

SUI Calendar 2.0

User's Guide

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Overview

Expand your FileMaker solutions with SUI Calendar template - a powerful tool to help plan events, meetings and tasks. It supports team interaction by allowing users to comment on each other's appointments. E-mail notifications, multiple calendar views and user management are also included in this FileMaker calendar template.

Features

- Optimized for Instant Web Publishing
 Native support of FileMaker's Instant Web Publishing. No PHP or other web technology required.
- **Optimized for FM Go** Native support of FileMaker's FM Go. Get access to your calendar from iPhone and iPad.
- **Quick find** The convenient find field in Calendar searches the full database for criteria matches.
- Simple time tracking and subtasks Original estimate and work log for tasks and subtasks
- Multi-user environment

Users can assign appointments to other team members.

- Single or recurring appointments Appointments can be scheduled singly or as daily, weekly, monthly or yearly entries.
- Alternative calendar views

Schedules can be viewed in daily, weekly, monthly, yearly and plain list overviews with corresponding levels of detail, each with the option for a quick view of any single day.

• Editable appointment categories

Task, Event, Meeting, etc. categories make sense of different appointments.

• Expired appointments quick view

A quick view of expired appointments helps users stay alerted.

User management

Program features can control users of SUI Calendar or the entire FileMaker system.

User preferences

Each user can save individual preferences.

Multilingual capabilities

The calendar user interface can be translated to several languages simply by editing the table with string resources. English, German, French, Russian and Turkish are included.

E-mail notification

Users can receive e-mail notifications about newly assigned appointments and track

appointments assigned to other team members.

Fully customizable

Full access privileges allow for unlimited changes to program appearance and behavior.

Online help

Contextual help system offers program assistance.

System Requirements

SUI Calendar requires one of the following FileMaker products installed on your system:

- FileMaker Pro 10, 11
- FileMaker Pro Advanced 10, 11
- FileMaker Server 8, 9, 10, 11
- FileMaker Server Advanced 8, 9, 10, 11

Installation Notes

Unzip the downloaded package to your desired location.

Use the following predefined accounts to login to SUI Calendar:

Login	Password	Role
Admin	Admin	System Administrator
Bob	Bob	Administrator
Lucy	Lucy	<u>User</u>

Note: Changing passwords immediately after installing SUI Calendar is strongly recommended.

- SUI Calendar can operate in single user and multiuser environments.
- To use SUI Calendar in a multiuser environment, it is recommended to install it on a **FileMaker Server**.
- SUI Calendar has full support for FileMaker's **Instant Web Publishing** (IWP) feature. Users may access and edit data using any web browser.
- SUI Calendar can be accessed remotely with FileMaker Pro client software.
- To use **IWP**, you must enable the feature in **FileMaker Pro** software preferences or in the Admin Console if you are using a **FileMaker Server**.

SUI Calendar Basics

User Roles

There are the following predefined User Roles in SUI Calendar:

System Administrator

System Administrators are [Full Access] users who can change data, scripts, custom functions, database structure and user settings.

Administrator

Administrators can manage SUI Calendar users, edit data, manage the database structure and scripts (except areas which explicitly require [Full Access] privileges.)

User

Users can edit only own data within the database. Also, this role can not conduct database management or user management.

Common Controls

SUI Calendar, like <u>Vedatrak</u> have the same set of panels and controls:

Company		:56:55 PM by <u>Jason</u>		odified 4/5/2	010 3:49:34 PM by Sales		SUI Solutions	7.
Contact #			t contact #					10w 2009
		ss Toys Inc.			Discount 10%		Status Small	•
	Mr. V	Tony	Davis				ACC No	•
	Owner	nfederate Drive			Terms 2%	14;Net 30	ACC No	
ity/State/Zip		liedelate Dilve	NY 13502		Phones		Custom Pro	perties
Country	U.S.A.	Go To B		W	Work 745837	78594 🙆	Gustom Dro	nortion
		brasstoys.com					Custom Pro Area	
Web	www.bras	sstoys.com		De	ete Button			
IVI	MSN	director@bra	isstoys.com					
Notes (0)	🕂 Conta	cts (2) 🔂 Calenda	· (0) 🕒 Mail (1)	0.0	rders (3) Invo	ices (7) 🕒 Fi	les (0) Misc	
		w/Edit Butto			Title		<u>les (0) Misc</u> Address	
ontact #			Mr. Michael Bell	_	Rental clerk		4066 Duke Lane, Newark, NJ,	07102 11 5 4
1925	Individ		Chad Sheard		Vocational educ		161 Mattson Street, Portland,	
	marvia		to the second		1.16.4	ation toacher	for Mataon Street, Fonand,	011, 07204, 0.
			Linked	Item	s Area			

