

Scheduler/Day Planner

The Day Planner is divided into 3 sections where you can view your appointments; the day tab, the week tab and the month tab. There is also an All Day Event area where you can schedule appointments or events that would typically last the entire day. You are able to view your calendar as well as the calendars of those contacts to which you have access. You are also able to send appointments to other users for acceptance into their calendars.

To access the **Day Planner** area if you are in the Tab view simply click on the **Day Planner** tab, if you are in the Special view simply click on the large **Day Planner** button on the left.

To Add a New Appointment/Event

Note: The Event section is an area where you can record events that would typically last the entire day but not occupy a specific block of time. These would be things such as birthdays, vacations, anniversaries, etc.

To add a new appointment/event to the database use the following steps:

1. In any of the views find the day you would like to schedule the appointment/event for.
2. If you are in the day or week tab select the time you wish to schedule by left clicking and dragging your mouse over the appropriate time blocks. If you are in the month tab you will have to add the times afterwards.

Note: If you are scheduling a smaller block of time than you can select with your mouse you will have to select the smallest amount of time you can and adjust the time when you add the details of the appointment

Note: If you are adding a new event you do not have to select any time blocks because events are not time dependent.

3. Right click and select **New Appointment/New Event** to access the following screen:

4. Fill out the appropriate information for the appointment you are adding. (Continued Below)

Description/Location/Notes

The description, location and notes fields are for your reference. The description and location fields will appear on the main screen. The notes will not.

Start Time and Stop Time

Appointments

Generally, the time that you wish to schedule an appointment for is selected before you click on **New Appointment**, thus defaulting the selected time into the start time and stop time fields. If however you would like to change the selected time after you have clicked on **New Appointment** you may do so by simply adjusting the two fields.

Events

The start time and stop time will be the date of the event you are adding. Because events are not time dependant if the time does display it will default to 12:00am.

Show Space As

The **Show Space As** field is used to indicate how you would like your scheduled time to appear to other users that have access to your calendar. When giving users access to your calendar there are 3 options: none, available time only, full. The **Show Space As** field only applies to users that have access to available time only. Based on the option you select in the **Show Space As** field the appointment will display differently to other users viewing it. If **Busy** or **Tentative** is selected the space will appear as unavailable to the other user and will specify busy or tentative but no other information will be given. If **Full Detail** is selected the other user looking at your calendar will be able to see all details of the appointment. If **Available** is selected the time will appear to the other user a simply unscheduled.

Folder Group

The folder group allows you to put an appointment into a folder group that you have already set up (Options and Preferences). If you have put your appointments into folders you are able to group and sort by your folders on the screen.

Categories

You are able to put your appointments into different categories that you have already set up (Options and Preferences) so that you are able to search by them in the find area

Contact

You are able to assign an appointment to an Address Book contact. This is especially useful when dealing with clients. If you do assign an appointment to a contact the appointment will show up in the calendar module as well as on the Journal Entries tab of the contact information card in the Address Book.

Repeating an Appointment/Event

To make an appointment a repeat appointment click on the **Repeat** tab at the top of the appointment screen. You will then have 4 options:

Day/Week

If you would like your appointment to repeat every number of weeks on a particular day use the following steps:

- A. Click on the **Day/Week** button on the repeat screen.
- B. Select how often you would like the appointment to repeat on a weekly basis.
- C. Select which day of the week you would like the appointment to repeat on.

Note: The day you would like the appointment to repeat on does not have to be the same as the day you are entering the appointment for. For example, if you entered an appointment on a Wednesday and selected Friday to have the appointment to repeat, the original appointment would occur on Wednesday as you specified but the following repeated appointments would continue on Fridays.

The day selection however, defaults to the day you are adding the appointment for. If you would like it to repeat on a different day be sure to uncheck the defaulted option or the appointment will repeat on both days.

- D. If you know the date you would like to stop the repeated appointment check **Stop Repeat** and enter the appropriate date.

