Enhanced Microsoft Access Calendar Scheduling Database Template
User Manual

This easy to use and intuitive calendar can help with the efficiency and productivity of your business, but implementing an elegant calendar in your Microsoft Access database can be a challenge. The Enhanced Microsoft Access Calendar Scheduling Database is a full featured calendar system built completely in Microsoft Access tables, forms, reports and VBA (Visual Basic for Applications) code.

Based upon some of the concepts of the Microsoft Outlook Calendar modules, this database template has the advantage of being 100% Microsoft Access based. This allows for smooth and easy integration into your existing Access database. The Enhanced Microsoft Access Calendar Scheduling Database offers a daily, weekly, bi-weekly, and monthly view of scheduled appointments/meetings/task. This database has a form for setting up and maintaining appointments/meetings/tasks as well. Pre-built daily, weekly, bi-weekly, and monthly reports are also included with the Enhanced Microsoft Access Calendar Scheduling Database.

Table of Contents

Main Menu

Upon opening the Enhanced Microsoft Access Calendar Database, the Main Menu page is displayed. By selecting each button, the following actions occur:

- Search button - allows the user to search calendar items
- Calendar View button – add and view calendar items
- Import – import calendar items from Outlook
- Maintenance Lookups – allows the setup of specific fields
- System Setup – allows for the customization of the calendar day and time format, colors, etc.
- Export – export database calendar to desktop Outlook for designated persons
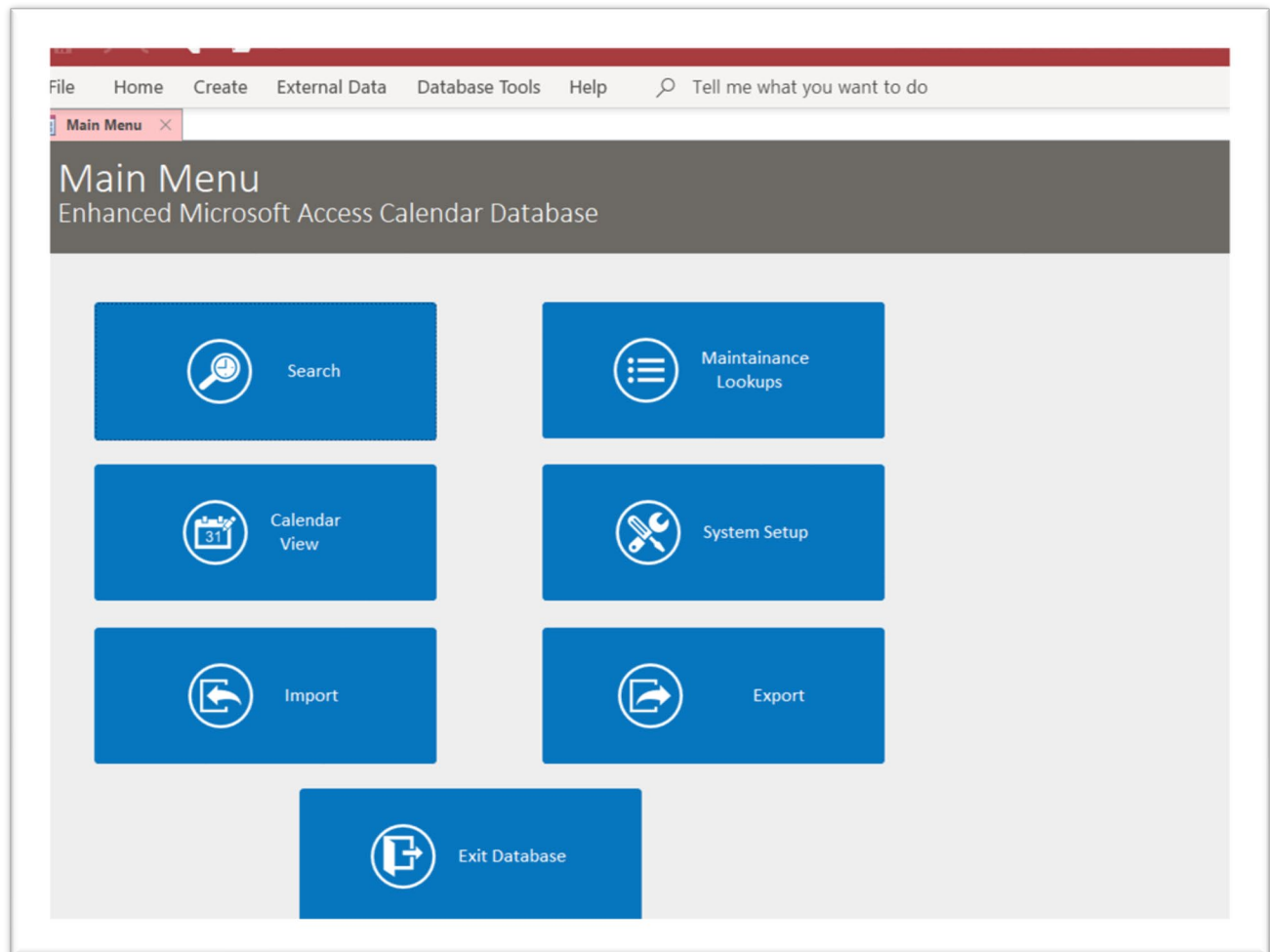
Rest of page intentionally blank
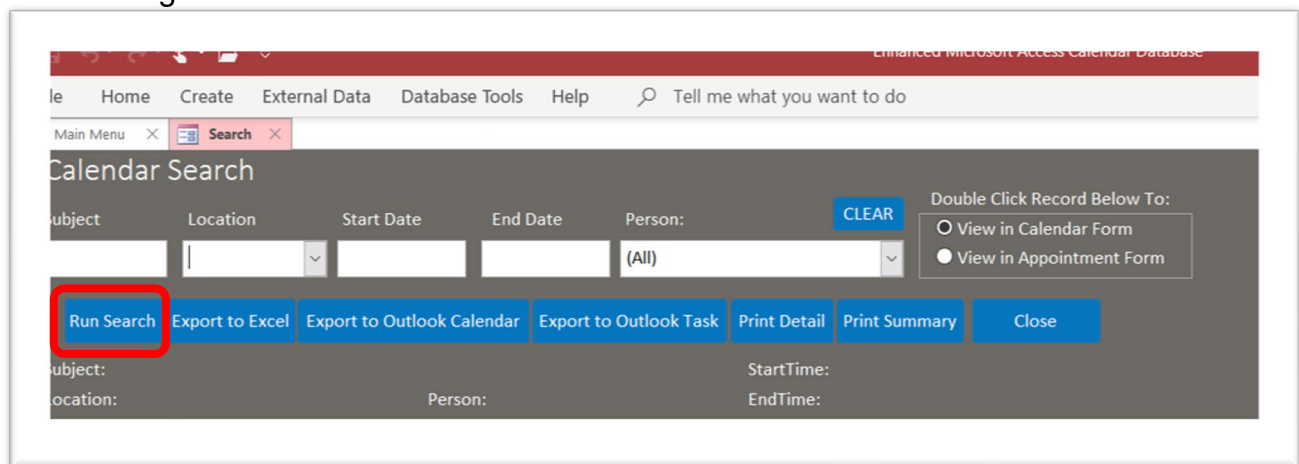
Search Button

