

Working with the Calendar for Meetings and Appointments

Describes in details the calendar for meetings and appointments in Smart Flow, the automatic appointment reminders, how you can add or delete the appointments, and how you can synchronize appointments between Smart Flow and MS-Outlook

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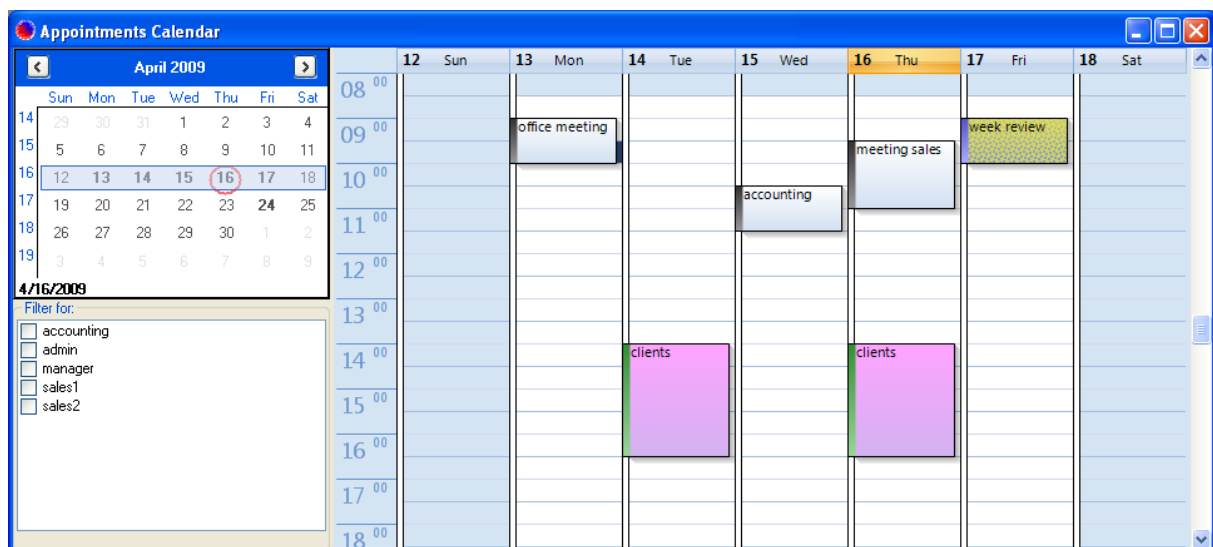
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Introduction

Smart Flow provides shared calendar for meetings and appointments, available to all users. It looks similar to the *MS-Outlook's* calendar, but it is multi-user. The calendar allows you to create multiple single or recurring appointments. You can set appointment reminders at a certain time before the appointments' start times. You can also relate each appointment to a work process.

Working with the Calendar

To inspect, manage or create new appointments, on the *Smart Flow* main screen select the menu *Manage / Appointments*, or press the button 'Appointments' on the toolbar. The *Appointments Calendar* screen will show up.



On the upper left part of the screen is displayed the calendar of the current month. The dates, on which there are scheduled appointments, are shown bold. The current week is pre-selected by default. You are free to select another date range, if you like to inspect the meetings and appointments scheduled for that period.

On the lower left part of the screen is displayed the filter of participants. If you like to view only the appointments, which have specific contact(s) participating in them, mark these contact(s) in the list.

On the right side of the screen is displayed the detailed day-by-day plan of appointments for the days in the specified date range. The appointments scheduled for each day are displayed in the corresponding day column within their specific start- and end-times. The background of each appointment has the color of its corresponding appointment category.

If you like to change only the subject of an appointment, click on the appointment on the right side of the *Appointments Calendar* screen. The subject of the selected appointment will become editable. Enter the new subject and then press *Enter* or click somewhere outside of the appointment. The subject of the appointment will be changed to the new one entered.

