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Client Data System®
Calendar Module Enhancements
User Guide

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Table of Contents

Introduction

The CDS 6.0 Calendar Module introduces newly added features and enhancements designed to provide our users with a more effective and efficient means of managing activities. Most of these added features are customizable to meet the users' needs and preferences.

Activity Options
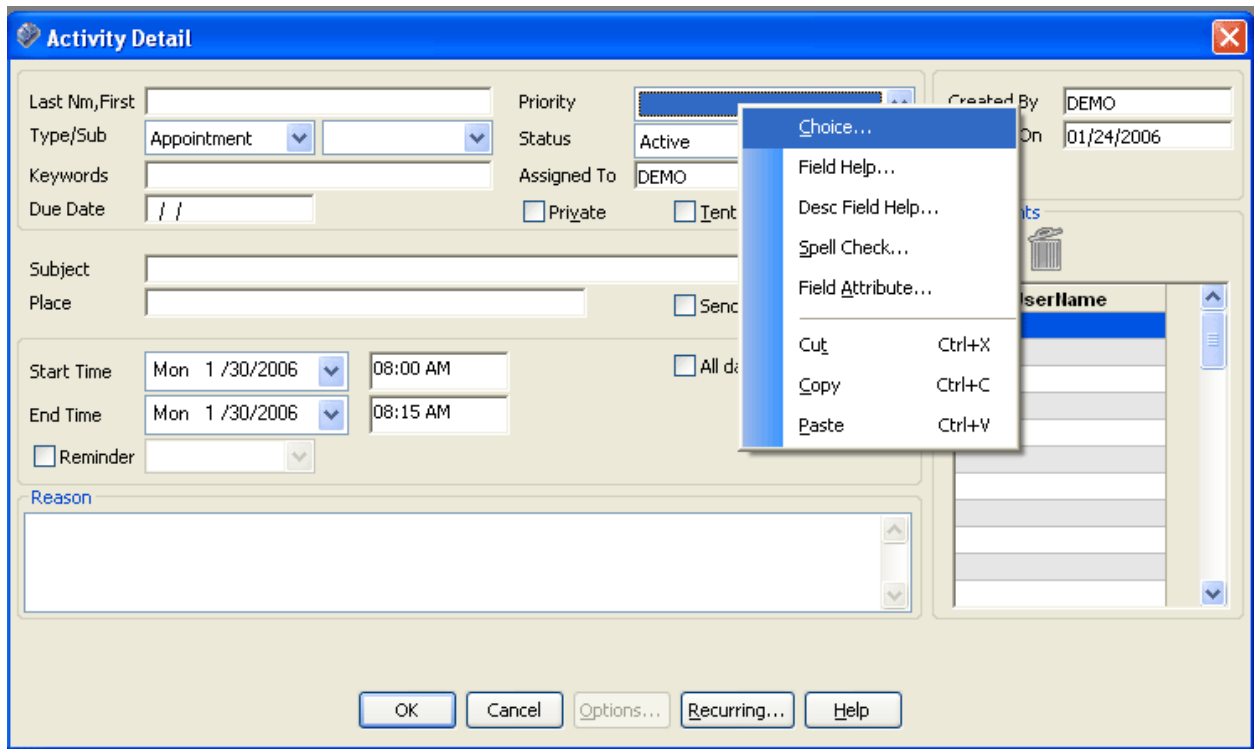
In CDS 6.0, aside from the system default priority choices for an activity, the user can define their own custom priority settings and also assign font colors for custom priorities.

The system default priority choices are Normal, Urgent, Important, Tentative and Others.

To add new priority choices:

1. In CDS, open an Activity Detail dialog box.

2. From the **Priority** drop-down menu, select either an existing priority or highlight a blank choice.

3. Right-click on the field and then select **Choice** from the expanded menu to open the Choice Options – Priority dialog box.
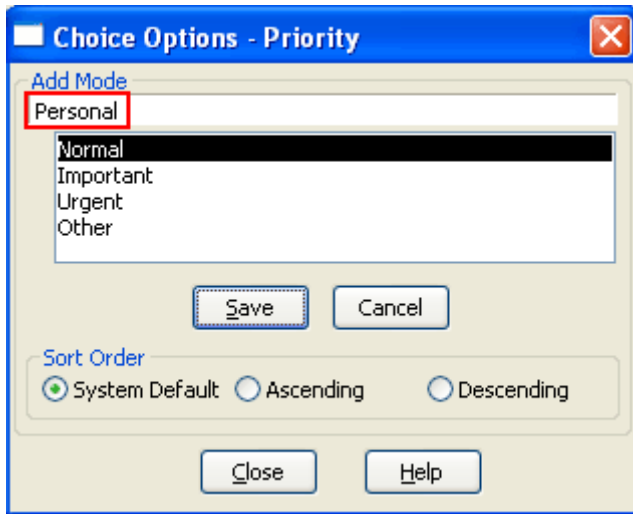
4. Click the **Add** button.
5. In the Add Mode field, enter the custom priority (i.e., Personal) and then click the **Save** button.
6. Click the **Close** button.
7. The newly added priority now displays in the **Priority** drop-down menu.
8. To assign a specific color for the newly added priorities, in CDS, click the **Database** menu to display a list of options.
9. Select the **Modify Current User's Profile** option to display the **Personal Information** tab.
10. Click the **Activity Options** tab.
11. In the Priority Color Coding section, the newly added priority displays.
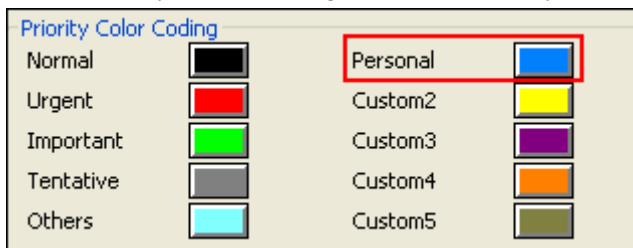
12. Click the color block next to the added priority.
13. The Color dialog box displaying the different colors opens.
14. Select the appropriate color and then click the **OK** button. The priority color coding will take effect on all of the Calendar views in CDS.

Calendar Views

The DayView, WeekView and MonthView Calendars have been updated and optimized to provide a clear and easy way to review activities. All Calendar Views now include the User Name in the title bar as shown below. Group or All User views are noted as well.
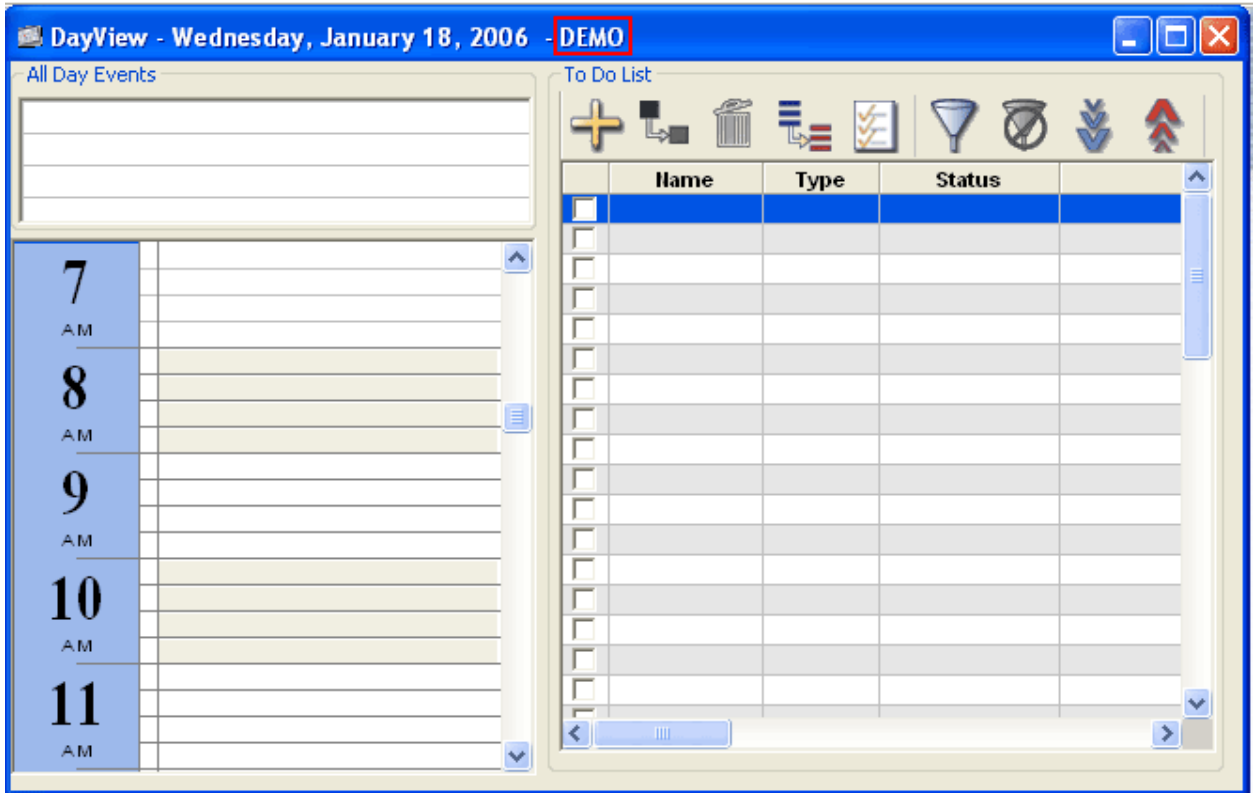
In CDS 6.0, the DayView, WeekView or MonthView Calendar can be set up to display upon login.
1. From the CDS desktop, select **Modify Current User's Profile** from the expanded **Database** menu to display the Personal Information tab.