Selecting the Search button allows for the search of items in the calendar. This can be searched by:

- Subject
- Location
- Start Date
- End Date
- Person

Search Parameters

When the parameters have been set for the search options, select the Run Search button to generate the results.

Figure 1 – Search Parameters

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Search Example

For this example, the search parameter is set by location (Location 1) and date (04/06/2020). The date format can be changed by making the adjustment under the System Maintenance button. **See System Maintenance button.**

Figure 2 – Search Example

Record View

The Double Click Records Below To box provides two options to display the record when it is selected. *See examples on the next page.*

To access the record, double click anywhere on the record. This will open the record in either the calendar or appointment form view. Changes can be made to the record and saved.

Figure 3 – Record View

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Calendar Form Option View

When the record is selected, the user is directed to the calendar view for this record.
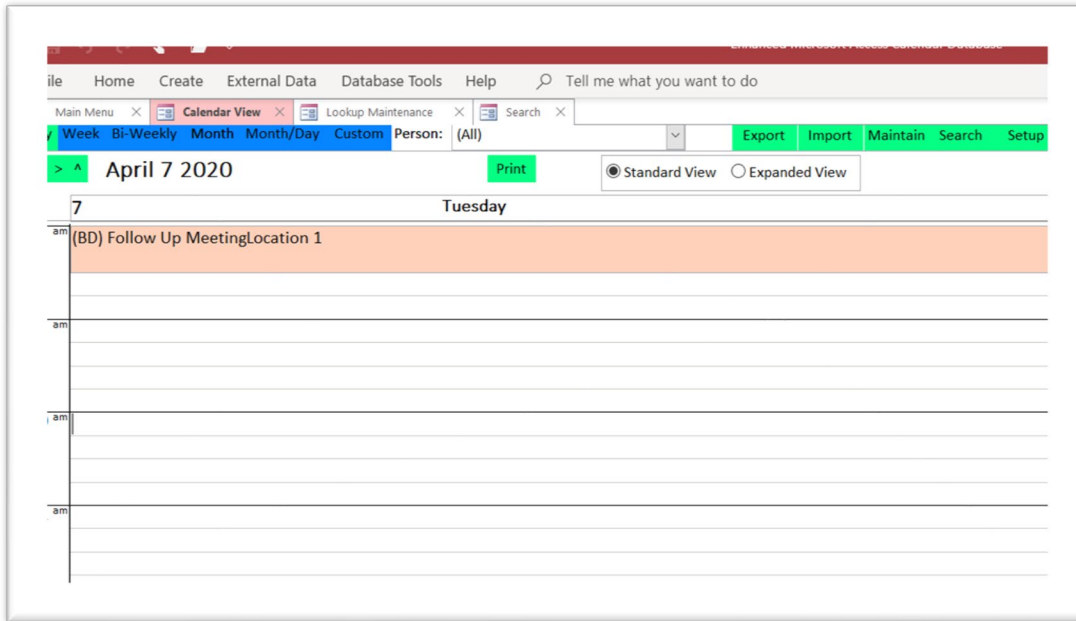
Example – Calendar Form Option View

Appointment Form Option View

When the record is selected, the user is directed to a text box view for this record.
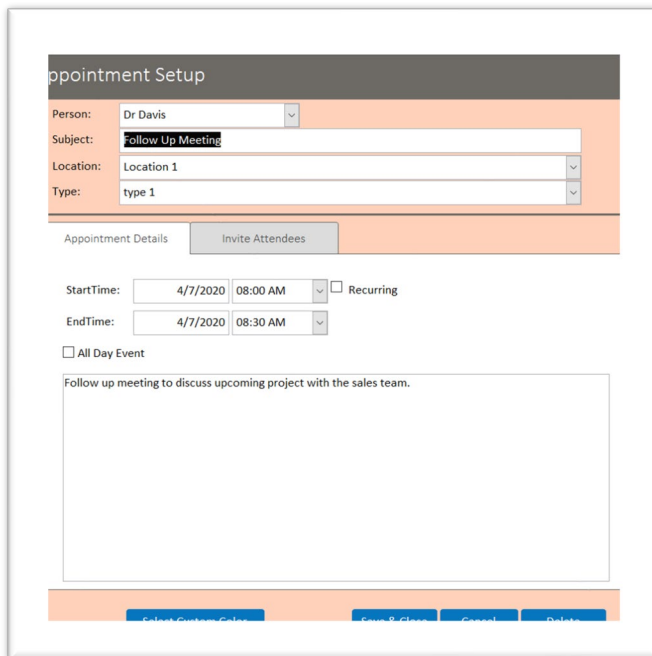
Example – Appointment Form Option View

