



# **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	<a href="#">System Administrator</a>
Bob	Bob	<a href="#">Administrator</a>
Lucy	Lucy	<a href="#">User</a>

**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

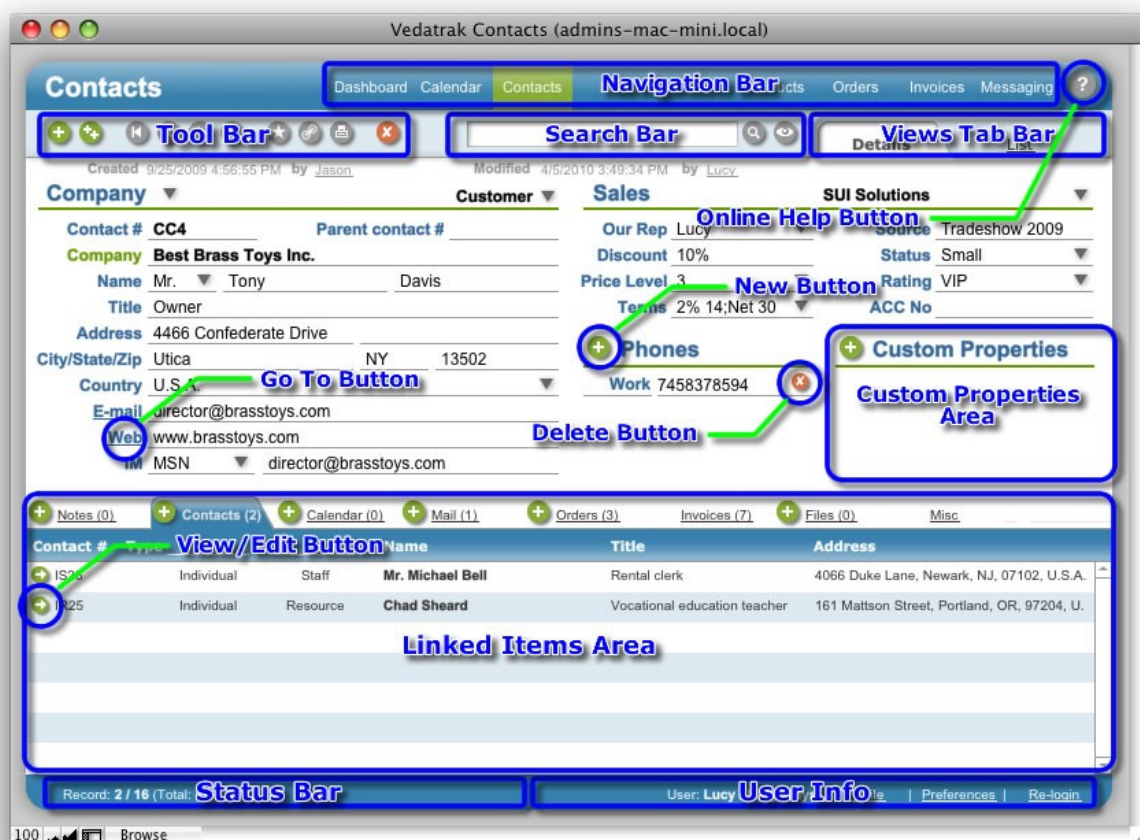
**Administrators** can manage SUI Calendar users, edit data, manage the database **structure** and scripts (except areas which explicitly require [Full Access] privileges.)

### 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 [Vedatrak](#) have the same set of panels and controls:





Navigation Bar


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



Tool Bar

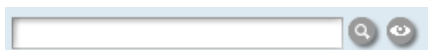
The **Tool Bar** is located at the top of each layout and may contain the following buttons:



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

Button	Action
	Apply changes.

## Search Bar

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



- To perform a general search, enter the information that you would like to locate and click **Find**  to return all matches.
- Click **Show all**  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.

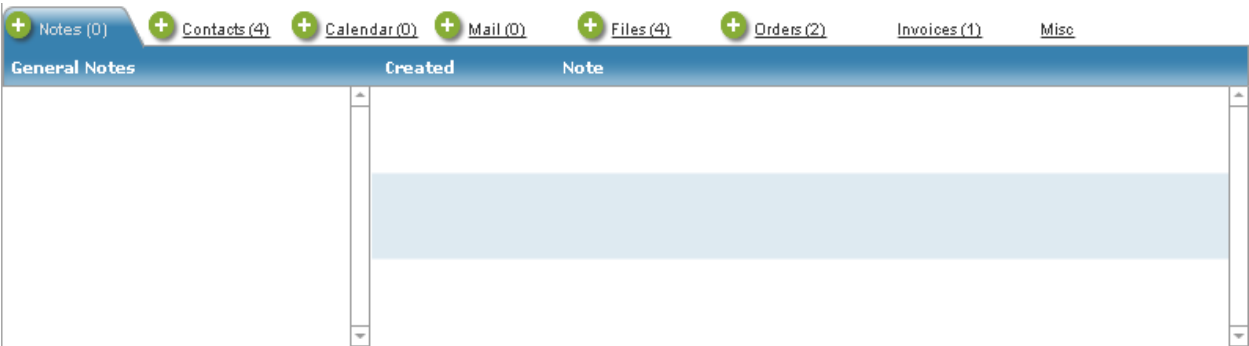


- User** displays the user's login and full name.
- Click **Profile** to view or edit the [User Profile](#).
- Click **Preferences** to view or edit [User Preferences](#).

- 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**  to activate the online help system.

New Button

Click **New**  to create a new item.

Edit/View Button

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

Delete Button

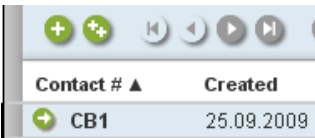
Click **Delete**  to delete an item.

Go To Button

Click **Go To** (shown as Underlined text) to open an item.