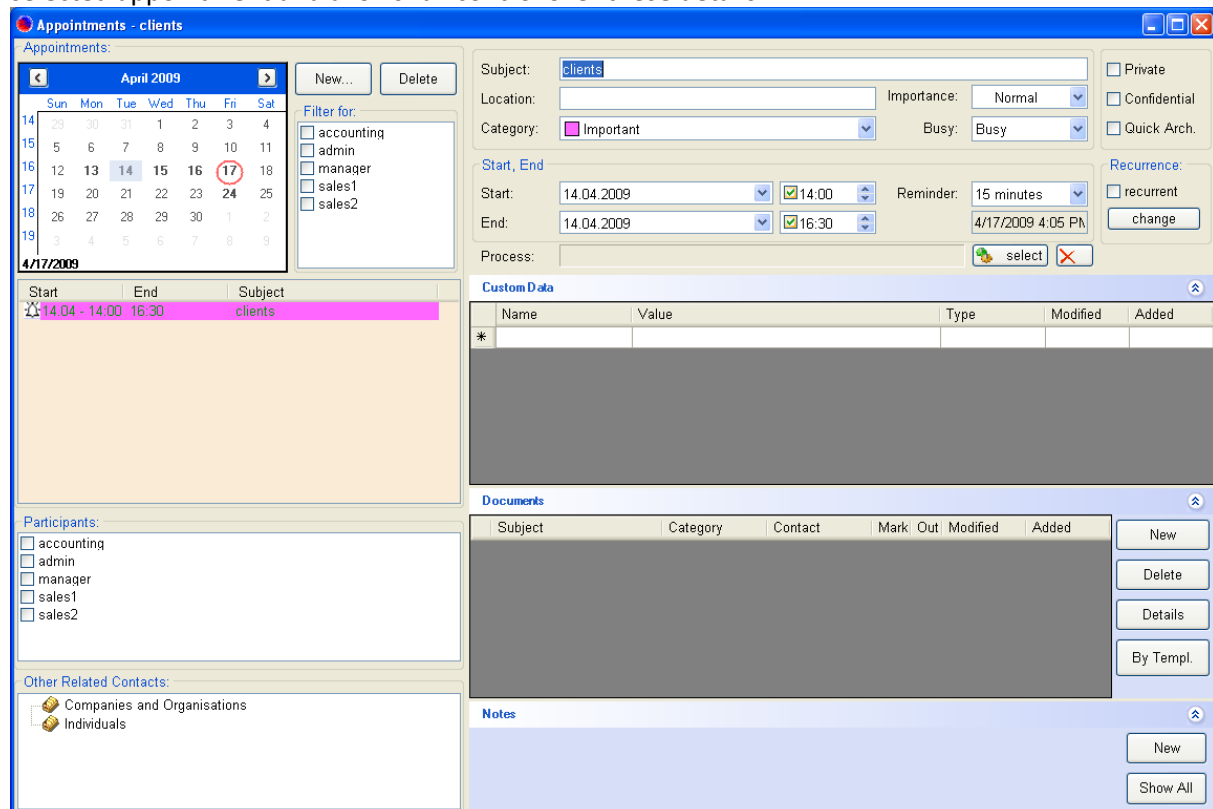
To move an appointment to another day or time, drag and drop the appointment to the appropriate day and time within the day-by-day plan on the right side of the *Appointments Calendar* screen. To

change the start or end time of an appointment, drag the top border (start time) or the bottom border (end time) of the appointment to the appropriate time.

If you like to inspect or change the details of an appointment, double click on it or right click on the appointment and select *View Appointment Details* from the context menu. The *Appointments* screen will show up.

The Appointments Screen

In contrast to the *Appointments Calendar* screen, the *Appointments* screen shows all details of the selected appointment and allows full control over these details.



On the upper left part of the screen is displayed the calendar of the current month. The dates, on which there are scheduled appointments, are shown bold. The date of the appointment, which has been selected on the *Appointments Calendar* screen, is selected by default. You can choose another date or date range, if you like to inspect the appointments scheduled for that date period.

Next to the calendar is displayed the filter of participants. If you like to view only the appointments, which have specific contact(s) participating in them, mark these contact(s) in the list.

Below the calendar is displayed the list of the appointments scheduled for the selected date or date range. The appointment, which has been selected on the *Appointments Calendar* screen, is selected by default.

Below the list of appointments is displayed the list of the available participant-contacts for the currently selected appointment. The contacts which participate in it are marked. Marking the participants for an appointment is not mandatory, but this could provide useful information and reminders to these participant-contacts. Below the list of the participants is displayed the list of other related contacts, if any.

On the right side of the screen are displayed the details of the currently selected appointment, including its subject, location, category, importance, etc. Below these details are displayed the start and end dates and times of the appointment. Next to them is displayed the reminder time for the currently selected appointment. You can change it as needed or turn off the reminder.