Contact	S	Dashboar	d Calendar	Contacts Navigat	ton Bar.cts Orders Invoices Messaging
• K	Tool Bar	*08		Search Bar	🔍 🔍 🛛 Det Views Tab Bar
Contact #	Created	Туре	Sor	table Headers	Address
CB1	09.25.09	Company	Brand	SUI Solutions	Online Help Button
CC4	09.25.09	Company	Customer	Best Brass Toys Inc.	4466 Confederate Drive, Utica, NY,
🕥 IS10	10.15.09	Individual	Staff	Miss. Lucy Mays	Ap #664-143, Nisi St., Williston, VT,
🕤 IR11	View/E	dit Button	Resource	Mr. Bob Rollins	837 Delete Button ton, VI
1512	10.15.09	Individual	Staff	Mr. James Travis	934-3728, Phasellus Rd., Williston,
CC18	10.16.09	Company	Customer	Hanox	286-3075, Proin Avenue, West
0 CC19	10.16.09	Company	Customer	Cornbit	4870 Deans Lane, Westbury, NY,
CC20	10.16.09	Company	Customer	Ballanthem LTD	2332 Owen Lane, Fort Myers, FL,
CP21	10.16.09	Company	Prospect	Dynamictons	2001 Buck Drive, South Burlington,
CC22	10.16.09	Company	Customer	Litobe	4952 Delaware Avenue, Sausalito,
IC23	10.16.09	Individual	Customer	Mr. Roger Turner	102 Werninger Street, Houston, TX,
CP240	10.16.09	Company	Prospect	Affordable Promotion	3591 Hoffman Avenue, Huntington,
IR25	10.16.09	Individual	Resource	Chad Sheard	161 Mattson Street, Portland, OR,
IS26	10.16.09	Individual	Staff	Mr. Michael Bell	4066 Duke Lane, Newark, NJ, 07102,
CV9	03.24.10	Company	Vendor	SUI Solutions	380 Hurricane Lane, Suite 201,
IS82	04.02.10	Individual	Staff	Mr. Jason Burch	4333 Vestibulum. Av., Williston, VT,
Record: 1/16	(Total: Statu	s Bar		User	

Navigation Bar

Use the Navigation Bar to switch between modules. The active module is highlighted.

Dashboard Calendar Contacts	Mail	Files	Products	Orders	Invoices	Messaging
-----------------------------	------	-------	----------	--------	----------	-----------

Tool Bar

The Tool Bar is located at the top of each layout and may contain the following buttons:

Button	Action
٥	Navigate to first item.
0	Navigate to last item.
0	Navigate to previous item.
0	Navigate to next item.
0	Add a new item.
0	Duplicate current item.
٥	Print current item.
8	Delete current item.

Button	Action
0	Apply changes.

Search Bar

Use the Search Bar to find records that meet specific criteria.

	00
L	~ ~ ~

• To perform a general search, enter the information that you would like to locate and click **Find**

Sto return all matches.

Click Show all ⁽²⁾ to display all items.

Views Tab Bar

Choose between the Detail or List view using the Views Tab Bar.



Status Bar

The Status Bar displays the following information:

• **Record** indicates the number of the current item, the number of items found, and the total number of items.

Record: 1 / 16 (Total: 16)

• Commit and Revert are used to save or undo current changes.

Commit Revert Record: 2 / 16 (Total: 16)

User Info

User Info provides quick access to the current user's settings.

User: admin / System Administrator Profile | Preferences | Re-login

- User displays the user's login and full name.
- Click **Profile** to view or edit the <u>User Profile</u>.
- Click **Preferences** to view or edit <u>User Preferences</u>.

• Click **Re-login** to login as a different SUI Calendar user.

Linked Items Area

The Linked Items Area displays all associated items for ease of accessibility.



Online Help Button

Click **Online Help I** to activate the online help system.

New Button

Click **New (Section**) to create a new item.

Edit/View Button

Click Edit/View 💁 to access or change an item's data.

Delete Button

Click **Delete** ⁽²⁾ to delete an item.

Go To Button

Click Go To (shown as <u>Underlined</u> text) to open an item.

Sortable Headers

Click Sortable Headers to sort the list as ascending or descending.

••	
Contact # 🛦	Created
😜 CB1	25.09.2009

Custom Properties Area

Additional custom properties may be added in SUI Calendar records.

- Click New
 next to Custom Properties to create a new property.
- Select an existing property name from the list or create a new name.

	(*
Property 1	
Property 2	
Property 3	
Edit	

• To edit the property name list, click **Edit...** In the **Edit Value List** dialog box, type each name on a separate line in the order you want them to appear. Then click **OK**:

Property 1 Property 2	
Property 3	
-	
	Cancel OK

Click **Delete** Set to delete a property value from the current record.

User Preferences

User Preferences allows users to edit default SUI Calendar settings. To change user preferences, click the **Preferences** button in <u>User Info</u>.

00	Preferences		
want improve this layout × User preferences Close	- Bob		3
General Language English		¥	Options ✔ Always use WebDialog ✔ Show "I want improve this layout" feature
Calendar Options Start week on Monday Show occupied days Show completed	E-mail me about new appointments assigned to me E-mail me about updates in appointments assigned by me		
Browse			

General

• Select your preferred language from the Language drop down list.