Calendar View

When the Calendar View button is selected, the calendar is displayed. The calendar view can be changed by selecting:

- Weekly
- Bi-Weekly
- Month
- Month/Day
- Custom
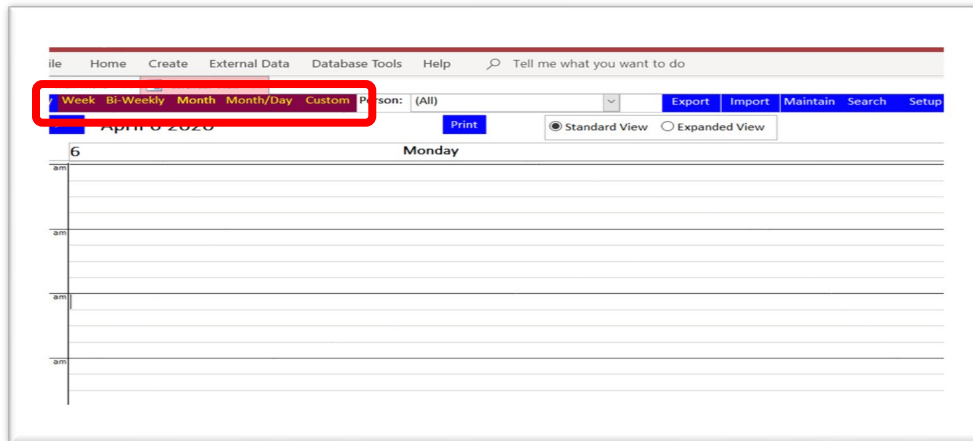
Day View

The view of the day calendar can be changed by selecting the Standard View or Expanded View radio button.

Day View – Standard View

The standard view shows all the appointments for everyone.

Figure 4 – Day View: Standard View

Day View – Expanded View
The expanded day view identified the calendar status for assigned to the calendar. While in the expanded view, a maximum of seven (7) people will be displayed. Changing or adding people to the calendar is made under the Maintenance Lookup button. **See Maintenance Lookup button.**
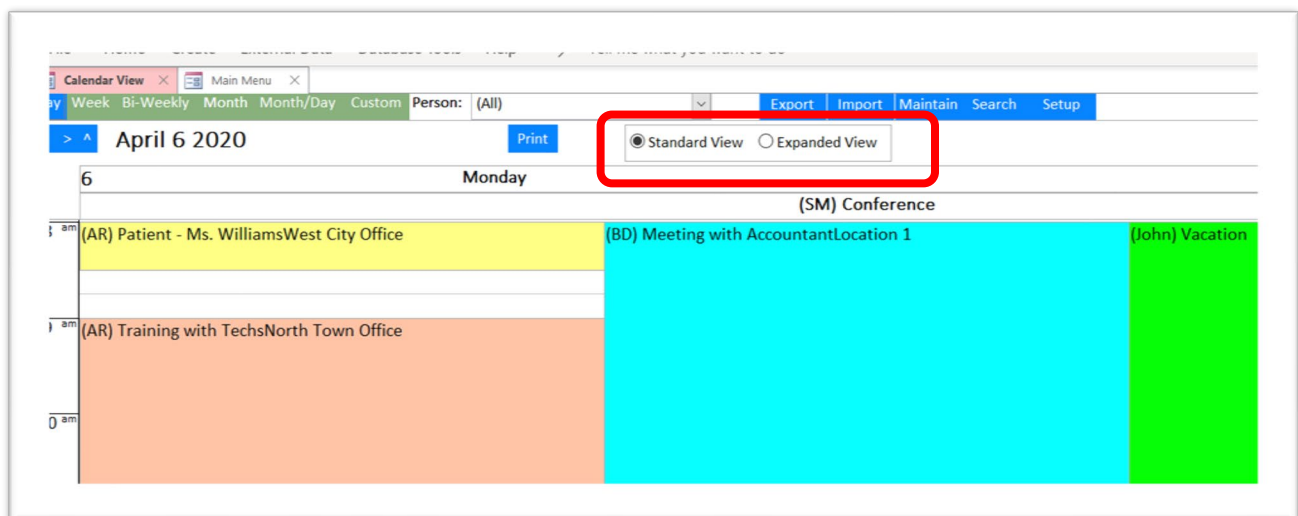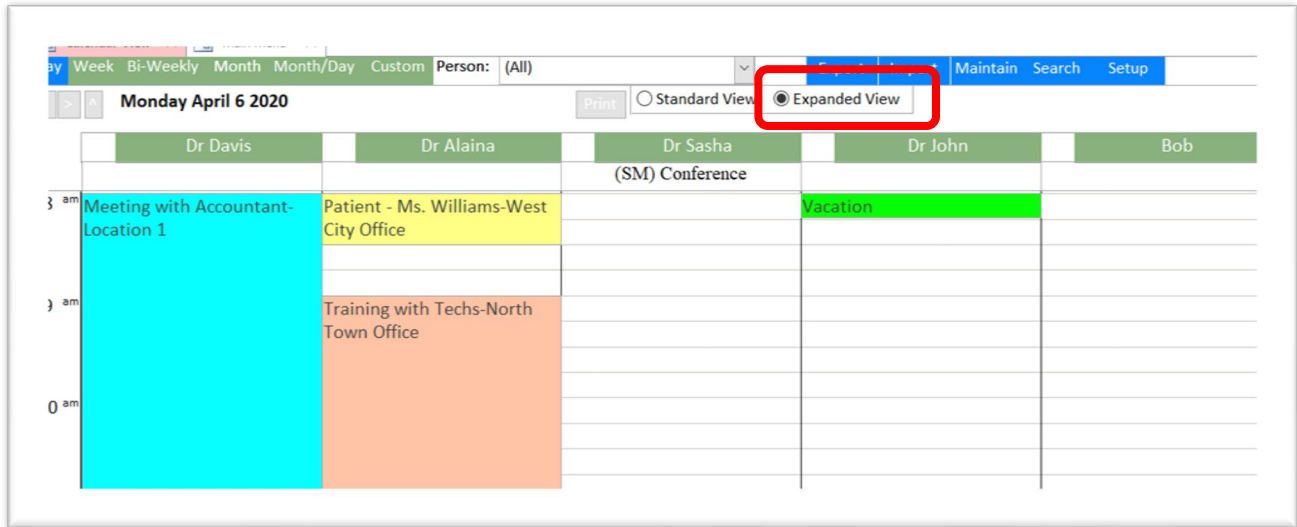

