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:

• Ability to create and sync multiple personal calendars.
• Fully configurable appointments with optional recurrence rules.
• Email notification and notification within SmarterMail of upcoming appointments.
• Overlay view to display multiple calendars, tasks and conference rooms on the same calendar.
• 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. To view multiple resources at once or to toggle between views, use the Resource Selectors (dropdown menu options at the top of the content pane toolbar) and check the desired resource. Items found in these dropdowns are based on a user's personal calendars and task list and any domain/user shared resources that have been mapped.

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.

There are a couple of ways to differentiate between differnt appointment types and events:

- Each resource can be given its own color in the Calendar Settings .
- All-day appointments are denoted with a triangle.
- Recurring events are denoted with a curved arrow.

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

- New - Creates a new appointment.
- Actions -

- Add to Outlook - Click this button and select Add to Outlook to 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.
- Get CalDAV URLs - Most CalDAV clients support multiple calendars and can retrieve these calendars using the All Calendars URL. If your CalDAV client cannot find the calendar(s) with the All Calendars URL, select this option to display the individual calendar URL(s) and try adding the calendar(s) individually with the respective URL.
- Import ICS File - Select this option to import a single event from an iCal file.
- 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.
- Overlay Calendars - When unchecked, adjusting the Resource Selectors will toggle views rather than overlaying resources to view multiple resources at one time.
- Print - Prints the data displayed in the current calendar view.

Viewing Calendar Event Details

When looking at your calendar in webmail, and viewing your appointments by day, week or month, only the barest details are initially displayed in order to save space. However, there may be times when you want to view more information about a specific appointment. You can do this one of two ways:

First, double clicking on an appointment will open it in a pop-up window. That pop-up window diplays the full appointment details just as it does when you create a new appointment, and, if you were the original creator of the appointment, you can edit it as needed. If the appointment was created by someone else, that is denoted at the top of the pop-up window and you are not able to edit the appointment details.

Additionally, simply moving your mouse over a specific appointment in your daily, weekly or monthly view will display the details of the appointment in a call out. The call out will display the subject of the meeting as well as the time and any location data.

Creating New Calendar Appointments

To create a new calendar appointment, click New in the content 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.

- Calendar - Use the dropdown menu to select which calendar the event is for. The default calendar can be chosen in Calendar Settings .
- 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 attedee 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 exlcusive, 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 confererence rooms at those locations.

• Room - If your domain administratator has added any shared resources, like conference rooms, the list of rooms will be available in this dropdown. Just as with attendee availablity, 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 availablity 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 cusomtizable.
• 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.
• Private event - This setting can be used for those who share their calendar with other users. Events marked as private will only be shown to those with Full Access. Those with Availability-Only or Read-Only permission will instead see "Busy Time" and cannot view appointment details.

Recurrence Information

In some cases, Events will need to occur on a regular basis. For example, weekly meetings, monthly lunches, holidays, anniveraries 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 indefinitly 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 Attenees' 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 or right-click and choose Edit from any calendar view. The appointment details will load in a popup window. Make any 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. In addition, meeting invites (appointments with attendees) cannot be moved among personal calendars.

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 . You can also right-click and choose 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. To delete a single instance, choose Delete Instance.

Deleting an Instance

When creating an appointment, it's possible to create it as a recurring event. That means the specific appointment will occur at a specific interval for a specific amount of time. The most common types of recurring appointments are weekly or monthly meetings. However, there may be a time when a recurring meeting needs to be canceled due to unforseen circumstances. That's where deleting an "instance" of a meeting comes in handy.

Deleting an instance of a recurring event allows you to delete a single meeting from a recurring sequence. That meeting can then be formally canceled or re-scheduled for a later day and time. To delete an instance, open up the meeting by double clicking on it and clicking the Delete Instance button. You can also right-click and choose Delete Instance . Deleting an instance of a meeting will not affect any future or past instances - only the instance you delete.