Options

- Check next to Always use WebDialog to display confirmation dialog boxes outside of IWP mode.
- Check next to Show "I want to improve this layout!" feature to enable the feature

Calendar Options

- Check the Start week on Monday check box for setting Monday as the first day of the week.
- Check the **Show occupied days** check box to view days with appointments as <u>underlined</u> in the <u>Calendar Navigation Component</u>.
- Use the Show Completed check box to show or hide completed appointments.
- Use the check boxes for e-mail notifications to remind other users and yourself about created, completed or commented appointments.



Note: In order to receive these e-mail notifications, your e-mail address must be included in your

User Profile.

System Preferences

System Preferences allows the <u>System Administrator</u> to edit SUI Calendar system default settings. To change the preferences, login to SUI Calendar as **System Administrator** then click **Preferences** in <u>User</u> <u>Info</u>.

ont improve th	s lavout! x	_			_		Preferences					_
Systen	n prefe	rence	s			-						?
Close												
General									Opti	ons		
Lang	juage Englis	sh						•	VA	lways use WebDialog		
nline Help	URL http://	filemaker.	suisolutions.	com/docs/help	/sui_calen	dar/2.0/			V S	how "I want improve	this layout" featur	e
Colonda	Ontion								V S	how only own appoin	tments for users	
	veek on Mon		E-mai	I me about ne	w appoint	ments assi	aned to me		🕀 Ar	pointment types (3)	
	occupied da				0.0						Graphics	
	completed		E-mai	I me about up	dates in a	ppointment	s assigned by me		50	Task	Ô	<u>()</u>
Graphic									3	Event	ø	8
Graphic	0	10000			Current	Another			97	Meeting	â.	8
Low	Medium	High	Today	Selected day	month	month			-			
000	0.	Ŧ										*
												_
Br	owse											

General

- Select the system default language from the Language drop down list.
- Change the Online Help URL field if necessary.

Options

- Check next to Always use WebDialog to display confirmation dialog boxes outside of IWP mode.
- Check next to Show "I want to improve this layout!" feature to enable the feature
- Check next to **Show only own appointments for users** to provide users with only access to their own appointments (strongly via **Assigned to** field).

Calendar Options

- Check the Start week on Monday check box for setting Monday as the first day of the week.
- Check the **Show occupied days** check box to view days with appointments as <u>underlined</u> in the <u>Calendar Navigation Component</u>.
- Use the Show Completed check box to show or hide completed appointments.
- Use the check boxes for e-mail notifications to remind other users and yourself about created, completed or commented appointments.



Note: In order to receive these e-mail notifications, your e-mail address must be included in your <u>User Profile</u>.

Graphics

- Calendar backgrounds (Today, Selected day, Current month, Another month).
- Priority type icons (Low, Medium, High).

Appointment Types

- To add a new appointment type, click **New** 🔨.
- Select the <u>MultiLang</u> Label Id from the # drop down list and insert the picture in the Graphics field.
- Click **Delete (2)** near the type to delete.

Calendar

The **Calendar** helps users plan events, meetings and tasks with the ability to link work to a database contact. Calendar supports team interaction by allowing users to view, comment on and assign each other's appointments. Calendar provides e-mail notifications, multiple calendar views, an expired appointments view and more.

Features

The Calendar module includes the following features:

- Multi-user Environment Users are able to assign tasks and appointments to other team members and themselves.
- Single or Recurring Appointments Appointments can be scheduled singly or with daily, weekly, monthly or yearly recurrences.
- Alternative Calendar Views

Each team member can view schedules in daily, weekly and monthly overviews with corresponding levels of detail, each with an option for a quick view of any single day.

• Editable Appointment Categories

Standard *Task*, *Event* and *Meeting* categories help make sense of different appointments.

- Expired Appointments Quick View A quick view of expired appointments in red text helps prevent tasks from being overlooked.
- E-Mail Notification System

Users can elect to receive e-mail notifications to track newly assigned appointments and progress on existing appointments.

Calendar Day View

Calendar Day View, using the Appointments Filter, shows appointments for the Selected Date (today is the default), Expired Appointments and Calendar Navigation Component.

0	0	0	Appo	ointn	nents	Ft	lter O Day		Veek		Mont	h	2	'ear		List	
÷			Appointme								Ex	oired	Арр	ointr	nent		-
~	#		Assigned by	Start date 8/10/2011	Due date 8/10/2011	Task	Title	c	omplete	d A		Due dat					*
0	<u>0</u>	1	Bob	8/10/2011	8/10/2011		Buy commercial version of Vedatrak			•	٢	8/8/201	-				
Ð	28	Ŧ	Bob			Task	Sub: Buy commercial version of Vedatrak - call SUI Solutions			8	P	8/9/201	ĒΣ		rec	nent	
Ð	<u>17</u>	0	Bob	8/10/2011	8/10/2011	Task	Create a project plan			8	Θ.	Ap	p'o	int	me	ents	3
0	18	•	Bob	8/10/2011	8/10/2011	Task	Follow up with new client			8		-					
0	<u>21</u>		Bob	8/10/2011	8/10/2011	Task	Contact John for details			8							
0	<u>16</u>	•	Bob	8/10/2011 9:00 AM	Daily		pointments		V	8							-
0	20		Bob	8/10/2011 1:00 PM	8/10/2011	ñe.	Team meeting			8			Aug	ust :	2011	-	
0	24	•	Bob	8/10/2011 4:00 PM	8/10/2011	<u>Å8</u>	Contrast annual			8	Sun	Mon	Tue	Wed	Thu	Fri	Sat
6	19	•	Bob	8/10/2011	8/10/2011	Meeting Event	Grandma birthdav		-	3	31	1	2	3	4	5	6
×		•	1000			Event	Grandina Dirtiloay			- I	Z	8	Ca	lêr	nda	r ²	<u>13</u>
											14	15	la	viq	ati	on	20
											21					ent	27
											28	29	30	31	1	2	3
											4	5	6	7	8	9	10
												ow occup					

