

Dr.DOC®-CALENDAR

Overview
Calendar-Configuration
New Calendar Entry

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Dr.DOC®-CALENDAR-MODULE

1. OVERVIEW

Dr.DOC® provides powerful calendar functionalities. All kinds of appointments can be managed and filtered: E.g. appointments for workgroups, for specific staff members, for projects, for a specific customer etc.. The user interface design follows the standards so that users will not have to get used to something completely new.

And this is the key feature: With a mouse click from your appointment you will have access to corresponding data and documents. You will not have to start searching any longer. The calendar is fully integrated in the Information Management Suite of Dr.DOC®. Management of all tasks, appointments and documents can be done with Dr.DOC® in one single system.

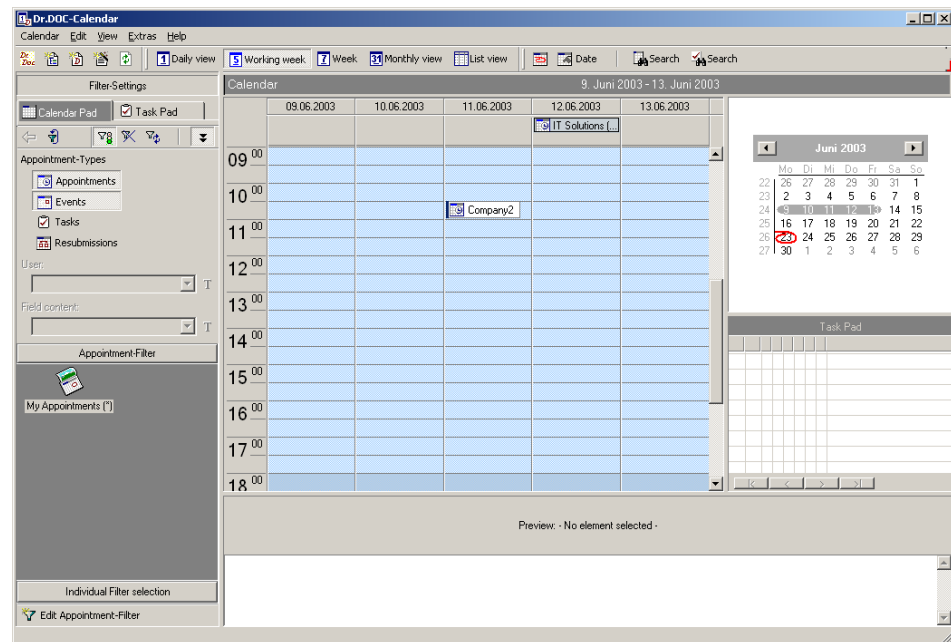


Fig. 1.1: Dr.DOC®-Kalender

The conceptual design of the Dr.DOC® - Calendar module allows seamless integration into existing Dr.DOC® archive applications. The Calendar module being included, Dr.DOC® becomes a complete Information Management Suite. The outstanding functionalities of the Dr.DOC® - Calendar module are listed below:

- Planning of single or group appointments
- Project management
- Free choice of different data views (e.g. referring to staff member or projects)
- Seamless integration into Dr.DOC® - Workflow
- Address Management and Customer Relationship Management (CRM)
- Freely definable data base
- Convenient maintenance of data
- Address import function for different data bases

2. CALENDAR CONFIGURATION

The corresponding data of Dr.DOC® - Calendar entries can be managed by means of an appointment archive. In the following paragraphs, generation and configuration of an appointment archive will be described according to the following checklist.

2.1 Conceptual Design / Checklist

Checklist

Please Note: Steps (1) to (2) of the Checklist have to be carried out in the Administration-Mode.

1. Generation of Appointment Archive

The Appointment Archive will be used for managing the data of the calendar entries

2. Assignment of Calendar Parameters:

„Settings/Field selection for.../Calendar - Appointment fields”

Assignment of Calendar-Parameters will make the field entries of the Appointment Archive available for the Dr.DOC®-Calendar

*Please Note: Steps (3) to (4) of the Checklist have to be carried out as user **PUBLIC** and in the mode in which the corresponding settings shall be available for the users (For Client/Server-Archives these settings need to be defined in the Client/Server-Mode).*

3. Search Template “My Appointments”

„Settings/ Field selection for/Search Templates“

The Search Template „My Appointments“ is required in order to define a Calendar-Filter-Symbol “My Appointments” (see Step 4).