Sortable Headers

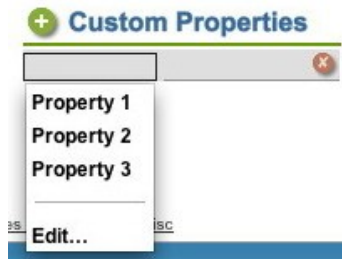
Click **Sortable Headers** to sort the list as ascending or descending.



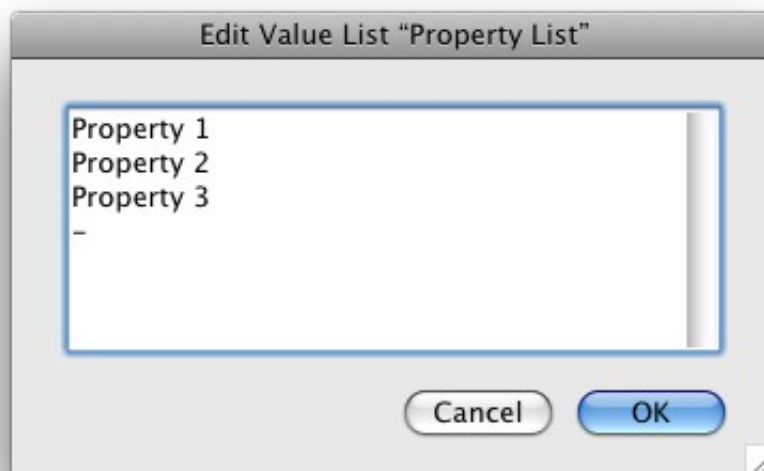
## Custom Properties Area

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.



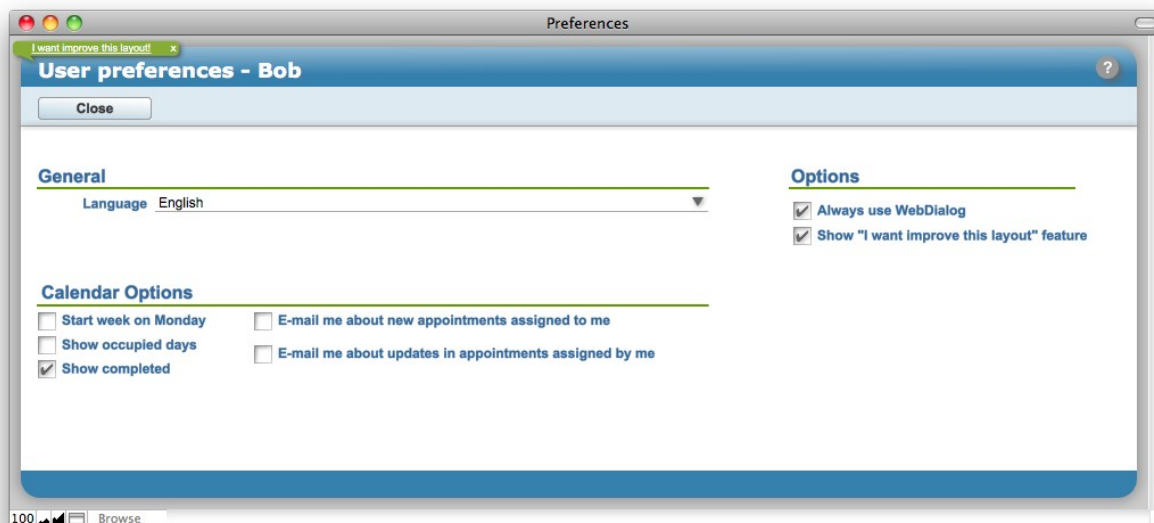
- To edit the property name list, click **Edit...** In the **Edit Value List** dialog box, type each name on a separate line in the order you want them to appear. Then click **OK**:



- Click **Delete**  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 [User Info](#).



### 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 underlined in the [Calendar Navigation Component](#).
- 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.



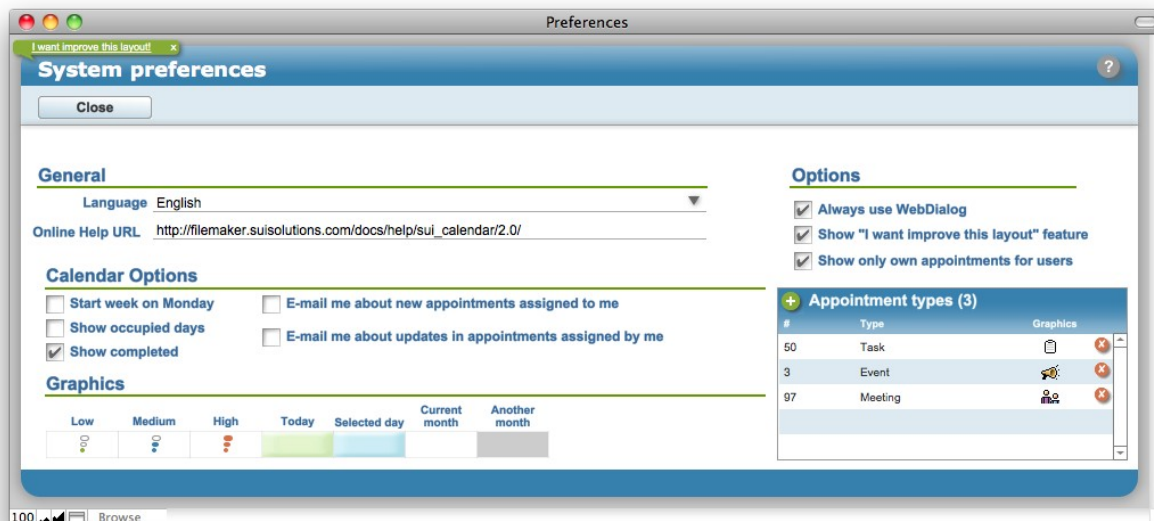
**Note:** In order to receive these e-mail notifications, your e-mail address must be included in your



[User Profile.](#)

## System Preferences

**System Preferences** allows the [System Administrator](#) to edit SUI Calendar system default settings. To change the preferences, login to SUI Calendar as **System Administrator** then click **Preferences** in [User Info](#).



