



# Calendar

Help Documentation

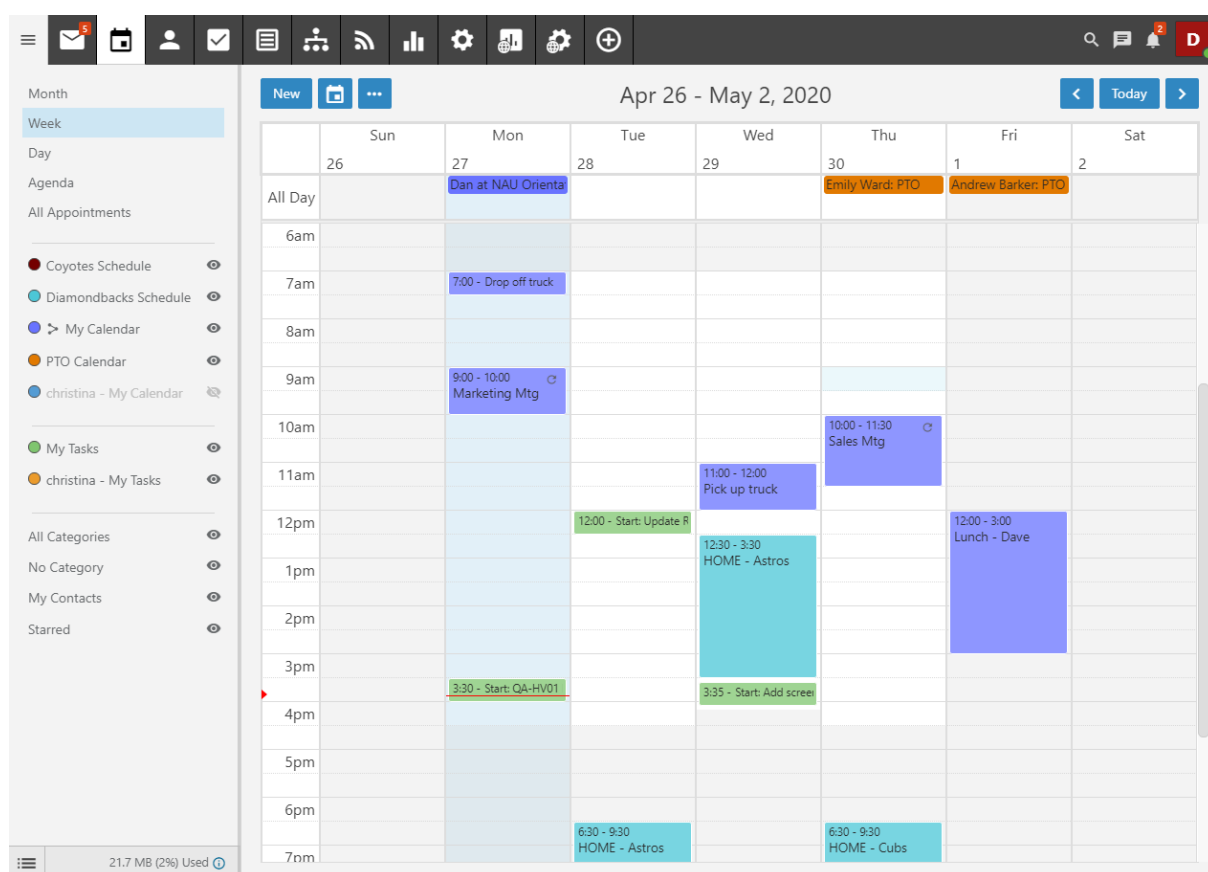
# Calendar

## Calendar Overview

SmarterMail's calendar feature takes the burden out of organizing your schedule and is accessible simply by using a standard web browser on any desktop, laptop or mobile device. SmarterMail's calendar system is extremely flexible and includes many options that make it easy to keep track of important events, including:

- The 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.
- Attendee availability information.
- Integration with Outlook.