Month

If you would like your appointment to repeat on a monthly basis use the following steps:

- A. Click on the **Month** button on the repeat screen.
- B. Select how often you would like the appointment to repeat on a monthly basis.

Note: The appointment will be repeated on the same date as the original appointment for the month frequency you select.

- C. If you know the date you would like to stop the repeated appointment check **Stop Repeat** and enter the appropriate date.

Year

If you would like your appointment to be repeated on a yearly basis use the following steps:

- A. Click on the **Year** button on the repeat screen.
- B. Select how often you would like the appointment to repeat on a yearly basis.

Note: The appointment will be repeated on the same date as the original appointment for the month frequency you select.

- C. If you know the date you would like to stop the repeated appointment check **Stop Repeat** and enter the appropriate date.

Special

If you would like to repeat an appointment that is not date dependent use the following steps:

- A. Click on the **Special** button on the repeat screen.
- B. Select how often and on which day of the week you would like your appointment to repeat.
- C. Select how often you would like the appointment to repeat on a monthly basis.
- D. If you know the date you would like to stop the repeated appointment check **Stop Repeat** and enter the appropriate date.

Generating an Appointment Alert

UVC allows you the option to be alerted for an appointment using different ways at the time and date of your choosing. To set-up an alert for your appointment click the **Alert** tab at the top of the appointment screen, click on the **Date/Time Alert** button and fill out the appropriate fields.

Date

This is the date and time that the appointment will be sent. If this is a repeat appointment you only need to put the date and time of the initial alert and UVC will generate the repeat alerts automatically based on the difference between the repeat date and the alert date.

Email

If you want your alert to be sent via email then tick off this box and enter the email address(es) you want this alert to be sent to.

Mobile

If you want your alert to be sent to your cell phone then tick off this box and enter your mobile phone notification email address(es). Please check with your mobile provider to see if this option is available for you.

UVC Instant Message

If you want your alert to be sent using a UVC instant message then just tick off this checkbox.

Warning: Alerts will only be sent if they are at least 15 minutes into the future.

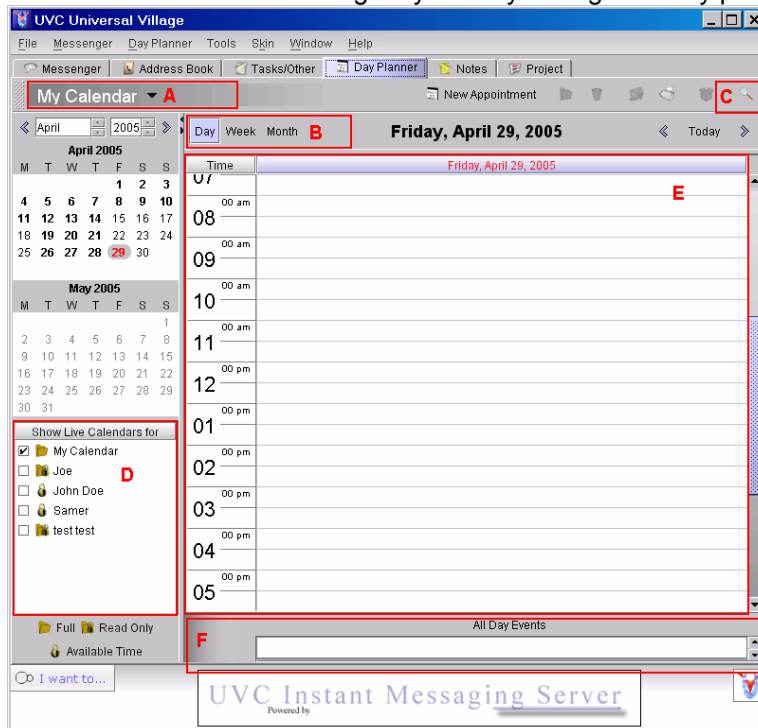
Details Tab

In this tab you are able to view who the owner of the appointment is as well as the appointments status.