### 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 underlined in the [Calendar Navigation Component](#).
- 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.

☐ E-mail me about new appointments assigned to me



☐ E-mail me about updates in appointments assigned by me

**Note:** In order to receive these e-mail notifications, your e-mail address must be included in your [User Profile](#).

## 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 [MultiLang Label Id](#) from the # drop down list and insert the picture in the **Graphics** field.
- Click **Delete**  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.

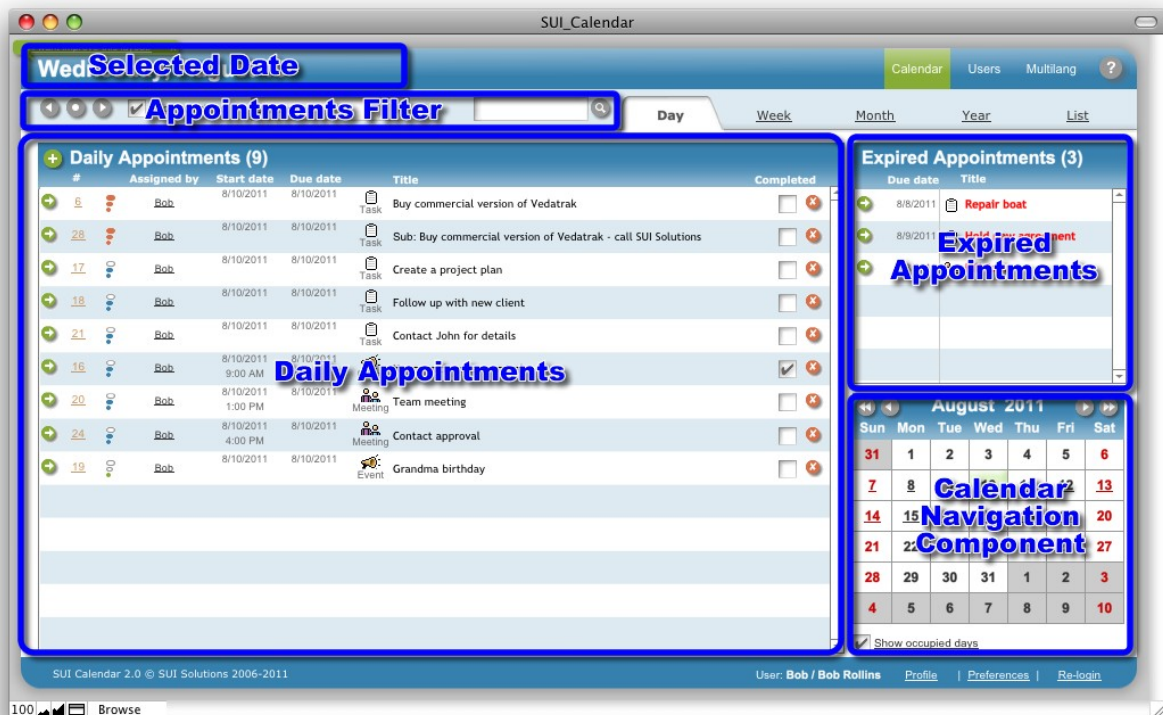
## Features

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**.



## 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.



## 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):

June 2010						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
<u>30</u>	<u>31</u>	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	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**  and **Next year** .
- Check the **Show occupied days** check box to view dates containing appointments as underlined.