If the appointment is a recurring appointment, the *recurrent* check-box is marked. If you like to inspect or change the recurrence pattern of the appointment, press the button *change* below the *recurrent* check-box.

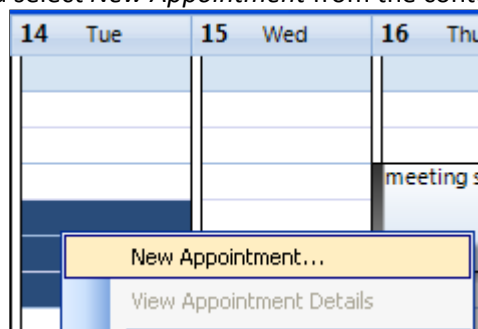
Each appointment could have a relation to a work process. The related work process (if any) is displayed as a hyperlink on the *Process* field. You can change the related work process by using the button *select* located next to the *Process* field. If you like to remove the relation between the currently selected appointment and its related work process, press the button with the red X, located on the right of the *Process* field.

The check boxes *Private* and *Confidential* control the user access to the selected appointment. The private appointment is available only to the user that has created it. The confidential appointment is available to the users that have permissions to see confidential information.

Below the details of the currently selected appointment are displayed the panels *Custom Data*, *Documents* and *Notes*. You can use these panels to specify additional data or information concerning the currently selected appointment.

Adding a New Appointment

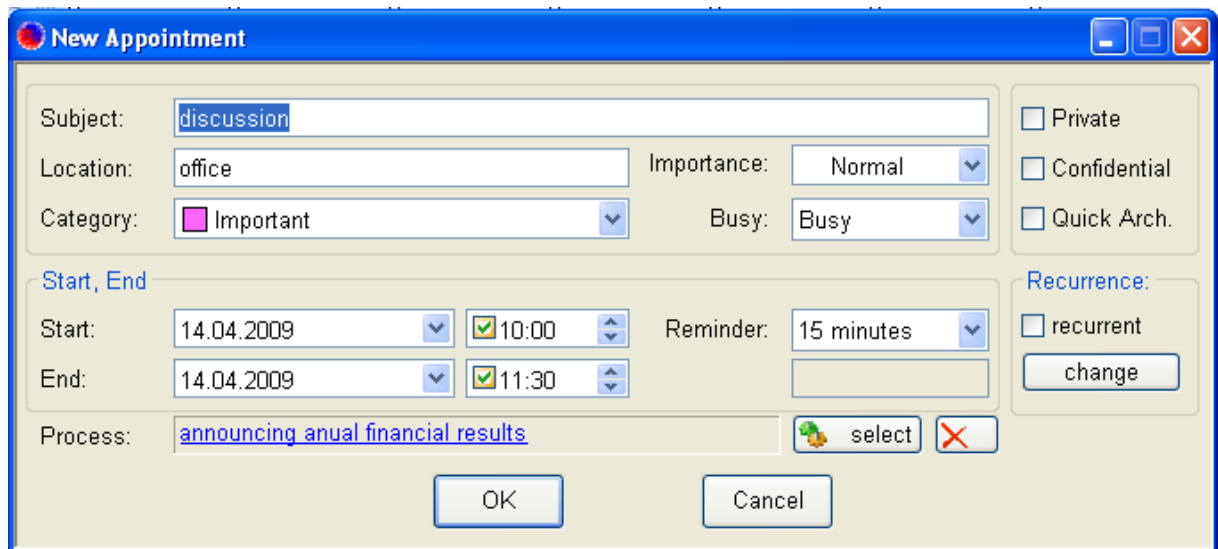
To create a new appointment, on the *Appointments Calendar* screen, select the needed time range within the respective day on the right side of the screen. Then right click on the selected time range and select *New Appointment* from the context menu. The *New Appointment* dialog will show up.



On the field *Subject* enter the subject of the appointment. On the field *Category* select the category of the appointment. If needed enter also the location of the appointment. The start and end dates and times are preset to the date and time-range previously selected, but you can change them if needed. If the appointment is an all-day event, clear the check-boxes in front of the time values.

Pay attention to the field *Reminder*. The default reminder time for all new appointments is 15 minutes. You can change the appointment's reminder time or turn off the reminder, as needed.