Figure 5 – Day View: Expanded View

Week View
The week view has two different view options:
- Full week
- Short work week

Full Week View
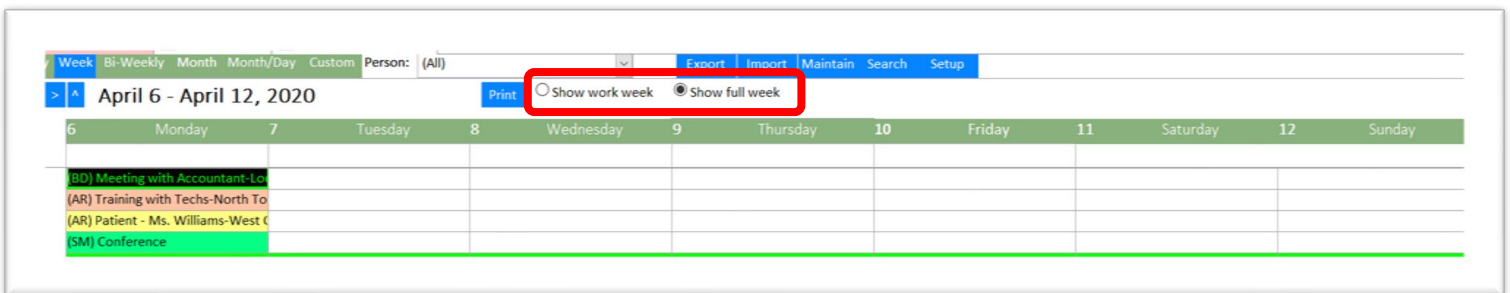The full work week displays Monday through Sunday.

Figure 6 – Week View: Full Week

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Short Work Week View
The short work week displays Monday through Friday.
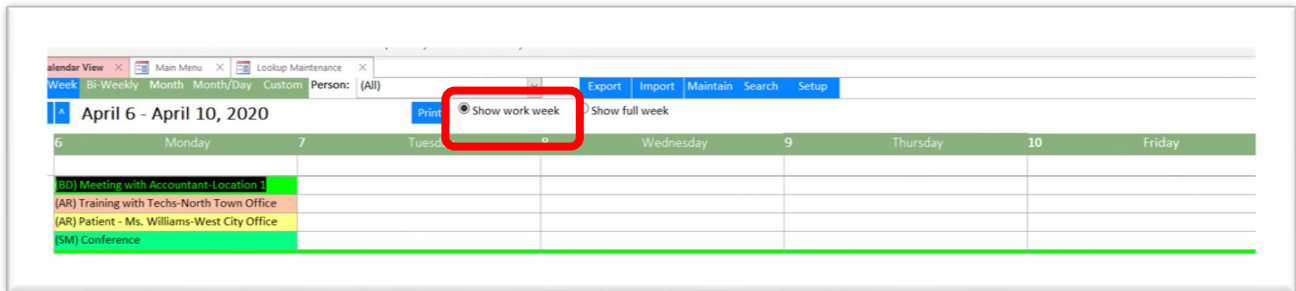

Figure 7 – Week View: Short Week

Week View Person Option
In the week view, the calendar can display all persons on the calendar or by person only.
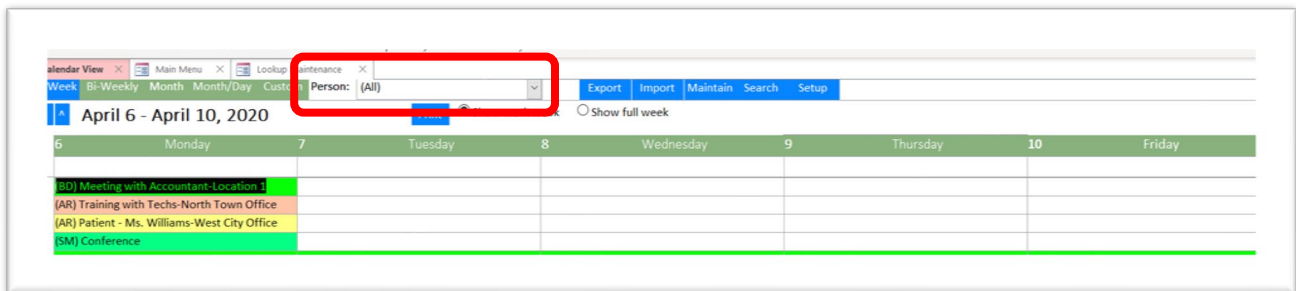

Figure 8 – Week View: Person

Bi-Weekly View
The bi-week view has two different view options:
- Full week
- Short work week

The same features available in the weekly view is also available in the bi-weekly view, the calendar can display all persons in the calendar or just one specific person.

Month View
The month view has the same features as the weekly calendar view. Items on the calendar can be viewed in full or short week, as well as by person.

