



# Calendar

Help Documentation

# Calendar

## Calendar Overview

SmarterMail's calendar feature takes the burden out of organizing your schedule and is accessible from any desktop, laptop or mobile device with Internet access. SmarterMail's calendar system is extremely flexible and includes many options that make it easy to keep track of important events, including:

- Fully configurable appointments with optional recurrence rules.
- Email notification and notification within SmarterMail of upcoming appointments.
- Attendee and invitation status tracking.
- Conference room availability and scheduling.
- Availability information about attendees (Enterprise Edition only).
- Integration with Outlook (Enterprise Edition only).

To access your calendar, click the calendar icon . Depending on your account settings, the daily, weekly, monthly, or all appointments calendar view will load. Note: To view different calendars (such as shared calendars or mapped resources), click the Calendars menu at the top of the content pane and select the desired calendar.

For help understanding the different areas of the calendar, see the calendar interface diagram .

## Navigating Your Calendar

When you view your SmarterMail calendar, you can toggle between four different views:

- Daily - The daily view is a planner-type view that displays all appointments scheduled for the day. If configured, this view also displays the weather forecast for the date you are viewing and any applicable start or due times for tasks.
- Weekly - The weekly view is intended as more of an agenda-type view and displays all appointments scheduled for the week. If configured, this view also displays the 7-day weather forecast and the start and due dates for tasks.
- Monthly - The monthly view displays all appointments and tasks scheduled for the month. It serves as an at-a-glance type of calendar that outlines a general idea of the upcoming events over the next 30 days.
- All Appointments - The all appointments view lists all appointments on your calendar and can be sorted by the appointment subject, start date, or end date.

To help you differentiate between different appointment types, SmarterMail assigns different colors to your calendar items. These colors are as follows:

- Blue - Regular appointments
- Yellow - All-day appointments
- Green - Tasks

In general, the following options are available in the content pane toolbar:

- New - Creates a new appointment.
- Actions - Click this button and select the appropriate option to edit an appointment, delete an appointment, or import all calendar appointments to Microsoft Outlook. Note: The ability to add your calendar to Outlook is only available in SmarterMail Enterprise and SmarterMail Free editions.
- View - Click this button and select the appropriate option to filter calendar items by category or choose the details that are displayed about an appointment in the calendar view.
- Filter - Filtering appointments allows you to view all of your appointments, including ones that are recurring or all day, or to only view appointments in particular categories.
- Visible Fields - Choose which appointment details are displayed on the calendar.
- Print - Prints the data displayed in the current calendar view.

## Creating New Calendar Appointments

To create a new calendar appointment, click New in the navigation pane toolbar. This will open a new appointment window that you will use to add the appointment to SmarterMail and to invite attendees.

### Saving Appointment Details

When you add a new appointment to your calendar, you can save as much or as few details about the appointment as you like. In general, appointment details are divided into four tabbed sections:

#### **Event**

The event is essentially whatever you want to schedule in your calendar. It can be a lunch or dinner, a meeting, an anniversary or birthday, or virtually any other type of event you want to keep organized in your calendar. To create an Event, you will need to include the following information. Note: The Subject and Start date are the only fields required to save an appointment.

- Subject - The subject is the friendly name for the event you're creating.
- Attendees - Attendees are the people you want to invite to your event. When adding

Attendees, each will receive an event invitation that they can either accept or reject. You will receive notifications back regardless of whether the attendee accepts or rejects the invitation. To add attendees, you can either type their email address directly or simply click the "Attendees" field name to open your list of contacts. You can select contacts from your various contact lists, including the Global Address List (GAL), as well as cycle through contacts you have listed in categories.

- **Conflicts** - If you add an attendee from your Global Address List, and their schedule conflicts with the date and time of your event, it will be displayed as a Conflict. To find a new day or time for the event, click on the availability icon next to the Attendees field to bring up a grid of all GAL Attendees' availability.
- **Location** - Where the Event will be taking place. The location can be a room or building, an address, or even some descriptive text, such as "via Webex". Regarding Room selection versus Location, these are mutually exclusive, yet compatible fields. Separating them allows for users to specify more general locations, such as a geographical location or specific office building, while still being able to reserve conference rooms at those locations.
- **Room** - If your domain administrator has added any shared resources, like conference rooms, the list of rooms will be available in this dropdown. Just as with attendee availability, if a conference room is already reserved for a specific day and time an Event is to be set, this information will display in the Conflicts field of the new appointment window. Conference room availability will also show when users click the availability icon next to the Attendees field in the new appointment window.
- **Start and End Dates and Times** - A Start Date is required to save the event. By default, Events start as the current date and time and end 1 hour later. These fields are fully customizable.
- **Availability** - Here you can set your own availability - either Busy or Free. Setting your status as Busy will be reflected if others within your Global Address List try inviting you to their own events.
- **Reminder** - Setting a reminder will make a pop-up window appear in webmail at whatever reminder interval you set.
- **Email Notification** - Adding in an email address will send the event reminder to that email address based on the time interval set by the reminder.

### **Recurrence Information**

In some cases, Events will need to occur on a regular basis. For example, weekly meetings, monthly lunches, holidays, anniversaries or business appointments. In these cases, an Event's recurrence is set. The recurrence feature is very flexible and can be as simple or as complex as necessary. Examples include a birthday that occurs every August 7th, a meeting that happens the second Monday of every month, or an appointment that occurs every four days for three weeks.

When you select the timeframe for how often the Event needs to repeat, you're presented with several options. The first is how often the Event occurs, in weeks. For example, if the Event occurs every week, you leave the recurrence at "Every 1 week(s)." If the Event happens every third week, you set the recurrence at "Every 3 week(s)," etc.

Next, you select the day of week the you want the Event to repeat on.

Finally, you set the end time for the Event recurrence. The Event can repeat indefinitely or can end after a certain number of occurrences or on a specific date.

### **Description**

Use the Description area to keep any important notes or a description of the Event. You can also include any webinar information, call in numbers, or other information you want your Attendees to see. The Event Description is passed along with the Event invitation and will appear in your Attendees' calendars and Event details.

### **Categories**

A category provides a way to organize your Events into manageable groups. To add a category, simply click the Master Categories button and type the new category name. Note: Be sure to separate categories with a comma.

## **Managing Calendar Appointments**

To view the details of an appointment, click on the appointment from any calendar view. The appointment details will load in a popup window.

### **Editing Appointment Details**

To edit the details of an appointment, click on the appointment from any calendar view. The appointment details will load in a popup window. Make the appropriate changes and click Save . The appointment details will update on your calendar and any attendees will receive a new invitation notifying them of the change. Note: Editing a recurring appointment will update all instances of the appointment on your calendar. There is no way to edit a single date of a recurring appointment series.

### **Deleting an Appointment**

On occasion, you may need to delete a calendar appointment. To delete and remove an appointment from your calendar, click on the appointment from any calendar view. The appointment details will load in a popup window. Click Delete . The appointment will no longer appear on your calendar and any attendees will receive a notification that the appointment has been cancelled. Note: Deleting a recurring appointment will delete all instances of the appointment from your calendar.