2. Click the **Misc. Information** tab.
3. From the Miscellaneous Options section, click the **Startup Module** drop-down menu to open a list of options.
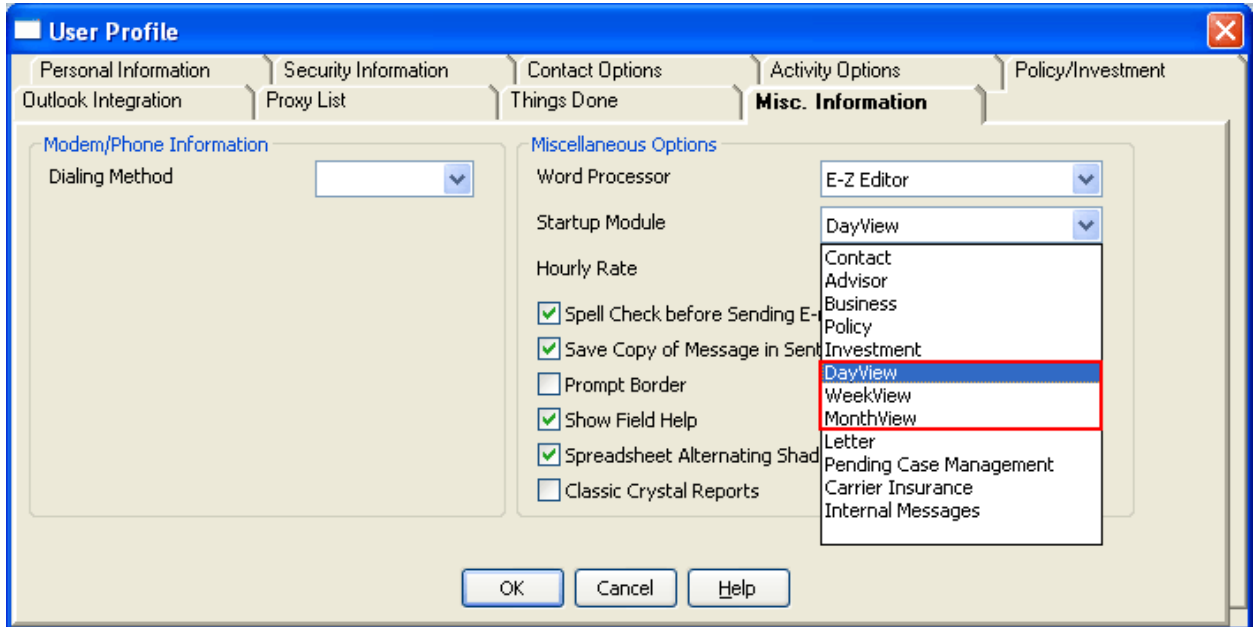
4. Select the **DayView** option and then click the **OK** button. The next time the user logs back into CDS, the DayView calendar will display.

