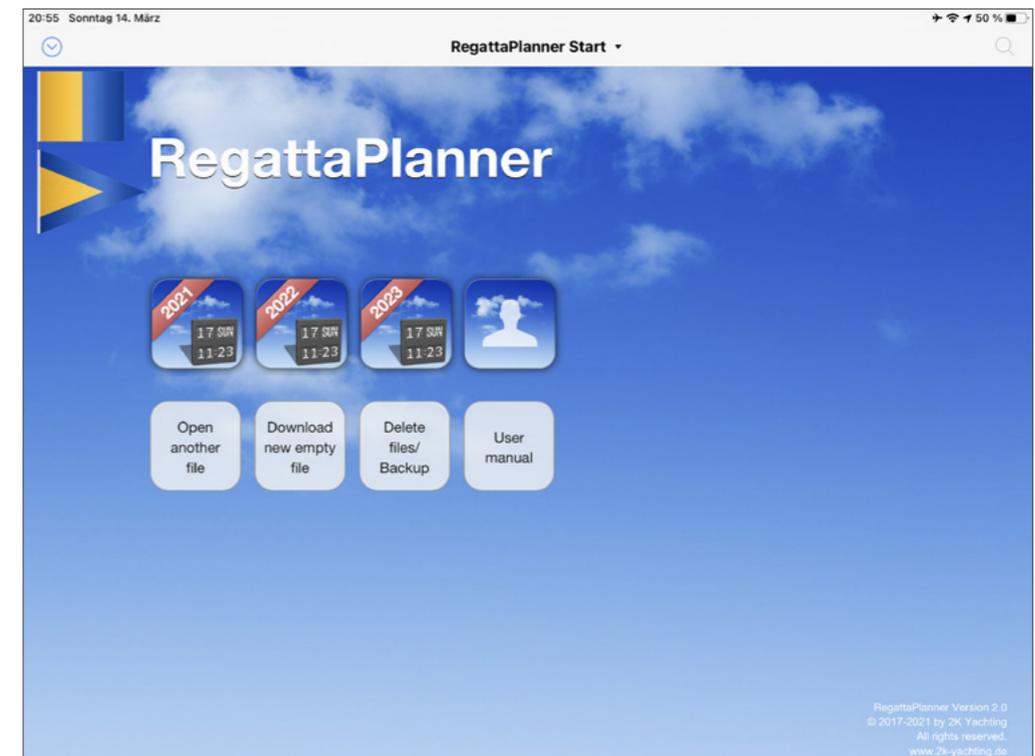
The icon of the iOS app REGATTAPLANNER

## iOS Open, activate, close, and delete REGATTAPLANNER files on iOS

After starting the app shows the window **RegattaPlanner Start** – the control center of REGATTAPLANNER.

### Open files

- The three buttons showing the REGATTAPLANNER icon in the upper row open a **Planner** file prepared for the specified year.
- The button at the top right with the person symbol opens the **Person List**.
- If your file uses a different file name than the standard file name, you can open the file using the button **Open another file**. Select the desired file from the list (if necessary, you should update the list with the upper button), and then tap **Open**.



The start window **RegattaPlanner Start**

- With the button  you get into the file system of REGATTAPLANNER. In the following dialog tap at the bottom center on **Device** and then select the desired file from the list (the button on right has no function). This feature also allows you to open PDF files which had been created by the app and saved in the apps documents folder.
- To open a file that is stored at a **cloud service** or in another app on your iPad you use the button  (iOS) to open the standard file dialog of the iOS. Under **Locations** you'll find your cloud services and under **On my iPad**, all apps that can store and share files. Select the file you want to open. It copies the selected file to the data folder of REGATTAPLANNER and opens the file.

**Changed in Version 2**

## Switching files using the title bar

When multiple files are opened in REGATTAPLANNER, only the currently active window is visible, hiding all other windows.

1. To select another file tap in the title bar on the triangle right of the window title (usually the name of the file).
  2. All windows opened are displayed side by side in reduced size.
  3. Tap on the desired window to bring it to the foreground.
- By clicking on the button  on the right of the window of each file, you will always return to the window **RegattaPlanner Start**.
  - The Planner window and the window of the Person List also provide a button to switch to the corresponding other window.

## Closing files

There are several ways to close a file which is opened in REGATTAPLANNER.

- To close a file tap on the icon  in the top left of the window and choose the entry **Close File**.

Or

1. Tap in the title bar on the triangle right of the window title (usually the name of the tool).
2. This will display all windows side by side in reduced size.
3. Then tap on the red closing icon  which is shown on the top left of the reduced document window of the file you want to close.
4. A message is shown which gives you the possibility to make a backup copy of your last file version.

## Deleting files from REGATTAPLANNER

In the popover **Delete files/Backup** REGATTAPLANNER provides two functions for deleting files.

- The function **Delete file** opens a popover where you can select the file which you want to delete. The list contains all files stored in REGATTAPLANNER.
- The function **Delete backups** deletes all files that have been created by automatic backups during the work with REGATTAPLANNER. The file names end with **backup**.

As an alternative to the delete functions of the iPad app REGATTAPLANNER itself you can use iTunes on PC to rename or delete files stored in the app (see the following section).



## Loading a new, empty REGATTAPLANNER File

New empty default files for REGATTAPLANNER can be loaded using the button **Download new empty file**.

This function requires an internet connection, because the file is loaded directly from the website of 2K Yachting.

## File Exchange between iOS and PC

REGATTAPLANNER can be used alternately on the PC (Mac or Windows) and on the iPad or iPhone. Automatic synchronization is not possible. You must copy your current files to your device using one of the following methods.

### Dateien über iTunes mit dem PC austauschen

Using the file sharing function in iTunes on PC you can easily copy files from REGATTAPLANNER between PC and iPhone/iPad back and forth and this way use them on different devices.

1. Connect your iPhone/iPad to your PC (using USB or WiFi, depending on your setup for the device in iTunes). In iTunes select your iPhone/iPad and then **Apps**. Scroll down to **File sharing** and in the list on the left choose **RegattaPlanner**.
2. The button **Add...** opens a dialog in which you can select the files from REGATTAPLANNER on PC that you want to transfer to your iPhone/iPad.
3. With the button **Save as...** you can store files from your iPhone/iPad on the PC. Use the standard data folder of REGATTAPLANNER (on the Mac the folder “Documents/RegattaPlanner” inside of your user folder, on Windows the folder “[system drive letter]:/RegattaPlanner”).
4. Alternatively you can drag and drop the file.



### Exchange files with the Mac via the Finder

Starting with macOS Catalina, access to files stored on the iPad in LOGBOOK SUITE is no longer via iTunes, but directly with the Finder. If the iPad is connected to the Mac via cable or WLAN, the iPad appears in the list on the left side of the Finder window under **Locations**.

In principle the data exchange works the same way as described in the previous instructions with iTunes.

When the iPad is selected under **Locations**, the Finder window shows the same information as iTunes. Select **Files** in the list on top to get to the file sharing.

Expand the entry **Logbook Suite**. Now you can drag and drop the files to iPad or copy them from iPad to Mac.

### Saving files via cloud services and exchange with the PC

REGATTAPLANNER allows to store files with services such as iCloud or Dropbox in a cloud and thus transfer the files to the PC or another iOS device or save a backup in the network. Normally you need to have installed a special app from the cloud provider on your iPhone/iPad.