- (Continued from Above) After entering the appropriate information you can now add the appointment into the database. You can do this by clicking on **Save and Close**.

Navigating in the Day Planner Screen

The following is an explanation of the buttons used to navigate your way through the day planner:



A

This drop down menu is used to flip between your calendar and the calendars of contacts you have full access to.

B

To flip between the Day, Week and Monthly views use these buttons.

C

Toggles the search area on or off.

D

This area allows you to view calendars for other users that have given you access by placing a checkmark beside their name. You are able to view more than one user's calendar at once.

E

This area is where your scheduled appointments will appear

F

This area is where your scheduled events will appear.

Viewing Appointments/Events for Other Users

Other users are able to give you access to be able to view their appointments. If they have done this their name will appear in area D above. To be able to view appointments that other users have entered simply place a checkmark in the box beside the user that you would like to see the appointments for (area D above).

Working with Other Users Appointments/Events

If a user has given you full access to their calendar module you are able to add, delete and modify that users appointments. To be able to do this simply select the users name from the drop down list (area A above) and you will be able to see and work with all of their appointments.

Explanation of Colours and Symbols Used in the Day/Week Tab

The following explains what the colours and symbols used in the **Day** and **Week** tabs indicate.

Red Line above Appointment

If a time block appears with a Red line above it it indicates that this is a group appointment.

Day of the Week Heading

If the day of the week at the top of the column appears in Blue it indicates that there is a scheduled appointment somewhere on that day.

Note: This is of particular use in the weekly tab where, by default, not as many time blocks are displayed. If you see the Blue heading but cannot see the appointment simply scroll up or down until the appointment comes into view.

Time	Mon May 16	Tue May 17	Wed May 18	Thu May
05 00 am				
06 00 am				
07 00 am				
08 00 am			Meeting	
09 00 am		Golf		

Show Hidden Days Feature

You are able to select which days of the week you would like to show in the week and month views of the module. If you do not select to see certain days you can still get access to them in the module by clicking on a button called **Show Hidden Days**. This will show you at a glance all the days of the week, when you click the button again it will only show you the days you have selected in the setup.

To change your calendar work week display use the following steps:

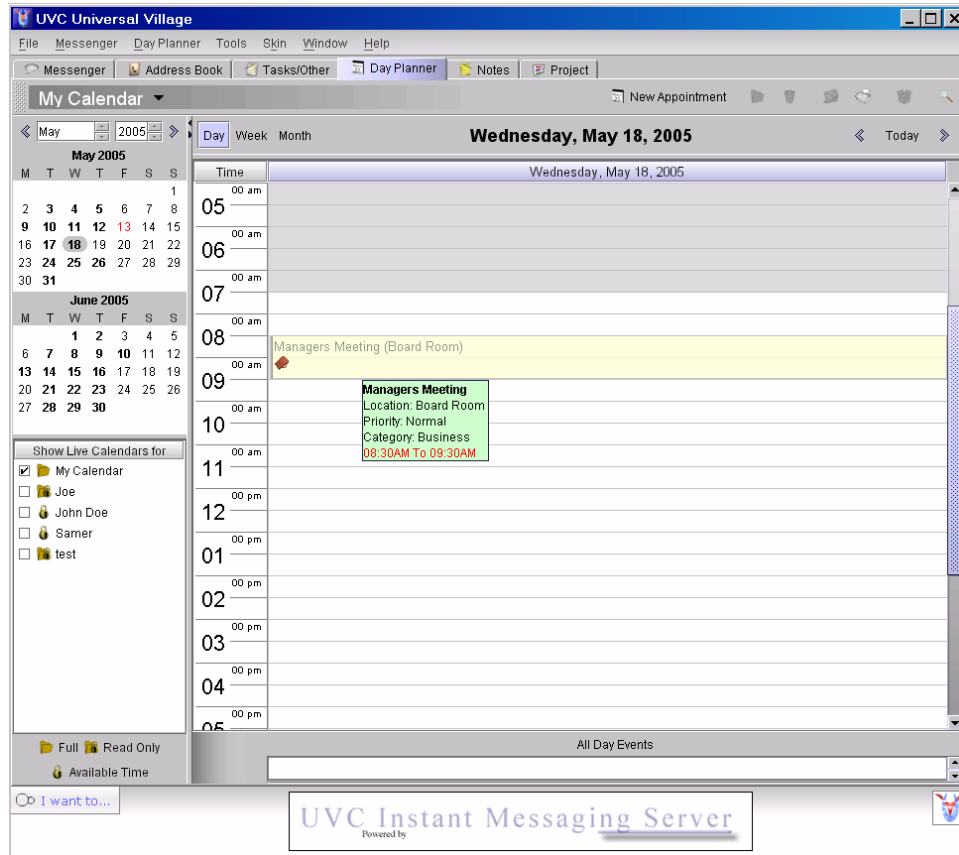
1. Click on the **File** menu and select **Options and Preferences** from the menu.
2. Click on **Calendar Options** under the **Calendar** heading.
3. In the Work Week box in the lower part of the screen place a checkmark beside all the days that you would like to work with in your calendar module by default. Keep in mind that even if you do not check certain days you can still get access to them periodically by clicking on the **Show Hidden Days** button in the calendar module.
4. Click on **Ok**.

