priority

Calendar Script

Clip Link: http://www.eshbel.com/Movie_Search/Calendar_Clip.htm
Note: Yellow highlights indicate action instructions.

Introduction (00:00-01:43)
In this video we will demonstrate how to work with ***Priority***'s interactive graphic interface calendar. The calendar enables you to keep track of the tasks and service calls scheduled for one or more users or groups, to update or reschedule any of these appointments, or to schedule new ones, while taking into account defined office hours, holidays and employee absences.
In ***Priority***, any task whose start date (or time) differs from its end date (or time) is considered an appointment and so appears in the ***Priority*** **Calendar** for each assigned user. Any updates to the task also impact appointment details appearing in the calendar. Conversely, a task is recorded automatically whenever an appointment is opened in the calendar, and whenever an order, project activity, warehouse assembly or service call is scheduled. Any updates recorded within the calendar update the task, as well. We will demonstrate this functionality momentarily. Appointments can also be imported from your MS-Outlook calendar and Outlook e-mail messages.
Note that ***Priority*** offers two specialized Calendars in addition to the regular Calendar: a **Technician Scheduling Calendar** and an **Appointment Calendar**. The **Technician Scheduling Calendar** allows you to view and change assignments to scheduled service calls, and provides information on the regular work hours and scheduled appointments of designated service technicians. Similarly, if your organization works with employee shifts, you can schedule customer appointments around those shifts using ***Priority***'s **Appointment Calendar**. Since all three calendars operate in much the same way, we will only be demonstrating the regular Calendar in this video. Note that additional information on scheduling service calls and employee shifts is available elsewhere.

Viewing Appointment Details (01:44-02:54)
Let's go ahead and open the **Calendar**. To view the details of a scheduled appointment, press **F1**. Alternatively, double click the appointment or press **F2** to view or modify appointment details in the **Tasks** form. Let's review the scheduling information recorded for this appointment, as well as any other definitions that affect how it appears in the Calendar. As you can see, the appointment is scheduled to begin on Monday at 11:00 and end 30 minutes later, at 11:30. The task recorded for the appointment is assigned to A, and several other **Participants** have also been defined. The designated **Task Code** indicates that this task is defined as a "staff meeting." Press **F6** twice from this column to view task code definitions, such as the color used to display tasks with this task code in the calendar. Returning to the **Tasks** form, we can also check what **Resources** have been allocated to the task. In this case, the task requires the use of the small meeting room. To return to the Calendar, press **Esc** or select **Calendar** from the list of Direct Activations.

Scheduling a New Appointment (02:55-04:48)
Note that the Calendar is currently displaying appointments for USER A. Suppose that you are A's administrative assistant and you need to schedule a meeting between A and several of his colleagues. You can use the options in the upper **View** menu to view the calendars of any other employee or group of employees. In this example, we're going to use the **Select Employees** option to display the calendars of *multiple* employees of your choosing, side by side in a single window. To select multiple employees, hold down the **Shift** or **Ctrl** key while highlighting the employees in question with the cursor. You can then flag the **Group Schedule** option in the upper **View** menu in order to view the combined schedule of the selected employees. This option greatly simplifies the process of locating a free time slot in which no appointment is currently scheduled for any of them.
To add the appointment to the calendar, double click the appropriate time slot. The **Tasks** form opens with basic scheduling data, such as the date, time and assigned user or users, already filled in. You can then proceed to define additional details in this form and its sub-levels -- for instance, you can link the appointment to the relevant customer and project, add participants, set a reminder half an hour before the appointment starts and record task notes. Upon exiting the **Tasks** form, ***Priority*** updates the calendar of each participant accordingly.

Display Options (04:49-05:47)
Let's continue by examining a few different measures you can take in order to change how data are displayed in the Calendar. For instance, use the options in the tool tray to fine-tune the level of detail, such as the number of days displayed and their division into hours or minutes, or open the **View Settings** dialog box, from which you can revise these and other definitions, such as which weekdays and hours are displayed. You can also toggle between a horizontal and vertical display of hours, or a Gantt chart display, by selecting **Change View** from the upper **View** menu or simply pressing **Shift+F4**.
You can save up to five different view settings (e.g., timescale, number of columns and resources) for future retrieval. To save the current setting in a buffer, click the upper **View** menu and select **Save View Settings**. The next time you work with the Calendar, you can simply select **Get View Settings** in order to retrieve the desired settings.

Navigation (05:48-06:33)
Use the vertical and horizontal scroll bars to scroll through the different days and times within the designated range, or use the options in the upper **View** menu to move back and forth by months and weeks. You may also find it helpful to display a small calendar to the side of the screen and use this to jump to the desired date or hold down the mouse key to select a range of dates.
You can also use the **Tab** key to jump to the next scheduled appointment within the designated range or press **Shift+Tab** to move to the previous one. To quickly locate a specific appointment, search by key word (or string) in the task subject. That is, press **Ctrl+F3** and record the desired text. Press **Ctrl+F** to perform additional searches for the same key word.

Additional Operations (06:34-07:47)

If at any time you need to reschedule an appointment, you can simply drag it to the desired time slot within the Calendar. You can also change the scheduled employee by dragging the appointment to the line for the desired employee. Any changes to the appointment update the task in the **Tasks** form.

To print task details for an appointment or a summary of tasks recorded for the associated customer, right-click the appointment's time slot and select the desired operation. To delete the appointment, select **Delete** or simply press **Ctrl+Del**.

Note that the calendar is color-coded, to help you easily locate different types of calendar entries and blocks of free time in which a new meeting or appointment can be scheduled. Regular working hours (determined by user definitions of office hours, holidays and vacations) appear with a white background; time slots outside those hours appear in gray and can be hidden. Similarly, different colors are used to display tasks and service calls. Color-coding can also be used to clearly indicate tasks and service calls of a particular type or status. More information on how to record your own calendar color definitions is provided elsewhere.

This concludes our demonstration of ***Priority***'s interactive Calendar.

Related Documentation

- Sync with Outlook (Office Connectivity Clip)
- To Do/Calendar Wizard
- Tasks (CRM Wizard)
- Scheduling Service Calls (Service Calls Wizard)
- Employee Shifts (Branches SOP)
- Calendar Colors (FAQ: How do I set different colors for different types of Calendar entries?)