4. Calendar-Filter-Symbol “My Appointments”

By means of the Calendar-Filter-Symbol “My Appointments” the appointments will be displayed in the Calendar user specifically.

Each single configuration step of the checklist will be explained in the following.

2.2 Generation of Appointment Archive

In order to generate an Appointment Archive proceed as follows:

Start Dr.DOC® in the Administration-Mode, open the menu “Archive/New...”, enter an Archive name and select the following Archive options:

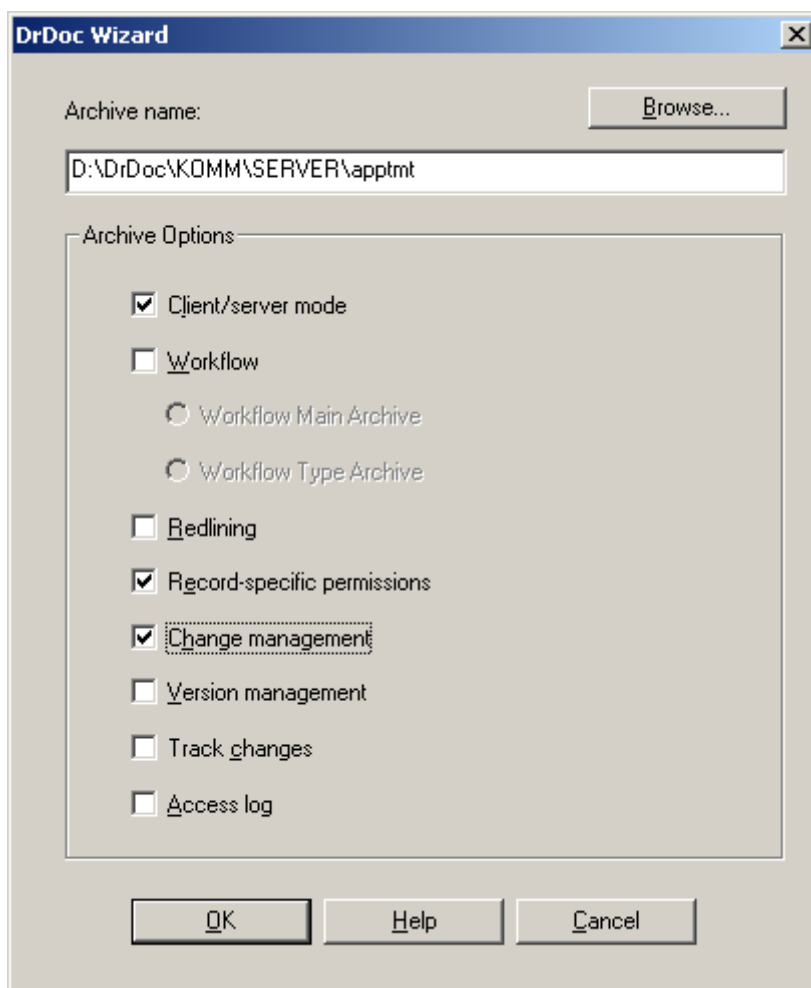


Fig. 2.1: Archive Options for Appointment Archive

The data base fields and corresponding data types necessary for managing the data of clandar entries are depicted in fig. 2.2 and fig.2.3, respectively.

The screenshot shows a window titled "Search Fields" with a menu bar (Find, Edit, View, Settings, Window, Help) and a toolbar. The main area is divided into several sections:

- Appointments / Events** and **Changes** tabs.
- Subject** and **Location** text input fields.
- Starts on** and **Ends on** date/time input fields.
- Starts at** and **Ends at** time input fields.
- A **Full time** checkbox.
- Participants** table with columns: Company name, Contact name, AdressID.
- Notes** text area.
- User in charge** text input field.
- Done** button.
- by**, **date**, and **time** input fields.

| Company name | Contact name | AdressID |
|--------------|--------------|----------|
| | | |
| | | |
| | | |