☒ Show occupied days

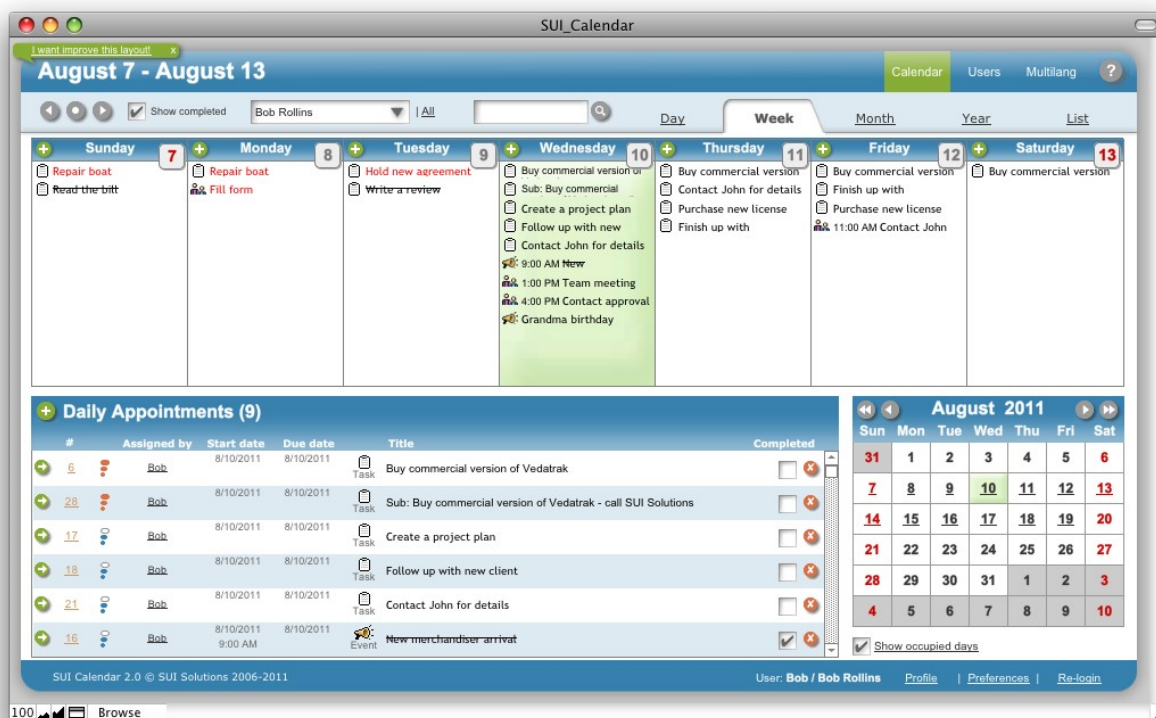
Expired Appointments

**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**.



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

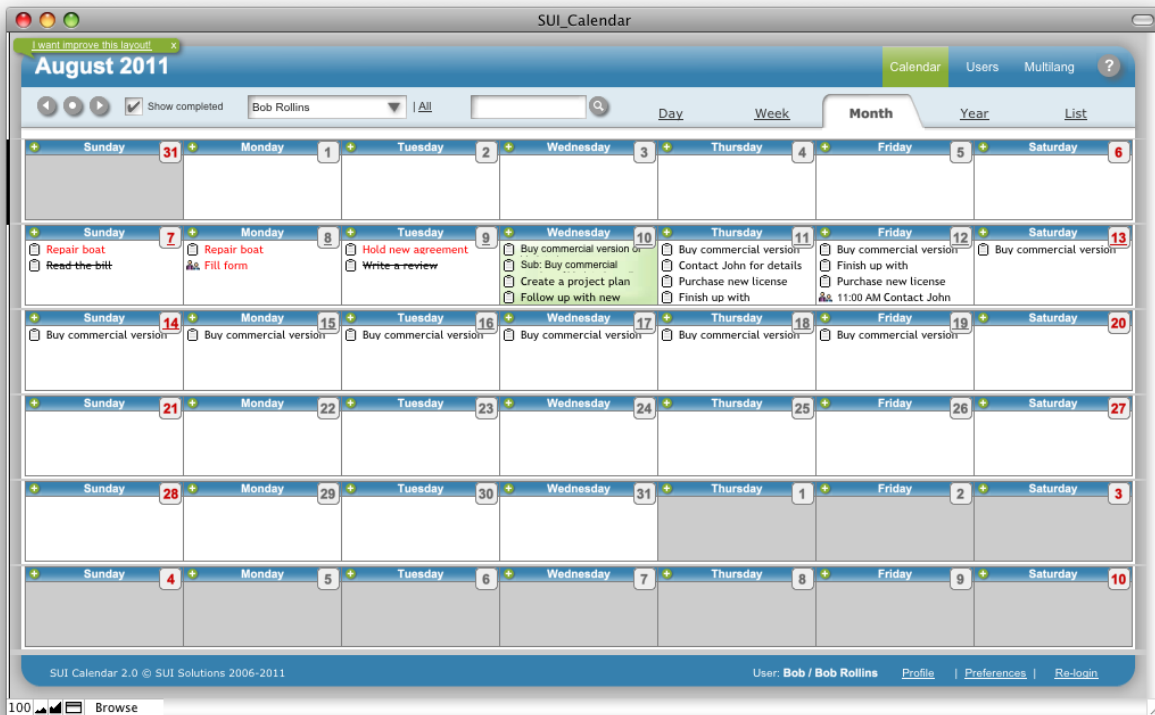


- To open **Day view** for a chosen day, click the date in **Week View**.



## 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.



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



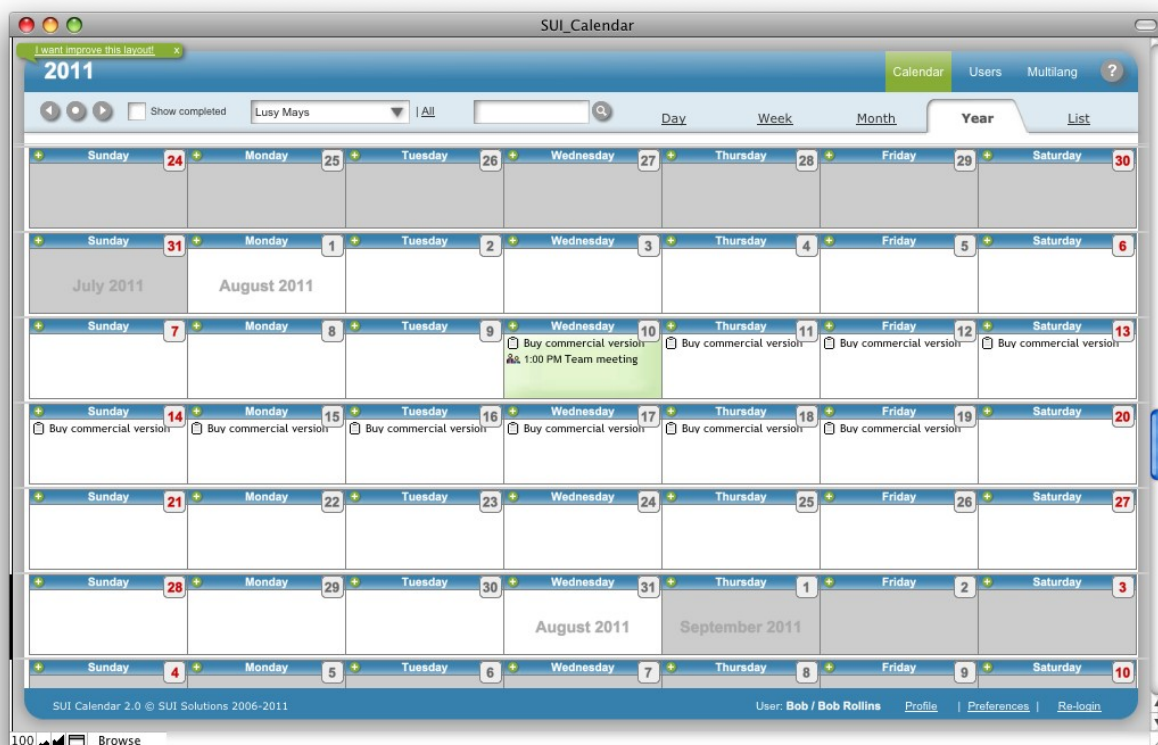
- To open the **Day view** for a chosen day, click on the date in **Month View**.





