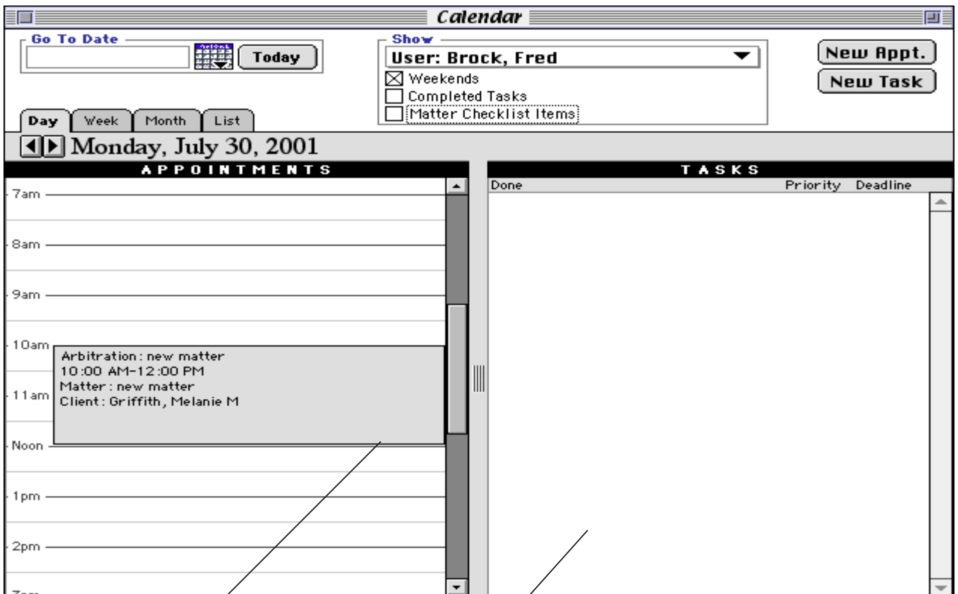
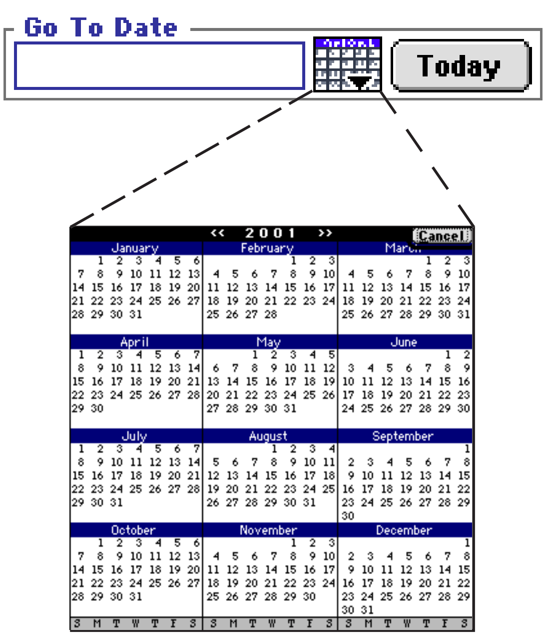
# Using the *CaseMgr* Calendar

**Calendar Screen - Day Tab**



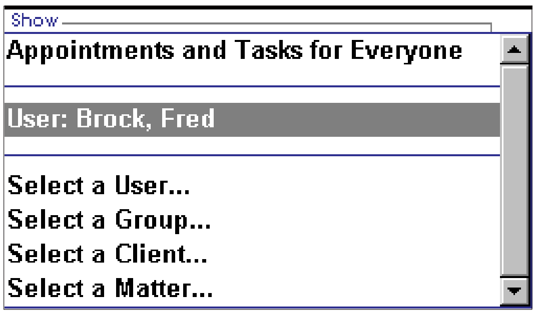

***Today's appointments*** ***Today's Tasks (To-do items)***

The ***Calendar*** is a module of *De Novo CaseMgr*. Reach it from the **Tools Menu**, or with the *Command-L* key combo. The *Personal Settings* option of the **Edit Menu** offers an option to open the ***Calendar Screen*** on starting *CaseMgr*. The ***Calendar Screen*** is internally tabbed, with four tab windows appearing in the lower part of the screen. Today's date and the *Day Tab* is the default when you initially arrive at the ***Calendar Screen***. Select a different view of the Calendar by clicking the *Week*, *Month* or *List* Tab. On later visits, the last Tab set on the screen is the default. The top portion of the screen applies to all four tabs, and always shows a ***"Go to date"*** control for selecting the starting date of the window display, a ***Show*** control with a Pop-up for selecting a user or group of users, a client or a matter, check-boxes to show or hide weekend dates, completed tasks and checklist items, and **New Appointment** and **New Task** buttons. The whole window can be resized by (*on Windows*) dragging from any side or *(on Macintosh*) by dragging the lower right corner of the window.