The check boxes *Private* and *Confidential* control the user access to the selected appointment. The private appointment is available only to the user that has created it. The confidential appointment is available to the users that have permissions to see confidential information.



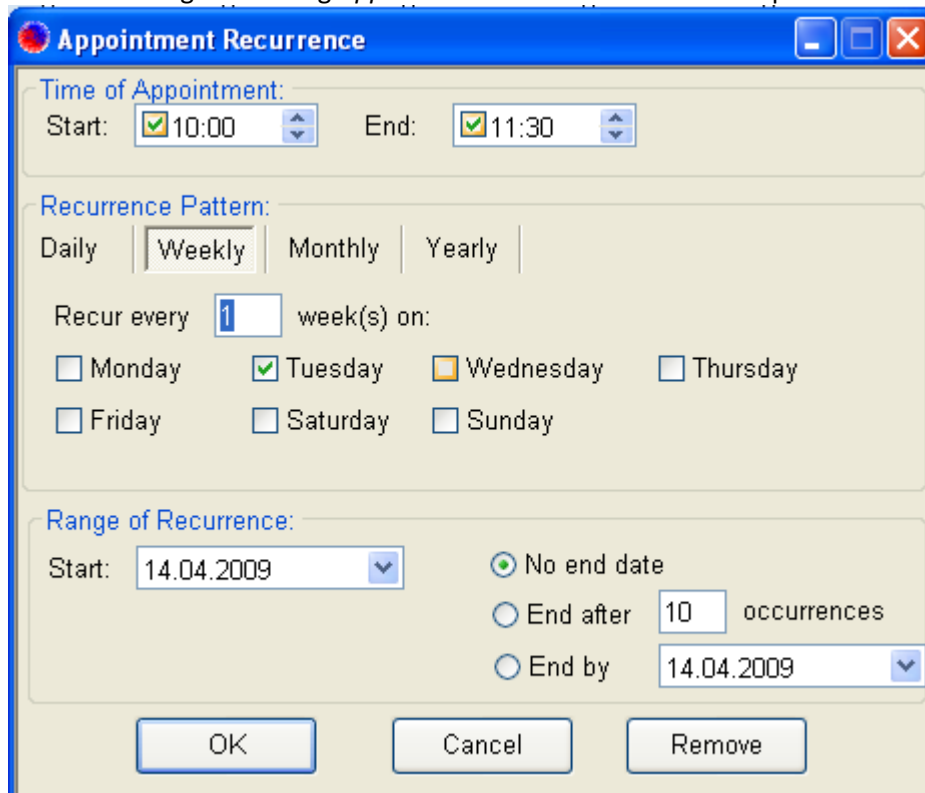
Relating an Appointment to a Work Process

If you are willing to relate the appointment to a work process, press the button *select* located next to the *Process* field. The dialog *Select Process or Step* will show up. Select a work process from the list of available processes and press the button *OK*. The selected work process will be related to the appointment and will be displayed on the *Process* field.

To remove the relation between the appointment and the work process, press the button with the red X located on the right of the *Process* field.

Making an Appointment Recurrent

To make the appointment recurrent, mark the check-box *recurrent* on the lower right part of the *New Appointment* dialog. The dialog *Appointment Recurrence* will show up.

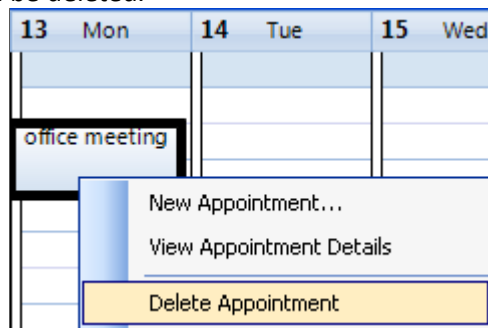


The start and end time of recurring appointment are set by default to the start and end time of the appointment, but you can change these times as needed. Select the needed recurrence pattern and set the pattern specific settings. The appointment can recur daily, weekly, monthly or yearly. If you want to limit the appointment recurrence to a date range, specify the recurrence start date, and optionally the end date or the number of the appointment occurrences. Finally press the button *OK*.