## 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.

I want improve this layout. x

**List** Calendar Users Multilang ?


☒ Show completed Bob Rollins All  Day Week Month Year List

#	Assigned to	Start date	Due date	Title	Completed
5	Bob	8/9/2011	8/9/2011	Write a review	120%
20	Bob	8/10/2011	8/10/2011	Team meeting	0%
28	Bob	8/10/2011	8/10/2011	Sub: Buy commercial version of Vedatrak - call SUI	0%
2	Bob	8/7/2011	8/8/2011	Repair boat	
1	Bob	8/7/2011	8/7/2011	Read the bill	75%
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	New merchandise arrivat	
4	Bob	8/9/2011	8/9/2011	Hold new agreement	0%
19	Bob	8/10/2011	8/10/2011	Grandma birthday	
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%
3	Bob	8/8/2011	8/8/2011	Fill form	0%
17	Bob	8/10/2011	8/10/2011	Create a project plan	0%
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	
6	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	Bob	8/13/2011	8/13/2011	Buy commercial version of Vedatrak	

Record: 5 / 28 (Total: 28) User: Bob / Bob Rollins [Profile](#) [Preferences](#) [Re-login](#)

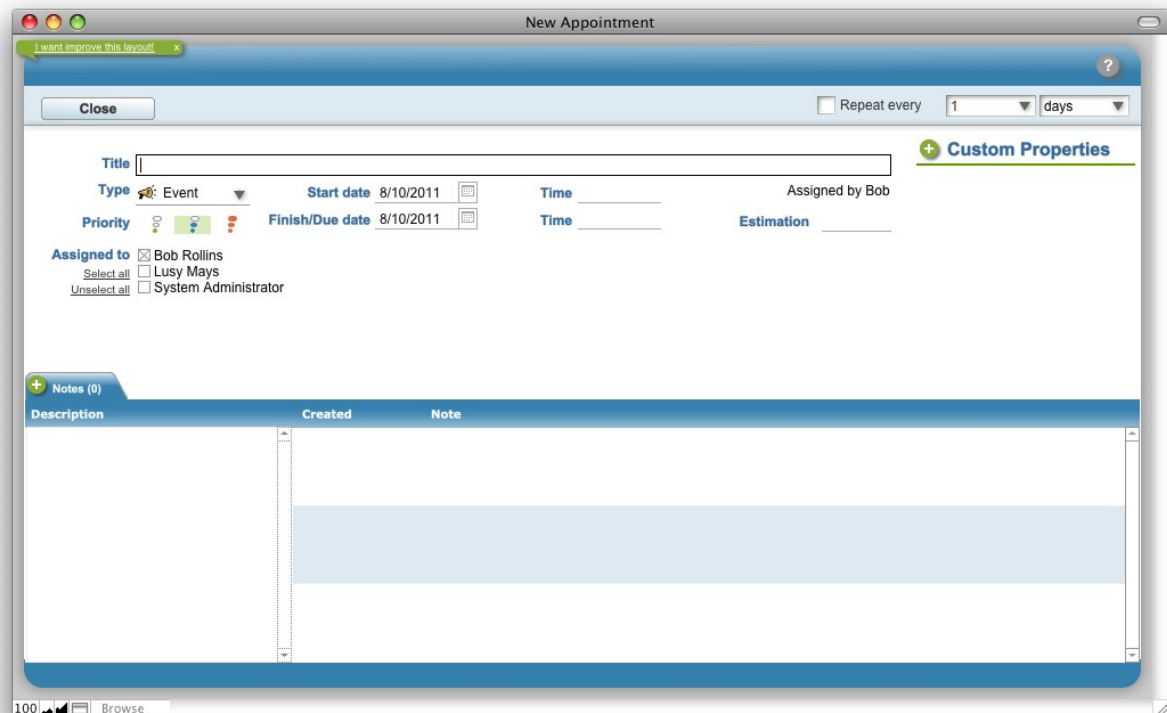
100% [Browse](#)




# 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:



- 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  
Select all ☒ James Travis  
Unselect all ☒ Jason Burch  
☒ Lucy Mays  
☒ System Administrator

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

☐ Repeat every



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

Priority   

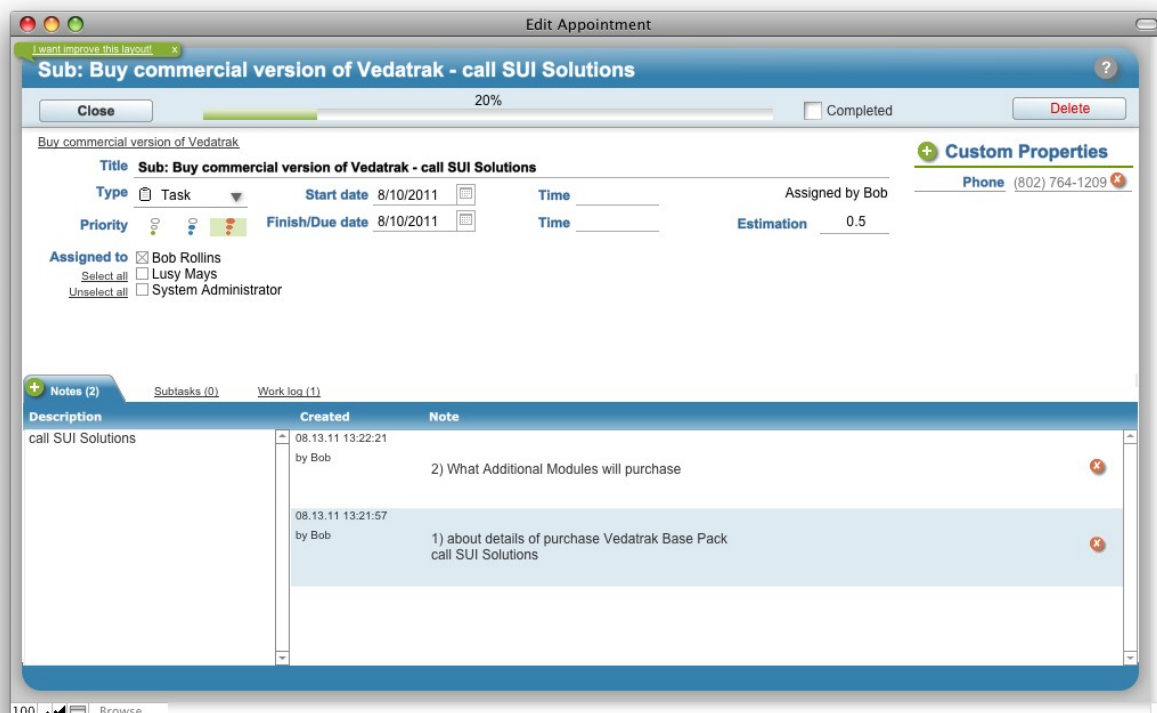
- Click the **Close** button  to save the appointment and close the window.