***Pop-up Date-Picker Window***

You may directly enter a date in the *Go To Date* field, or click the small calendar icon to the right of the field to display the ***Pop-up Date-Picker*** window. When the cursor is within this window, one date is always highlighted. Move the cursor to highlight the desired start date and click the mouse to select that date. Note that the *CaseMgr Date Calculator* function is built into every date field. Just type in the calculation. For example "Today + 3 Months" or "TOD + 45 DY". Clicking the **Today** button to the right of the *Go to date* field takes you to the current date. You should confirm that the correct date is set on your computer's *Date/Time* (*Windows*) or *Date & Time* (*Macintosh*) control panel.

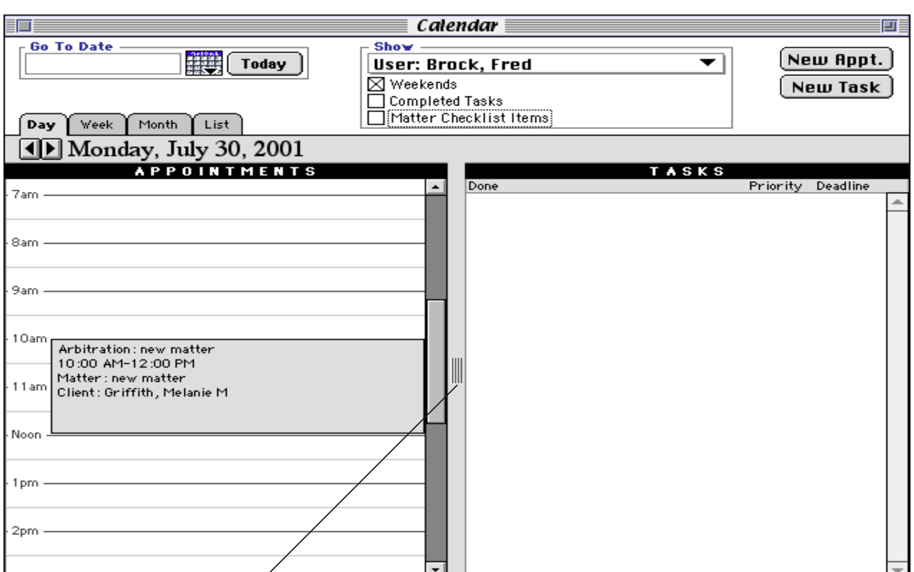



***Show Pop-up List***

**The *Show* Pop-up list** allows you to display appointments and tasks for everyone, or only those appointments or tasks associated with a selected user or group of users, or with a particular client or matter. The default behavior is to display all items associated with the current user.

There are three checkboxes beneath the Pop-up list: *Weekends, Completed Tasks, and Matter Checklist Items*. *Weekends* toggles (turns on or off) the display of Saturday and Sunday appointments and tasks. Completed tasks toggles the display of task items which are marked as completed with a mark in the checkbox to the left of the item. *Matter Checklist Items* toggles the display of Checklist Items, a special category of *Tasks* which are created using the ***Matter Screen***'s *Checklist* tab. New appointments and new tasks can always be added using the buttons in the upper right corner of the screen.