1. In the window **RegattaPlanner Start** first select the button **Delete files/Backup** and then in the popover the button **Backup (Device/Cloud)**.
2. In the following popover select the files for which you want to copy or backup. Use the button **Backup** to start the process.
3. A dialog will appear, where you can specify a name for the first file. The standard file name is preset. You don't need to enter the file name extension .fmp12. Type the name and then press the **Continue** button.

4. In the following dialog you can select a destination for your file. It depends on the apps installed on your iPad/iPhone, which destinations are listed.
5. In the bottom line you will find cloud destinations such as iCloud Drive, Dropbox etc. Select the desired cloud service or **Send to**.
6. You will then be taken to another dialog where you can select the destination inside your account of the cloud service. Select the destination and then tap **Select**. If necessary, you have to confirm further dialogs.
7. The file is now uploaded to the chosen cloud.
8. If you have selected more than one file for the backup, the dialog for entering the file name for the next file appears as in step 3.

Refer to the section “Open files” on page 9 to read more on transferring files saved in a cloud service into REGATTAPLANNER on your iOS device.

## Get to Know: The User Interface

The user interface of the REGATTAPLANNER files is almost identical on all user systems.

The window of REGATTAPLANNER consists of two areas: The area at the top is the control bar with various controls. The area beneath displays the interactive timeline with your appointments or shows the list of all persons.

### The Buttons in the Control Bar

In the control bar of REGATTAPLANNER you find buttons that give access to the functions of the Planner and the Person List. The table gives a description of the buttons. The functions will be described in the corresponding chapters of this manual.

**Changed in Version 2** The buttons ,  and + open a menu with text buttons. Clicking on a text button opens either a dialog with settings or executes the specified function. In the person file, some buttons open popovers instead of dialogs  
To close a menu or popover just click use the closing button () , which is located on in the upper right corner. Depending on the selected function, the menu closes automatically.

Button	Function
	Fast go back in timeline
	Go back in timeline
	Go forward in timeline
	Fast go forward in timeline
	Zoom in (less days in view)
	Zoom out (more days in view)
	Dialog <b>Show</b>
	Refresh timeline
	Dialog <b>New</b> (New event, New group)
	Dialog <b>Communication</b> (Import, Backup, Print, About RegattaPlanner, Quit)
	Dialog <b>Settings</b> (Defaults, Color, Order of groups, Lists)
	Switch to <b>RegattaPlanner Start</b>
	Back to last used <b>Planner</b>
	Show <b>Person List</b>
	Edit entry

*The buttons*

## The interactive Timeline

Your events (regattas) and appointments are displayed and edited in the interactive timeline. Events belong to different groups, which are displayed at the left edge of the timeline. A vertical, red line indicates the current day.

### Gestures in the timeline

Interactive timeline means that all scrolling and zooming functions, which can be done by using the buttons in the control bar, are also possible to be done directly by mouse or finger in the timeline.

Function	Gesture on iPad	Gesture on PC
Move the displayed period	Hold your finger on the timeline and then move	Hold on the timeline with mouse button pressed and then move the mouse
Zoom (change the number of days displayed)	Pull or squeeze two fingers on the timeline	Place mouse pointer over the timeline and use the scroll wheel of the mouse
Edit event/ appointment	Tap on entry	Click on entry (Windows: use the right mouse button)

**Changed in  
Version 2**

**Changed in  
Version 2**

Function	Gesture on iPad	Gesture on PC
Edit group	Within the row of the group, tap on an area without a event or appointment	Within the row of the group, click on an area without a event or appointment (Windows: use the right mouse button)

**New in  
Version 2**

### Refresh the timeline

You can use the Refresh button (🔄) to refresh the timeline if needed.

The button also indicates when the timeline is being refreshed by the software. During the refresh, a red dot will light up, and at the end, the dot will briefly turn green.

When moving the timeline via the buttons of the control bar, the Refresh button briefly lights up yellow when the new section has been set.

## REGATTAPLANNER in Practice

REGATTAPLANNER displays the time in a continuous horizontal timeline. Your appointments appear on the timeline as colored bars. You can use the buttons in the window **RegattaPlanner Start** to open a prepared Planner file for 2017-2021, 2018 and 2019. In the default setting this Planner files display the time period from 1 January to 31 December of the corresponding year in the timeline. However, in the dialog **Defaults** you have the option to customize the displayed time period (see “The Dialog Default” on page 23).

### Events and Appointments—Your Appointments in REGATTAPLANNER

REGATTAPLANNER works with two levels of appointments: the **events** (reagttas) and the appointments during a regatta event.

#### Creating a new event

Start your work with REGATTAPLANNER by clicking the appropriate button in the window **RegattaPlanner Start** to open the file for the desired year and then create a new event.

1. In the control bar of the Planner file select the + button and then in the menu the button **New event**.
2. The dialog **Edit event** opens. It contains three tabs. On the tab **Event**, all data for the regatta event can be entered, on the tab **Crew** you can put together the crew for the regatta and on the tab **Appointments** you setup the individual appointments during the regatta.

3. First start with the data entry on the tab **Event**. In the upper field a name for the event must be entered. This name will later appear in the timeline.

The screenshot shows the 'Edit event' dialog box with the 'Event' tab selected. The dialog is divided into three tabs: 'Event', 'Crew', and 'Appointments'. The 'Event' tab contains the following fields and controls:

- Event Name:** A text field containing 'Dragon Gold Cup'.
- From: Date:** A date field containing '13.10.2017'.
- Until: Date:** A date field containing '21.10.2017'.
- Group:** A dropdown menu showing 'Regatten'.
- Color:** A color selection field showing a blue square.
- Level:** A text field containing 'Gold Cup'.
- Ranking Factor:** A text field containing '1.5'.
- Place:** A text field containing 'St. Tropez'.
- Description:** A large empty text area.
- Options:** A group of checkboxes including 'all-day', 'open end', 'fixed', and 'closed'.
- Buttons:** A trash icon, 'Cancel', and 'OK' buttons at the bottom.

The dialog **Edit event**, tab **Event**

4. The following fields are used to enter the **date** and **time** for the **start** and the **end** of the event. Only the start date is required (see below). The date fields open the popup calendar from which the date can be selected. The date can also be entered using the keyboard.



### Tip: Entering a date or time on iOS

When you activate a field for a date or a time on iPhone and iPad the popup Date oder Time of the iOS is shown and the current date or time is preset. To enter a date or time, shortly scroll one of the scrolling dials until the date or time is displayed in the field. Then switch to the next field by tapping **Next** or finish the data entry by tapping on an area without a data field.

Also, you can hide the popup with the button  (in the bar on top left of the keyboard) and then enter the date or time using the keyboard.

5. Each event must be assigned to a group. The triangle to the right of the **Group** field opens a list in which you can select from the groups created in this Planner file.
6. Tap/click on the color field to open the color picker. Here you can select one of 10 colors by tapping/clicking on a color field. With **Group color** you select the color specified for the group.
7. Entering a **Description** is optional.
8. Close the dialog with **OK**. Or continue with your entries on the following tabs of the dialog (see below).