## Viewing and Editing Appointments

Appointments can be viewed and edited in several places:

- **Day View:** Click **Edit/View**  near the appointment.
- **Week View** and **Month View:** Click the appointment.
- **List View,** click **Edit/View**  near the appointment.

The **Edit Appointment** window opens:



**Edit Appointment**

Sub: Buy commercial version of Vedatrak - call SUI Solutions

Close 20% Completed Delete

Buy commercial version of Vedatrak

**Title** Sub: Buy commercial version of Vedatrak - call SUI Solutions **Custom Properties**

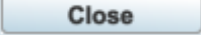
**Type** Task **Start date** 8/10/2011 **Time** Assigned by Bob **Phone** (802) 764-1209

**Priority** **Finish/Due date** 8/10/2011 **Time** **Estimation** 0.5


**Assigned to** ☒ Bob Rollins ☐ Lusy Mays ☐ System Administrator

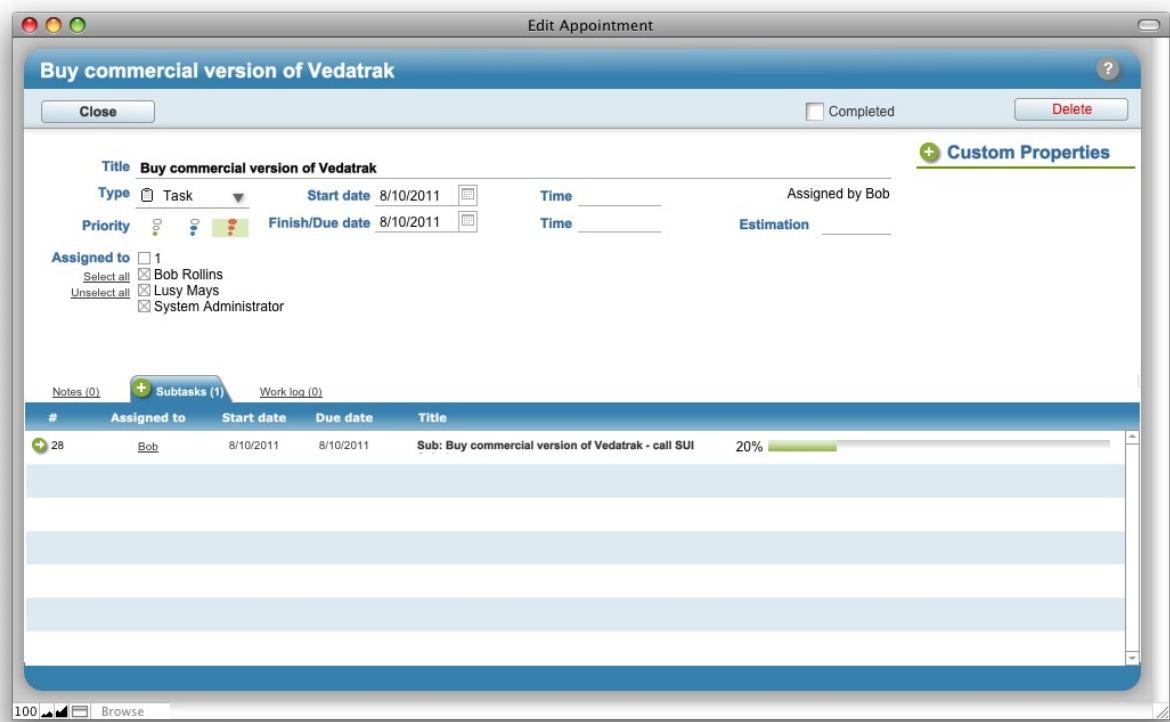
**Notes (2)** **Subtasks (0)** **Work log (1)**


Description	Created	Note
call SUI Solutions	08.13.11 13:22:21 by Bob	2) What Additional Modules will purchase
	08.13.11 13:21:57 by Bob	1) about details of purchase Vedatrak Base Pack call SUI Solutions

Click the **Close** button  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.



Click the **Close** button  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 [edit](#) and click the **Delete** button.



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 [edit](#), then check the **Completed** check box ☒ Completed at the top of the window.

If [e-mail notifications](#) 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**, [Role](#), **E-mail**, **Photo**, **Signature scan** and the **Active** status.