## Day Tab



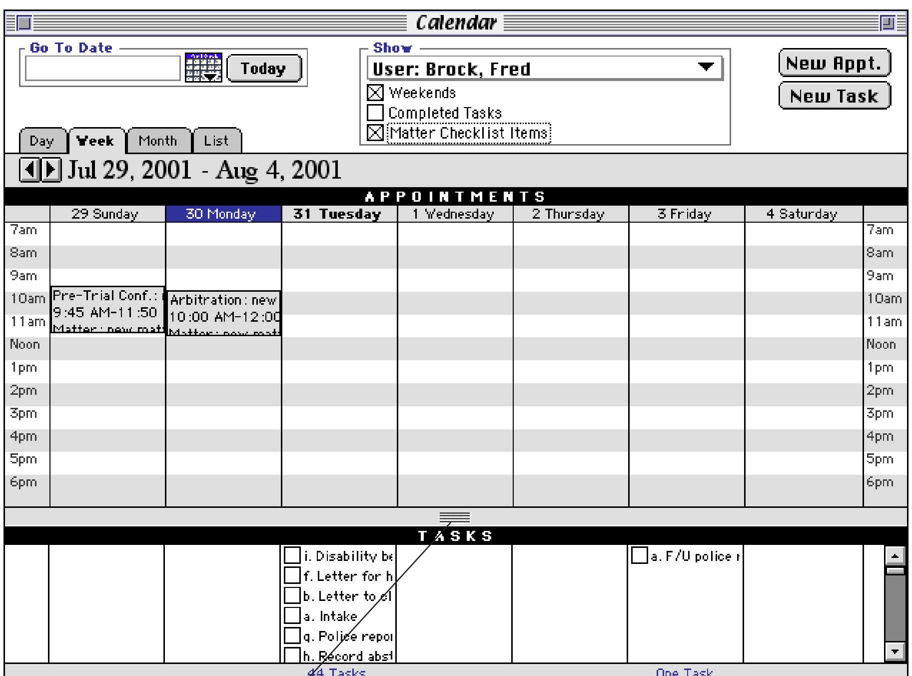

***Drag handle***

**On the *Calendar Day*** Tab, the left side shows this date's *Appointments*, and the right side lists the *Tasks*, or to-do items, for the day. Just below the *Day* tab itself, there are two small controls, a left (*Back*) and right (*Forward*) arrowhead. These change the display by one unit, with the unit selected by the tab. When the selected tab is the *Day* tab, the unit changed is a single day. When the Month tab is the active tab, they would move the display to the next or the previous month. The chosen date always shows to the right of these controls.

The relative size of the two panels can be changed by dragging the bar between the two panels to the left or right to allow more space for Appointments or Tasks. Scroll either side using the vertical scrollbars. You can add a new appointment to the left side *Appointments* list by clicking and dragging the mouse cursor to outline the area corresponding to the time of the appointment you wish to create, or by simply double-clicking in the *Appointments* area.

## Week Tab

**The Calendar *Week Tab*** gives a broader view of your tasks and appointments. View a single week, with or without Saturdays and Sundays. Tasks are viewed in the panel below the *Weekly Appointments* panel, and the relative size of the *Weekly Appointments* and the *Tasks* panels may be changed by dragging the handle on the bar separating them. As on the *Day Tab*, you can add appointments by either clicking the **New Appointment** button or by using the mouse to click and drag, enclosing the area of the appointment you wish to set. The drag area must be completely within a single day. (Recurring appointments are indicated on the *New Appointment* window, which opens after the drag selection is completed.)

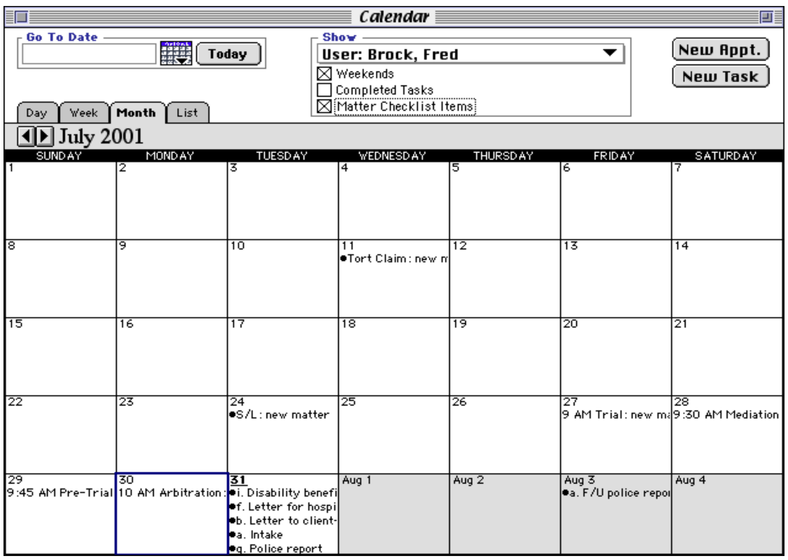



***Drag handle***

Tasks (other than Checklist items, added from the Matter *Checklist Tab*) are always added using the **New Task** button.