If the dialog is closed, the new event appears as a bar in the selected color in the row of the selected group. The event name is displayed on the color bar. If the name is longer than the bar, the text extends to the right over the color bar. The timeline is automatically moved and scaled so that the new entry is visible.

### Attention

The dialog can not be closed with **OK** until the field with the name of the event as well as the fields **Start date** and **Group** are filled. It is also not possible to switch to one of the two other tabs before these fields are filled.

### Options when entering the date and time

To simplify the entry of events and appointments REGATTAPLANNER adds dates.

- If no time is entered at the start date, the event starts at 0 o'clock at night.
- If no time is entered at the end date, the event lasts until 23:59 h at night.
- If no end date is entered, start and end dates are identical. It is therefore an event or appointment on only one day, which lasts until 23:59 h.  
If a time is entered for the end, but no date, the start date is also taken as the end date. This way you can easily enter short appointments.
- For events for which you not want to specify a time at either the start or end date, you can completely hide the time fields by using the option **all-day**. With its option internally 0:00 h is used for the start and 23:59 h for the end so that the color bar in the timeline extends from the beginning of the first day to the end of the last day.

- With the option **open end**, you can create events whose end is not yet fixed. The end date should include a date until which the event will last at least. The end date can be adapted at any time, or in some cases it is also automatically adapted by REGATTAPLANNER.  
Events with an open end are shown in the timeline with a color gradient hiding at the end.
- Events whose dates and times should not be changed in any case can be permanently protected against changes with the option **fixed**. All date and time fields are then locked.

#### Tip: Time fields

Time fields use the time format hh:mm, thus two digits for the hours and then, separated by a colon, two digits for the minutes.

If you enter only one number (for instance, “4”), this is automatically interpreted as an hourly value and is complemented to 4:00.

#### Attention

Entering separators other than the colon results in wrong data. Thus, when entering a time using the keyboard, always check the time that is displayed in the field.

## Create the Crew for the Regatta

On the tab **Crew** of the dialog **Edit event** you can select for each event your participants of the regatta and their function on board. The names of the participants are selected from the Person List of REGATTAPLANNER. You will find out how to create the Person List in “The Person List” on page 26. For the following steps the persons must already be entered in the Person List.

### Adding persons to the crew list

1. In the timeline, click/tap on the color bar or text of the event and open the **Edit event** dialog – if it is not already open. Then select the tab **Crew**.
2. For adding a person select the + button in the upper right near the scrollbar. This displays on top of the dialog a selection window with the list of all persons from your Person List who have not yet been selected as participants in this regatta. In addition to the name the functions on board, which are setup for this person in the Person List, are displayed.
3. The plus button the left of a name selects the person for the crew of the regatta; the close button (⊗) on the upper right closes the selection window without adding a new person to the crew.
4. After selecting a person, the selection window is closed and the name of the person appears in the dialog box at the bottom of the list. In the field **Task/position** you can now select which function the person should have on board. Only the tasks are available, that had been assigned to the person in the Person List.



The dialog *Edit event*, tab *Crew*

## Showing and editing person data

The edit button (✎) to the left of the name switches to the Person List and shows the detail dialog with all the information about the person. Further data entries for the person can be made here. Meanwhile the dialog **Edit event** dialog with the tab **Crew** of the Planner file remains open. To return to the dialog you can either select the Planner window, or close the detail dialog of the Person List and then return using the Planner button (🏠).

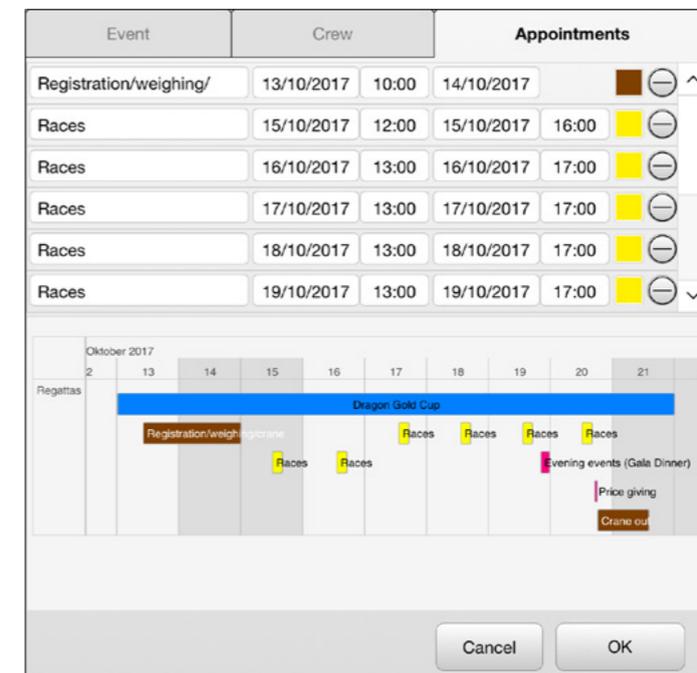
## Deleting persons from the crew list

To delete a crew member, tap/click on the minus sign at the end of the line for this person. After a security query the entry is deleted from the crew list.

## Creating a new appointment

Appointments are dates within an event and are created in the dialog **Edit event** on the tab **Appointments**.

1. In the timeline, click/tap on the color bar or text of the event and open the **Edit event** dialog – if it is not already open. Then select the tab **Appointments**. In the upper part of the tab all appointments for the event are listed. The lower part shows a section of the timeline that contains the event and the related appointments. For events with a longer duration, this timeline can be moved and zoomed with gestures, just like the REGATTAPLANNER timeline itself.
2. To create a new appointment, use the + button in the right of the first empty row of the appointment list.



The dialog *Edit event*, tab *Appointments*

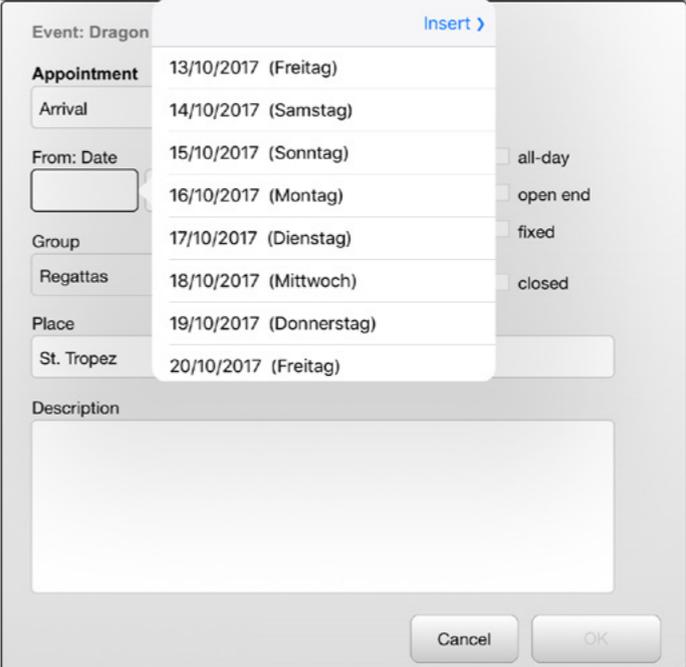
3. This opens the dialog **Edit appointment**. The fields in the dialog are almost identical to those for events. The field **Appointment** provides a selection list with possible entries. The list can be customized in the dialog **Lists** which can be found inside the menu **Settings** (button  at the top right, read more here: “Titles for appointments and levels for regattas” on page 24). You can either select a title from the list or enter a title for the appointment using the keyboard.

