

# Manage Calendar

- [How to access it](#)
- [Add/Edit an Event](#)
- [Delete an Event](#)
- [Manage Co-workers Calendar](#)
- [Calendar Views](#)
- [Search for an Event](#)

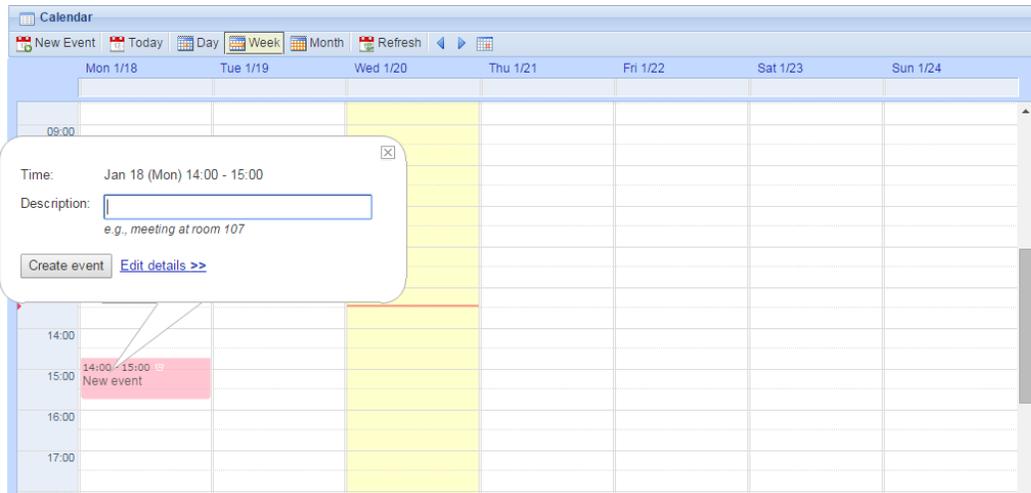
## How to access it

From the main menu "Calendar".

## Add/Edit an Event

You can add an Event using 2 methods:

1- Directly from the Calendar: Click on any time slot on the Calendar, the system will offer to Create an Event with the Description. If you wish to add more details to the Event, you can choose Edit Details.



2- Using the Task Add form: Go to the Task Add form and choose the Task Type to be Meeting

3- From the Calendar also click on **New Event**

**Add New Task**

Case: Start Typing Task Type\*: Meeting

Organizer\*: Start Typing Priority\*: Medium

From\*: 2016-01-20 15:30 to\*: 2016-01-20 16:30

Task Status\*: 1-Open Location: Start Typing

Estimated Effort: 0

Invitees: Dima Salman

Send notification by email  
 Save and create another

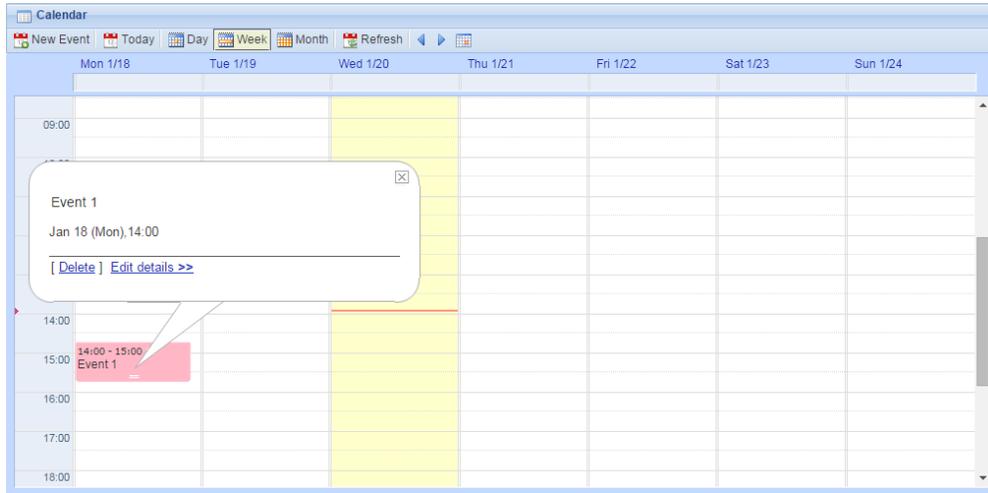
Save Cancel

The Task of Type Meeting (Event) form has many important fields:

- Case: An Event may be related to a Case or not depending on your needs
- Organizer: App4Legal User who organized this Meeting. There is a hyperlink that adds that logged in User directly into the field.
- From and To Date and Time

- Task Status: A defined list that can be managed in the Admin & Setup.
- Priority: A defined list that is hard coded.
- Location: A defined list that can be managed in the Admin & Setup or on the fly.
- Estimated Effort
- Privacy: An Event can be marked as Private and hence it will not appear to other Users on App4Legal. If a User is the creator of the Event and marks it as Private, he/she will be the owner of this Meeting. The Private Meeting could also be Shared with other specified Users. Users who are marked to Override Privacy will be able to see any Private object in App4Legal. A Private Meeting appears on the Calendar in the form of "busy" without displaying any details concerning it.
- Invitees: App4Legal Users who are invited to this Meeting.
- Save and Create another: For quick data entry, if the Save and Create Another check box was checked, upon Saving the Event, another Add form will appear directly until the flag is unchecked. This check box appears only in add forms.

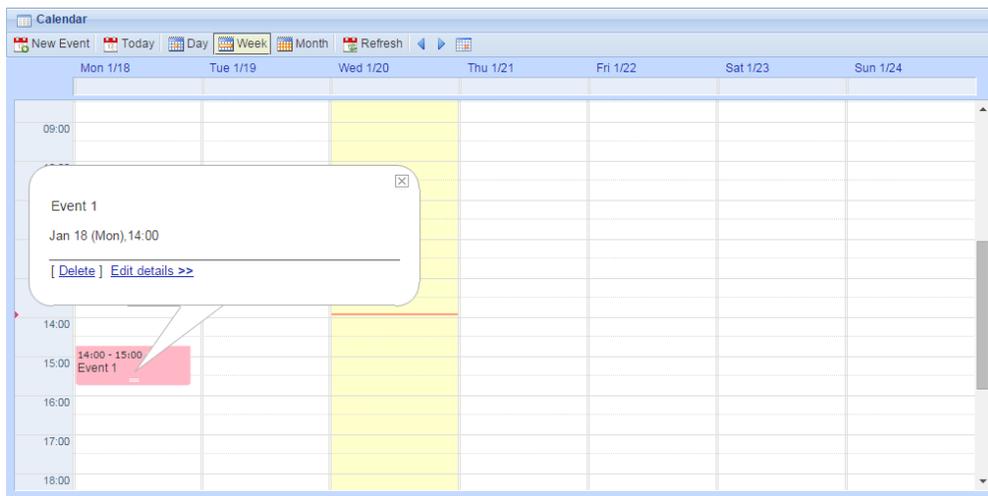
In order to edit an Event, all what you have to do is click on the Event and a pop-up will appear, click on Edit Details.



[Back to Top](#)

**Delete an Event**

In order to delete an Event, all what you have to do is click on the Event and a pop-up will appear, click on Delete.