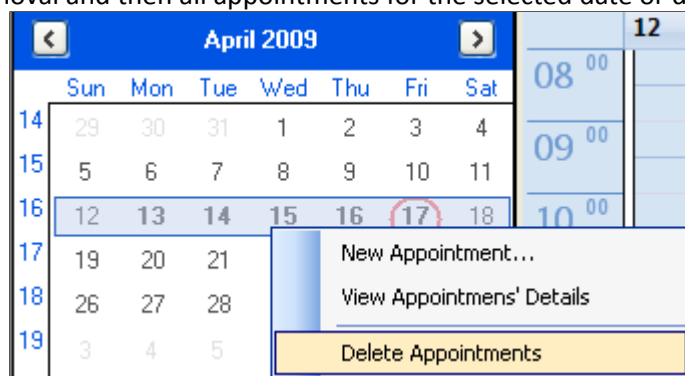
To change the recurrence pattern of the appointment, press the button *change* located below the check-box *recurrent*. To remove the recurrence pattern of the appointment, clear the check box *recurrent*, or press the button *change* to open the *Appointment Recurrence* dialog and then press the button *Remove*. Then the appointment will become once again a non-recurring appointment.

Deleting an Appointment

To delete an appointment, on the *Appointments Calendar* screen, right click on the appointment and select *Delete Appointment* from the context menu. Confirm the removal and then the appointment will be deleted.

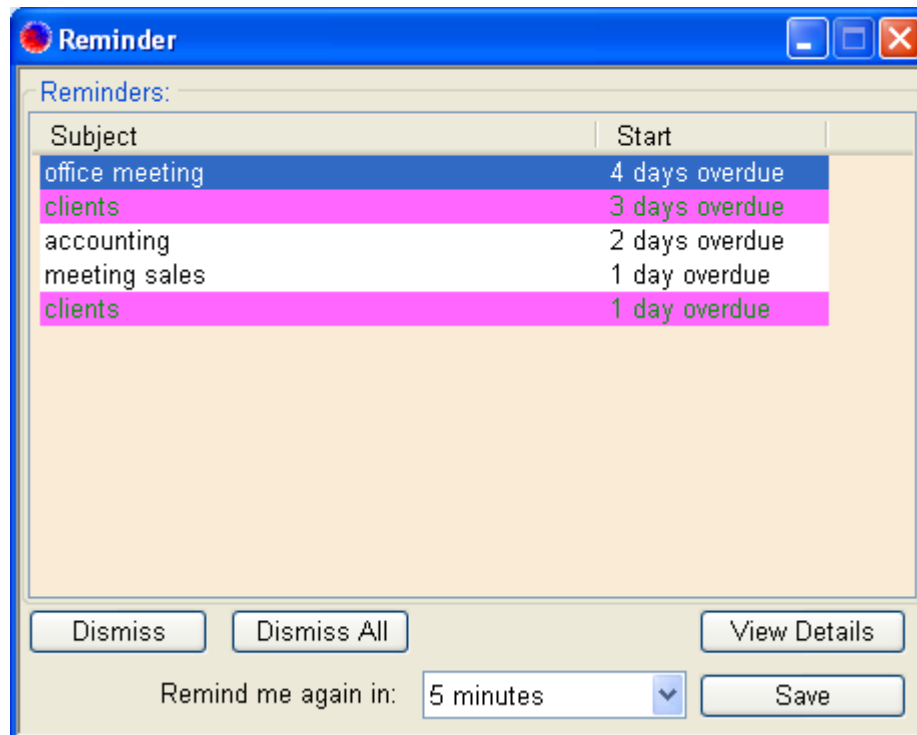


To delete all appointments for a date or a date range, select the date (or the date range) on the calendar located on the upper left part of the *Appointments Calendar* screen, right click on the selected date (or date range) and select *Delete Appointments* from the context menu. Confirm the removal and then all appointments for the selected date or date range will be deleted.



The Reminder Dialog

Smart Flow tracks all appointments depending on their specific reminder times. The appointments, which have their reminders turned off, are not tracked. For all other appointments, when their corresponding reminder times pass, they are being queued for a reminder. This includes also the appointments, which have not been yet dismissed. When there are appointments in the reminder-queue, the *Reminder* dialog shows up.



The dialog displays the list of pending appointments, along with the time to their corresponding start time or the delay after it. The background of each appointment in the list has the color of its corresponding appointment category.

If you like to inspect the details of an appointment in the list, select the appointment and press the button *View Details*. The dialog *Appointment Details* will show up, displaying the details of the selected appointment.