**Tip: Entering manually into a field with drop-down list**

In order to do enter your own text on PC you need to click in the field once again while the drop-down list is shown. The list is closed and you can now type in your own data.

On iPad you first need to hide the list with the button  (in the bar on top left of the keyboard) and then you can enter your text using the keyboard.

4. The date fields do not show a calendar. Instead a list with the all days within the event period is provided to choose from. But you also can enter the dates manually. In the case that, while entering the dates manually, the time period of the appointment is not completely within the event period, REGATTAPLANNER will display a message when you finish your data entry with the **OK** button. With this message you have the option to let REGATTAPLANNER adjusted either the date of the event or the date of the appointment automatically.



Appointment	Date	Day
Appointment	13/10/2017	Freitag
Arrival	14/10/2017	Samstag
From: Date	15/10/2017	Sonntag
	16/10/2017	Montag
Group	17/10/2017	Dienstag
Regattas	18/10/2017	Mittwoch
Place	19/10/2017	Donnerstag
St. Tropez	20/10/2017	Freitag

*Selection list when entering a date for an appointment*

5. Since an appointment always belongs to the same group as its event, the group is only displayed in the dialog and can not be changed.
6. Closing the dialog **Edit appointment** gets back to the tab **Appointments** of the dialog **Edit event**. The new appointment is displayed in the appointment list and in the timeline.
7. With this steps you can enter or edit (see next section) several appointments one after the other. To complete the data entry, close the dialog **Edit event** with **OK**.

## Editing Events and Appointments

### Editing and deleting appointments

Appointments can either be edited directly from the REGATTAPLANNER timeline or from the dialog **Edit event** of the event they belong to.

- To edit an appointment directly from the timeline, click/tap on the color bar or on the text of the appointment.
- To edit an appointment on the tab **Appointments** of the dialog **Edit event** switch to the tab **Appointments** and then click/tap on the title of the appointment shown in the appointment list.
- To delete an appointment go to the tab **Appointments** of the dialog **Edit event**. Click/tab on the minus button at the right end of the row of the appointment. After a security message, the entry is deleted from the list.

### Editing an event

To edit a event, just click or tap the event's color bar or text in the timeline. This opens the dialog **Edit event**.

### Switching the group

When you change the group of an event which has associated appointments, a security message is shown and all related appointments are also moved to the new group. Appointments always belong to the same group as their event.

### Closing an event

In REGATTAPLANNER you can close events and appointments and thus prevent unintentional changes. When an event or appointment is marked to be closed only the field **Description** can be edited.

- To close an event or appointment activate the option **closed**.
- If the option **closed** has been activated for an event, REGATTAPLANNER will check, when you close the dialog with **OK**, if all the related appointments have already been closed. If not, a message is shown and it is possible to automatically let REGATTAPLANNER close all appointments.

### Deleting an event

Events can be deleted with the button  in the **Edit event** dialog. When deleting an event with associated appointments, a message is shown where you can select to delete the associated appointments or to convert them to stand-alone events.

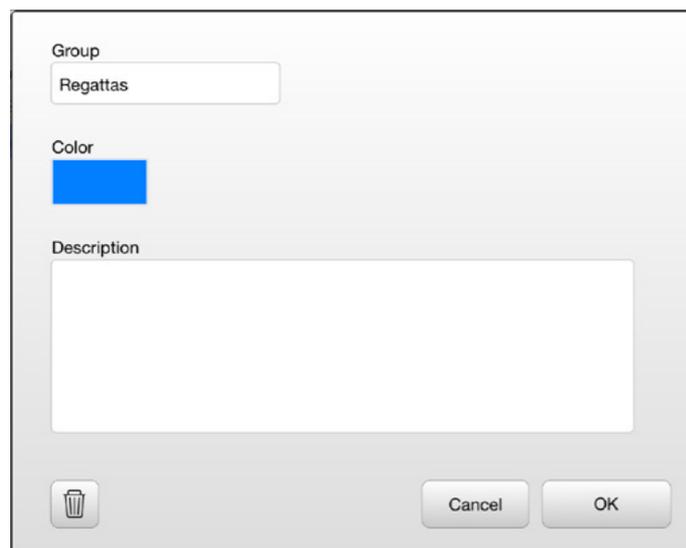
## Groups

In REGATTAPLANNER groups are used to sort regattas, for example by location, boats classes or ships. The names of the groups are displayed statically at the left edge of the interactive timeline.

Two groups are already created in a new, empty Planner file. This groups can, of course, be renamed or deleted.

### Creating a new group

1. In the control bar of REGATTAPLANNER select the + button and then in the menu the button **New group**.
2. The dialog **Edit group** opens. Here you need to enter a name for the group into the upper field and choose a standard color for the group from the field **Color**. It is optional to enter a further description.
3. Close the dialog with **OK**. The new group appears inserted below the existing groups.



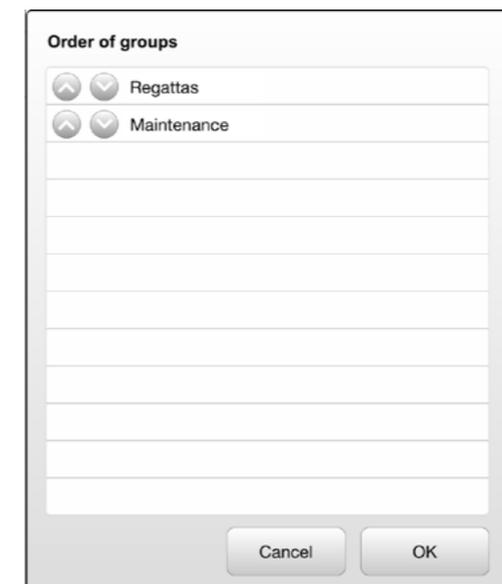
*The dialog **New group***

### Editing or deleting a group

1. To edit or delete a group click/tap within the horizontal area of the group at a location where no event or appointment is displayed.
2. The **Edit group** dialog opens.
3. Make your changes and press **OK** to accept the changes. **Cancel** closes the dialog without accepting changes.
4. With the button , which is displayed at the bottom of the dialog **Edit group**, the group can be deleted. Please note that after a security message all events and appointments created in the group are also deleted.

### Moving groups

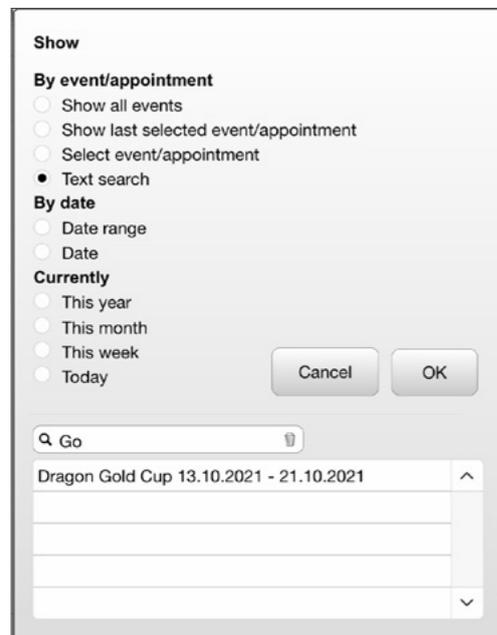
In the dialog **Order of groups** which is opened using the menu **Settings** (button  at the top right) you can change the order of the groups. Using the buttons to the left of the group names you can move the group up or down one line.