Selected Date

Selected Date is displayed at the top of the page. You can change Selected Date using the Appointments Filter or the Calendar Navigation Component.

Appointments Filter

- Switch between days using the **arrows** or the **Today** button.
- Use the Show Completed check box to show or hide completed appointments.
- Appointments for the current user are shown by default. To view other users' appointments, select the user from the Assigned to drop down list or click All to display appointments for all users.

000

Show completed

Daily Appointments

Daily Appointments are displayed only for the **Selected Date.** Users may add, edit, complete and delete appointments.

Calendar Navigation Component

In the **Calendar Navigation Component**, today's date is highlighted in pink while the selected day is highlighted in blue (if not coinciding with today):

Sun	Mon		ne 2 Wed		Fri	Sat
<u>30</u>	<u>31</u>	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>
<u>6</u>	7	<u>8</u>	<u>9</u>	<u>10</u>	<u>11</u>	<u>12</u>
<u>13</u>	<u>14</u>	<u>15</u>	<u>16</u>	<u>17</u>	<u>18</u>	<u>19</u>
<u>20</u>	<u>21</u>	<u>22</u>	<u>23</u>	<u>24</u>	<u>25</u>	<u>26</u>
<u>27</u>	<u>28</u>	<u>29</u>	<u>30</u>	1	2	3
4	5	6	7	8	9	10

Show occupied days

- Switch between months using **Previous month** and **Next month**.
- Switch between years using **Previous year** 4 and **Next year** 2.
- Check the Show occupied days check box to view dates containing appointments as <u>underlined</u>.

Show occupied days

Expired Appointments

Expired appointments are shown in red and displays appointments that were not completed on time (Finish/Due date < Today).

Hold new agreement

Calendar Week View

Calendar Week View, using the Appointments Filter, shows weekly appointments, including the Selected Week (today's week is the default), Daily Appointments and the Calendar Navigation Component.

		0	Show co	malated Dat	b Rollins					1		N N			_				
-	0	0	Show co	mpieted Bo	D Rollins				9	Day	Week		Mont	<u>h</u>	7	<u>rear</u>		List	t
	Repair Read t			Mon Repair boat Repair boat Age Fill form	0		Tuesday d new agreement te a review	9 Dev Connecida Buy commercial Sub: Buy comme Crate a projec Follow up with Contact John fo \$5 900 AM New & 1:00 PM Team m & 4:00 PM Contact \$6 Grandma birtho	rcial t plan new or details neeting t approval	Buy com		D Fin	ish up w chase n	ercial ve	ise	🛨	Satu		13 rsion
_	_																		
Ð	Da	ily A	Appointn	nents (9)											A STATISTICS	ust :		Eri	Sat
Ð	Da #	ily A		Start date	Due date		Title		_		Complete	1	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Ð	Da # <u>6</u>	ily A		Start date 8/10/2011	8/10/2011	Task	Title Buy commercial ve	ersion of Vedatrak	-			d)	Sun 31	Mon 1	Tue 2	Wed 3	Thu 4	5	Sat 6
•	Da # <u>6</u> 28	ily A	Assigned by	Start date		0	Buy commercial ve	ersion of Vedatrak cial version of Vedatrak -	- call SUI Sc	olutions		3	Sun 31 <u>7</u>	Mon 1 <u>8</u>	Tue 2 <u>9</u>	Wed 3 <u>10</u>	Thu 4 <u>11</u>	5 <u>12</u>	Sat 6 <u>13</u>
	# <u>6</u>	7	Assigned by <u>Bob</u>	Start date 8/10/2011	8/10/2011	Task	Buy commercial ve	cial version of Vedatrak -	- call SUI Sc	olutions		3	Sun 31 <u>7</u> <u>14</u>	Mon 1 <u>8</u> <u>15</u>	Tue 2 <u>9</u> <u>16</u>	Wed 3 <u>10</u> <u>17</u>	Thu 4 <u>11</u> <u>18</u>	5 <u>12</u> <u>19</u>	Sat 6 <u>13</u> 20
•	# 6 28 17	7	Assigned by Bob Bob Bob	Start date 8/10/2011 8/10/2011	8/10/2011 8/10/2011	Task Task	Buy commercial ve Sub: Buy commerc Create a project p	cial version of Vedatrak - olan	- call SUI Sc	olutions		3 3 3	Sun 31 7 <u>14</u> 21	Mon 1 <u>8</u>	Tue 2 <u>9</u>	Wed 3 <u>10</u>	Thu 4 <u>11</u>	5 <u>12</u>	Sat 6 <u>13</u>
	# 6 28 17 18	••• ••• •••	Assigned by Bob Bob Bob Bob	Start date 8/10/2011 8/10/2011 8/10/2011	8/10/2011 8/10/2011 8/10/2011	Task Task Task Task	Buy commercial ve Sub: Buy commerc Create a project p Follow up with new	cial version of Vedatrak - olan w client	- call SUI Sc	olutions		3 -	Sun 31 <u>7</u> <u>14</u>	Mon 1 <u>8</u> <u>15</u>	Tue 2 <u>9</u> <u>16</u>	Wed 3 <u>10</u> <u>17</u>	Thu 4 <u>11</u> <u>18</u>	5 <u>12</u> <u>19</u>	Sat 6 <u>13</u> 20
	# 6 28 17	7	Assigned by Bob Bob Bob	 Start date 8/10/2011 8/10/2011 8/10/2011 8/10/2011 	8/10/2011 8/10/2011 8/10/2011 8/10/2011	Task Task	Buy commercial ve Sub: Buy commerc Create a project p	cial version of Vedatrak - olan w client	- call SUI Sc	olutions		3 -	Sun 31 7 <u>14</u> 21	Mon 1 <u>8</u> <u>15</u> 22	Tue 2 <u>9</u> <u>16</u> 23	Wed 3 <u>10</u> <u>17</u> 24	Thu 4 11 18 255	5 <u>12</u> <u>19</u> 26	Sat 6 <u>13</u> 20 27