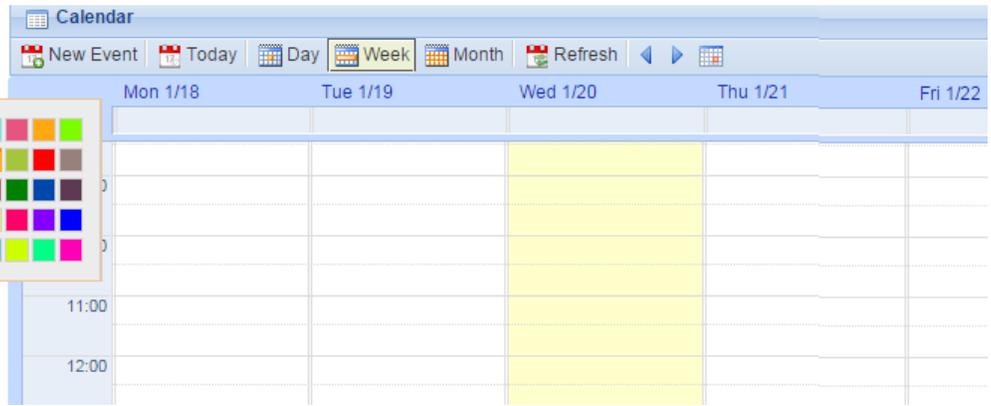
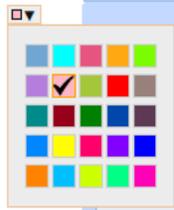
[Back to Top](#)

**Manage Co-workers Calendar**

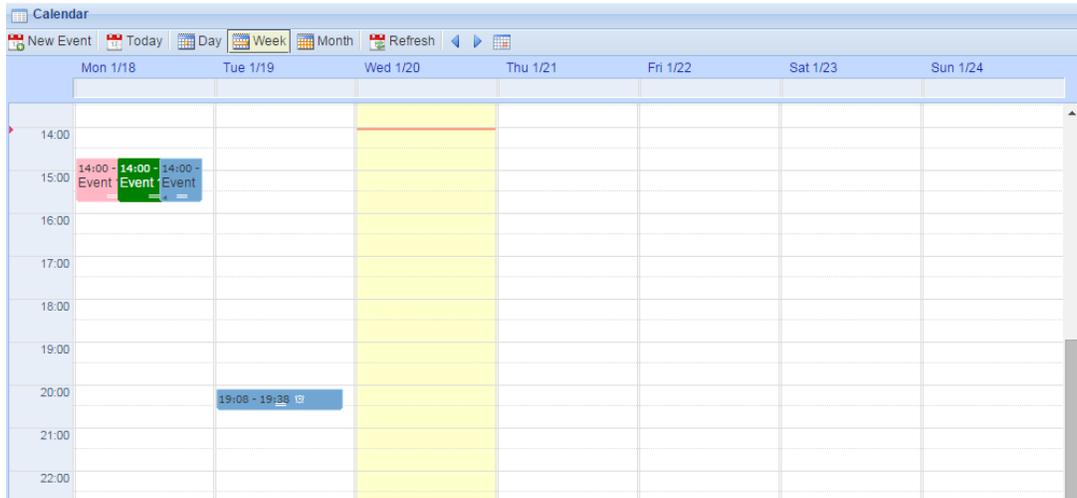
On the left of the screen, there is a list of App4Legal Users that you would like to add to your Calendar. All what you have to do is click on the check box next to their name(s). Colors could be defined for different Users Calendars to better distinguish. You can also add a Color to your Calendar as well.

Add Coworker's Calendar

- Dima Salman
- Jessica Fletche...
- Brad Blando



Colors are reflected on the Calendar as shown below:



[Back to Top](#)

### Calendar Views

From the Calendar, there are some quick actions to be done such as View Today's date, choose Day/Week/Month Views, refresh your Calendar, navigate forward or backward or choose a certain Date to go to.



[Back to Top](#)

### Search for an Event

Tasks of Type Meeting are by default hidden in the Tasks grid Advanced Search. All what you have to do is go to the Advanced Search in Tasks grid and filter on Type equals **Meeting**.

Task Search Filters

Task ID	contains	<input type="text"/>	Related Case	Look Up	<input type="text"/>
Task Type	Equal	<input type="text" value="Meeting x"/>	Task Status	Equal	<input type="text" value="Select"/>
Task Description	contains	<input type="text"/>	Assign To	contains	<input type="text"/>
Estimated Effort	Equal	<input type="text"/>			

More Filters Criteria [...](#)

[\[Hide\]](#)

[Back to Top](#)