Fig. 2.2: Appointment Archive: Data base fields

Field selection for Data Types

Enter Edit View Workflow Window Help

Appointments / Events Changes

Subject S

Location S

Starts on D Starts at T BOC Full time

Ends on D Ends at T

| Company name | Contact name | AdressID |
|--------------|--------------|----------|
| S | S | Z |
| | | |
| | | |

Notes S

User in charge S

BOC Don

S D T

by date time

Fig. 2.3: Appointment Archive: Data types

After completion of the archive form save it and close the "Archive Editor". To finish generation of the Appointment Archive proceed as follows:

- Open „Management/Archive Parameters“ and confirm the “Client Parameters”.
- Enter the Appointment Archive in your active Dr.DOC® - User set by menu “Archive/Enter in User Set”. Connect the Appointment Archive to the User groups and save changes to the user set.
- Login as User “PUBLIC” and create the following “Settings Field Selection for ...”
 - Column Heads
 - Selection List
 - Sort

2.3 Assignment of Calendar Parameters

Assignment of Calendar-Parameters will make the field entries of the Appointment Archive available for the Dr.DOC®-Calendar. To assign the Calendar-Parameters proceed as follows:

- Open „Settings/Field selection for.../Calendar - Appointment fields” (see fig. 2.4)
- Enter a name for the Field selection and click on “Edit” (see fig. 2.4)
- Assign predefined Calendar-Parameters according to fig. 2.5 using the Thesaurus buttons

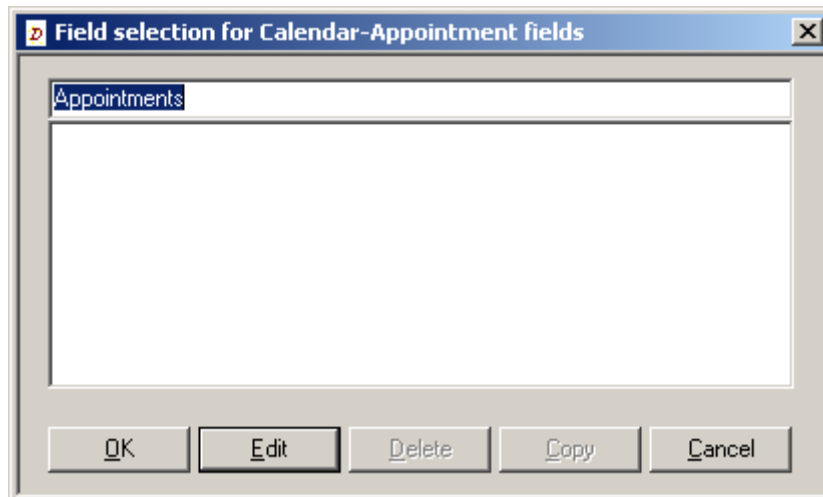


Fig. 2.4: Appointment Archive: Settings/Field selection for/Calendar - Appointment fields”

The screenshot shows a software window titled "Field selection for Calendar-Appointment fields". It contains several input fields and a table. The "Subject" field is set to "CalSubject3" and "Location" to "Location". There are fields for "Starts on" (CalStart...), "Starts at" (CalStart...), "Ends on" (CalEnd...), and "Ends at" (CalEnd...). A "Full time" checkbox is checked. The "Participants" section contains a table with three columns: "Company name", "Contact name", and "AddressID". The first row has values "CalSubject", "CalSubject2", and an empty cell. The "Notes" field contains "CalText". At the bottom, the "User in charge" field is set to "CalUser". There is a red "Don" button and three empty input fields labeled "by", "date", and "time".

| Company name | Contact name | AddressID |
|--------------|--------------|-----------|
| CalSubject | CalSubject2 | |
| | | |
| | | |

Fig. 2.5: Appointment Archive: Assignment of Calendar-Parameters

2.4 Search Template “My Appointments”

The Search Template „My Appointments“ is required in order to define a Calendar-Filter-Symbol “My Appointments” (see next paragraph). To create the search template “My Appointments” proceed as follows:

Login as user **PUBLIC** and open „Settings/Field selection for.../Search Templates“. Enter the string `%B%` in the field “User in charge” and save the setting (see fig. 2.6).