DayView

Navigate through the different views of the DayView calendar by clicking on the **DayView** button. The spreadsheet is displayed in alternate shading; this makes it easier for the user to read information across spreadsheet rows.
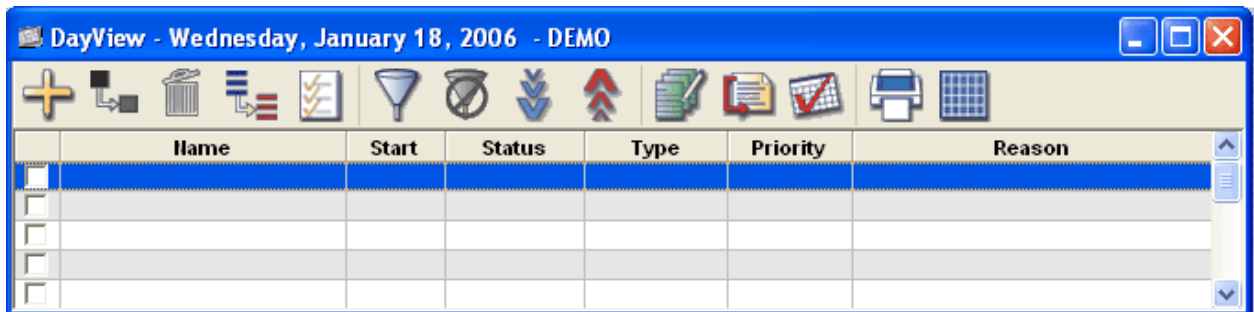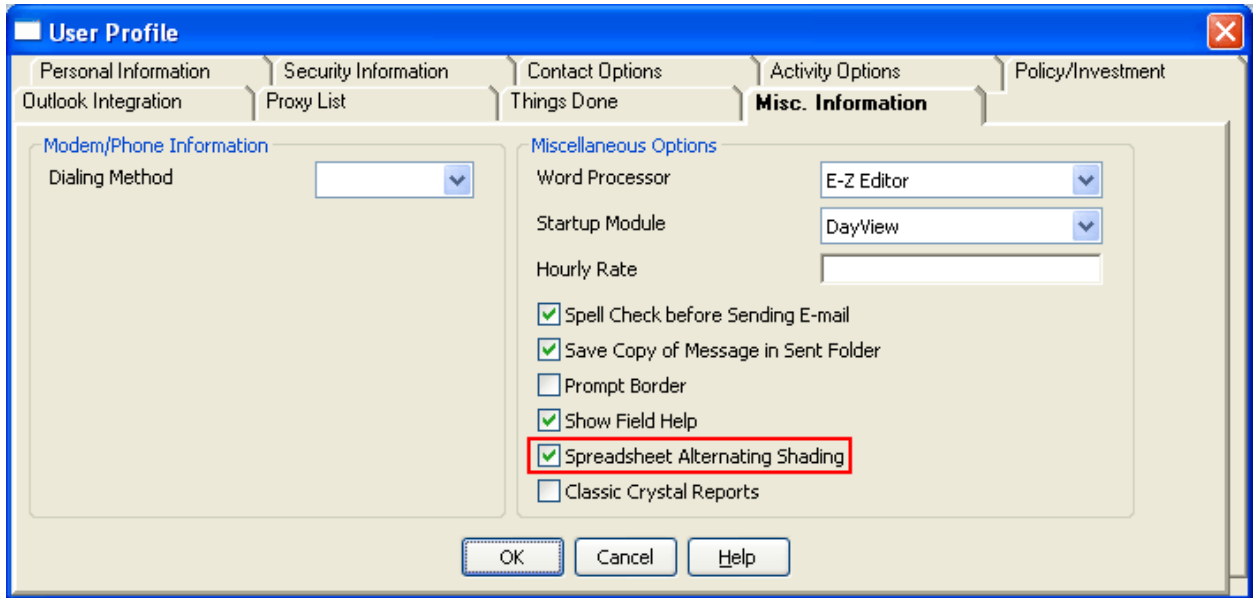

Spreadsheet Alternating Shading is an option which can be turned on and off based on the users' preferences.

1. From the CDS desktop, select **Modify Current User's Profile** from the expanded **Database** menu to display the Personal Information tab.

2. Click the **Misc. Information** tab.

3. From the Miscellaneous Options section, the **Spreadsheet Alternating Shading** option is selected by default. This option controls the alternate shading for all of the spreadsheets throughout CDS. If the user turns off this feature, it will affect all spreadsheets throughout the application.