*The Dialog **Order of groups***

## Settings for displaying the Timeline

With the options in the dialog **Show** (button ) you can bring certain events, appointments or selected time periods into the visible display area of the timeline without the need to search, scroll and zoom for these entries with the buttons or gestures.



*The dialog **Show** with the input field and the selection list when searching for events and appointments with a certain text in the title*

Most of the display options are self-explanatory. With some options special fields for data entry or selection are displayed at the bottom of the dialog.

The **OK** button starts zooming the timeline to the selected entries.

- The option **Select event/appointment** provides a list of all events and appointments from which an entry can be selected. With the option **Only from group** two selection lists are offered. If you then select a group from the upper list, the lower list only shows the entries from this group.

### Text search

A special case is the option **Text search**.

1. To bring an event or an appointment with a specific text into the visible area of the timeline, first enter a search term into the field  which is provided with the option **Text search**.
2. While you are entering the text, the list below the search field lists all the events and appointments that contain this search term.
3. If you have found the searched entry, select it in the list and then close the dialog with the button **OK**. The timeline area now shows the selected entry.

## Customize REGATTAPLANNER: Settings and Lists

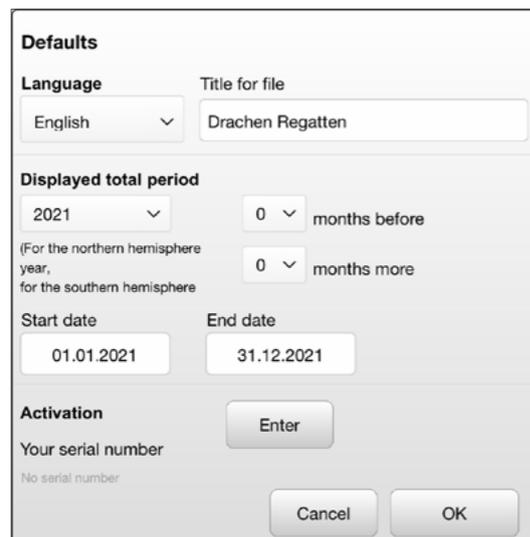
The menu **Settings**, which is opened via the button  on the far right of the control bar, provides functions that allow you to customize your Planner file.

### The Dialog Default

First use the button  in the right of the window to open the dialog **Settings**. Then choose **Defaults**. In this dialog you can set some defaults.

#### Language

Choose the language for the user interface of your Planner file. Currently we support German, English, Dutch and Swedish.



*The dialog Defaults*

#### Title for RegattaPlanner file

Enter here a title for your file. It is displayed in the Planner window at the top left of the control bar.

#### Show events/appointments of a group stacked

If this option is enabled, events and appointments within a group with overlapping time periods are displayed with a vertical offset, so that the color bars and texts are completely visible. Activating this option is recommended to increase clarity.

#### Displayed total period

This settings allow you to specify which time period should be visible in the Planner file. The setting selected here affects only the visibility in the window of this Planner file and can be changed at any time without deleting existing events or appointments.

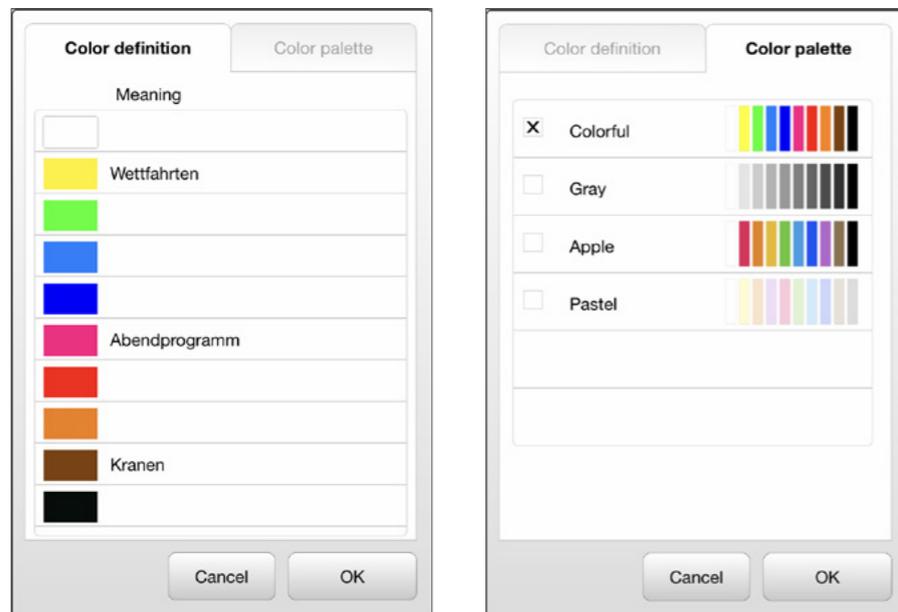
The selection list provides a simple way to configure the file for displaying a selected year (from January to December) or in the southern hemisphere of a season (from July to June). Using the two lists **months before** and **months more** you can add one or more month to be shown at the start or end of the selected time period. Alternatively, you can enter dates into the fields **Start date** and **End date**, which always display the selected time period. The time period is displayed in Planner window the upper right of the control bar.

#### Activation – Your serial number

In the area beneath you can read your current serial number or if no serial number has been entered yet **No serial number**. For the unlimited use of REGATTAPLANNER you need to enter a serial number by choosing the button **Enter**. The serial number field itself is not editable.

## Color Definitions and Color Palettes

The button **Colors/color palettes** in the menu **Settings** (button  at the top right) opens a dialog with two tabs.



*The dialog **Colors/color palettes***

### Color definition

On this tab you can assign an individual meaning to each color. Thus, for example, the races could always be displayed yellow, times for craning in brown etc.

### Color palette

In this first version of REGATTAPLANNER four different color palettes are available. The selected color palette affects all entries. When changing the color palette, the colors of entries already created are also changed. The order of the colors is fixed, the meanings created on the tab **Color definition** are adopted in the given order.

## Lists

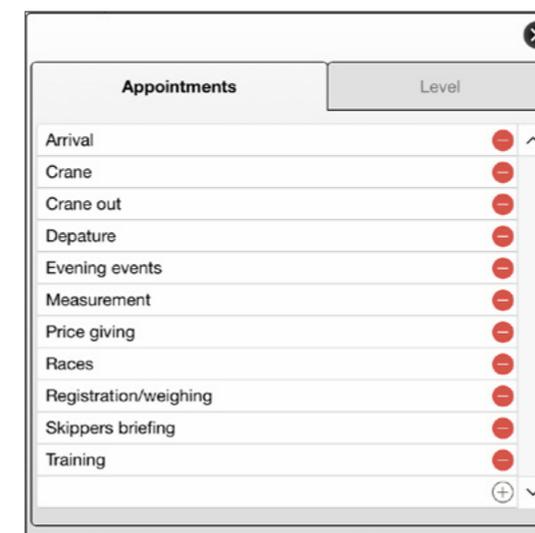
The Button **Lists** in the menu **Settings** (button  at the top right) opens a dialog with two tabs, on which you can customize the lists for the title of appointments and for levels of the regattas.