• Switch between weeks using arrows or the Today button with the Appointment Filter.



• To open **Day view** for a chosen day, click the date in **Week View**.



Calendar Month View

Calendar Month View, using the **Appointments Filter**, shows appointments for every day of the month, including the **Selected Date** (today is the default). This view is convenient for finding an unoccupied day to set an appointment.

00							SUI_Calendar							_	C
Augus													Jsers	Multilang	?
000) 🔽 Sh	ow completed	Bob Rollin	IS			9	<u>Day</u>	Week		Month	<u>Y(</u>	ear_	List	
🔸 Sun	Iday	31	Monday	1	👲 Tuesday	2	• Wednesday 3	٢	Thursday 4)•	Friday	5	•	Saturday	6
 Sun Repair boat 	1	7 •	Monday air boat	8	 Tuesday Hold new agreement 	9	Buy commercial version or	O Bu	Thursday 11 y commercial version		Friday Buy commercial w	ersion	Buy	Saturday commercial v	ersion
Read the bi	itt	As Fill:	form		Write a review		 Sub: Buy commercial Create a project plan Follow up with new 	🗍 Pu	ntact John for details rchase new license nish up with	ō	Finish up with Purchase new lice 11:00 AM Contact .				
Sun Buy comme		14 • Buy	Monday commercial ver		 Tuesday Buy commercial version 	16	Wednesday 17		Thursday 18 y commercial version		Friday Buy commercial w	19	•	Saturday	20
			commercial ref					0.50		ľ	boy commercial r				
👲 Sun	Iday	21 •	Monday	22	🔸 Tuesday	23	🔸 Wednesday 24	٢	Thursday 25]•	Friday	26	•	Saturday	27
👈 Sun	iday	28	Monday	[29]	🛨 Tuesday	30	+ Wednesday 31	•	Thursday 1)•	Friday	2	•	Saturday	3
									_	1					
🔸 Sun	Iday	4 •	Monday	5	🛨 Tuesday	6	+ Wednesday 7		Thursday 8	10	Friday	9	•	Saturday	10
		-								Γ					
		UI Solutions	2006-2011						User: Bob	/ Bob	Rollins Profil	<u>e</u> ₽	Preference	e <u>s</u> <u>Re-lo</u> g	in
	rowse	_	_	_		-		_	_	-	_	_	_		_

• Switch between months using arrows or the Today button in the Appointment Filter.



• To open the Day view for a chosen day, click on the date in Month View.



Calendar Year View

Calendar Year View, using the **Appointments Filter**, shows appointments for every day of the year, including the **Selected Date** (today is the default). This view is convenient for finding an unoccupied day to set an appointment.



• Switch between years using arrows or the Today button in the Appointment Filter.



• To open the **Day view** for a chosen day, click on the date in **Month View**.



Calendar List View

Calendar List View, using the **Appointments Filter**, shows appointments as list. This view is very convenient for finding and viewing appointments by some criteria.