Selecting/Viewing Multiple Days in the Day View

You are able to select multiple days to view at a time in the day view. The days that you view can be any that you wish and do not have to be in consecutive order. To view multiple days you can hold down the ctrl key on your keyboard and click on the days that you would like to view at the same time in the mini month calendar on the left of the screen. You should then see multiple days displayed in the main day view. Alternatively you can click and hold to select dates in the mini month calendar so that you are able to view multiple days at the same time. You are able to select as many days as you wish.

To View the Details of an Appointment/Event

To view more details of an appointment without having to edit/view the appointment you can hover your cursor on top of the appointment or event. You should then be able to see the details in a tooltip box.



To View/Edit an Existing Appointment/Event

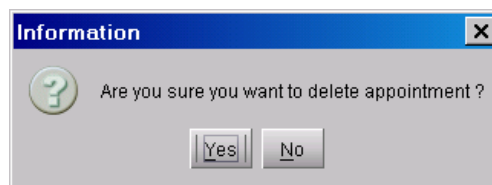
To view or edit an existing appointment's information use the following steps:

1. Find the appointment you would like to edit.
2. Double click on the appointment; you should then see the appointment's information.
3. If you are editing the information, make the necessary changes and click on **Save and Close**. If you have not made any changes but just wanted to view the information, simply click on the x in top right hand corner to close the window when you are finished.

To Delete an Appointment/Event

To delete an existing appointment use the following steps:

1. Find the appointment you would like to delete.
2. Right click on the appointment select **Delete...** from the menu. You should then get the following warning:



3. Click **Yes** to confirm delete.

Please exercise caution when deleting appointments. The action cannot be reversed.

Deleting Repeat Appointments/Events

When deleting repeat appointments you have 2 options. You are able to delete a specific instance of the repeat appointment or all of the repeat appointments. To delete a repeat appointment use the following steps:

1. Find one instance of the repeat appointment you would like to delete.
2. Right click on the appointment select **Delete...** from the menu. You will then get an option asking you if you would like to modify all instances or one instance. If you would only like to delete this specific appointment select one instance. If you would like to delete all of the repeat appointments select all instances.
3. If you are sure click on **Yes** to confirm delete.

Please exercise caution when deleting appointments. The action cannot be reversed.

Calendar Subscriptions

The Calendar subscription area allows you to integrate other calendars into your calendar view. These could be TV show schedules, holiday calendars, sport event schedules, etc. You can do this by subscribing to one of the calendars UVC has provided by default or by entering your own link to another type of calendar such as ical.