## Month Tab

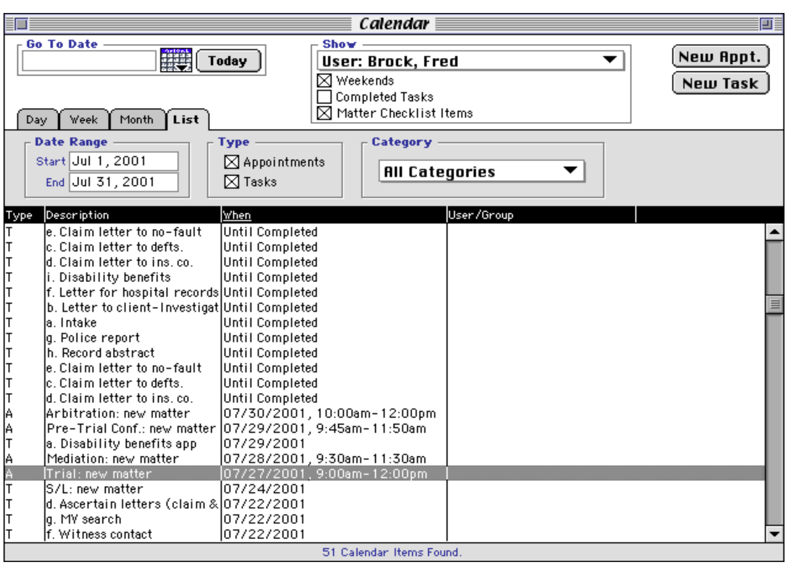
**The Calendar *Month Tab*** displays a full month of information at a glance, and it can be filtered to show information for all users or a particular *Group* or *User* (all Attorneys for the firm are entered as *Users*, even if they never personally access *CaseMgr*), or for a particular *Client* or *Matter*. Weekend dates, completed tasks and checklist items can each be hidden or displayed.




***Calendar Month Tab***

Because each day's area is quite small in the Month view of the information, only very little identifying information is offered in this view. You will want to use other tabs to see details. *Appointments*, which necessarily have both starting and ending times, begin with the starting time, and only part of one line is displayed. Lines do not wrap. *Tasks*, which may have a Deadline date and time, are displayed following a bullet on the deadline date and thereafter until checked as completed. Again, only a single line appears for each Task. Double-click an item, either an Appointment or a Task, to edit it.

## List Tab



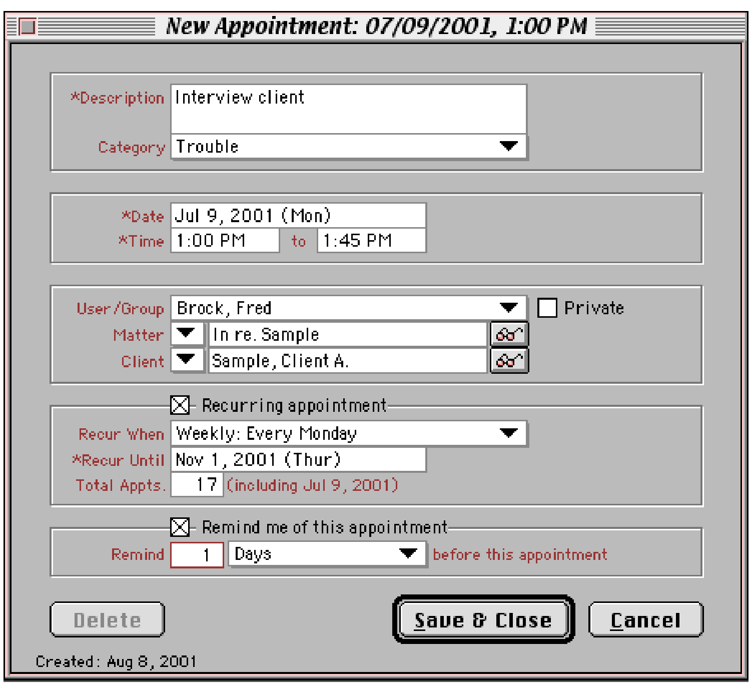

**The *Calendar List* Tab** offers a view of your calendar items as a list, much like those offered from the **Lists Menu**. All the usual calendar item filtering and date selection is available, but in addition you can sort items by clicking on the column headings, and you may insert additional calendar-related columns. The selection of displayed columns is remembered and becomes the new default display on a user-by-user basis.