### Titles for appointments and levels for regattas

To simplify the data entry of new appointments, the list of frequently used texts can be edited in REGATTAPLANNER. To do this, select in menu **Settings** (button ) the button **Lists**.

On the first tab you can setup the entries for the selection list of the field **Appointment** and on the second tap the entries for the selection list of the field **Level**.

In a new Planner file this list already contains some entries, but these are only suggestions. Unused entries can be overwritten or deleted. Of course, the lists can be updated at any time while working with the Planner file.



*Dialog for editing the selection list with titles for appointments*

- To insert a new entry, click/tap the + sign at the bottom of the list, and then type the text into the field.
- To delete an entry, click/tap the minus sign at the end of the row with the entry that you want to delete. After a security message, the entry is deleted from the list.

**Attention**

Deleting an entry from the list has no effect on existing entries which use the title. The entries remain untouched, even if you remove the list entry from the list.

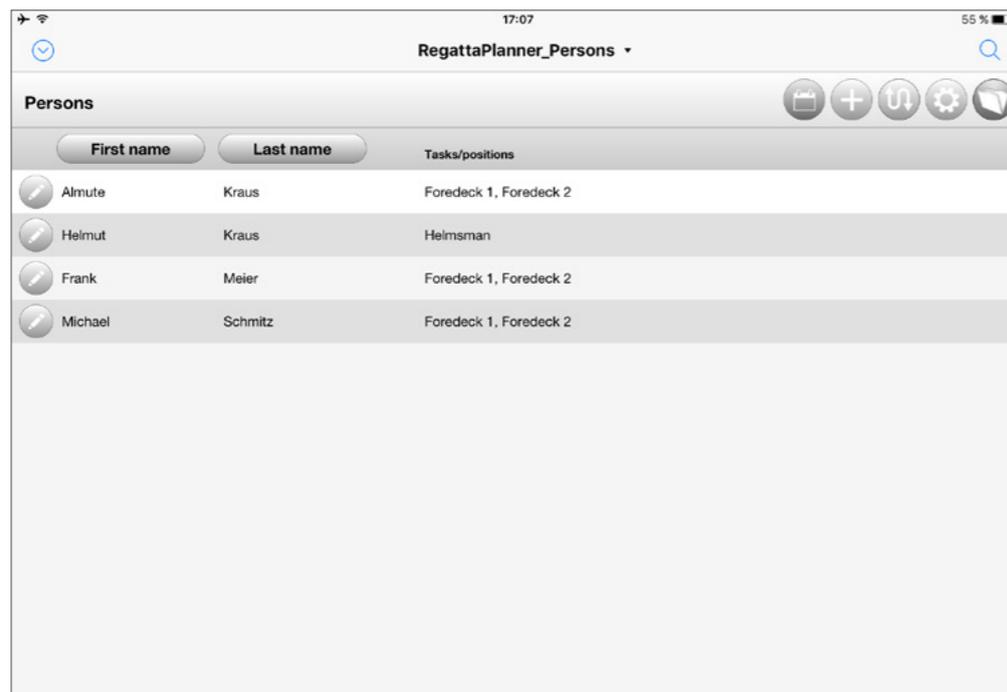
**Zoom**

On PC the menu **Settings** provides the additional button **Zoom**. It opens a dialog for setting the overall zoom level for the file. From the list **Zoom level** select the desired scaling and use the button **Activate** so set the zoom level. The zoom level is saved and automatically set when you open the Planner file the next time.

## The Person List

In addition to scheduling, REGATTAPLANNER offers a Person List in which you can record information on your crew members such as address data, telephone numbers, but also qualifications and possible functions on board. When you create an event, you can then select the participants from the Person List and define their functions.

The Person List is opened in the window **RegattaPlanner Start** with the button at the top right with the person symbol, in the Planner file you go to the Person List via the persons button (👤).



*The Person List in list view*

## The List View

In the list view, all persons are listed with first name, last name and the assigned tasks/positions on board.

The column title buttons **First name** and **Last name** can be used to sort the list by first or last name.

The edit button (✎) to the left of the name opens a dialog with the person's detail data.

## The Detail data of the Person

General information about the person, such as name, phone numbers and email address are located at the left of the dialog. In the field with the button **Insert photo** you can insert a picture of the person. The image is automatically reduced to the optimized size.

By clicking/tapping on the envelope icon you can create an empty email to the person.

In addition you enter in the field **Qualifications/Experience** further information about the person which are relevant for your regattas.

Important for REGATTAPLANNER are the functions under **Tasks/positions**, which this person can take on board. Here you should check all tasks the person may take, so that this tasks are listed when selecting the person as a regatta participant. The list of tasks provided here can be customized in the popover **Settings** (see “The Popover Settings for the Person List” on page 27).

For quick editing of the personal data use the two buttons at the top right of the details dialog to scroll through the person list.

*Detail data for a person in the Person List*

## Create a new person

Creating a new person can be started in both the list view and the detail dialog.

1. Select the + button in the list view or in the detail dialog. An empty dialog for entering the personal data is displayed.
2. Enter all required information about the person. The fields are labeled with a clear explanation.
3. Finish your data he entry with **OK** or choose the + button to proceed directly with the data of the next person.

## Delete a person

1. If you want to delete a person you need to open the detail dialog for the person. To do so click/tab in the list view on the edit button (✎) left of the name or when already in detail dialog use the arrow buttons in the top of the detail dialog to scroll to the person.
2. Select the delete button at the bottom left of the detail dialog.
3. After a warning message the person will be deleted.

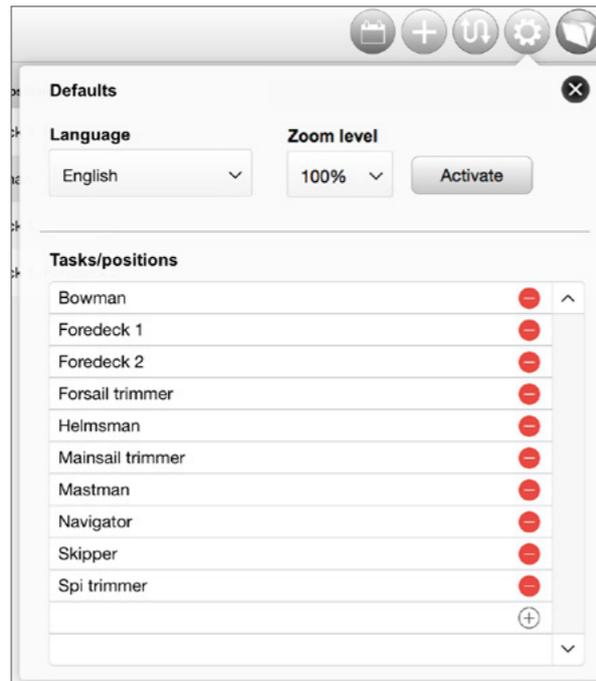
### Attention

Deleting a person from the Person List has no effect on the crew lists already setup for events.

## The Popover Settings for the Person List

The language for the Person List can be selected in the popover **Settings** of the Person List, which is opened using the button ⚙ on the right. The language you select here also sets the language for the window **RegattaPlanner Start**.