List								Users	Multilang	?
	🕽 🚺 📝 Show co	ompleted Bob	Rollins		Day	Week	<u>Month</u>	Year	List	
#	Assigned to	Start date	Due date	Title 🔻		Completed			_	
5	Bob	8/9/2011	8/9/2011	Write a review	12	0%				
20	Bob	8/10/2011	8/10/2011	💦 Team meeting		0%				- 1
28	Bob	8/10/2011	8/10/2011	Sub: Buy commercial version of Vedatrak - o	call SUI	0%				-
2	Bob	8/7/2011	8/8/2011	Repair boat						
) 1	Bob	8/7/2011	8/7/2011	Read the bill	7	5%				-
25 🜔	Bob	8/11/2011	8/11/2011	Purchase new license		0%				-
26 🔾	Bob	8/12/2011	8/12/2011	Purchase new license		0%				-
16	Bob	8/10/2011	8/10/2011	剩: New merchandiser arrivat						
24	Bob	8/9/2011	8/9/2011	Hold new agreement		0%				-
19	Bob	8/10/2011	8/10/2011	剩: Grandma birthday						
2 18	Bob	8/10/2011	8/10/2011	Follow up with new client						
27	Bob	8/11/2011	8/12/2011	Finish up with documentation		0%				- 1
3 3	Bob	8/8/2011	8/8/2011	Re Fill form		0%				-
17	Bob	8/10/2011	8/10/2011	Create a project plan		0%				- 1
21 🔾	Bob	8/10/2011	8/10/2011	Contact John for details						
22 🜔	Bob	8/11/2011	8/11/2011	Contact John for details						
23 🔾	Bob	8/12/2011	8/12/2011	Contact John for details						
24	Bob	8/10/2011	8/10/2011	Contact approval						
0	Bob	8/10/2011	8/10/2011	Buy commercial version of Vedatrak						
) 7	Bob	8/11/2011	8/11/2011	Buy commercial version of Vedatrak						
8	Bob	8/12/2011	8/12/2011	Buy commercial version of Vedatrak						
9 9	<u>Bob</u>	8/13/2011	8/13/2011	Buy commercial version of Vedatrak						

Creating New Appointments

New appointments can be created by clicking **New** 👥 in several places:

- Day View: In Daily Appointments to create an appointment for the selected day.
- Week View, Month View and Year View: Near the particular day.

The New Appointment window opens:

00		New Appointment			
want improve this layout! x					?
Close			Repeat ev	ery 1 🔻 days	
				O Custom Brons	rtico
Title				Custom Prope	rties
Type 剩: Event 🔻	Start date 8/10/2011	Time	Assigned by Bob		
Priority 💡 🔋 🔋	Finish/Due date 8/10/2011	Time	Estimation		
Assigned to Sob Rollins Select all Lusy Mays Unselect all System Administr	rator				
Notes (0)					
Notes (0) Description	Created Note				
	Created Note				
					<u></u>
					-

- The **Title** field is visible in all views.
- The **Type** field is shown before the title as an icon. Different icons are used to represent each appointment type.

🗐 Task 🛛 🔐 Meeting 🚿 Event

- Start date, Finish/Due date, Start time, and Finish time can be defined and are visible in all views.
- Select Assigned to users for the appointment.

Assigned to	🖂 Bob Rollins
	🖂 James Travis
Unselect all	🖂 Jason Burch
	🖂 Lucy Mays
	System Administrator

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• Use the **Repeat every** feature to specify the frequency at which the appointment should recur.

Repeat every 1 V days V

• Specify Priority. The default priority is *Medium*.

```
Priority 💡 💡 🖡
```

Click the **Close** button
 Close
 to save the appointment and close the window.

Viewing and Editing Appointments

Appointments can be viewed and edited in several places:

- Day View: Click Edit/View ^S near the appointment.
- Week View and Month View: Click the appointment.
- List View, click Edit/View ^{So} near the appointment.

The Edit Appointment window opens:

Close			_	20%	/0		Completed		Delete
Buy commercial								🕒 Custom I	Properties
	Sub: Buy co			rak - call SUI Sol		Accid	ned by Bob	Phone (8	02) 764-1209 🤇
Priority		•	Start date 8/ ish/Due date 8/		Time		0.5		
Assigned to									
Select all	Lusy Mays	5							
Unselect all	System Ad	dministrator							
	Subtasks (0) Work	log (1)						
Notes (2)) Work	Created	Note					
and the second) Work	Created 08.13.11 13:22:21				_		
escription) Work	Created		dditional Modules will purcha	ase			6
escription) Work	Created 08.13.11 13:22:21		dditional Modules will purcha	ase			8
escription) Work	Created 08.13.11 13:22:21 by Bob 08.13.11 13:21:57	2) What Ac	dditional Modules will purcha	ase		_	Q
escription) Work	Created 08.13.11 13:22:21 by Bob	2) What Ac	etails of purchase Vedatrak				0
escription) Work	Created 08.13.11 13:22:21 by Bob 08.13.11 13:21:57	2) What Ac	etails of purchase Vedatrak				
escription) Work	Created 08.13.11 13:22:21 by Bob 08.13.11 13:21:57	2) What Ac	etails of purchase Vedatrak				
escription) Work	Created 08.13.11 13:22:21 by Bob 08.13.11 13:21:57	2) What Ac	etails of purchase Vedatrak				
escription		<u>) Work</u>	Created 08.13.11 13:22:21 by Bob 08.13.11 13:21:57	2) What Ac	etails of purchase Vedatrak				
escription) Work i	Created 08.13.11 13:22:21 by Bob 08.13.11 13:21:57	2) What Ac	etails of purchase Vedatrak				
escription) Work I	Created 08.13.11 13:22:21 by Bob 08.13.11 13:21:57	2) What Ac	etails of purchase Vedatrak				

Click the **Close** button **Close** to save the appointment and close the window.