To access your calendar, click the Calendar icon. By default, when you first access your calendar, the Agenda view will be displayed. However, when you close your browser, SmarterMail will store which view you were last using, then open that view the next time you open your calendar. If you delete browser cookies, the calendar view will reset to the Agenda view. To view multiple calendars or tasks at once or to toggle between views, simply click the eye icon next to the resource you want to show/hide. The options available are based on a user's personal calendars and task list PLUS any shared calendars, task lists or conference rooms that have been shared with you and subsequently mapped to your calendar.



## Navigating Your Calendar

When you view your SmarterMail calendar, you will generally see the Agenda view, which presents 2 weeks' worth of events, in list form, starting with the current day. You can change your view at any time, and SmarterMail will remember which view you last used, so it's there when you log back in. Essentially, there are five (5) different Views that toggle between the different ways that SmarterMail displays your events:

- **Month** - The monthly view displays all appointments and tasks scheduled for the month, with the current day highlighted. It serves as an at-a-glance type of calendar that outlines a general idea of the upcoming events over the next 30 days.
- **Week** - 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.
- **Day** - 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.
- **Agenda** - The Agenda view mimics the Month view, but instead of displaying all appointments and events as a calendar, a rolling 14 days is presented in list form, starting with the current day. Shared calendars and resources can be shown or hidden, and the list can then be printed out and handed to a personal assistant or other individual.

- All Appointments - The All Appointments view displays all events in your calendar, each on its own line. Every event and appointment is listed only once: recurring tasks are denoted with a check mark in the "Recurring" column. The All Appointments view makes it easier to find appointments and events as virtually everything in your calendar is listed in one area and easily searchable. NOTE: Tasks, availability-only shared calendars and conference rooms are not displayed in the All Appointments view.

There are a few ways to distinguish between the various types of appointments and events:

- Each calendar source has its own color, so you can easily distinguish which calendar the event belongs to.
- All-day appointments only appear at the very top of your calendar view.
- Recurring events are denoted with a curved arrow in the right corner of the appointment listing.

In general, the following options are available when viewing calendars:

- New - Creates a new appointment.
- Choose Date - Allows you to select a specific day, then go to that day.
- Actions (...) -
  - Add to Outlook - Select Add to Outlook to import all calendar appointments to Microsoft Outlook for Windows. Note: Add to Outlook is not available for Outlook for Mac.
  - Subscribe to Calendar - This allows you to subscribe to internet/web calendars, such as a sports teams's schedule, the payroll calendar from your payroll provider, a holiday calendar you find on the internet and more.
  - Import ICS File - An ICS file is a calendar file that's saved in a universal format that can be used in several email and calendar programs, including Microsoft Outlook, Google Calendar and Apple Calendar. When moving from one of these applications, SmarterMail can import your existing ICS so you'll have any and all events and appointments set up in your previous calendar app.
  - Print - Prints the data displayed in the current calendar view.
  - Day/Week/Month Navigation - At the top, right of the calendar view are Previous and Next arrows that allow you to move your view forward and backward. That means, to the previous/next day, week or month, depending on which view you're using. There is also a "Today" button that returns you to the the current day, or to the week or month where the current day is located.

## 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 do this by simply selecting the calendar item. Doing so opens the item in a pop out window, giving you all of the information about the appointment. This includes information like the list of attendees, a description of the event (if one was written), the event's location and much more.

## Shared Calendars

SmarterMail gives users the ability to share their primary or secondary calendars with others who share the same domain name. Shared calendars -- whether you've shared them or they're shared with you -- are automatically "mapped" to the people they're shared with. So nothing needs to be done once a calendar is shared.

Shared calendars appear under the Calendar View area. By default, each user has a personal calendar called "Calendar." This is where you create your appointments. You have the ability to share this calendar with others, or you can create additional calendars and share those as well. Any calendars shared with you will also appear in this list. For more information on how to share your calendar, or map to a shared calendar, take a look at the Shared Resources page in this help documentation.

