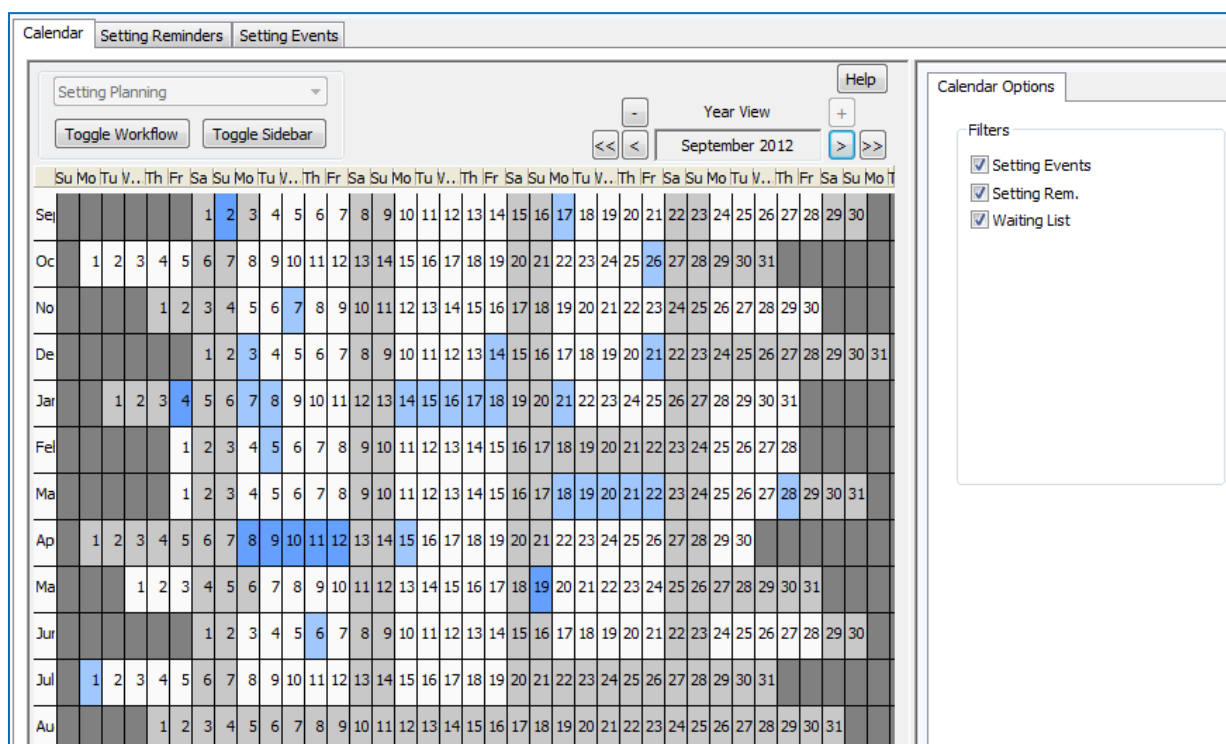# SETTING DIARY

Go > Home > Day Planner > Setting Diary >

The Setting Diary function tracks essential dates for the setting manager. These dates do not directly relate to staff or volunteers. That information is kept in the Staff Diaries.

The **Setting Planning calendar** is used to manage .

- **Setting Reminders**   Key dates for the setting - insurance renewals, return dates, etc.

- **Setting Events**   Events with a duration - a week when decorators are visiting, etc.

- **Waiting List Events**   Appointments that do, or do not affect availability (e.g. peer observation).

  (The diaries shown here are from the Quick Start tutorial data.)

The waiting list items are just displayed here, they are managed from:

Go > Home > Family Details > Waiting List >

The easiest way to make and see diary entries is to use the Calendar tab. You can also add and remove reminder and event entries using the other tabs, but their main purpose is to list and filter the diary entries for your convenience.

# Colours Used On The Setting Diary Calendar
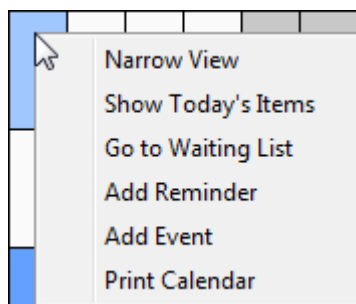
The Setting Diary calendar days are coloured as follows:

- **Blue**   –   Event, Reminder or Waiting List item, open day.
- **Darker Blue** –   Event, Reminder or Waiting List item, closed day.
- **White**   –   The setting is open and there is nothing to display.
- **Dark Grey**   –   Not the current month.
- **Light Grey**   –   The current month and the setting is closed.