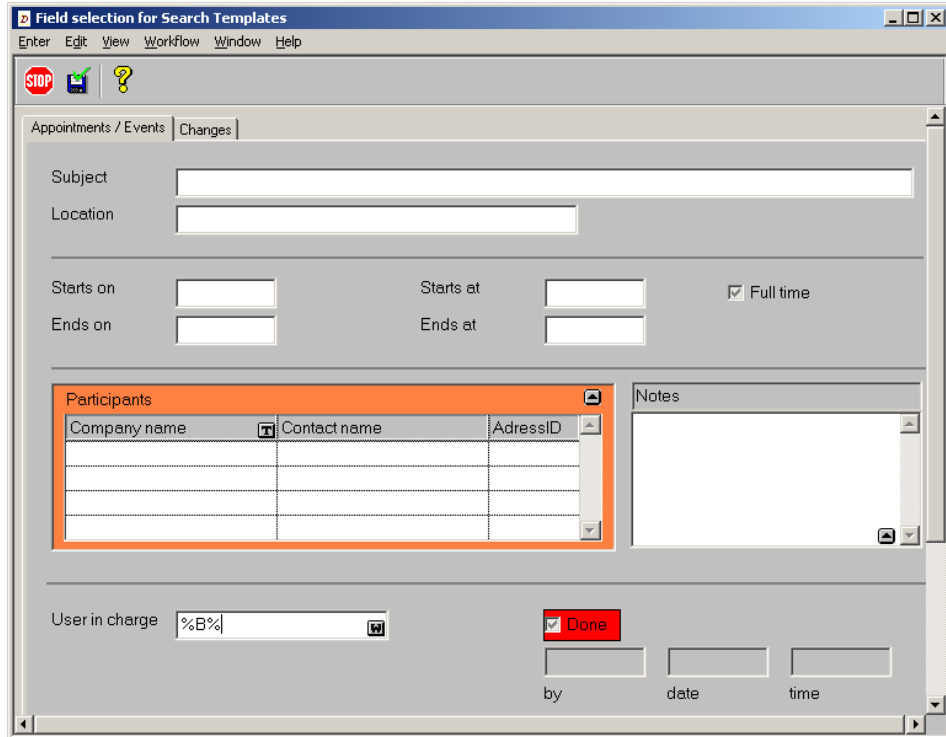


Fig. 2.6: Appointment Archive: Settings for search template “My Appointments”

2.5 Calendar-Filter-Symbol “My Appointments”

By means of the Calendar-Filter-Symbol “My Appointments” the appointments will be displayed in the Dr.DOC® - Calendar user specifically.

In order to define the Calendar-Filter-Symbol “My Appointments” proceed as follows:

Login as user **PUBLIC** and open Dr.DOC® - Calendar using the icon “Display Calendar”:



Execute steps (1) to (6) according to fig. 2.7:

The screenshot shows the 'Dr.DOC-Calendar' application window with the following configuration steps highlighted:

- 1) Activate "Calendar Pad"**: The 'Calendar Pad' checkbox is checked in the 'Filter-Settings' section.
- 2) Activate "Individual Filter selection"**: The 'Individual Filter selection' checkbox is checked in the 'Appointment-Filter' section.
- 3) Select Filter "My Appointments"**: In the 'View Calendar Pad' tree, the filter 'Filter: MY APPOINTMENTS' is selected.
- 4) Select options for "List view": Field selections for Selection List and Sort**: Under 'List view', 'Field selection for Selection List' is set to 'APPOINTMENTS (Appointments)' and 'Field selection for Sort' is set to 'CHRONOLOGICAL (Appointments)'.
- 5) Activate "Edit Appointment-Filter"**: The 'Edit Appointment-Filter' button is active.
- 6) Enter "My Appointments" as name for the Calendar-Filter and click on "Save"**: The name 'My Appointments' is entered in the text field at the bottom, and the 'Save' button is highlighted.

