



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 - Filters appointments by the selected category or whether they are recurring or all day.
- 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 sections:

- Appointment - Type the subject of the appointment and specify the attendees, the appointment's start date and time, end date and time, location, and a room assignment. You can also specify your availability (free or busy) and configure a reminder that will display in webmail prior to the appointment time, in addition to an email reminder. Note: The subject and start date are the only required fields to save an appointment.
- A note on attendees: When inviting 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, as well as cycle through

contacts you have listed in categories.

- **Recurrence Information** - Use this section to indicate that the appointment occurs on a regular basis. Recurring events may include personal occasions (birthdays, anniversaries, etc.), holidays, and regular meetings or business appointments. 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.
- **Description** - Type any important notes or a description of the appointment, if desired.
- **Categories** - A category provides a way to organize your appointments 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.

Once the appointment is saved, attendees will receive an email appointment invitation and the appointment will appear on your calendar. When attendees accept or decline the appointment, you will also receive a notification email.

Checking the Availability of Attendees

SmarterMail users can check the availability of attendees prior to saving an appointment. This allows you to determine if there is a scheduling conflict and adjust the planned appointment time accordingly. If one or multiple attendees have a conflict with the date/time you are scheduling an appointment, this information will display in the Conflicts field of the new appointment window. To get more information on the specifics or the conflict or to check the availability of attendees, click the availability icon next to the Attendees field in the new appointment window.

Conference Room Scheduling

SmarterMail users also have the ability to select, and reserve, conference rooms. Just as with attendee availability, if a conference room is already reserved for a specific day and time an appointment 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.

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.

Appointment Invitations

Once the appointment is saved, attendees will receive an email appointment invitation and the appointment will appear on your calendar. If they are viewing the appointment invitation from their

SmarterMail webmail, they can click the Check Availability button to view their availability in a popup window.

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.