

Calendar

Work with calendar

Version 8.0



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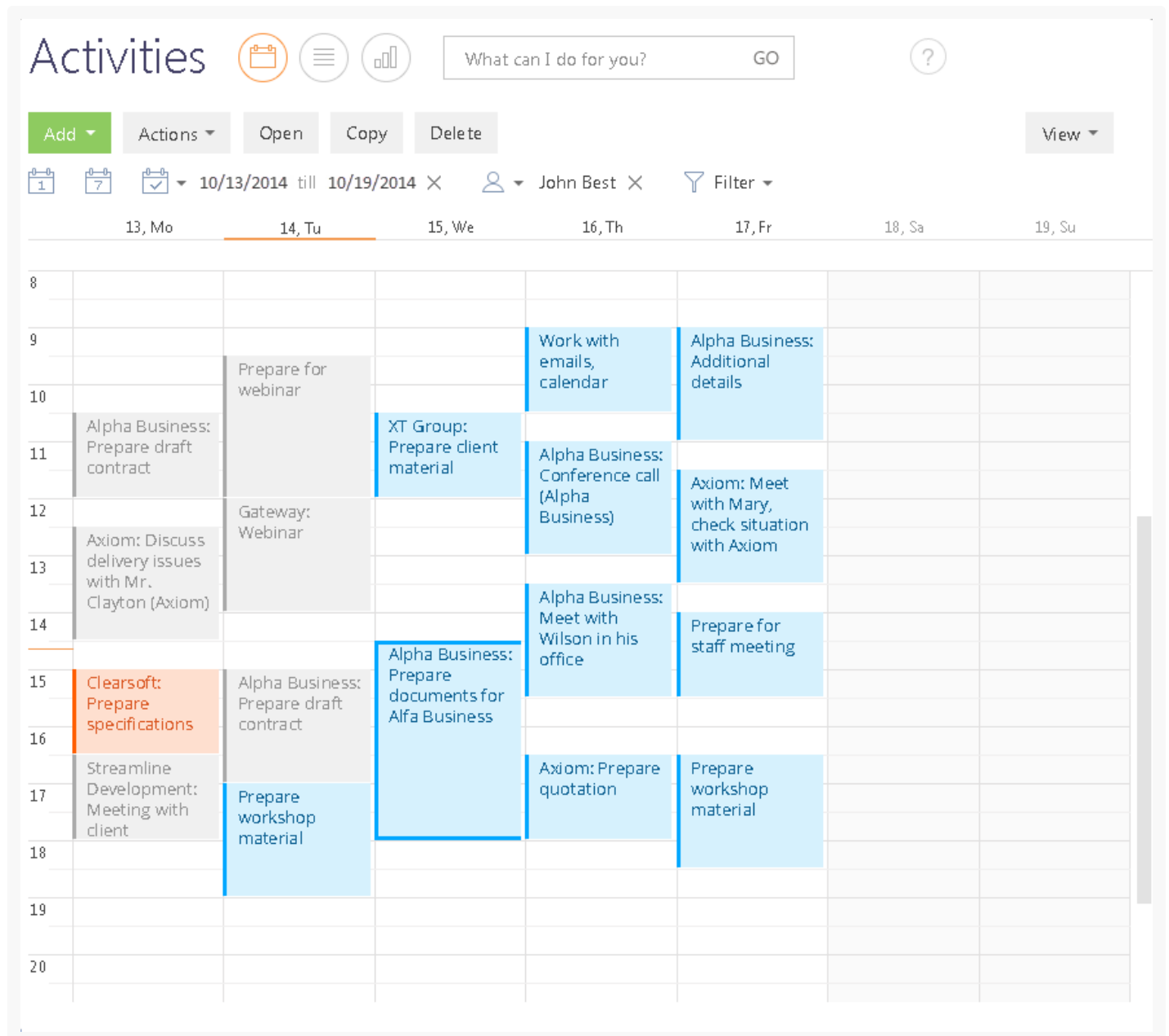
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Work with calendar

PRODUCTS: ALL CREATIO PRODUCTS

The [*Calendar*] view of the [*Activities*] section (Fig. 1) displays activities as an electronic day planner.

Fig. 1 - [*Calendar*] view



You can add, copy, delete, as well as an open activity for viewing or editing using the toolbar buttons. When you copy an activity, the list of its participants will be copied too. Activities in the calendar can be filtered in the same manner as records in the list.

Analyze the calendar

The calendar area

The calendar area is divided into days. The date and day of the week are displayed in the heading of each day column. The title of the current day is highlighted.

In the calendar area activities are displayed in the form of rectangular blocks whose height corresponds to the duration of activities. The current time is highlighted with an orange line. To scroll the calendar vertically, use the scrollbar at the right of the calendar or the [*Up*] and [*Down*] keys on your keyboard.

Long activities

An activity is considered as “Long” if it lasts more than 24 hours (for example, a business trip or a vacation). Such activities are displayed above the calendar (Fig. 2).

Fig. 2 – Display of long activities in the calendar view

	2, Tu	3, We	4, Th	5, Fr	6, Sa
Business trip to New York					

If the start or due date can not be specified within the time period that the calendar displays, it will display either the start date or the due date of the activity.