## 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**.

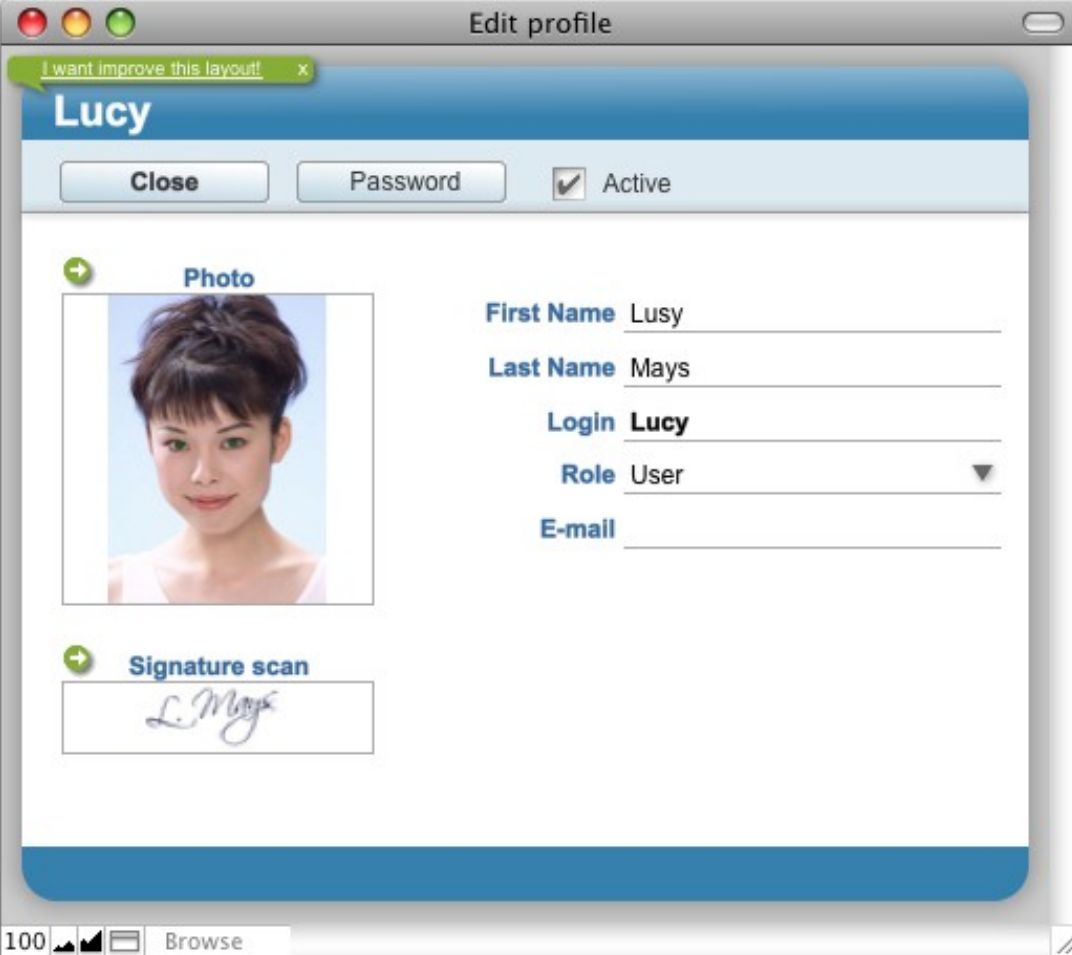
When the **Edit profile** window appears, enter the new user's data

## Editing User Profile

**User Profile** can be edited in multiple ways:

- [User Info](#): 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:



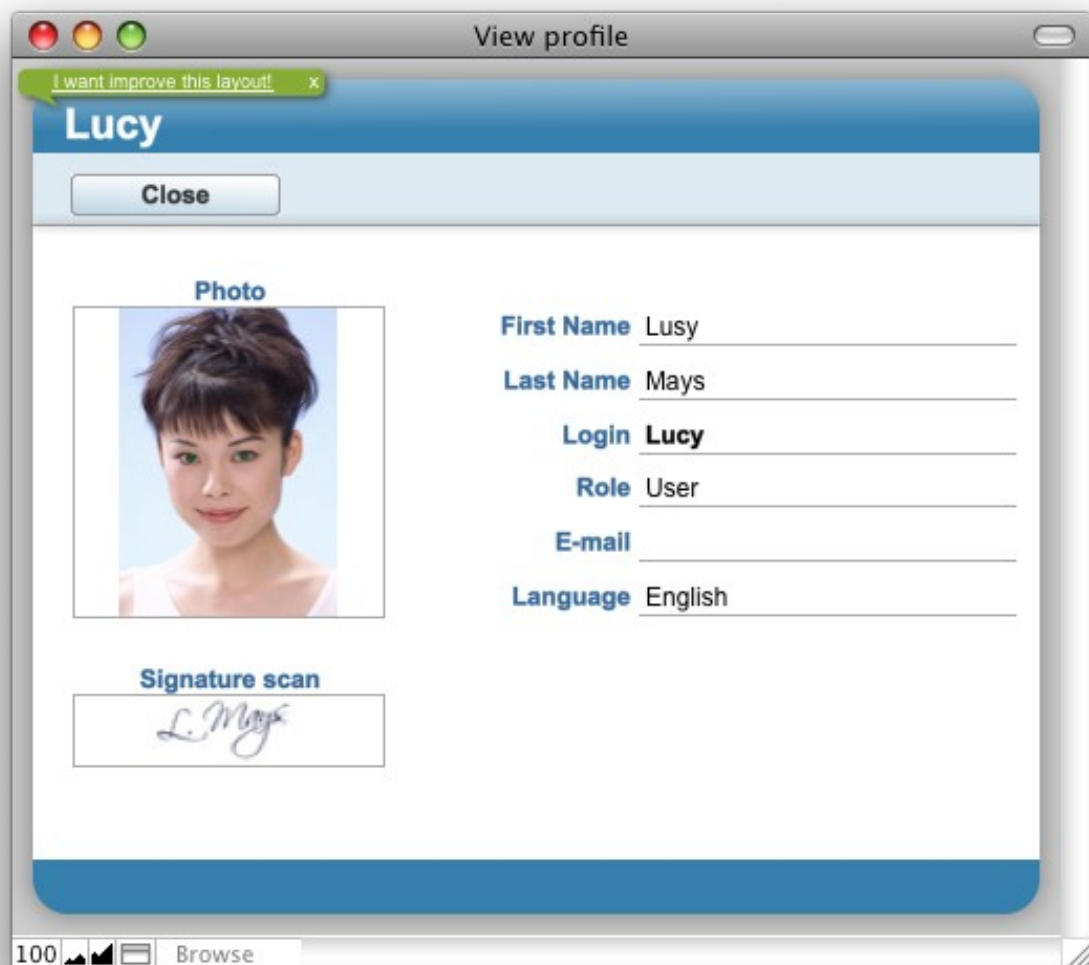
Click **Close**  to save changes and close the window.