Creating Subtasks

Open the appointment where you would like to create a subtask. Click **New** • in the **Subtasks** tab in the **Edit Appointment** window.

Close							Con	npleted		Delete
Title	Buy co	mmercial	version of	Vedatrak	c				🔁 Custom	Properties
Туре	Tas	k 🔻	S	start date	8/10/2011	Time	Assigned b	y Bob		
Priority	0.	: :	Finish/I	Due date	8/10/2011	Time	Estimation			
Assigned to Select all Unselect all	Bob l	Rollins Mays em Adminis	trator							
<u>Notes (0)</u> # As:	🛨 Subta	and the second second	<u>Work log (0</u>	A CONTRACTOR	Title					
	🛨 Subta signed to <u>Bob</u>	Star	t date	0) Due date 8/10/2011		nercial version of Vedatrak - call SUI	20%			
# As:	signed to	Star	t date	Due date		nercial version of Vedatrak - call SUI	20%			
# As:	signed to	Star	t date	Due date		nercial version of Vedatrak - call SUI	20%		-	
# As:	signed to	Star	t date	Due date		nercial version of Vedatrak - call SUI	20%		-	
# As:	signed to	Star	t date	Due date		nercial version of Vedatrak - call SUI	20%			
# As:	signed to	Star	t date	Due date		nercial version of Vedatrak - call SUI	20%			
# As:	signed to	Star	t date	Due date		nercial version of Vedatrak - call SUI	20%			

Click the **Close** button **Close** to save the appointment and close the window.

Deleting Appointments

Appointments can be deleted in several places:

- Calendar Day View: Click Delete 🥙 to the right of the appointment.
- Open the appointment to <u>edit</u> and click the **Delete** button.

Delete

The appointment will be deleted after your confirmation of the action.

Note: Users may only delete appointments that they've created.

Completing Appointments

Appointments can be marked as completed in several ways:

- Calendar Day View: Click the Completed check box 🔲 to the right of the appointment
- Open the appointment to <u>edit</u>, then check the **Completed** check box **Completed** at the top of the window.

If <u>e-mail notifications</u> are activated, the notification will be sent immediately after completing the appointment.

Users

Users is a convenient tool that simplifies account management for the entire system.

Features

- One Touch User Management Users and roles are maintained consistently throughout all solution files in one spot.
- Intuitive User Interface

Allows users to edit user properties, add photos, scanned signatures and adjust user settings.

• Easy-to-use Roles Adjustment

Set privileges and add, change, or delete users in several FileMaker files simultaneously with a minimal amount of prep work.

• External User Management

User Manager can be used to manage roles and users in any FileMaker files outside of SUI Calendar.

Using Users

Users List View is used to view and search for users. Each user has an individual User Profile including **Login**, **Name**, <u>Role</u>, **E-mail**, **Photo**, **Signature scan** and the **Active** status.

	S	UI_Calendar	Calenda	ar Users	Multilang	?
) U 🔒 📃		9		(List	
Name	Role	E-mail		Ac	tive	
System Administrator	Sysadmin					
Bob Rollins	Administrator					
Lusy Mays	User				~	8
I: 3)			User: Bob / Bob Rollins Profil	e Preference	s Re-lo	gin
	Name System Administrator Bob Rollins Lusy Mays	Name Role System Administrator Sysadmin Bob Rollins Administrator Lusy Mays User	Name Role E-mail System Administrator Sysadmin Bob Rollins Administrator Lusy Mays User	Calenda Cal	Calendar Users I Calendar Users I Name Role E-mail Ac System Administrator Sysadmin Bob Rollins Administrator Lusy Mays User	Calendar Users Multilang

Creating New Users

Note: This feature is limited to the System Administrator and Administrator.

New users can be created by clicking **New** 💁 in:

• Users List View: In Tool Bar.

When the Edit profile window appears, enter the new user's data

Editing User Profile

User Profile can be edited in multiple ways:

- <u>User Info</u>: Click **Profile** to edit your own **User Profile**.
- Users List View: Click Edit/View 🕥 next to the user to edit a set of users.
- Day View and Week View: Click Assign by user name

When the Edit profile window appears, you can edit all the user properties:

Close Photo	Password Active	
	First Name Lusy	
1000	Last Name Mays	
Auditor Press	Login Lucy	
25	Role User	
H	E-mail	
Signature scan		
L. May		

Click **Close** to save changes and close the window.