WeekView

A feature has been added for the WeekView calendar where the view can be expanded to allow more data to display. In the past, it has been difficult to tell which activity belonged to which user from the All Users calendar view. This has been resolved in CDS 6, where the name of the owner of the activity is now displayed in parenthesis.
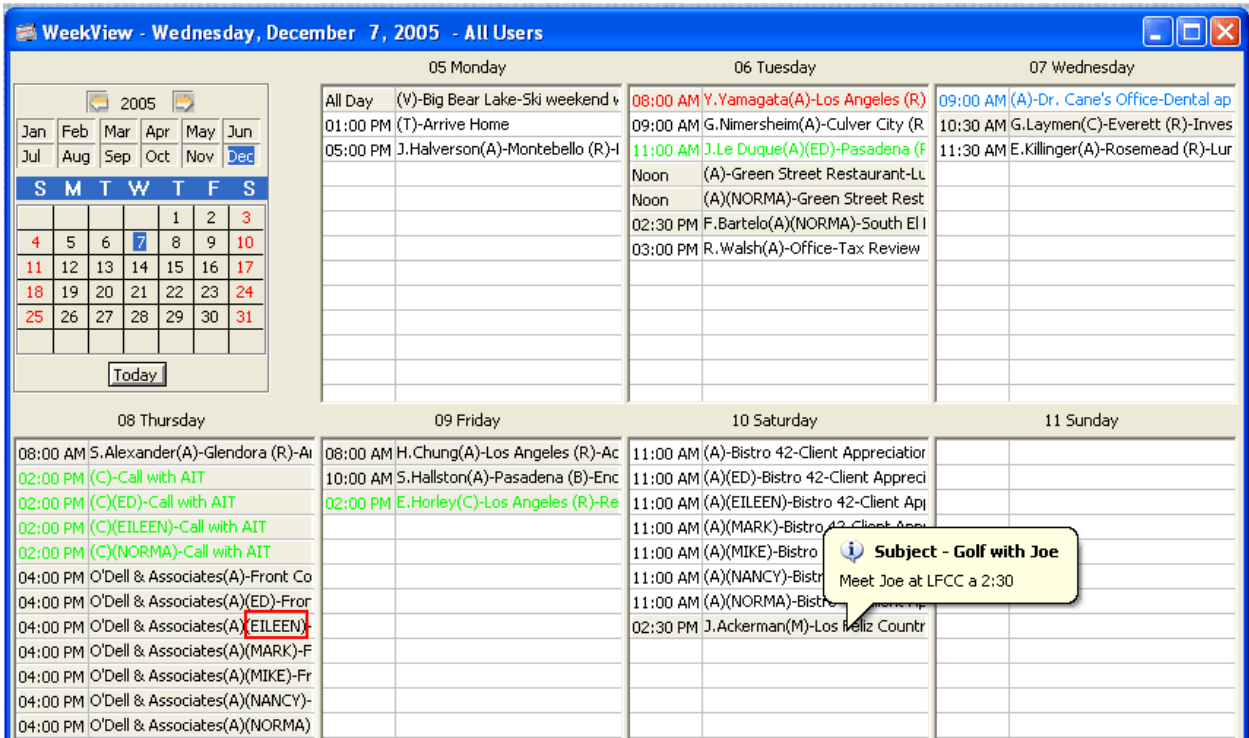
In addition, when the user places the cursor over an activity, a ToolTip will display the Subject and the Reason of the activity as shown above.