## Viewing User Profile

**User Profile** can be viewed in multiple areas:

- [User Info](#): Click **Profile** to view your own **User Profile**.
- **Users List View**: Click **Edit/View**  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:



The screenshot shows a 'View profile' window with a title bar and standard OS window controls. A green tooltip at the top left says 'I want improve this layout!' with a close button. The profile is for 'Lucy'. It features a 'Close' button at the top. Below this, there is a 'Photo' section with a portrait of a woman and a 'Signature scan' section with a handwritten signature 'L. Mays'. To the right of the photo, there are input fields for 'First Name' (Lucy), 'Last Name' (Mays), 'Login' (Lucy), 'Role' (User), 'E-mail' (empty), and 'Language' (English). The window has a status bar at the bottom with a zoom level of 100%, a 'Browse' button, and a scroll bar.

<b>Photo</b>	<b>First Name</b> Lucy
	<b>Last Name</b> Mays
	<b>Login</b> Lucy
	<b>Role</b> User
	<b>E-mail</b>
	<b>Language</b> English

**Signature scan**

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 [System Administrator](#) and [Administrator](#). 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 [may be switched in one touch](#) 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.

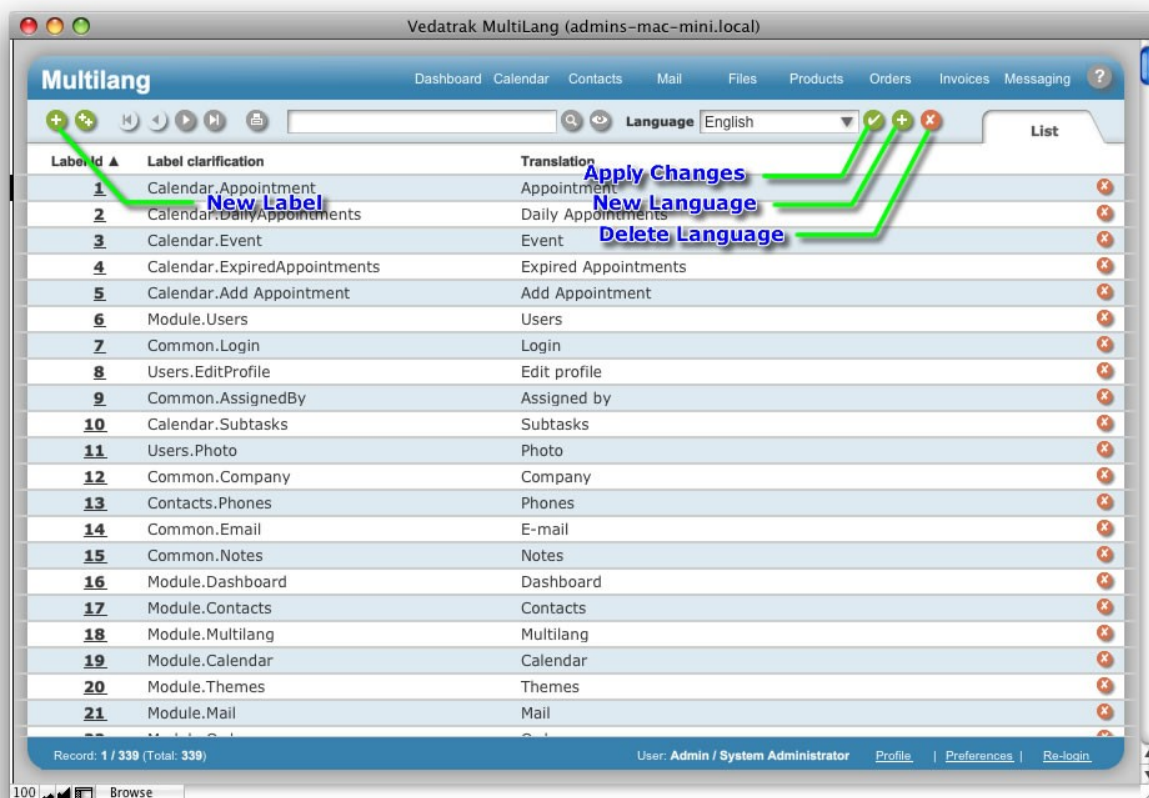
- **Handy Language Editor**

Create your own language dictionary for virtually any language using the language editor.



## Using MultiLang

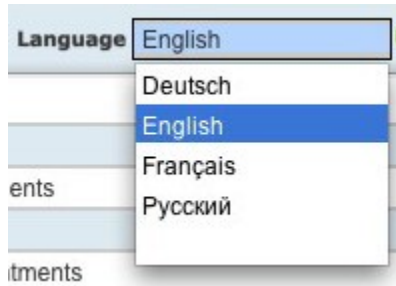
Each user [may choose](#) their own language for SUI Calendar. Each language has a dictionary with each word used in SUI Calendar. **MultiLang List View** allows users to edit the dictionary for the existing languages and create new ones.




## 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**.





- 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**  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 [System Administrator](#) and [Administrator](#). 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.

# Support / Contact

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

[fmsupport@suisolutions.com](mailto:fmsupport@suisolutions.com)

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

<http://filemaker.suisolutions.com>

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