Full Week View
The full work week displays Monday through Sunday.

Short Work Week View
The short work week displays Monday through Friday.

Month View Person Option

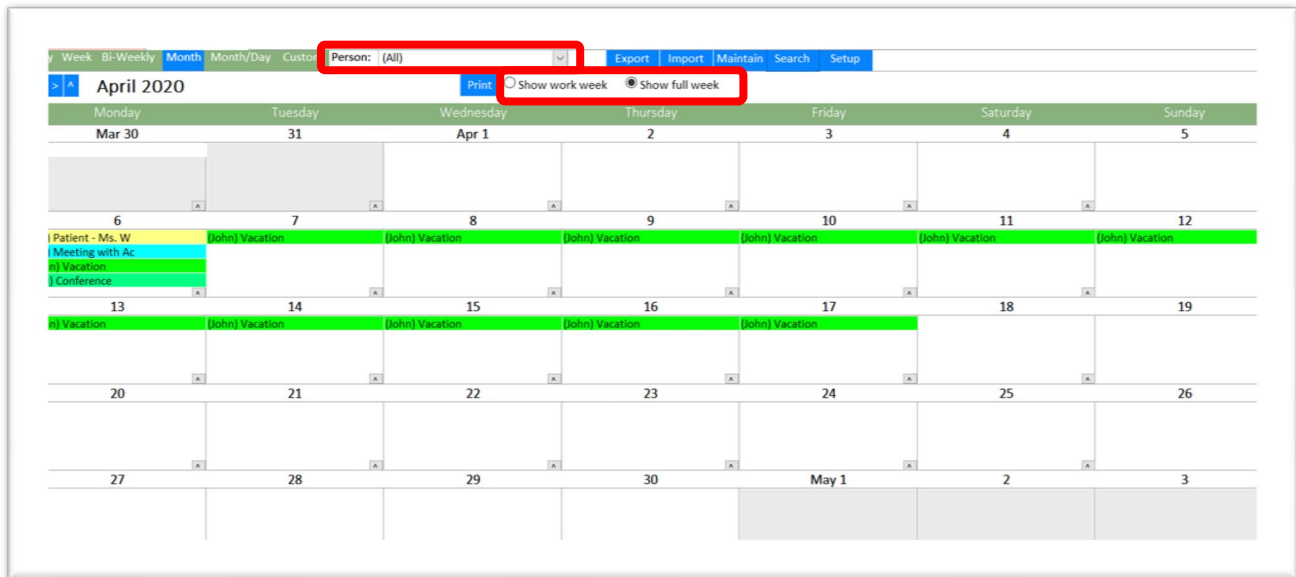In the month view, the calendar can display all persons on the calendar or by person only.

Figure 9 – Month View

Month and Day View

The month and day view displays both the calendar and then the day, which is located on the right side of the calendar.

This calendar option allows items on the calendar can be viewed in full or short week, as well as by person.
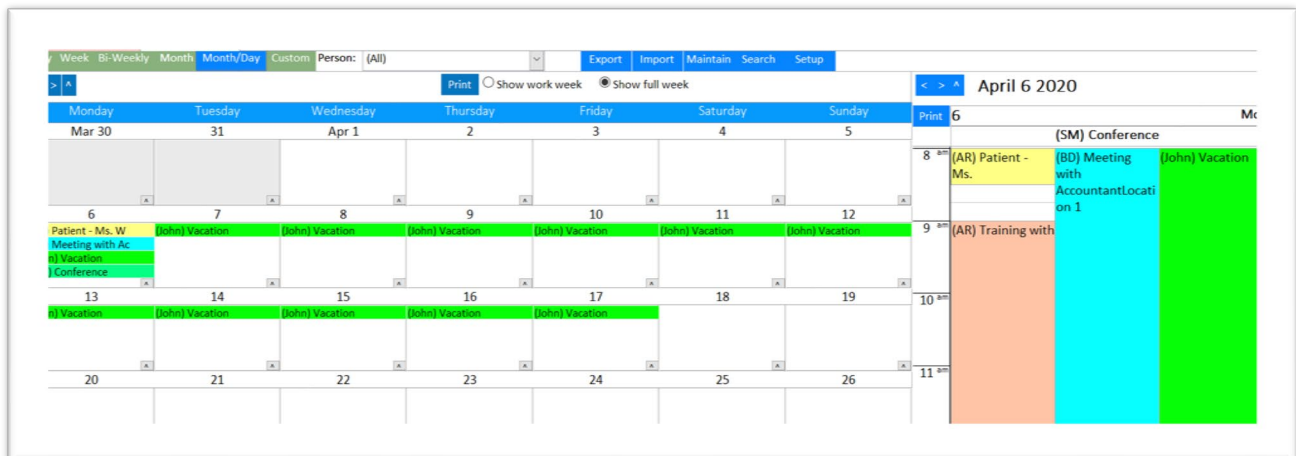

Figure 10 – Month and Day View

Custom View

The custom view allows for a specific date range to be searched.