All Day Events

In previous versions of CDS, when an all day event was created, it would block out all of the time slots for the day. In CDS 6, a separate section has been added for All Day Events to the DayView and MonthView calendars, where it displays the All Day Events activities but does not mark them as busy.
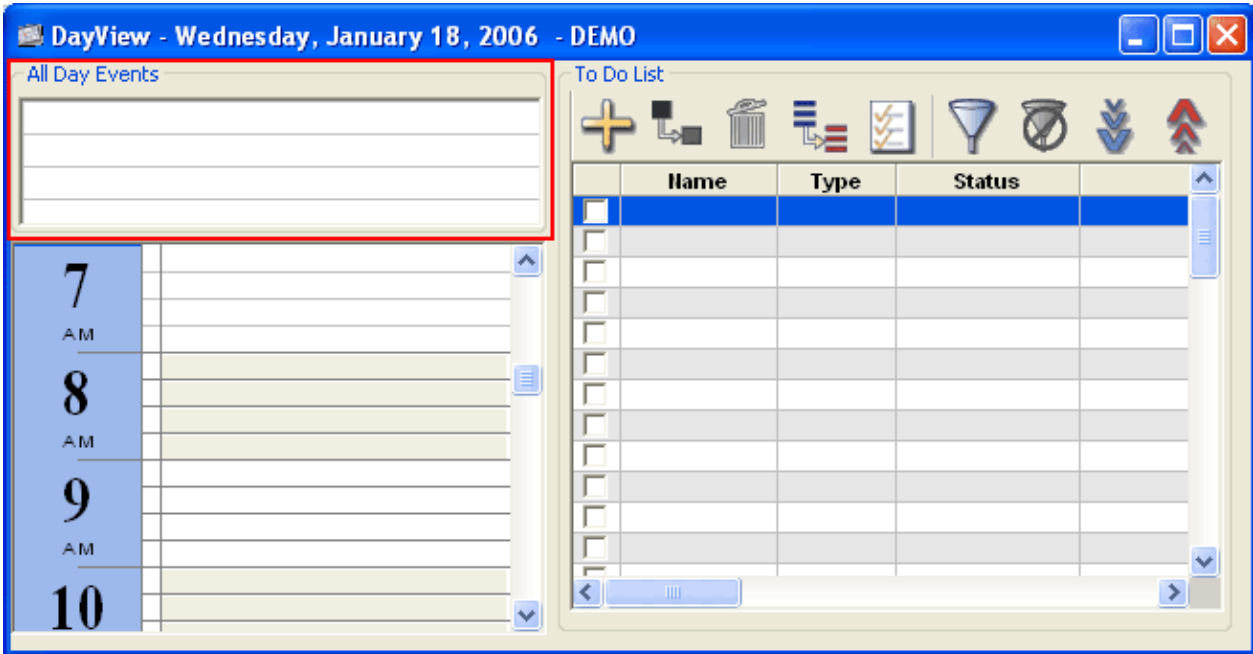
In the MonthView calendar, the All Day Events are shown in gray on top of the grid for the selected day. This makes it easier for users to differentiate regular activities from All Day Events.
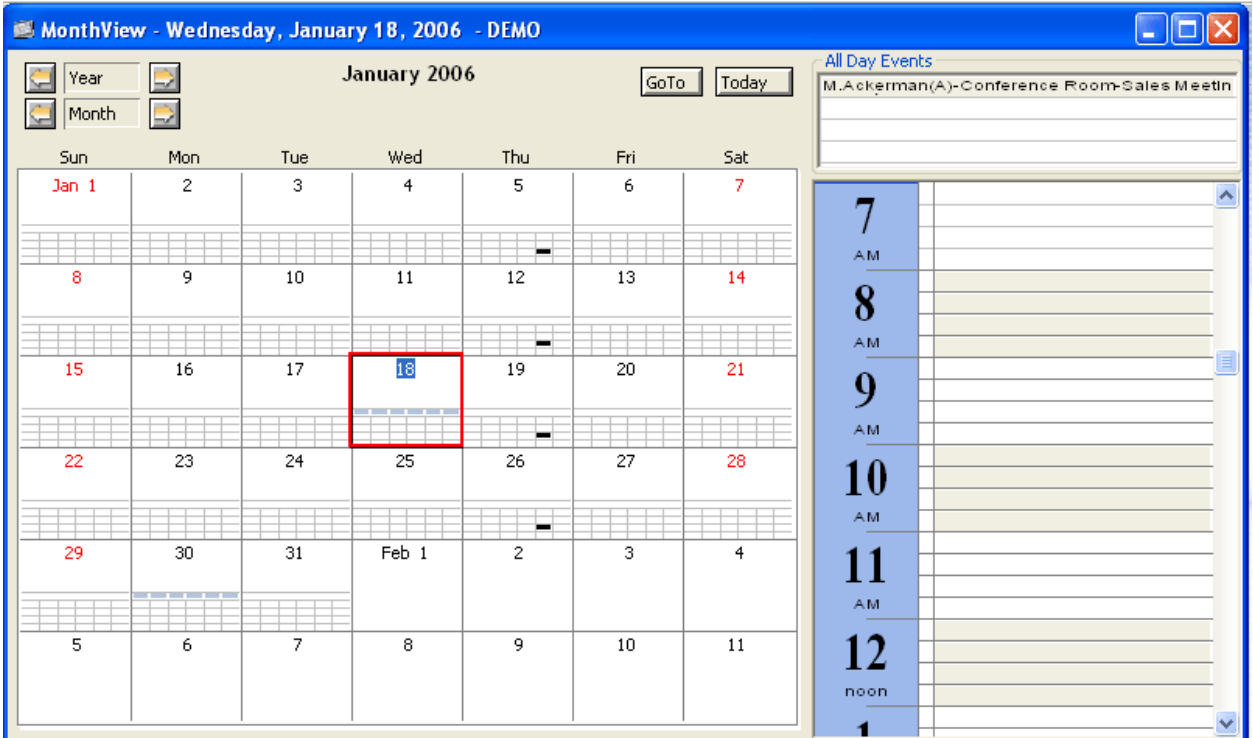
Recurring Activities

The new recurring activities interface makes managing recurring activities much more efficient. CDS 6.0 makes it easy to modify a single instance of a recurring activity or make modifications to a whole series of activities.

1. In CDS, create an activity and then click the **Recurring** button.

2. The Activity Recurrence dialog box displays.

The Start Time, End Time and Duration is automatically populated from the Activity Detail dialog box. By default, the Recurrence pattern is set to Weekly. The concept of the recurring activity in CDS is similar to the one presented in MS Outlook.