Viewing User Profile

User Profile can be viewed in multiple areas:

- <u>User Info</u>: Click **Profile** to view your own **User Profile**.
- Users List View: Click Edit/View ^O near the user to view a found set of users.
- Day View and Week View: Click Assign by user name

When the View profile window appears, users may view user properties:

Close			
Photo	First Name		
Antin Solo	Last Name Login	Lucy	
-	E-mail		
Signature scan	Language	English	
L. Mays			

Click **Close** to close the window.

Changing User Password

To change a password: Open the User Profile to edit, then click Password .

Click **Close** to close the window.

Deleting Users

Note: This feature is limited to the <u>System Administrator</u> and <u>Administrator</u>. You can not delete the **admin** user.

Click **Delete** to the right of the user in the **Users List View**.

The user will be deleted after your confirmation of the action.

MultiLang

MultiLang adds multilingual support to SUI Calendar. While several additional language sets are included with SUI Calendar, this useful language editor allows for the creation of additional dictionaries quickly and easily. This module can be used to translate most application elements.

Features

- One-Touch Language Adjustment Languages <u>may be switched in one touch</u> at run-time with no need to restart the program.
- Predefined Language Sets All application elements are already translated into Turkey, French, German and Russian.
- Handy Language Editor
 Create your own language dictionary for virtually any language using the language editor.

Using MultiLang

Each user <u>may choose</u> their own language for SUI Calendar. Each language has a dictionary with each word used in SUI Calendar. **MultiLang List View** allows users to edit the dictionary for the existing languages and create new ones.

Multilan	g	Dashboard Calendar Contacts Mail Files Products Orders Invoices Messaging	
00 8		🕘 🕥 Language English 🔻 🎾 💬 👰 🛛 List	
Laber Id 🔺	Label clarification	Translation Appointment	_
1	Calendar.Appointment	Appointment	8
2	Calendar, Appointment New Label Calendar, Daily Appointments	Daily Appointments	8
3	Calendar.Event	Event Delete Language	0
4	Calendar.ExpiredAppointments	Expired Appointments	8
5	Calendar.Add Appointment	Add Appointment	8
6	Module.Users	Users	8
2	Common.Login	Login	0
8	Users.EditProfile	Edit profile	8
9	Common.AssignedBy	Assigned by	0
10	Calendar.Subtasks	Subtasks	0
11	Users.Photo	Photo	0
12	Common.Company	Company	8
13	Contacts.Phones	Phones	8
14	Common.Email	E-mail	8
15	Common.Notes	Notes	0
16	Module.Dashboard	Dashboard	8
17	Module.Contacts	Contacts	8
18	Module.Multilang	Multilang	0
19	Module.Calendar	Calendar	0
20	Module.Themes	Themes	8
21	Module.Mail	Mail	8
Record: 1 / 33		User: Admin / System Administrator Profile Preferences Re-loc	

Viewing and Editing Dictionaries

Note: This feature is limited to the System Administrator and Administrator.

• Select the language you desire in the Language drop down list at the top of MultiLang List View.

Language	English	
	Deutsch	
ents	English	
	Français Русский	
tments	_	_

- To modify a dictionary entry, change the contents in the **Translation** column.
- Click Apply 🥙 to apply the changes you've made.

Warning: Each language has a dictionary with all the words used in SUI Calendar. Do not delete the dictionary items - doing so will remove the items from all dictionaries.

Creating New Dictionaries

Note: This feature is limited to the System Administrator and Administrator.

An unlimited number of languages can be created in SUI Calendar using Multilang.

- To add a language, click **New** 🔨 to the right of the **Language** drop down list.
- Enter the name of the new language and click **OK** to open the new dictionary.
- The Label clarification column lists the basic words used in SUI Calendar. Enter the translation for the new language in the Translation column.
- Click **Apply (4)** to apply the changes you've made.

Warning: Each language has a dictionary with all the words used in SUI Calendar. Do not delete the dictionary items - doing so will remove the items from all dictionaries.

Deleting Dictionaries

Note: This feature is limited to the <u>System Administrator</u> and <u>Administrator</u>. You can not delete the **English** dictionary.

To delete a language, select it in the **Language** drop down list then click **Delete** to the right of the drop down list.

The dictionary will be deleted after your confirmation of the action.

SUI Calendar Internals

Basic technical information regarding SUI Calendar is included here.

SUI Calendar is delivered as a set of FileMaker database files containing data, layouts, scripts and user account information.

FileMaker layouts compose the user interface. Data entry *forms, reports, navigation bars*, and *custom dialogs* are all parts of the layout.

Since SUI Calendar gives defined users full control of its databases, these users can customize existing layouts, create additional layouts, make reports and modify database tables according to business needs. To access layouts and database tables in design mode, the user must have valid system privileges.

SUI Calendar can operate in a single user desktop mode but is more efficient when information is shared between users through an LAN or the Internet. FileMaker can share the information from databases in two main modes:

- FMNET protocol: Users who want to access the database must have FileMaker installed locally.
- *Instant Web Publishing Access*: FileMaker operates like a web server and the remote user only needs a browser to access the database.

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For troubleshooting, product suggestions or comments on how to improve our product, please e-mail us:

fmsupport@suisolutions.com

For information on our other products, please visit our web site:

http://filemaker.suisolutions.com

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