## Shared Tasks

Just as with Calendars, SmarterMail gives users the ability to share their tasks with others on the same domain. In addition, users can "map" tasks that others share. The difference is that tasks do not necessarily need to appear in your calendar. The ability to display task start and end dates, as well as completed tasks, is set in the Calendar Settings area.

If tasks are set to display in your calendar, then Tasks, the default task list created for you, and any shared and mapped tasks, appear under the Shared Calendars area. For more information on how to share your tasks, or map to shared tasks, take a look at the Shared Resources page in this help documentation. Please Note: Even though tasks may be displayed in your calendar, if you are syncing your calendar with a desktop and/or mobile email client, the task will not show up on your calendar. Instead, they will generally be considered notifications and will display in mobile and/or desktop clients accordingly.

## Improving Calendar Responsiveness

For the best calendaring experience, a user's calendar files should not exceed 3 - 4MB. SmarterTools

recommends that users enable Calendar Auto-Clean to keep past calendar events from cluttering up their calendar views and exceeding the recommended size limit.

System Administrators can set the default Calendar Auto-Clean setting for a domain within the domain's configuration settings. The User Defaults template can then set a user's Calendar Auto-Clean setting to use that Domain Default or set it to Never, 3 Months, 6 Months or 12 Months. Domain Administrators may also modify this setting per user in the user's configuration options.

Please note that although System and Domain Administrators can enable Calendar Auto-Clean for a user by default, the user may still adjust the setting or turn it off within their Calendar Settings. Therefore, it is important to monitor user' calendar files periodically and contact users that are exceeding the recommended limit.

## Creating New Calendar Appointments

It's very easy to create a new calendar appointment in SmarterMail:

- Tap the New button, or
- Tap on the day/time you want to create the event in your calendar. Alternatively, you can tap anywhere in your calendar, then change the day/time as needed.

Regardless of how you decide to do it, creating a new event pops-out the new event window.

### 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 handled by a few different cards:

#### Appointment

The Appointment card carries the actual details of the appointment or event you're creating. 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, Start and End dates are the only fields required to save an appointment.

- Subject - The subject is the friendly name for the event you're creating, such as "Lunch with Joan" or "Weekly Marketing Meeting".
- Location - This is 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 "Conference Room" versus "Location", these are mutually exclusive, yet compatible fields. That said, while the Location is something you enter on your own, the Conference Room will be a shared resource that was set up by your Domain Administrator.

- All Day Appointment - Enable this if the appointment you're creating will last the entire day. When enabled, the Appointment will move to the very top of your calendar list when viewing in Week or Day view. On Month view, it will be the first Appointment shown for the specific day.
- Show Time Zones - Enable this setting to allow yourself the ability to create Appointments in a time zone different than your own. When enabled, a Time Zone drop down appears beneath the Start and End dates for the Appointment, allowing you to set the proper day and time based on the Time Zone selected.
- 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 customizable.
- Recurrence - Use this setting to set how often this particular appointment will occur: Once, Daily, Weekly, Monthly or Yearly. NOTE: When setting the End date for a recurring Appointment, SmarterMail, Outlook for Mac, and eM Client all treat the "end by" date as the LAST day that a recurring instance can happen. However, Mac Mail seems to treat it as the first day that the recurrence cannot happen. That means in Mac Mail, the last occurrence of that event will be the day BEFORE the date you put in the "End By" area in SmarterMail. You will want to take that into consideration when creating recurring appointments

### **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 attendees accept or reject the invitations. To add attendees, simply start typing their email address. SmarterMail will suggest contacts from your various contact lists, including the Global Address List (GAL), as well as cycle through contacts you have listed in categories. You can finish typing the address or select the proper address from the options available.

As for whether an invitee is available or not, once you've added in one or more attendees, you can click the "View Availability" button. This will let you know whether attendees are available on the day and time you're planning your event. In addition, if a conference room was reserved for an event, when clicking on that room reservation in your calendar you can see who reserved the room. Generally, this will correspond to the organizer of the corresponding event. NOTE: Availability is only offered for users of the same domain as the event organizer. External domains, as well as information for users of free email services such as Gmail or Office365, is not accessible.