Like the weekly and monthly calendar options, the custom view allows for items on the calendar to be viewed in full or short week, as well as by person.
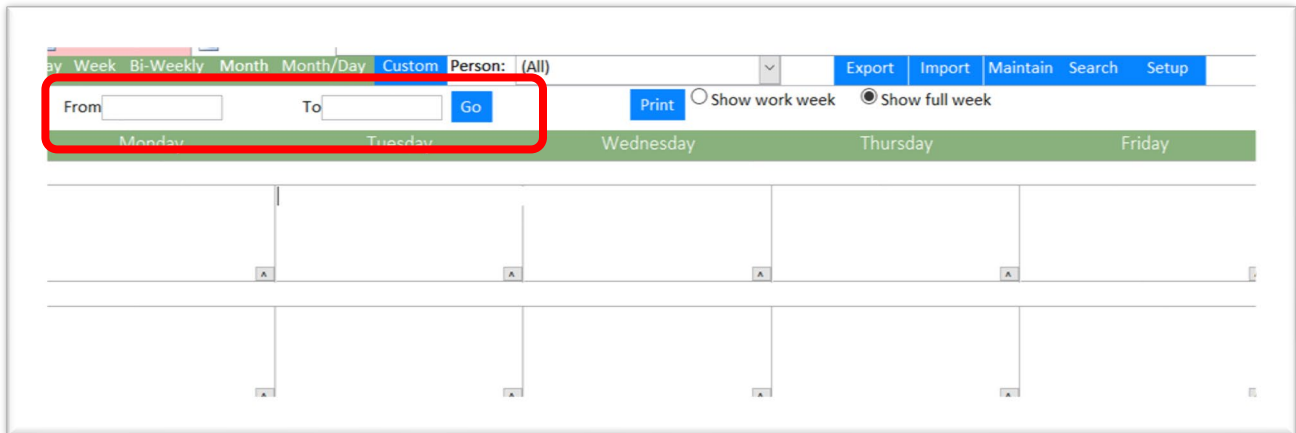

Figure 11 – Custom View

Calendar Options

All the calendar options include:
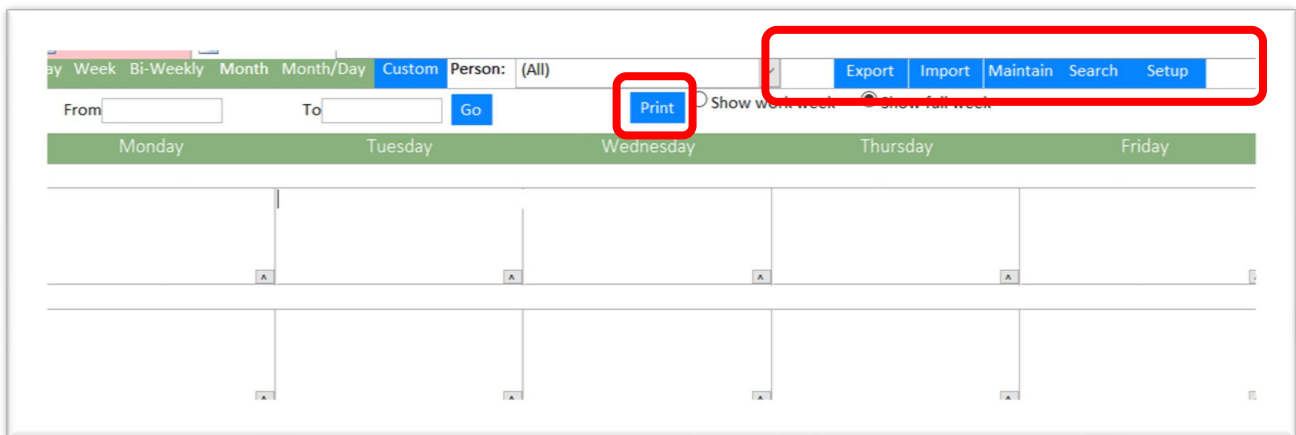- Export
- Import
- Maintain
- Search
- Setup
- Print

Figure 12 – Calendar Options

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Export Option

When the Export button is selected, a text box appears. This allows the user to export data to Outlook. This function is the same as the Export button on the Main Menu Page.

Items can be exported as a calendar item or task. This information can also be exported based on a specific person or all persons with items scheduled in the calendar.

Figure 13 – Export Option

Import Option

When the Import button is selected, a text box appears. This allows the user to import data to Outlook. This function is the same as the Import button on the Main Menu Page.

Items can be imported as a calendar item or task. This information can also be imported based on a specific person or all persons with items scheduled in the calendar.
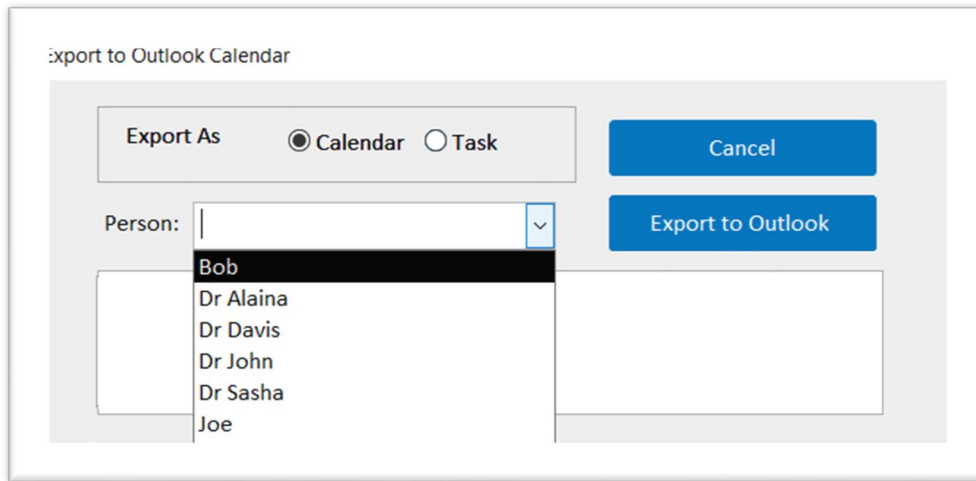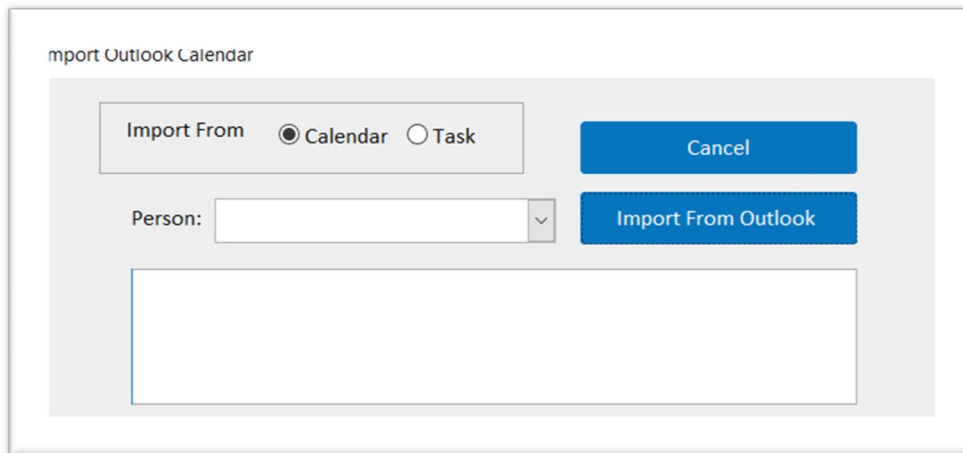