To Subscribe to a Calendar

To subscribe to a calendar use the following steps:

1. Click on the **File** menu and select **Options and Preferences** from the menu.
2. Click on **Calendar Subscriptions** under the **Calendar** heading.
3. Click on the **New Subscription** button.
4. Choose the type of subscription you would like from the drop down list. Once you have selected which one you want the program will automatically populate the Calendar URL and Description fields. If you want you can change the description field to whatever you wish. If you would like to enter your own type of calendar select **Other** from the list and enter the link in the Calendar URL field. You must then also populate the Description field with a description of the calendar.
5. Click on **Ok**.
6. If you are finished adding subscriptions click on **Ok** to close the window.

To Enable a Calendar Subscription

To view a calendar subscription simply place a checkmark beside the name of the subscription in the Show Live Calendars For area at the bottom left corner of the screen (area D above). You will now be able to see the schedule on the main screen. If you do not see the subscription you would like to view the calendar for you must enable it in the Options and Preferences area.

Viewing, Scheduling and Deleting Appointments/Events for Other Users

If other contacts have given you access you are able to work with their calendars as if they were your own (scheduling, deleting and viewing appointments).

To view, schedule and delete appointments for other contacts use the following steps:

1. Click the drop down menu at the top of the day planner screen where it says **My Calendar** and select the contact who's schedule you want to work with.
2. Once you've done that you are able to work with that calendar just as if it were your own. You can use the Day, Week or Month views and add appointments where needed.

Note: If the user you want to schedule an appointment for is not in the drop down menu it means that the user has not given you full access to their calendar.

Viewing Other Users Schedules

You are able to view the schedules of other users if they have given you access to do so. You can view multiple calendars at the same time (overlapping each other) which is very useful when trying to find a time slot where everyone is available to schedule a group meeting. To view the calendars of other users simply place a checkmark beside their name in the Show Live Calendars For area at the bottom left corner of the screen (area D above). You will now be able to see their schedule on the main screen. If you do not see the user you would like to view the calendar for in this area they have not given you access to view their calendar. They must go to their options and preferences and give you access.

To Send an Appointment/Events to Other Contacts/Adding Group Appointments

When adding an appointment you are able to send it to other contacts for acceptance into their calendars. This would be useful if you wanted to schedule a meeting for a group of people and wanted to send them an appointment that they could accept into their calendars to save them the trouble of entering it themselves. To do this use the following steps:

1. In any of the views find the day you would like to schedule the appointment for.
2. If you are in the day or week tab select the time you wish to schedule by left clicking and dragging your mouse over the appropriate time blocks. If you are in the month tab you will have to add the times afterwards.

Note: If you are scheduling a smaller block of time than you can select with your mouse you will have to select the smallest amount of time you can and adjust the time when you add the details of the appointment

3. Right click and select **New Group Meeting**.
4. Fill out the appropriate information for the appointment you are adding. (Continued Below)

Description/Location/Notes

The description, location and notes fields are for your reference and the reference of the users you are sending the appointment to. The description and location fields will appear on the main screen. The notes will not.

Start Time and Stop Time

Generally, the time that you wish to schedule an appointment for is selected before you click on **New Appointment**, thus defaulting the selected time into the start time and stop time fields. If however you would like to change the selected time after you have clicked on **New Appointment** you may do so by simply adjusting the two fields.

Auto Create Appointment on all Selected Calendars with Write Access

This feature allows you to automatically add a group appointment to a user's calendar that you have full access to. For this feature to work you must have that users calendar selected (placed a checkmark beside their name in the bottom left of the screen). If you choose to use this feature it will not ask the user for acceptance into their calendar it will just add the appointment.

Auto Send Invitations for all Selected Calendars

This feature will automatically send an invitation for a group appointment to all the users that you have selected calendars for (placed a checkmark beside their name in the bottom left of the screen) and will ask them for acceptance into their calendars.