Fig. 2.7: Settings for Calendar-Filter "My Appointments"

In order to display the new Calendar-Filter “My Appointments” click at the button “Appointment-Filter (see fig. 2.8). Don’ t forget to click at the button “Automatic Filter refresh” to activate the automatic refresh mode first:

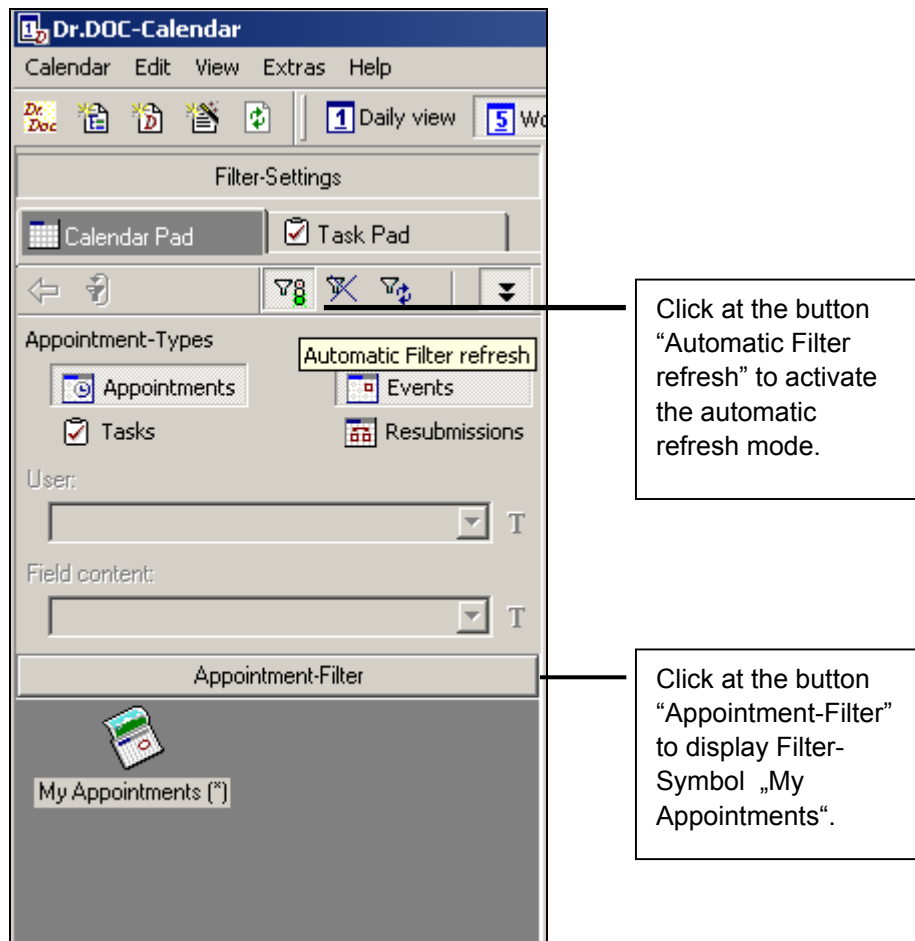


Fig. 2.8: Calendar-Filter “My Appointments” and automatic filter refresh mode

In order to display your appointments in the calendar block click at the symbol “My Appointments” (see fig. 2.8).

3. NEW CALENDAR ENTRY

In order to create a new appointment select the corresponding day and time in the calendar pad and activate the context menu using right hand mouse button (see fig. 3.1).