Modifying an Occurrence of a Recurring Activity

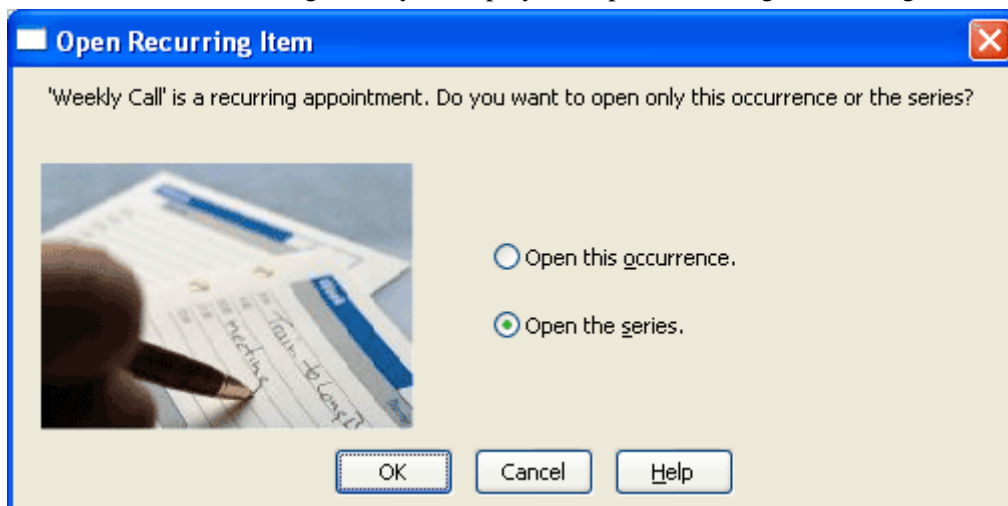1. Double-click the recurring activity to open the Open Recurring Item dialog box.
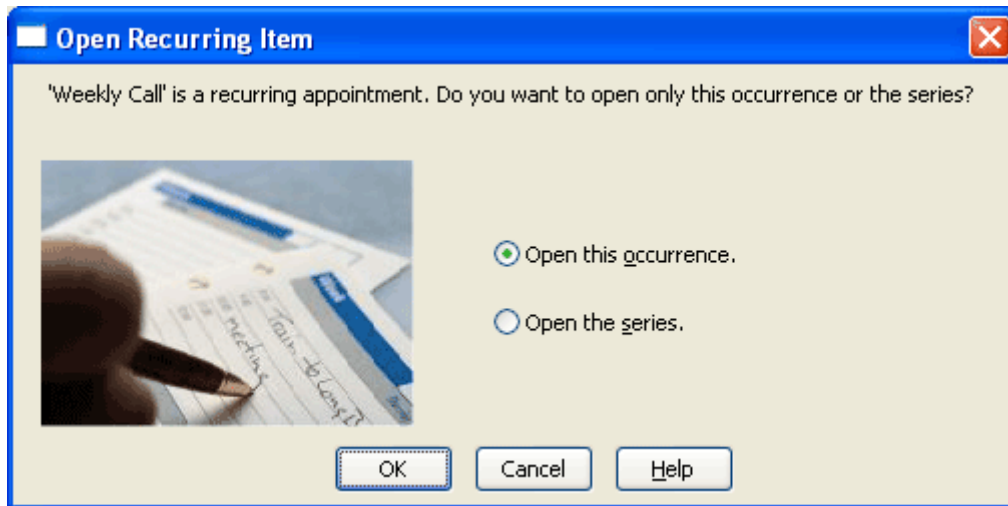
2. Select the **Open this Occurrence** option and then click the **OK** button to open the Activity Detail dialog box.
3. Make the necessary modification to this occurrence and then click the **OK** button to save the modifications.

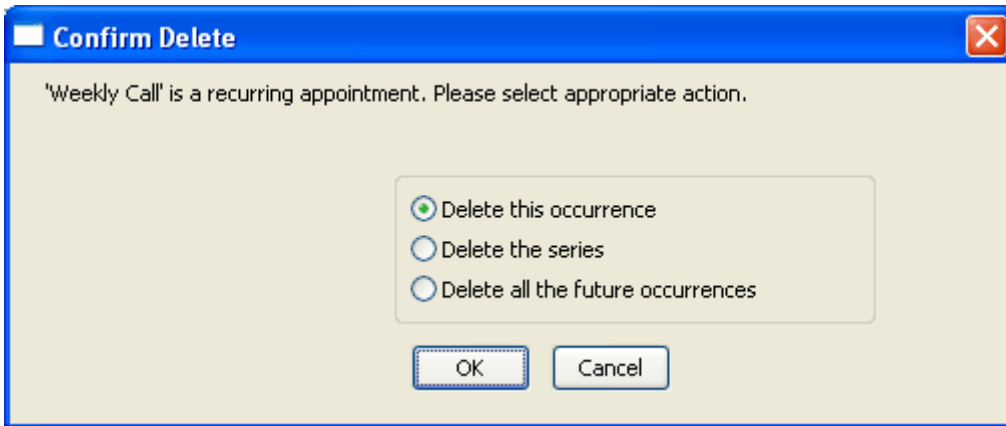## Modifying a Series of a Recurring Activity