### **Options**

- Source - Use the dropdown menu to select which calendar the event is for. The default calendar can be chosen in Calendar Settings .
- Conference Room - If your Domain Administrator has added any shared resources, like conference rooms, the list of rooms will be available in this dropdown. Just as with attendee

availability, 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 availability will also show when users click the View availability button on the Attendees card.

- 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 notification window appear in webmail at whatever reminder interval you set. Reminders are also synced to any email or calendar app you have synced to your SmarterMail account.
- 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.
- Description - This space is used for details about the meeting: Agenda items, web conferencing log-in details, etc. Anything typed in the Description will also be added to the appointment so attendees can see the detail as well.

### **Categories**

A category provides a way to organize your Events into manageable groups. To add a category, simply enable it.

## **Editing Calendar Details**

SmarterMail's powerful calendaring feature gives users the ability to use a single calendar for their own events and appointments, PLUS the ability to share their calendars with others or even map the calendars of others so that those events and appointments can be seen in one, singular interface.

Having access to all of those calendars, and all of those appointments and events, can be somewhat tedious, unless you have a way of keeping them separated in your calendar view. That's where the ability to edit a calendar source comes in handy.

Each calendar you have access to is editable. That means you can modify the color scheme for appointments in that calendar, modify the name of the calendar and more. To edit a calendar source, simply click on the calendar name. When you do, the Calendar modal will open.

There are a few options available for editing the calendar source:



- **Display Name** - This is how you want the calendar to display in the Calendar Source view. A calendar that you've mapped will generally have a default name, like "Calendar on JSmith" or something similar. However, you can modify the name to whatever you like.
- **Default calendar for new appointments** - By default, the calendar that's created for your user account -- generally called "Calendar" -- is the default selection for any new appointments and events that you create. However, if you've created any additional calendars, you can enable this option to choose the calendar you want to use as your default for new appointments.
- **CalDAV Link** - This is the link you enter into an email or calendar client that is synced to your account using the CalDAV protocol.
- **Color** - This is the background color used for appointments and events created on that calendar. It's a good idea to have different colors set for each, individual calendar you have so that you can easily distinguish between the events and the calendars those events belong to. You can either enter the color code you want to use (e.g., #FBE83) or click on the color selector and choose a color.

There are a few options that appear in the editing modal that are displayed, but not editable. These include a Username , which is the username for your particular email account or the username of the person sharing their calendar with you, and the Access that's been granted to you for that calendar. For more information on the different types of access available, head over to the Sharing and Collaboration section of Help.

## Subscribing to an Internet/Web Calendar

Many organizations and services make their calendars available for public or private consumption. For example, you can subscribe to your favorite sports team's seasonal schedule, subscribe to a payroll calendar, subscribe to a holiday calendar and more.

To subscribe to a web or internet calendar, do the following:

- Log into your SmarterMail account in webmail and go to your calendar.
- Click the Actions (...) button, and select Subscribe to Calendar from the dropdown menu.
- A modal window opens with the following options:
  - **Display Name** - This is the friendly name you want to give this calendar, such as "PTO Schedule" or "Suns Schedule".
  - **Calendar URL** - This is the url provided to you by the calendar's owner. Generally, this URL will be formed using "webcal://" as the prefix.
  - **Update interval (minutes)** - This is how often you want the calendar to update. By default, this is set to 60 minutes. For most things, the default interval will be perfectly fine.
  - **Color** - This is the background color used for appointments and events created on that

calendar.

- Once all the items are filled out, be sure to Save the subscription. The items from this calendar will show up on whichever calendar you've added the subscription to. In addition, when syncing this calendar to an email or calendar app, events on the subscribed calendar will also sync!