Activity colors in calendar view

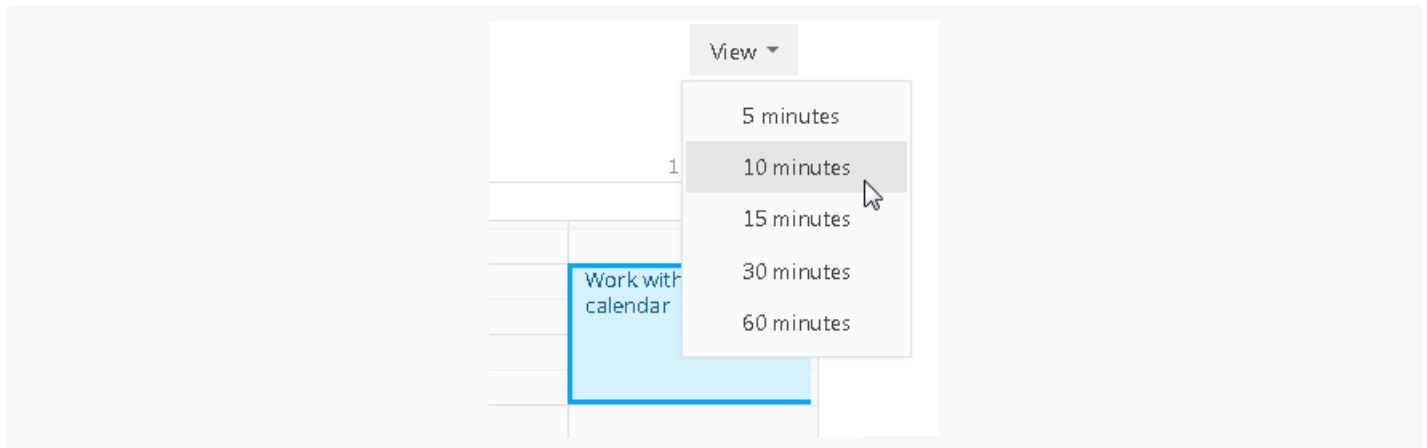
Activities in the calendar view are highlighted with different colors depending on their status and due date.

- Activities are highlighted red when their due time has already passed while those activities were not in the final state yet (overdue activities).
- Blue is used to highlight activities that are not in the final state (not started or in progress) and have not passed their due time yet.
- Grey is used to highlighting activities that are in the final state (completed or canceled).

Set up calendar scale

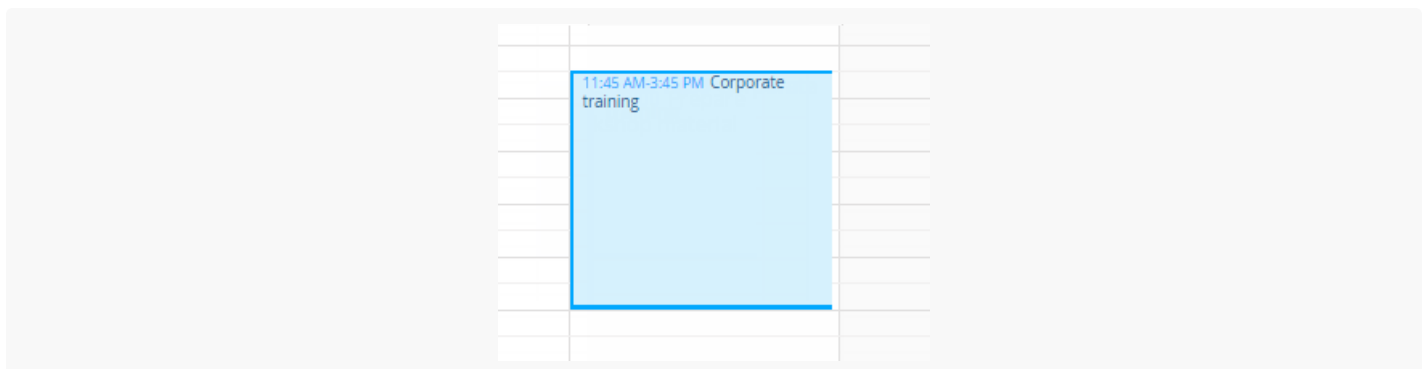
A calendar cell can display time intervals from 5 to 60 minutes. You can modify the calendar scale by selecting the corresponding command from the [*View*] menu (Fig. 3).

Fig. 3 – Changing the calendar scale



The calendar scale influences the accuracy of how activities are displayed (a calendar cell is always fully occupied). For example, if the cell is set to the interval of “60 minutes,” the activity with 1 hour 20 minutes duration occupies 2 cells. In this case, the accurate duration of the activity is displayed (Fig. 4).

Fig. 4 - Activity start and due date in the calendar



Note. If the name of the account is available for an activity, it will display in the calendar before the activity title.

If the start and due time are not visible due to the current calendar scale, you can see them on the activity mini page that appears when the mouse pointer hovers over the activity title. Also, the activity mini page contains primary fields of the activity record (Fig. 5).

Fig. 5 - Activity mini page in the calendar view

The screenshot shows a calendar activity popup. At the top, the activity title is "Call back to the client. Inform about case SR_204 resolution". Below the title, it indicates "Activity not started" and the time "May 18 10:00 AM - 11:00 AM". A "Connections" section lists three items: "Axiom", "SR_204", and "Henry Wayne". At the bottom, there are two buttons: "COMPLETE ACTIVITY" (with a green checkmark icon) and "CANCEL ACTIVITY" (with a grey 'X' icon).

Note. The information displayed on the [mini page](#) depends on the fields that are filled in on the activity page.