1. Double-click the recurring activity to display the Open Recurring Item dialog box.

2. Select the **Open the series** option and then click the **OK** button to open the Activity Detail dialog box.
3. Make the necessary modifications and then click the **OK** button. The modified data will be reflected for the series of the selected recurring activity.

Deleting an Occurrence of a Recurring Activity

1. Right-click a recurring activity to display a list of options.
2. Select the **Delete Current Activity** option to open the Confirm Delete dialog box.

3. Select the **Delete this occurrence** option and then click the **OK** button. This will only delete the selected occurrence of the recurring activity.
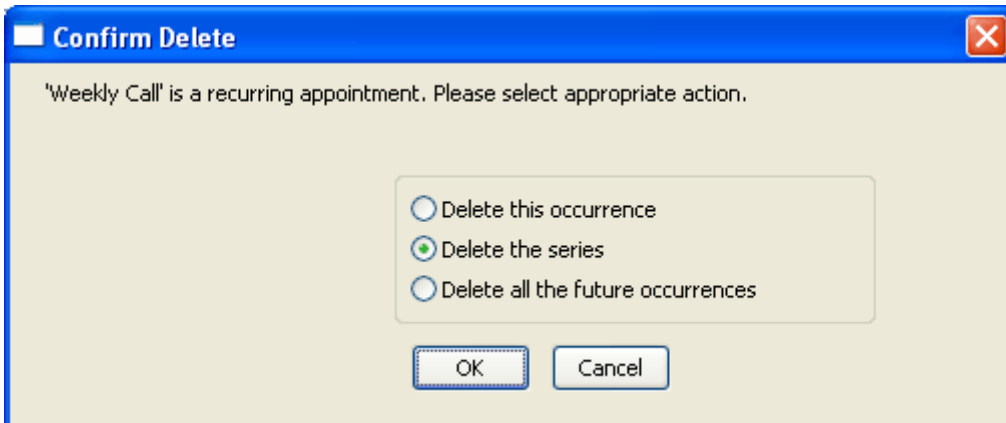
Deleting a Series of a Recurring Activity

1. Right-click a recurring activity to display a list of options.
2. Select the **Delete Current Activity** option to open the Confirm Delete dialog box.

3. Select the **Delete the series** option and then click the **OK** button. This will delete the recurring activity series.

Deleting Future Occurrences of a Recurring Activity

1. Right-click a recurring activity to open a list of options.
2. Select the **Delete Current Activity** option to open the Confirm Delete dialog box.
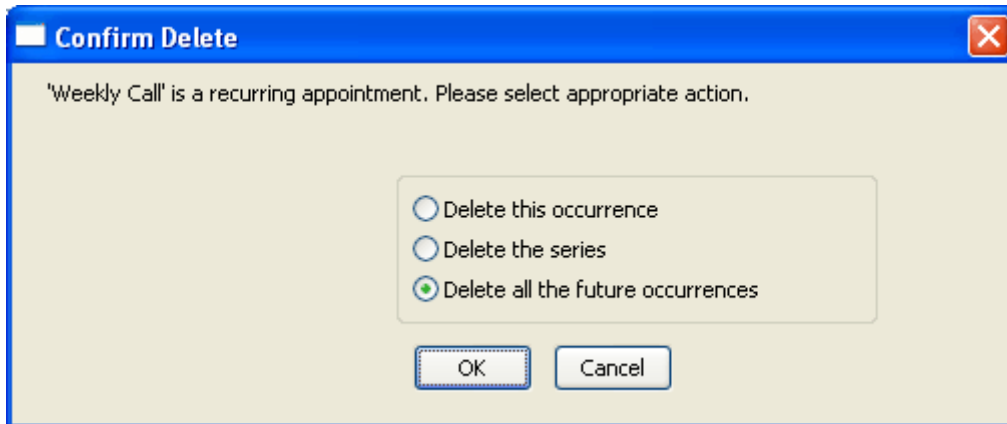
3. Select the **Delete all the future occurrences** option and then click the **OK** button. This will delete all the future occurrences of the recurring activity.