Show Space As

The **Show Space As** field is used to indicate how you would like your scheduled time to appear to other users that have access to your calendar. When giving users access to your calendar there are 3 options: none, available time only, full. The **Show Space As** field only applies to users that have access to available time only. Based on the option you select in the **Show Space As** field the appointment will display differently to other users viewing it. If **Busy** or **Tentative** is selected the space will appear as unavailable to the other user and will specify busy or tentative but no other information will be given. If **Full Detail** is selected the other user looking at your calendar will be able to see all details of the appointment. If **Available** is selected the time will appear to the other user a simply unscheduled.

The folder group allows you to put an appointment into a folder group that you have already set up (Options and Preferences). If you have put your appointments into folders you are able to group and sort by your folders on the screen.

Categories

You are able to put your appointments into different categories that you have already set up (Options and Preferences) so that you are able to search by them in the module.

Contact

You are able to assign an appointment to an Address Book contact. This is especially useful when dealing with clients. If you do assign an appointment to a contact the appointment will show up in the calendar module as well as on the Journal Entries tab of the contact information card in the Address Book.

Repeating an Appointment

To make an appointment a repeat appointment click on the **Repeat** tab at the top of the appointment screen. You will then have 4 options:

Day/Week

If you would like your appointment to repeat every number of weeks on a particular day use the following steps:

- A. Click on the **Day/Week** button on the repeat screen.
- B. Select how often you would like the appointment to repeat on a weekly basis.
- C. Select which day of the week you would like the appointment to repeat on.

Note: The day you would like the appointment to repeat on does not have to be the same as the day you are entering the appointment for. For example, if you entered an appointment on a Wednesday and selected Friday to have the appointment to repeat, the original appointment would occur on Wednesday as you specified but the following repeated appointments would continue on Fridays.

The day selection however, defaults to the day you are adding the appointment for. If you would like it to repeat on a different day be sure to uncheck the defaulted option or the appointment will repeat on both days.

- D. If you know the date you would like to stop the repeated appointment check **Stop Repeat** and enter the appropriate date.

Month

If you would like your appointment to repeat on a monthly basis use the following steps:

- A. Click on the **Month** button on the repeat screen.
- B. Select how often you would like the appointment to repeat on a monthly basis.

Note: The appointment will be repeated on the same date as the original appointment for the month frequency you select.

- C. If you know the date you would like to stop the repeated appointment check **Stop Repeat** and enter the appropriate date.

Year

If you would like your appointment to be repeated on a yearly basis use the following steps:

- A. Click on the **Year** button on the repeat screen.

- B. Select how often you would like the appointment to repeat on a yearly basis.

Note: The appointment will be repeated on the same date as the original appointment for the month frequency you select.

- C. If you know the date you would like to stop the repeated appointment check **Stop Repeat** and enter the appropriate date.

Special

If you would like to repeat an appointment that is not date dependent use the following steps:

- A. Click on the **Special** button on the repeat screen.
- B. Select how often and on which day of the week you would like your appointment to repeat.
- C. Select how often you would like the appointment to repeat on a monthly basis.
- D. If you know the date you would like to stop the repeated appointment check **Stop Repeat** and enter the appropriate date.

Generating an Appointment Alert

UVC allows you the option to be alerted for an appointment using different ways at the time and date of your choosing. To set-up an alert for your appointment click the **Alert** tab at the top of the appointment screen, click on the **Date/Time Alert** button and fill out the appropriate fields.

Date

This is the date and time that the appointment will be sent. If this is a repeat appointment you only need to put the date and time of the initial alert and UVC will generate the repeat alerts automatically based on the difference between the repeat date and the alert date.

Email

If you want your alert to be sent via email then tick off this box and enter the email address(es) you want this alert to be sent to.