## Creating New Calendars

SmarterMail allows users to create multiple personal calendars in order to better organize appointments. Along with being able to add as many calendars as needed, users can choose their own custom color for the calendars available, giving them the ability to identify the calendar for the appointment at a glance. Furthermore, users can sync their additional account calendars to email and calendar clients an apps using EAS, MAPI/EWS and CalDAV. All calendars can also be shared with others within the same organization as well.

Follow the steps below to create additional personal calendars:

- Log into your SmarterMail.
- Click on the Calendar icon.
- Click on the Menu icon at the bottom of the page. From the context menu, select New Folder .
- A modal window will appear. Here, you can edit the new calendar's details.
- Enter the Display Name you want to use for the calendar. You can then set the color used for new appointments on the calendar.
- If you want, you can even set this new calendar as the "Default for new appointments". That means that any new appointments or events that are created would go onto this calendar versus the default Calendar.
- If you want to share this calendar with other users or a User Group, you can do this by clicking the Sharing heading and then setting permissions as needed.
- Click Save .
- The new calendar will be displayed below any existing calendar sources in your list. If you need to edit the calendar -- for example, change its color -- simply click on its name and the details modal will open again.

## 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 and it will load in a popup window. To change the calendar that the appointment is assigned to, use the Move button

found in the toolbar. Note: Meeting invites (appointments with attendees) cannot be moved. Make any other 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: For recurring events, you have the option of deleting all instances from your calendar or just a single instance.

## Deleting an Instance

When creating an appointment, it's possible to create it as a recurring event. That means the 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 cancelled due to unforeseen 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 cancelled or re-scheduled for a later day and time. To delete an instance, open up the event and clicking the Delete Instance button. Deleting an instance of a meeting will not affect any future or past instances - only the instance you delete.

## Duplicating an Instance

The ability to create a recurring appointment is crucial for any user. However, recurring appointments generally follow a set of rules: Every Wednesday, or every third Monday, or the last Friday of each month. What if your recurring appointments are non-standard days? That's where duplicating appointments comes in...

Let's say you have a monthly appointment that happens on the last Friday of each month: a monthly Sales Meeting, for example. The Wednesday prior to that meeting, though, you want to make sure you have all of your sales metrics in place and ready to present to the CEO and any other attendees. The problem here is that you can't create a standard recurring appointment as there aren't any dynamic rules available for those. You can't use the "last Wednesday" as your rule as there could be another Wednesday AFTER the last Friday throughout the year. Sure, you could go through each month and manually create an event, but that means re-typing a bunch of info. Thankfully, you can duplicate

events and make sure they occur the exact day you want, without having to manually recreate each appointment.

Basically, the Duplicate button acts as a "Save As..." button: when you make a change to an appointment, the Duplicate button becomes active. You can then "save" those changes and create a NEW event based on the one you're duplicating. Only the info you change would be different.

## Tentative Appointments

SmarterMail utilizes tentative meeting requests to help prevent meeting requests or event invitations from getting lost or overlooked. When a meeting invitation is sent, a tentative appointment will be automatically added to the calendar. The appointment can then either be accepted or declined from the email request or directly within the calendar interface. In addition, if a meeting or event is tentative, the reminder will still be sent if one was added to the invite!

To manage a tentative meeting request from the calendar, click on the appointment to load its details in a popup window. After viewing the appointment details, you can choose to Accept or Decline the meeting using the buttons found in the popup window's toolbar. Tentative meeting requests are denoted with a dashed line around the appointment window at the day/time the event is scheduled.

It should be noted that if you delete a meeting invitation BEFORE you either accept or reject it, the tentative meeting will be removed from your calendar.

## Add to Outlook

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 use the Add to Outlook connection:

- In SmarterMail, navigate to your Calendar or Contacts.
- Click on the Actions (...) button, and select Add to Outlook from the dropdown menu.
- A popup window will appear with additional instructions. You'll be prompted to select the version of Outlook you're using, which calendar or contact list you wish to sync, and then you have the option of changing the default Description and/or add in a Display Name for the item you're syncing.
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- 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.