The calendar has a short right-click menu. This has the usual zoom in/out and print functions. It also has the ability to add setting reminders and events. You can also use the menu to go directly to the Waiting List to manage the Waiting List items.

The Setting Diary calendar navigates in the usual way and the sidebar allows you to choose which options are displayed on the calendar.
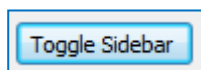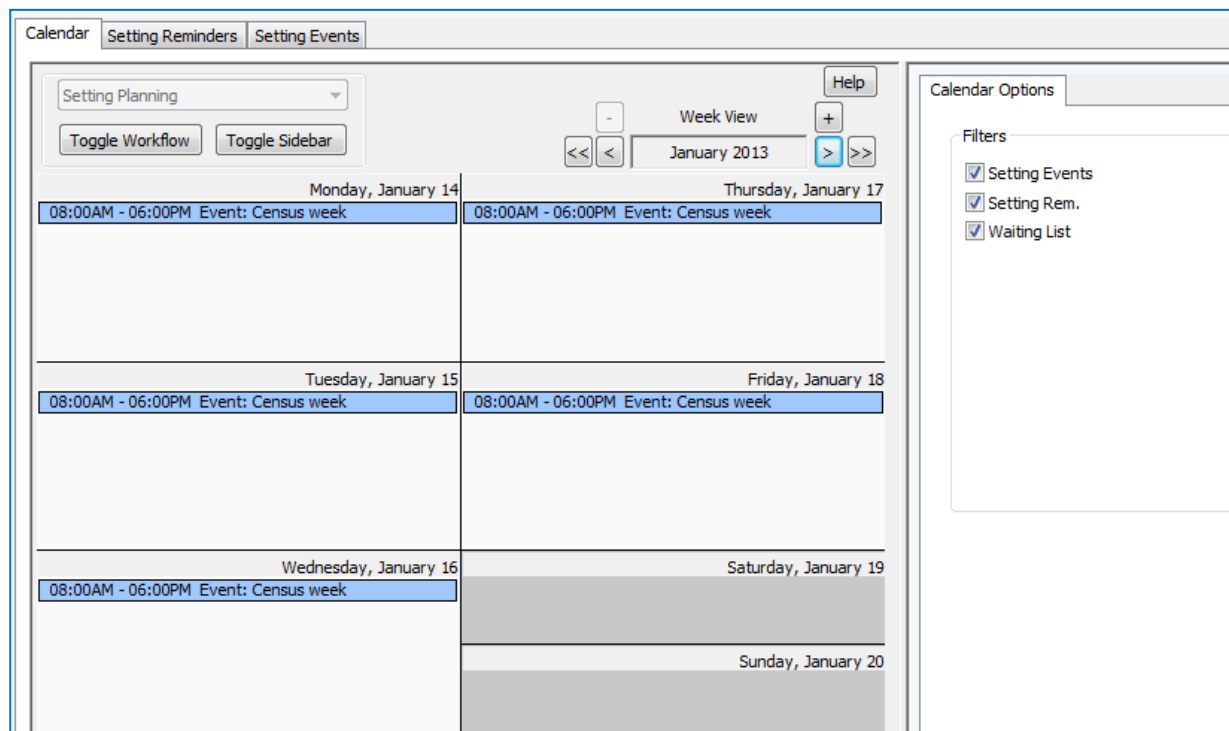

If you show the sidebar you can filter the calendar to show:

- Setting Events
- Reminders
- Waiting list children's start dates and next contact dates.
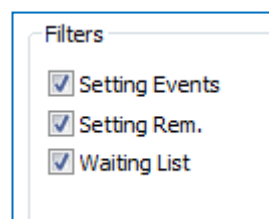
The calendar lists the day's entries when the calendar is in Weekly View.