Mobile

If you want your alert to be sent to your cell phone then tick off this box and enter your mobile phone notification email address(es). Please check with your mobile provider to see if this option is available for you.

UVC Instant Message

If you want your alert to be sent using a UVC instant message then just tick off this checkbox.

Warning: Alerts will only be sent if they are at least 15 minutes into the future.

5. (Continued from Above) Once you have added all the details to the appointment you can invite the attendees. Click on the **Attendees** tab at the top of the new group appointment screen.
6. Click on **Invite New**.
7. Place checkmarks beside the users that you would like to invite and click on **Ok**.
8. After entering the appropriate information you can now add the appointment into the database. You can do this by clicking on **Save and Close**. You will then get a message saying that your invitations have been sent.

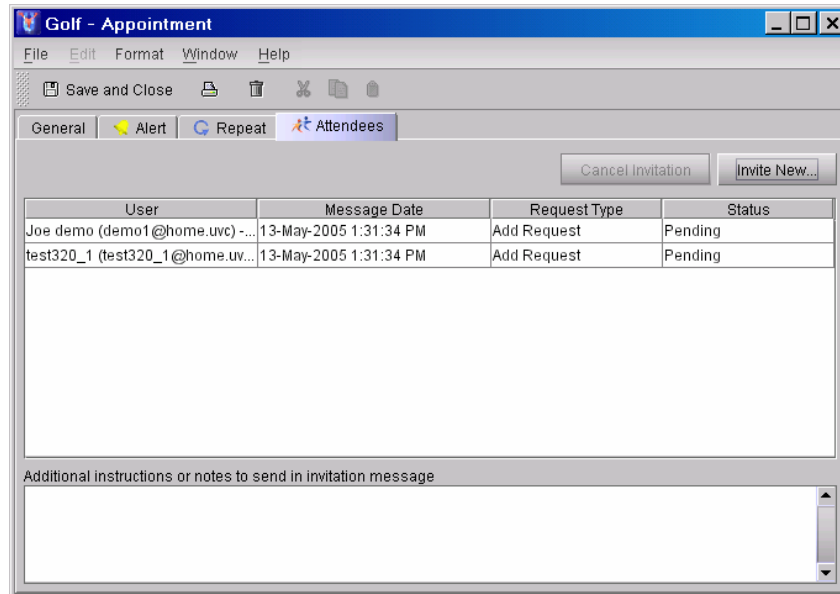
The contact you have sent the appointment to will now receive a request to accept or decline the appointment.

How to Tell When Your Sent Group Appointments/Events are Accepted or Declined

After an appointment has been sent to other contacts they will receive a request for the appointment with an option to accept or decline.

Once they have accepted or declined the appointment, that information will be transmitted back to you in a UVC instant message.

You can also check the approval status of an appointment by right clicking on it and selecting **Invitees/Acceptance Status**. You should then get the following window which will list all the attendees of this event and show the acceptance status of each user.



