



Calendaring

Help Documentation

Calendar

Calendar Overview

Calendar allows you to store and retrieve appointment and meeting information from the same place as your email. SmarterMail's calendar system is very flexible and includes many options that can help you keep everything organized.

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

To get started, click on the My Calendar link in the left sidebar, under the Calendars tree.

Adding an Appointment

There are two methods of adding a new appointment to a calendar. To add one so that it shows up in My Calendar, use the New Appointment link in the left menu under Calendars.

If you wish to add an appointment to a shared calendar (Enterprise Edition Only) , you must be viewing the calendar, then use the New Appointment button from within the page.

For information about inviting attendees, please refer to the help topic Inviting Attendees .

Event

The event tab records the common information about the appointment. Usually, this tab is the only one you will use. The available settings are explained below.

- Subject - This is the short description of the appointment, and is what will appear on calendar pages and reminders.
- Location - The physical location of the appointment. This field is optional.
- Start Date and Time - Enter the start date of the event. If the event will go all day, check the "All Day Event" box.
- End Date and Time - If the appointment does not have a scheduled end time, you may leave the end time blank.
- Reminder - For more information about reminders, please see the help topic Reminders .
- Event Description - Enter the full description of the appointment, if needed.

Recurrence Information

A recurring appointment is one that will happen again at some future date, and usually follows a pattern. A good example of a recurring event is a birthday. For more information about this, please refer to the help topic [Recurring Events](#) .

Categories

You may select which category the event should belong to or uncheck them all to specify an event with no category. To add a new category click on the Master Categories button to bring up the categories popup You may add categories by either using a comma(,) to separate them or putting one category per line.

My Calendar

To get started working with your calendar, click on the Calendars tree in the sidebar, and choose My Calendar. There are three primary views of calendars in SmarterMail: Monthly, Weekly, and Daily. These views are very similar, but have a few differences, which are noted below.

Monthly View - The monthly view shows a complete months' worth of appointments. It is meant more as an at-a-glance type of calendar that outlines a general idea of the upcoming events you have.

Weekly View - This view is intended as more of an agenda-type view, showing all appointments that occur during a specific week.

Daily View - The daily view is a planner-type view that shows all events during a day and also visually indicates when events overlap each other.

Calendar Controls

The right side of the page shows you both the current month and next month, and indicates days where events are scheduled with bold font in a different color. A legend below the calendars shows what different colors and effects mean.

Changing the month or year on the right calendar will not affect the calendar on the left. This is intended so you can look through a month (and the month after it) without affecting your currently selected timeframe.

Clicking on the double arrow next to the day indicators in the calendar will make the displayed month the currently selected month and put the calendar into the Monthly view.

Selecting the single arrow next to a week will select that week and change the display to the weekly view.

Clicking on a day in the calendar will make that day the selection and change to daily view.

Monthly, Weekly, and Daily View

The calendar view in the center of the page will change depending upon your date selection, as indicated above. These different views show data differently, but operate in the same manner.

Prev and Next - Click these buttons to quickly select the next month, week, or day (depending on your current view mode).

Adding an Appointment - Click on the New Appointment button to start a new appointment. For more information, please refer to the help topic [Adding an Appointment](#) .

Editing an Appointment - Click on an appointment to edit its content.

Deleting an Appointment - To delete an appointment, click on it, then click on the Delete button.

Add to Outlook (Enterprise Edition Only) - Click this button to attach to this calendar from within Microsoft Outlook. For more information, please see [Integration with Outlook](#) .

Sharing (Enterprise Edition Only) - Sharing is a feature that is available only with Enterprise Edition of SmarterMail, and allows you to share your calendar with another user on your domain. It is described in further detail in the topic [Sharing Your Own Resources](#) .

Inviting Attendees

You may need to coordinate an appointment with one or more other attendees. To do this quickly and easily, use the Invite Attendees button when adding or editing an appointment. Enter email addresses in the box to invite those people to your appointment. In addition, you can click on the attendees link to pop up a window that lets you quickly add members of your contact list or Global Address List (Enterprise Edition Only) .

Once you save your appointment, the attendees will receive an email invitation to the event. If they accept, you will receive a notification back. Additionally, if they accept from within SmarterMail, the event will get added to their calendar as an appointment.

Availability

This feature is available in Enterprise Edition only
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If attendees you are inviting have chosen to share their calendar with you, you can see their availability chart by clicking on the availability link.

Recurring events

SmarterMail's calendaring allows you to add events that recur over time. Recurring events can include:

- Holidays
- Birthdays
- Anniversaries
- etc.

When adding an appointment (see [Adding an Appointment](#)), it can be converted to a recurring event by clicking on the Recurrence Information tab. Use the options on the tab to schedule how often an event recurs. Recurrence is very flexible, and can be as simple or as complex as you want. Examples include:

- A birthday that occurs every 7th of August.
- A meeting that happens the second Monday of every month.
- An appointment that occurs every 4 days for up to 3 weeks.

Reminders

Reminders may be added to appointments in calendaring by setting the reminder drop-down box to a value other than None. When a reminder is activated, a sidebar item on the left will appear that reminds you of the event. By clicking on this sidebar item, you can dismiss the item or use snooze to bring up the reminder later.

You can also choose to activate an email reminder to send an email when the reminder activates. This can be your own email address, or can optionally be an alternate email address, like a cell phone SMS or pager email address.

Integration with Outlook

This feature is available in Enterprise Edition only

Calendars and contact lists can be loaded into Outlook and displayed side-by-side with your existing Outlook calendar and contacts. This allows you to see your current appointments and contacts from SmarterMail right in Outlook.

To enable the connection, you must first have Outlook installed and available to your user account.

- In SmarterMail, navigate to the calendar or contact list you wish to connect.
- Click on the Add to Outlook button.
- A popup window will appear with additional instructions. Click OK to initiate the connector.

- A security popup will appear from Outlook, explaining that an external source wants to attach to Outlook. Click on Yes to allow the connector to attach.
- The resource is now available in Outlook.

Note: If you change the password on your email account, the connections will be broken and will have to be reestablished.