Using the list **Tasks/positions** you can setup the tasks that are available in the detail dialog. This list already contains some entries, but these are only suggestions. Unused entries can be overwritten or deleted. Of course, the lists can be updated at any time while working with REGATTAPLANNER.



The popover **Defaults** with the entries for the check list **Tasks/positions**

- To insert a new entry, click/tap the + sign at the bottom of the list, and then type the text into the field.
- To delete an entry, click/tap the minus sign at the end of the row with the entry that you want to delete. After a security message, the entry is deleted from the list.

### Attention

Deleting an entry from the list has no effect on tasks which already have been assigned to persons. The tasks remain untouched, even if you remove the task from the list and even if they are no more shown in the details dialog for the person.



### Zoom level

On PC the popover **Settings** provides the additional option for setting the overall zoom level for the file. From the list **Zoom level** select the desired scaling and use the button **Activate** so set the zoom level. The zoom level is saved and automatically set when you open the Person List the next time.

## Import, Export and Sending Emails

### Importing Data from other REGATTAPLANNER files

REGATTAPLANNER provides in **communication** menu/popover (button ) of the Planner files two different import functions. **Import (all)** can be used to import all entries and settings from another REGATTAPLANNER Planner file into the current file.

**Import (settings)** allows to import all settings, the color definitions and the title list from another REGATTAPLANNER Planner file into the current file.

The Person List as well comes with an import function **communication** menu/popover (button ) for importing the personal data and the list **Tasks/positions**.

Due to the different operating systems the import function is slightly different on iPad and on PC.



### Importing on PC

1. In the Planner file select in **communication** menu (button ) the button **Import (all)** or **Import (setting)** or in the **communication** popover of the Person list select the button **Import**.
2. It opens an information dialog. Select **OK** to continue.
3. Now a dialog is opened where you need to select the REGATTAPLANNER file, from which you want to import. After you have selected the file, the import runs automatically.



### Importing on iPad and iPhone

On iOS you can only import from another REGATTAPLANNER file which is stored in the documents folder of REGATTAPLANNER on your device.

1. In the Planner file select in **communication** menu (button ) the button **Import (all)** or **Import (setting)** or in the **communication** popover of the Person list select the button **Import**.
2. It opens an information dialog. Select **OK** to continue.
3. REGATTAPLANNER now opens a dialog with a list from which you can choose the file you want to import from. The list shows all files stored in the documents folder of REGATTAPLANNER. Select the file and then start the import process by clicking **OK**.
4. The import will run automatically.

## Exporting Person Data

REGATTAPLANNER offers a function for exporting person data for further processing in some common file formats (for example, Excel worksheet, command-separated, tab-separated).

From the Person List you can export the data of all persons with the **Export** button in the **communication** popover (button ). In the Planner file you can export for each regatta a crew list containing all person data of the regatta participants.

1. To export your complete person list go to Person List and open the communication popover (button ) and choose the button **Export**.

If you only want to export the person data for a regatta in your Planner file open the dialog **Edit event** for this regatta and activate the tab **Crew**. At the bottom of the tab choose the second button.

2. Selecting one of the buttons opens a dialog box in which you specify the file format, name and location for your file. Other settings are not possible.



3. On iPad/iPhone the button **Continue** opens a next dialog. Choose where or in which app you want to save the export file. If you like you can send the file with email or upload the file to a cloud service.

## Sending Emails to Persons from REGATTAPLANNER

REGATTAPLANNER provides several ways to create an email to one or more persons hows data are stored in the app.

- In the details dialog of the Person List the button with the envelope icon to the right of the email will send a new email to this address.
- The button **Email to all** in the **communication** popover (button ) of the Person List creates a new email to all email addresses stored in the file.
- In the Planner file you can create an email to all participants of this regatta. To do so open the dialog **Edit event** for this regatta and activate the tab **Crew**. At the bottom of the tab choose the left button.

## Printing or creating a PDF in REGATTAPLANNER

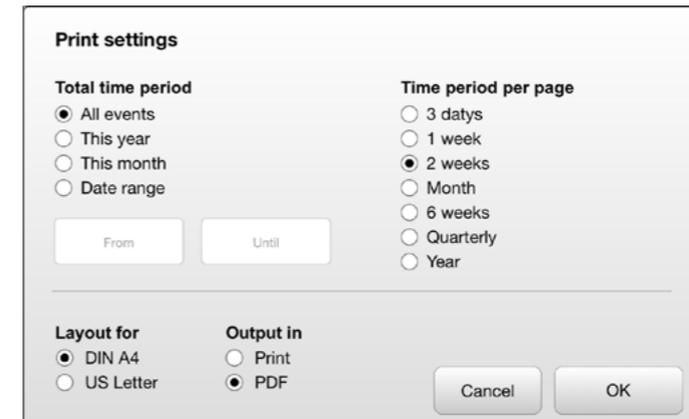
With the button **Print** in the menu/popover **communication** (button ) REGATTAPLANNER offers a printing function in the Planner file as well as in the Person List.

In the Planer file the timeline can be printed out on paper or saved as PDF. Since the timeline is very long or wide, but the printout and PDF files are limited by the width of the paper, the timeline needs to be divided into several pages when printing. The splitting can be defined in the dialog **Print settings**.

In the Person List you can choose between the printing of the person list and the person details.

### Print settings for the Timeline

The print function of the Planner file opens the dialog in which you can setup the splitting of the timeline onto the pages. You can select the section of the timeline which should be printed (option **Total time period**) and set the scale (option **Time period per page**). You can also choose between the paper sizes A4 and US letter.



The dialog **Print settings** for the Planner file

### Print settings for the Person List

The print function of the Person List gives the choice to print a list of all persons or to print the person details. You can also choose between the paper sizes A4 and US letter.



The dialog **Print settings** for the Person List

## Printing and saving PDF

After starting the printing process for the Planner file, REGATTAPLANNER opens a new window in which the content of the individual pages is calculated and visualized. This may take some time, depending on the number of pages and the content. The default printer page is setup in a way that the views can be printed in portrait format on a DIN A4 or US letter sheet.

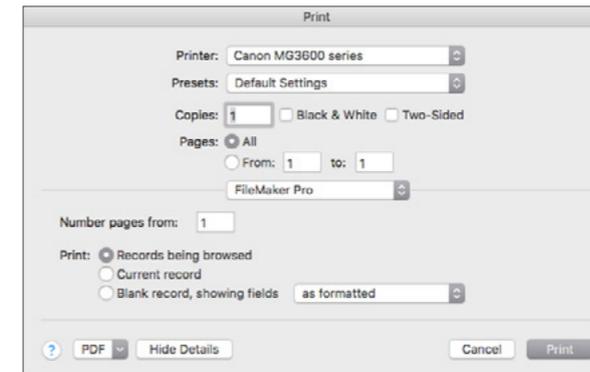
The print layout of the Person List is setup for the portrait format.