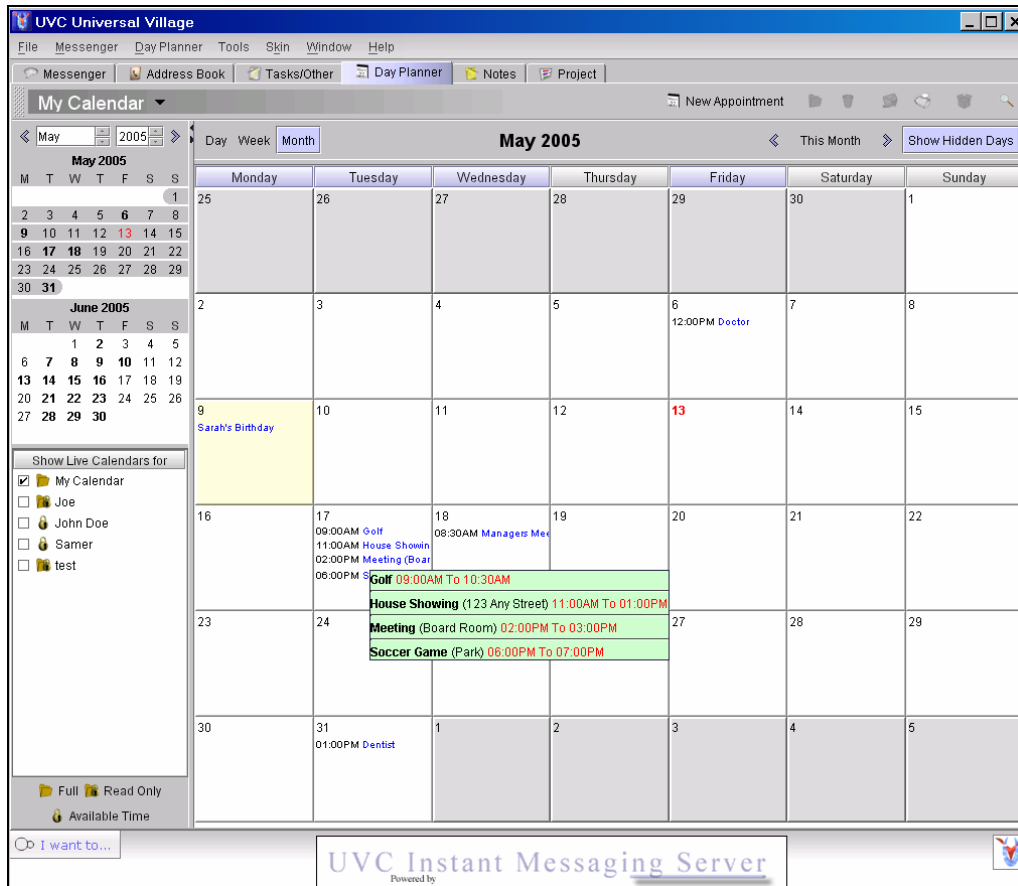
Modifying and Deleting Group Appointments/Events

UVC gives you the ability to modify or delete group appointments and events (if you have proper access). To change or delete a group appointment or event simply modify the appointment (or delete it) and UVC will automatically know that this is a group appointment and ask you if you would like to send an update request to the other users who are part of the appointment. They will then receive the request to change the appointment and will be able to accept or decline the new time. You will likewise be able to see the new acceptance status of the revised appointment.

The Month Tab

To View the Details of an Appointment

To view the details of an appointment in the month tab put your cursor on top of the appointment or event. You should then be able to see the details in a tooltip list.



To Jump to a Specific Day from the Month Tab

To jump to a specific day from the month tab simply double click on the day. You should then be moved to the daily tab for the day you have double clicked on.

Print

You are able to print 5 reports from the Calendar Module. The Day, Week and Month reports as well as the Calendar Table List and the Calendar Detail report. To print the reports use the following steps:

1. Go to the **File** menu on the top menu bar.
2. Select **Print** from the menu.
3. The available reports will be listed on the left hand side of the screen on the Calendar heading. Select the report you wish to print.
4. Once you select your report you will have various options available on the right hand side of the screen. Select the options you would like. The day week and month reports will print reports for each of those time blocks in the format shown on the screen in UVC (calendar layout format). The Calendar Table List report will print appointments that you have searched for in the calendar module and put them on the report in a list format that shows them exactly as you have your screen laid out with the appointments you have searched for, the layout of the columns and the sorting of the columns. If you want to use this report it is best to layout your screen they way you would like it to show before you go into the print menu. The Calendar Detail report will show the appointments that you have for the selected time period in a list format on the report with all the details of the appointment.
5. Select the type of Output you would like to use from the top of the screen. You are able to choose **Screen**-shows you a print preview, **Printer**-prints to paper, **HTML File**-creates and HTML file or **Adobe PDF**-creates a PDF file.
6. Click on **Ok**.