To delete (dismiss) an appointment and stop further reminders for it, select the appointment in the list and press the button *Dismiss*. To delete all appointments in the list and stop further reminders for them, press the button *Dismiss All*.

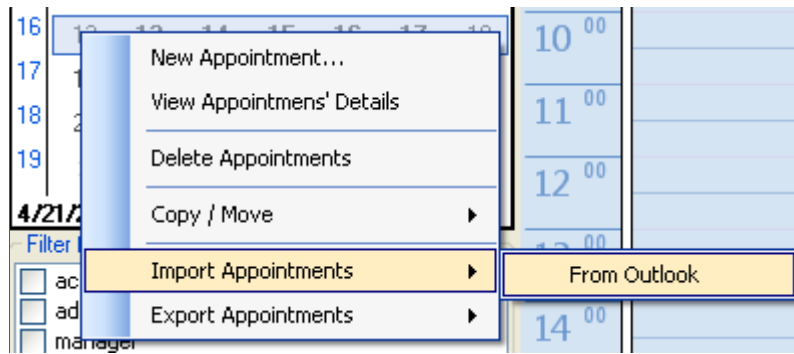
To reschedule the reminder for an appointment, select the appointment in the list, select the proper time on the field *Remind me again in* and press the button *Save*. To reschedule the reminders for all appointments in the list, select the proper time on the field *Remind me again* and close the *Reminder* dialog.

Synchronizing with MS-Outlook Calendar

Smart Flow provides two useful utilities – one to import existing *MS-Outlook* appointments in order to save the manual entry of the same appointments' data, and the other - to export the appointments' changes back to *MS-Outlook*. The both utilities make up a way to synchronize the changes in appointments' data between *Smart Flow* and *MS-Outlook*.

Importing Appointments from MS-Outlook

To import a list of appointments from *MS-Outlook* to *Smart Flow*, on the *Appointments Calendar* screen, right click on the calendar or on the day-by-day plan of appointments on the right side of the screen and select *Import Appointments / From Outlook* from the context menu. The *Import Appointments from Outlook* dialog will show up.

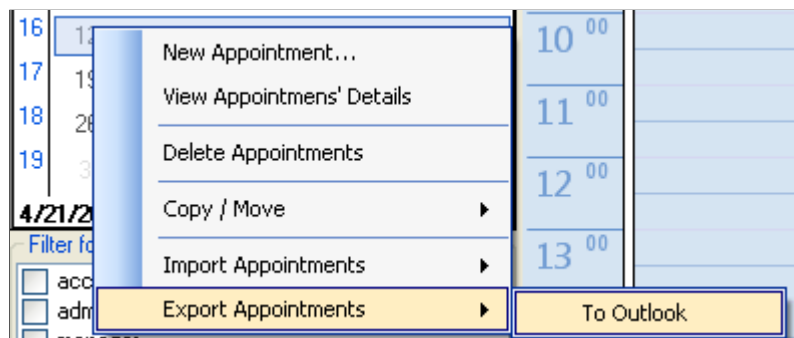


Ensure that all appointments that need to be imported into *Smart Flow* are marked, and then press the button *Import*. The marked appointments will be imported as *Smart Flow* appointments.

You can import the same *MS-Outlook* appointments multiple times. If an appointment already exists in *Smart Flow*, it won't be duplicated during the subsequent imports. Only the changes made to the appointment's data in *MS-Outlook* will be reflected to the corresponding *Smart Flow* appointment's data.

Exporting Appointments to MS-Outlook

To export a list of appointments (or changes of the appointments' data) from *Smart Flow* to *MS-Outlook*, on the *Appointments Calendar* screen, right click on the calendar or on the day-by-day plan of appointments on the right side of the screen and select *Export Appointments / To Outlook* from the context menu. The *Export Appointments to Outlook* dialog will show up.



Ensure that all appointments that need to be exported to *MS-Outlook* are marked, and then press the button *Export*. The marked appointments will be exported to the corresponding *MS-Outlook* appointments.

You can export the same *Smart Flow* appointments multiple times to *MS-Outlook*. If an appointment already exists in *MS-Outlook*, it won't be duplicated during the subsequent exports. Only the changes made to the appointment's data in *Smart Flow* will be reflected to the corresponding *MS-Outlook* appointment's data.