Tip! **Maximize.** The calendar display is quite large and if you are using a 1024 x 768 resolution monitor you will need to make your on work area as big as possible. Click on the maximise button (the middle control on the picture below). It may make your screen bigger. If not, don't worry, it's already as big as it will go. If it helps use the Toggle Workflow button to hide the Workflow Manager to free up some screen space.
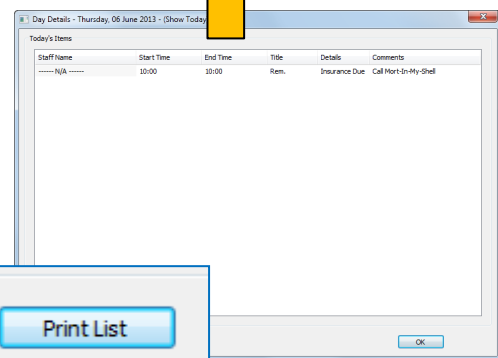
Show Today's Items

You can produce a detailed summary that you can print by using the right-click menu option to **'Show Today's Items'** in any calendar view.
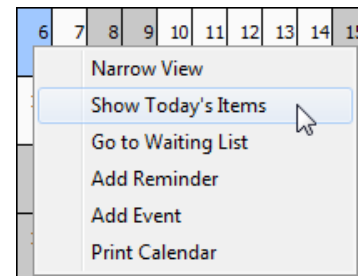
The day's diary items will be listed in detail in a pop-up window. This list shows much more detailed list than the calendar.

(You should be aware that the calendar days may be too small to show the entire list.)

You can use the Print List button to produce a detailed list of the day's items which may be useful in the setting.

The day's diary items are grouped by type - reminder, event or waiting list. Here there is just 1 reminder.

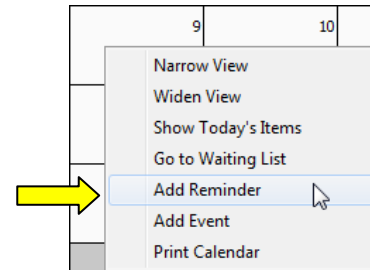### 1 Reminder

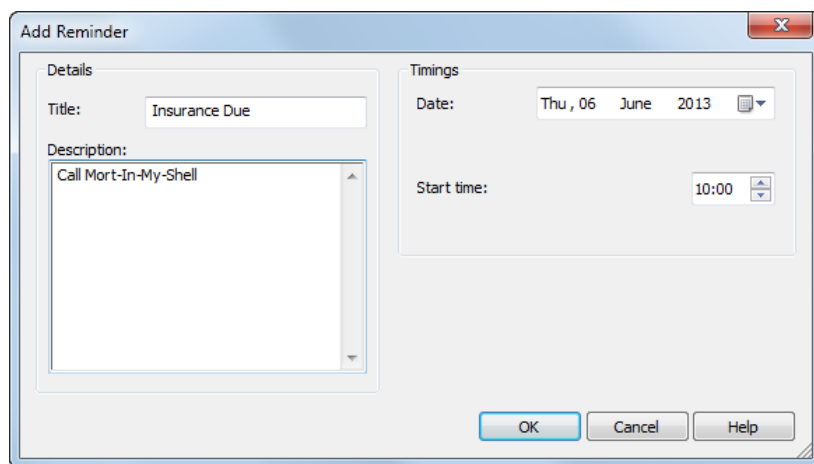| 10:00 | Insurance Due | Call Mort-In-My-Shell |