Because the list can become quite cluttered with the tasks and appointments of multiple users, particularly when checklist items are visible, the list tab will be most useful when appropriate filters are set.

## Appointments & Scheduled Events

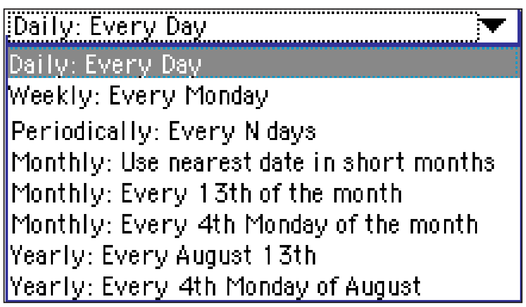
***Appointments*** are associated with a starting and ending time. *Tasks, or to-do*s are associated with a Deadline date (and, optionally, a time) only. Both *Tasks* and *Appointments* may be directly entered into the Calendar, and are in some cases automatically posted to the calendar when a date is saved on a *CaseMgr* screen. To directly enter a new *Appointment*:

**1**. Choose *New Record* from the **File** Menu and set the record type to “Appointment”. Alternatively, you may open the ***Calendar*** by clicking the *Calendar* button on the ***Main Screen***, or by selecting the **Calendar** item from the **Tools Menu**, or pressing CTRL-L.




***New Appointments Screen***

**2**. Click the *New Appointment* button located at the upper right of the screen or, in the Appointment (left) side of the ***Calendar Screen*** *Day Tab*, click and drag the cursor to enclose the approximate area corresponding to the duration of the appointment (or simply double-click). On the *Week Tab*, click and drag the cursor to enclose the approximate area corresponding to the duration of the appointment, staying within the column of the ap-




***Recur When* Pop-up**

pointed day (or simply double-click). On the *Month Tab*, double-click on the appointed day. Finally, you can select *New Appointment* from the contextual (right-click) menu while in the ***Calendar***

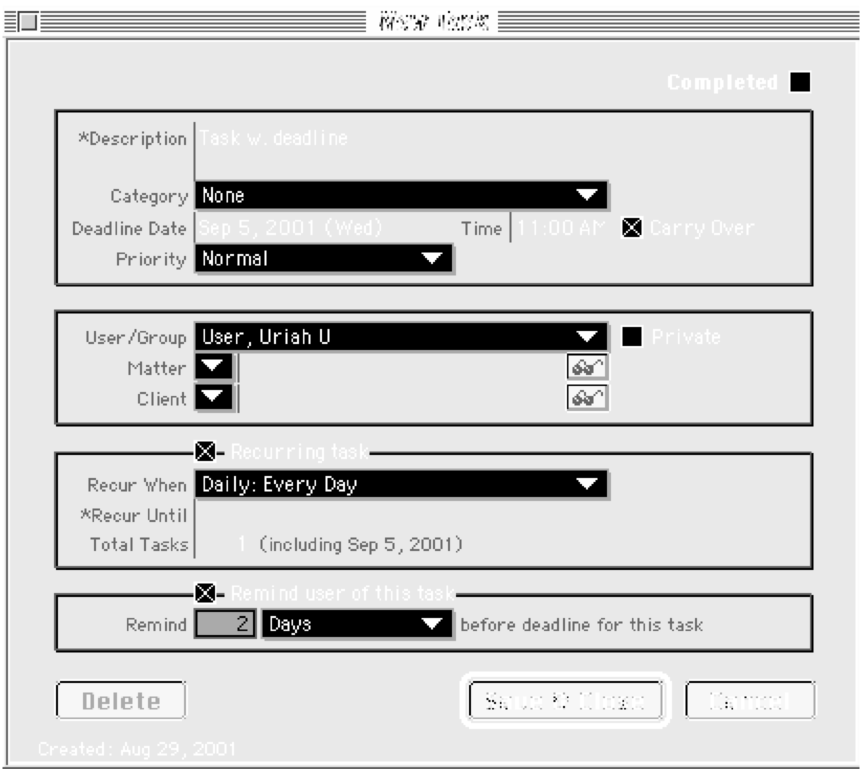
**3**. After the ***New Appointment*** screen appears, enter the following:

- Description of the Appointment (required)
- *Category* (Pop-up list)
- Beginning and Ending times (required.)
- User/Group; defaults to the current user (required.)
- *Matter* (Pop-up list)
- *Client* (Pop-up list)
- *Recurring appointment* checkbox. When checked, the following new controls appear:
  - *Recur When* (Pop-up list)
    The items in this list are self-evident with the possible exception of "User nearest date in short months." Use this item for Monthly dates which don't appear in every month, like the 30th day, which will not appear in February. This option would move the monthly appointment to the nearest February day, normally the 28th.
  - Recur until, the termination date for the recurring appointment
  - *Total Appts*. When the *Recur Until* date is entered, this field shows how many appointments your entry creates. You may enter a number directly into this field and it will change the *Recur until* date as required to create the number of recurrences entered using the period specified in the *Recur When* Pop-up list.
- *Remind me of this appointment* checkbox When this box is checked, the following new controls appear:
- *Remind…before*, a field in which to enter a numeral, followed by a *Period* Pop-up, for *Minutes*, *Days* or *Hours*. These control the Pop-up reminder windows. You might indicate that you want to be notified via a Pop-up on-

screen reminder that an appointment is scheduled for 1:30 PM on Aug. 24, and that you want the reminder to appear 1 hour before the appointment.

**4**. Click the *Save and Close* button to save the Appointment, or the *Cancel* button to discard your entry.

## Tasks (To-dos)




***New Tasks Screen***

***Tasks* are to-do items**, goals which may have a *Category*, optionally a *Deadline date* and *time*, and a *Priority* (high, normal or low). They may be marked as completed when appropriate, which removes them from the Calendar screens (unless the *Show completed items* checkbox is marked) and they may be marked to *Carry Over*. When marked as *Carry Over* items, they appear again on the date following the *Deadline date* and continue to do so until marked as *Completed*. Items without a deadline date carry over automatically.

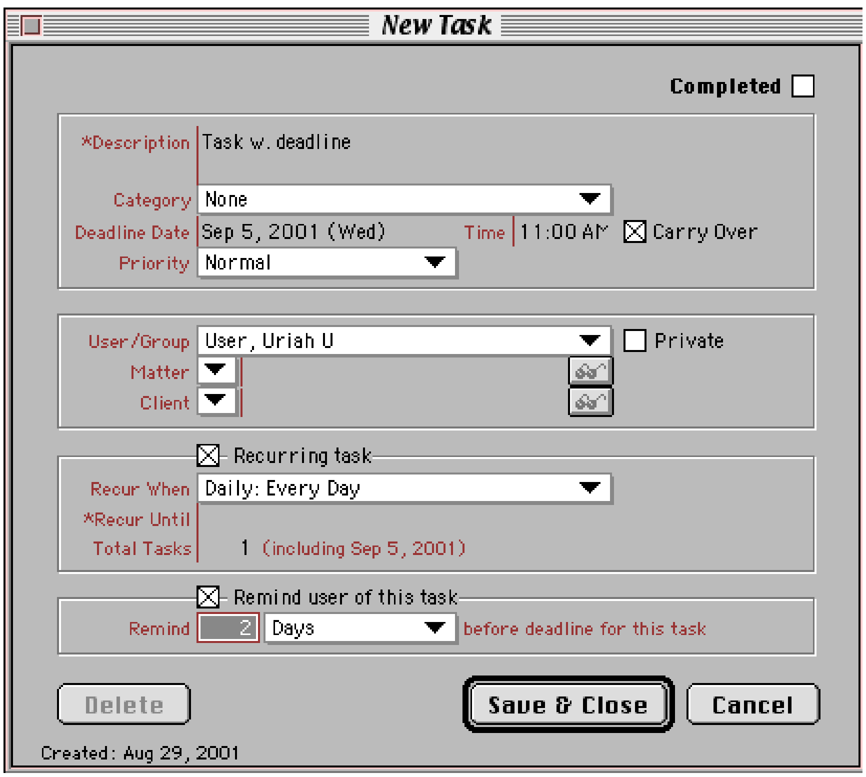
*Tasks* may be associated with a *Client* and *Matter*, and they may be marked as *Private*, which makes them visible to just the *User* or *Group* to which they have been assigned. The default assignment for *User/Group* is to the user entering the new Task. They may also be assigned to *All Users*.