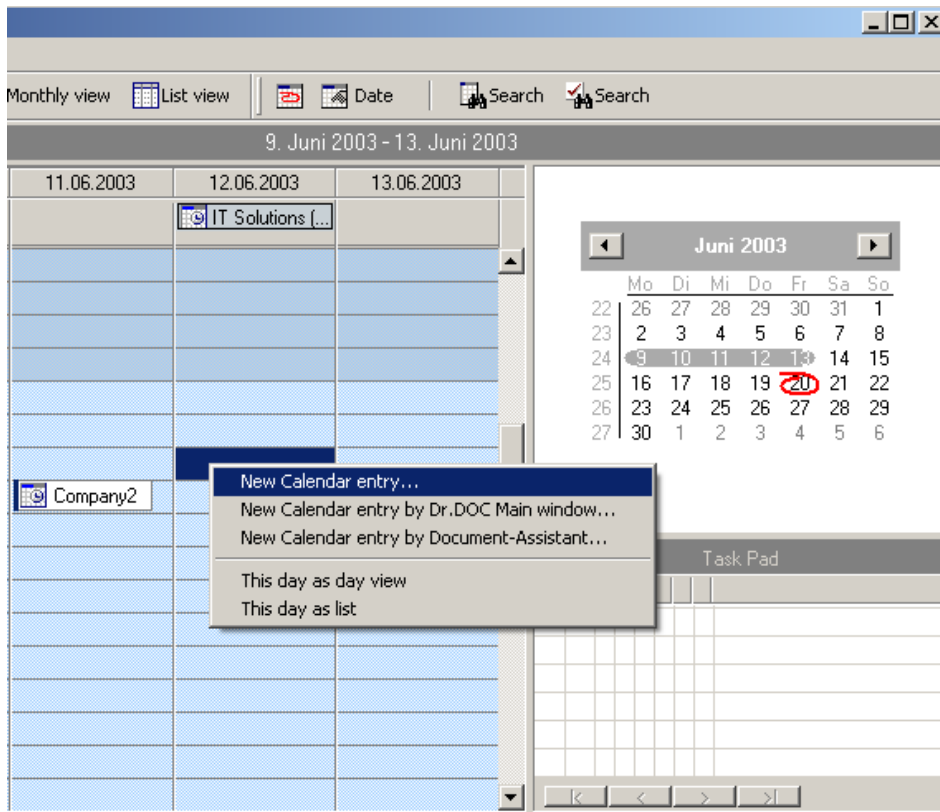


Fig. 3.1: Context menu "New Calendar entry..."

Selecting "New Calendar entry..." from this context menu will open the Dialog "New calendar entry" (see fig. 3.2).

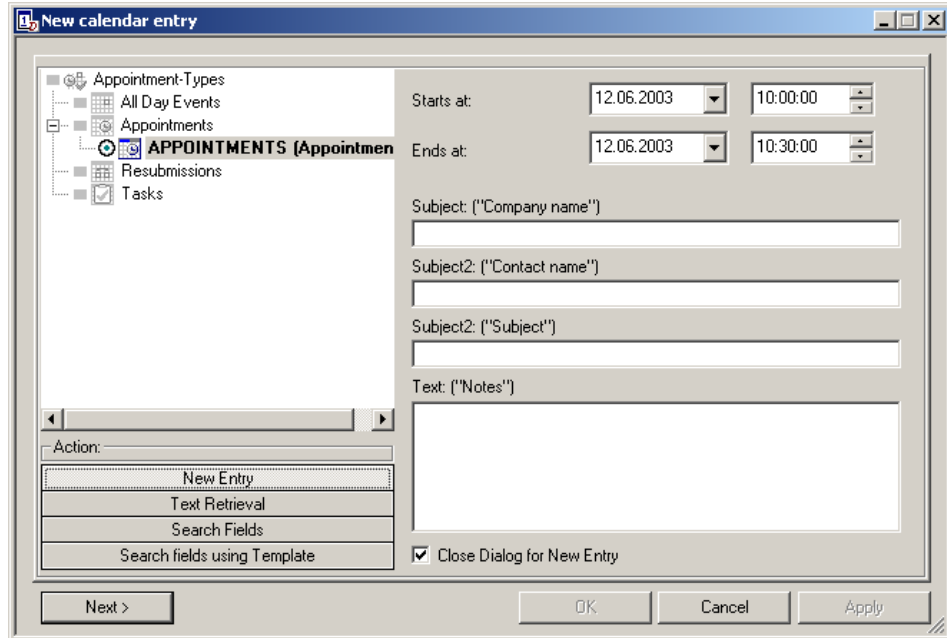


Fig. 3.2: Dialog "New calendar entry"

In category "Action" select "New Entry" and activate Option "Close Dialog for New Entry". Click on the button "Next" to open the new entry mode in the appointments archive (see fig. 3.3).

Dr.DOC - APPOINTMENTS - [New Entry - WINWORD file document source]

Archive Edit View Database Record Document Settings Workflow Management Window Help

Search results

Activities

Dr.DOC

- Archives
- Functions
- Symbols
- Windows Deskto
- Dr.DOC Deskto

Appointments / Events Changes

Subject

Location

Starts on 12.06.2003 Starts at 10:00 Full time

Ends on 12.06.2003 Ends at 10:30

| Company name | Contact name | AdressID |
|--------------|--------------|----------|
| | | |
| | | |
| | | |

Notes

User in charge

Done

by date time

Fig. 3.3: Appointments archive: New entry mode to enter data for new calendar entry

Enter the data for the new appointment and save the record by clicking on the icon "Save record".