### Printing and PDF creation using MacOS

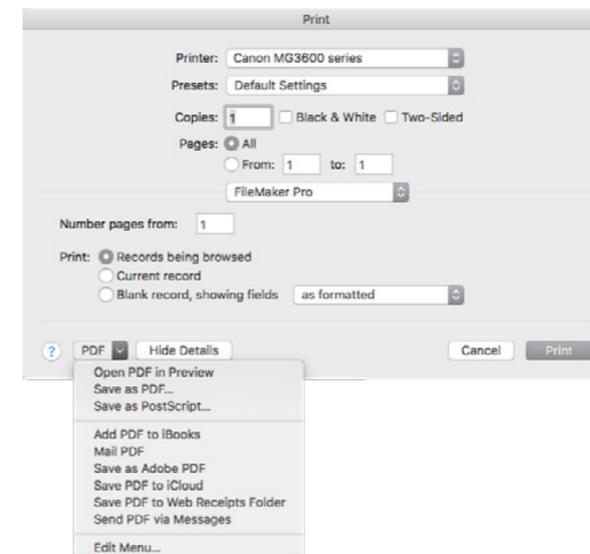
If the setting is not proper for your printer, you can setup the page in the dialog box **Page Setup** from the **File** menu. This opens the standard dialog box **Page Setup** of MacOS.

1. In menu/popover **communication** (button **↕**) choose the button **Print**.
2. In the dialog **Print settings** of the Planner file select the desired total time period for the printout and the time period to be displayed on each page or in the Person list choose one of the options **List of persons** or **Persons details**. Then activate the appropriate paper size. Close the dialog with **OK**.
3. After all pages are generated the standard MacOS dialog **Print** is opened. Activate the dialog's page with the settings for **FileMaker Pro**. For the option **Print** select **Records being browsed** (which means all pages generated). Also make sure that for the option **Pages** the setting **All** is selected. Just so all entries will be printed.
4. After you have checked all settings, start the print job with the button **Print**.



The **Print** dialog box under MacOS

5. To create a PDF don't click on the button **Print**, instead open the list of the button **PDF** and choose the option **Save as PDF...** from the list.

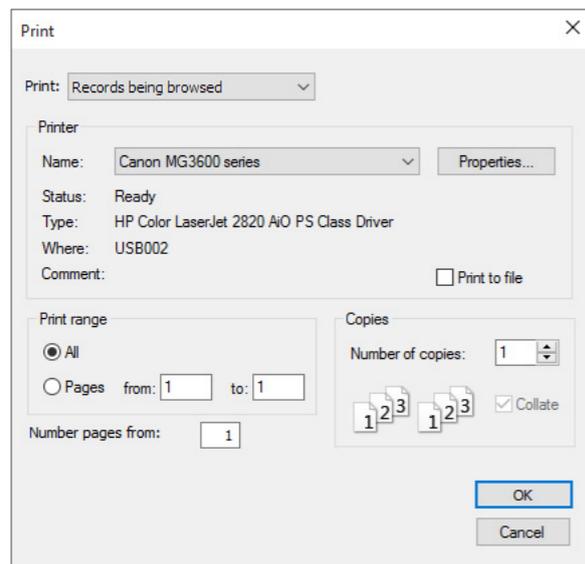


Saving the printout in a PDF file



## Printing and PDF creation using Windows

1. In menu/popover **communication** (button **↕**) choose the button **Print**.
2. In the dialog **Print settings** of the Planner file select the desired total time period for the printout and the time period to be displayed on each page or in the Person list choose on of the options **List of persons** or **Persons details**. Then activate the appropriate paper size. Close the dialog with **OK**.
3. After all pages are generated the standard **Print** dialog of Windows is opened. Decide here by selecting the appropriate printer, whether you want to print on paper or into a PDF.
4. For the option **Print** select **Records being browsed** (which means all pages). Also make sure that for the option **Pages** the setting **All** is selected. Just so all entries will be printed.
5. Again check all other settings in the print dialog. If needed check the settings for the printing size in dialog **Print Setup**.
6. Then start the print job or PDF creation with the button **OK**.



The **Print** dialog box under Windows

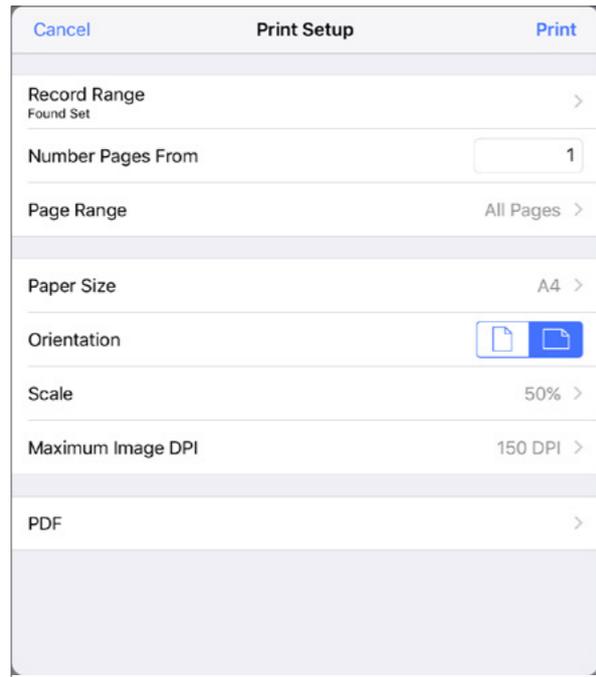


## Printing and PDF creation using iOS

On iPad and iPhone you need a printer which is capable for Air-Print (for details of setting up the printer refer to the manual of your printer).

PDFs can be created with the print function (option **Print** under **Output in**) or fully automatically (option **PDF** under **Output in**).

1. In menu/popover **communication** (button **↕**) choose the button **Print**.
2. In the dialog **Print settings** of the Planner file select the desired total time period for the printout and the time period to be displayed on each page or in the Person list choose on of the options **List of persons** or **Persons details**. Then activate the appropriate paper size. Close the dialog with **OK**.
3. After all pages are generated a standard **Print Setup** dialog of the iOS is opened. For the option **Record Range** select **Found set** (which means all pages). Also make sure that for the option **Page range** the setting **All Pages** is selected. Just so all entries will be printed.
4. Choose the paper size (A4 or US Letter).  
For the Planner file make sure that you have set up **Portrait** for **Orientation** and **50%** or **Set scale** for **Scale**.  
For the Person List make sure that you have set up **Landscape** for **Orientation** and **100%** for **Scale**.
5. Start the print job with the button **Print** or the creation of the PDF with **PDF** at the bottom of the dialog.
6. If you have selected **PDF** for **Output in**, you can enter a name in the following dialog and then choose the application in which the PDF should be saved.



*The dialog **Print Setup** of REGATTAPLANNER when printing the time-line*

## Updates and Troubleshooting

### Updates

2K Yachting will develop REGATTAPLANNER further and add new functions. From time to time 2K Yachting will provide a software update. Find out more on our website at [www.2k-yachting.de](http://www.2k-yachting.de). If you are a licensed user or registered to our newsletter, we will send you an email as soon as an update is available.

### Error Report

Although REGATTAPLANNER has been proved in practice, there may occur an error while using the software.

In this case we would be grateful if you inform us about the error, thus we can patch it with the next software release. Please send an email with a precise description of the error to [support@2k-yachting.de](mailto:support@2k-yachting.de).

2K Yachting  
Hohenzollernallee 37  
40235 Düsseldorf  
Germany  
Tel. +49.211.96667651  
E-Mail: [support@2k-yachting.de](mailto:support@2k-yachting.de)  
Web: [www.2k-yachting.de](http://www.2k-yachting.de)