If a *Deadline date* has been assigned, Tasks may be marked as *Recurring tasks*, which makes them appear on a scheduled basis until a specific date.

Finally, if a task has a *Deadline Date*, reminders may be scheduled at a specified period before the deadline. To directly enter a new *Task*:

**1**. Choose *New Record* from the **File** Menu and set the record type to “Task”. Alternatively, you may open the ***Calendar*** by clicking the *Calendar* button on the ***Main Screen***, or by selecting the **Calendar** item from the **Tools Menu**, or pressing CTRL-L.

**2**. In the Calendar, click the *New Task* button located at the upper right of the screen or select *New Task* from the contextual (right-click) menu while in the ***Calendar***



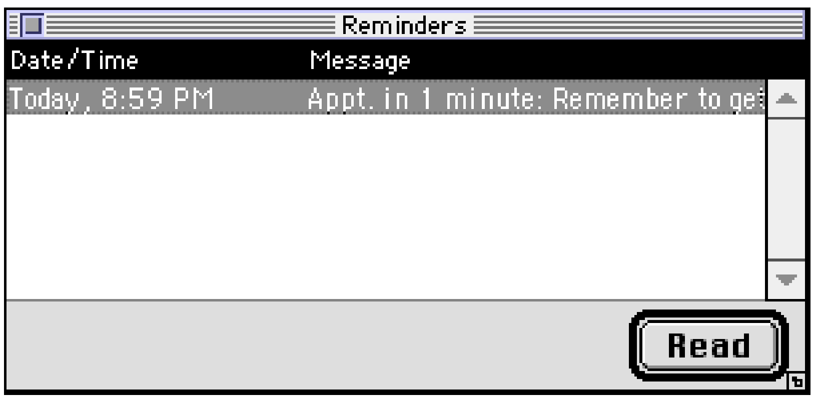

***New Tasks Screen***

**3**. After the ***New Task*** screen appears, enter the following information:

- *Description* of the Task (required)
- *Category* (Pop-up list)
- *Deadline date* and *Time*
- *User / Group*; defaults to the current user and may also be “All” (required.)
  - *Matter* (Pop-up list)
  - *Client* (Pop-up list)
  - *Recurring task* checkbox. When checked, the following new controls appear:
    - *Recur When* (Pop-up list)
    - Recur until; the termination date for the recurring task
  - *Total tasks* When the *Recur Until* date is entered, this field shows how many tasks your entry creates. You may enter a number directly into this field and it will change the *Recur until* date as required to create the number of recurrences entered.
- *Remind me of this task* checkbox. When checked, the following new controls appear:

- *Remind…before*, a field in which to enter a numeral, followed by a *Period* Pop-up, for *Minutes*, *Days* or *Hours*. These control the Pop-up reminder windows.

## Reminders (Nags)




***Reminder Screen***

For *Appointments* and for *Tasks* which have deadline dates, **Reminders** may be set which, if *CaseMgr* is open, will pop up, beep and let the designated user know that the time has come to take action

*Reminders* can be set for a particular *User* or *Group* of users, or for *All Users*. In any case, just the user or group selected will see the reminder when the appointed date and time arrives. Remember that *CaseMgr* must be *running* and the user must be *logged into the program* for the reminder to appear. If *CaseMgr* is not running, or the user is not logged in, the user will not receive the reminder.


***Reminder Detail Screen***

When the reminder appears on the screen, the user may close it without reading, using the close box, or read it, using the **Read** Button. The detail window displayed by the Read button offers the option to dismiss the reminder with the OK button, or to see it again later, using the text box after “in” to enter a number and the pop-up button to set that number to minutes, hours or days of delay before the reminder returns.