Making Diary Entries
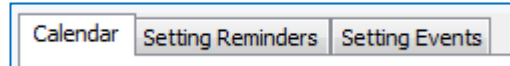
The easiest way to make and see diary entries is to use the Calendar tab. You can also add and remove entries using the other tabs, but their main purpose is to list and filter the diary entries for your convenience.
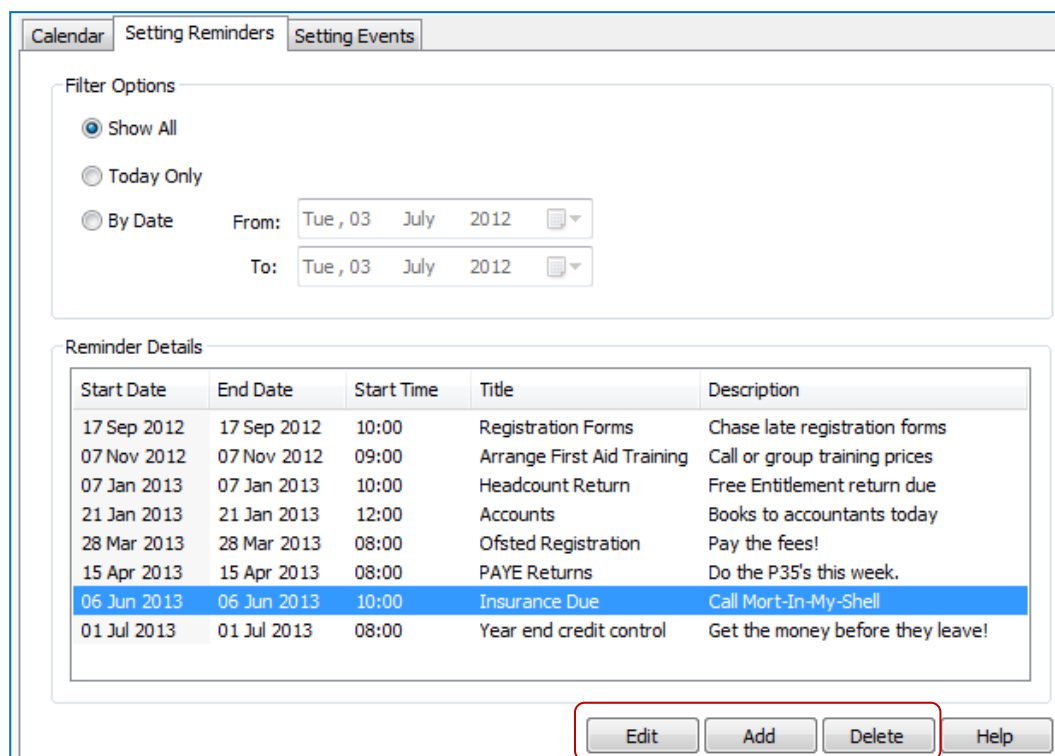
Setting Reminders

To add a reminder to the diary right click on the calendar day concerned. Choose 'Add Reminder' from the pop-up menu.

	9	10
	Narrow View	
	Widen View	
	Show Today's Items	
	Go to Waiting List	
	Add Reminder	
	Add Event	
	Print Calendar	

Add Reminder

Reminders are very simple, they just have a title, date, time and description.

Details
- Title: Insurance Due
- Description: Call Mort-In-My-Shell

Timings
- Date: Thu, 06 June 2013
- Start time: 10:00

OK Cancel Help

The reminders are listed on the Setting Reminders tab. You can add, edit or delete reminders from here too.

Calendar | Setting Reminders | Setting Events

Filter Options
- ⦿ Show All
- ◯ Today Only
- ◯ By Date From: Tue, 03 July 2012 To: Tue, 03 July 2012

Reminder Details

Start Date	End Date	Start Time	Title	Description
17 Sep 2012	17 Sep 2012	10:00	Registration Forms	Chase late registration forms
07 Nov 2012	07 Nov 2012	09:00	Arrange First Aid Training	Call or group training prices
07 Jan 2013	07 Jan 2013	10:00	Headcount Return	Free Entitlement return due
21 Jan 2013	21 Jan 2013	12:00	Accounts	Books to accountants today
28 Mar 2013	28 Mar 2013	08:00	Ofsted Registration	Pay the fees!
15 Apr 2013	15 Apr 2013	08:00	PAYE Returns	Do the P35's this week.
06 Jun 2013	06 Jun 2013	10:00	Insurance Due	Call Mort-In-My-Shell
01 Jul 2013	01 Jul 2013	08:00	Year end credit control	Get the money before they leave!

Edit Add Delete Help

Setting Events

To add an event to the setting diary right click on the calendar day concerned. Choose 'Add Event' from the pop-up menu.
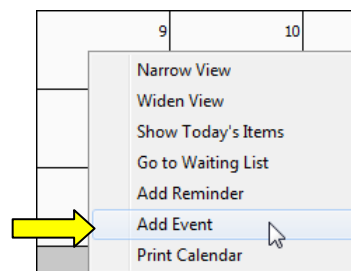
Add a title, description and start and end dates and times for the event.

Setting Events are listed on the Setting Events tab. You can add, edit or delete setting events here too.

Waiting List Items

To work with waiting list items use the right click menu for any day and choose the 'Go to Waiting List' option.