Figure 14 – Import Option

Maintenance Option

When the Maintenance button is selected, the user will navigate to the Lookup Maintenance page. Functionality and usage of the Lookup Maintenance features are covered under the Lookup Maintenance button.

Search Option

When the Search button is selected, the user will navigate to the Search button page. Functionality and usage of the Search button features are covered under the Search button.

Setup Option

When the Setup button is selected, the user will navigate to the System Setup page, where the General Setup functions can be adjusted. Functionality and usage of the System Setup is covered under the System Setup button.

Print Option

When the Print button is selected, the database will generate the printable calendar, based on the selection of the view (day, week, bi-weekly, month, month/day custom). Unless specified, the calendar will print on standard 8 ½ X 11 paper.

Page One Printout

(All)			April 2020		Revised 4/7/2020	
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Mar 30	31	Apr 1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	May 1	2	3
4	5	6	7	8	9	10

Figure 14 – Import Option

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Next Page

To view and print the next page, select the forward arrow to navigate to the page.
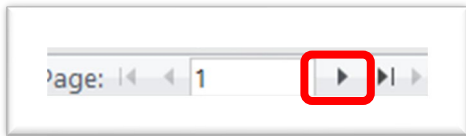
Figure 15 – Next Page

Page Two Printout

The page two printout of the calendar lists the appointments, giving more details, along with the calendar view of the appointments.
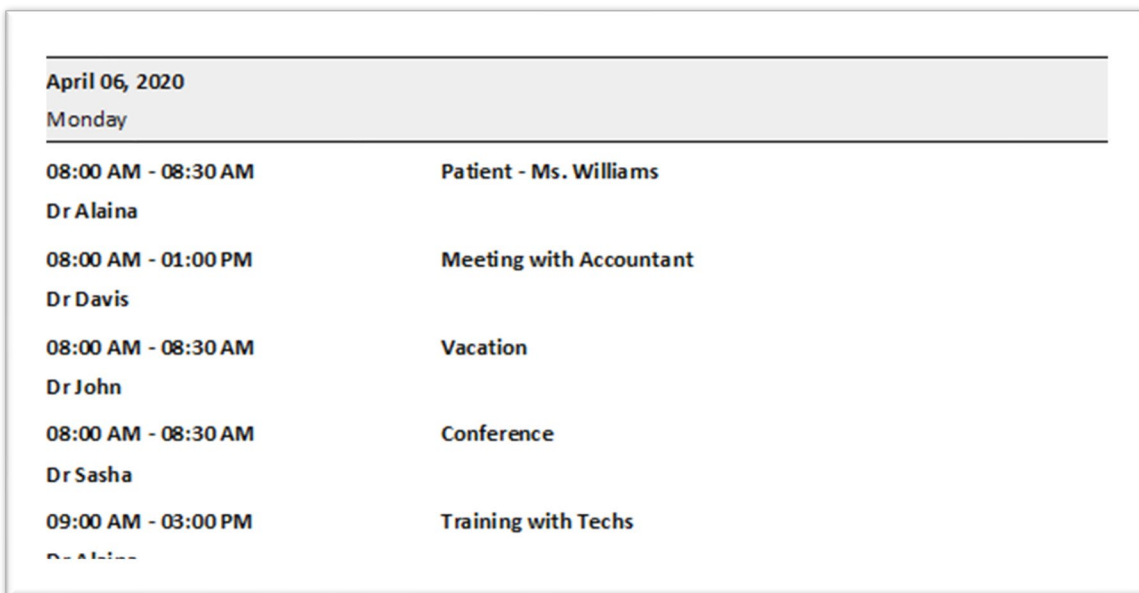

Figure 16 – Page Two Printout

Toolbar Options

Like all Microsoft products, the toolbar can be utilized to adjust the paper size, margins, and printer setup. This document can be converted to an Excel, text file, PDF. or XPS, and also emailed.
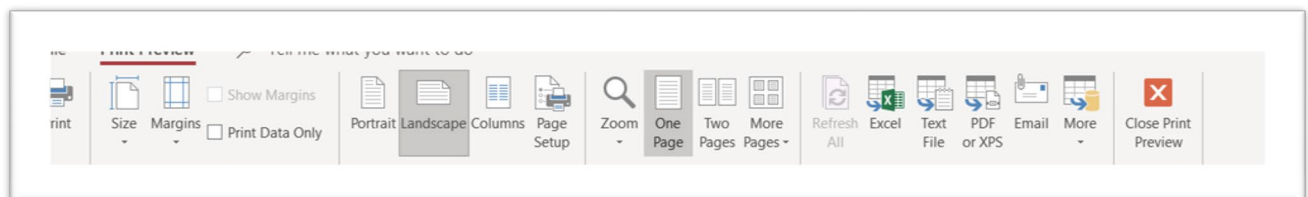

Figure 17 – Toolbar Options

Maintenance Lookup Button

Selecting the Maintenance Lookup button allows the user to change:

- Appointment Types
- Contacts
- Locations
- People
- User Logins

Appointment Types

When Appointment Types is selected, the type of appointment can be created or changed. The template example contains appointment types titled "type 1" and "type 2" but adding and changing titles can be accomplished by placing the cursor in the record you want to change. Once the cursor is in the record to change or add, type the title of the new appointment type and select the Enter key to move to the next record, saving the record change.
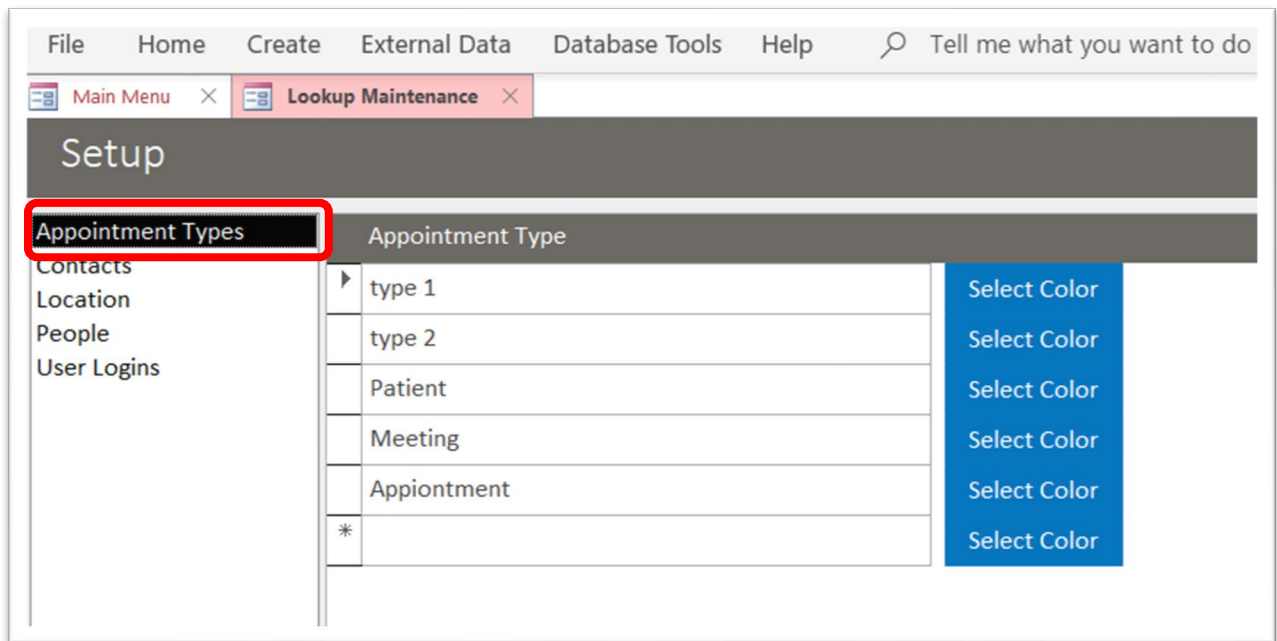

*Figure 18 – Appointment Types*

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Contacts

When Contacts is selected, this persons can be added to the database. This option is important due to the fact that when creating a calendar item, attendees can be invited. Those set up under contacts will be available to select from a dropdown when inviting attendees to your events.

The example below shows the first name and last name as only a single letter, depending on how you set up the names in this area, will determine how their name is reflected in the dropdown option.
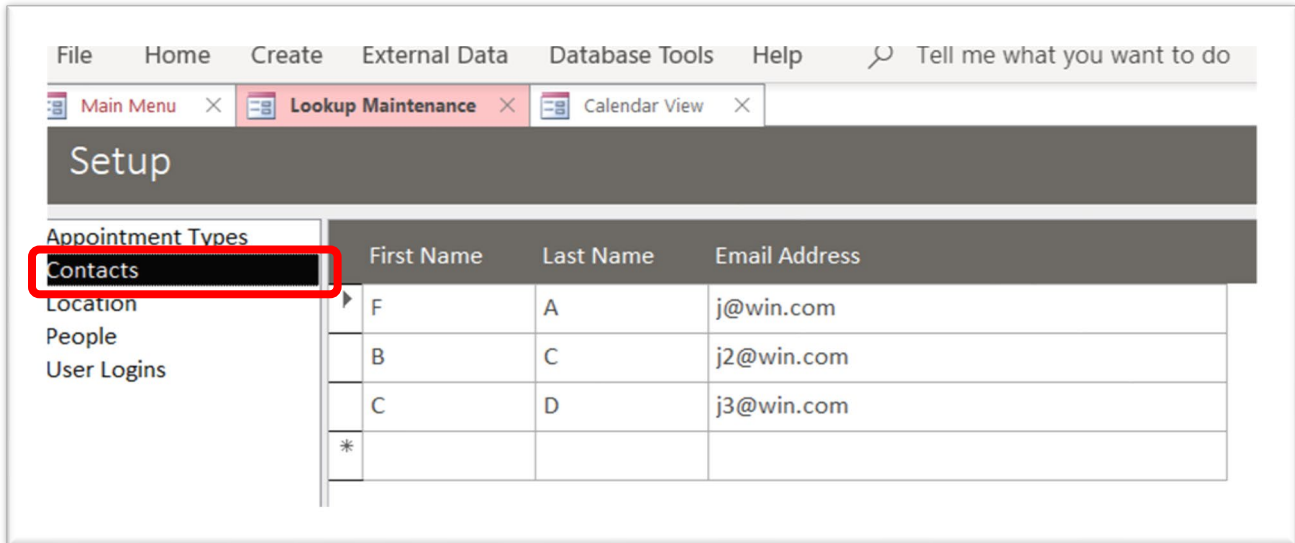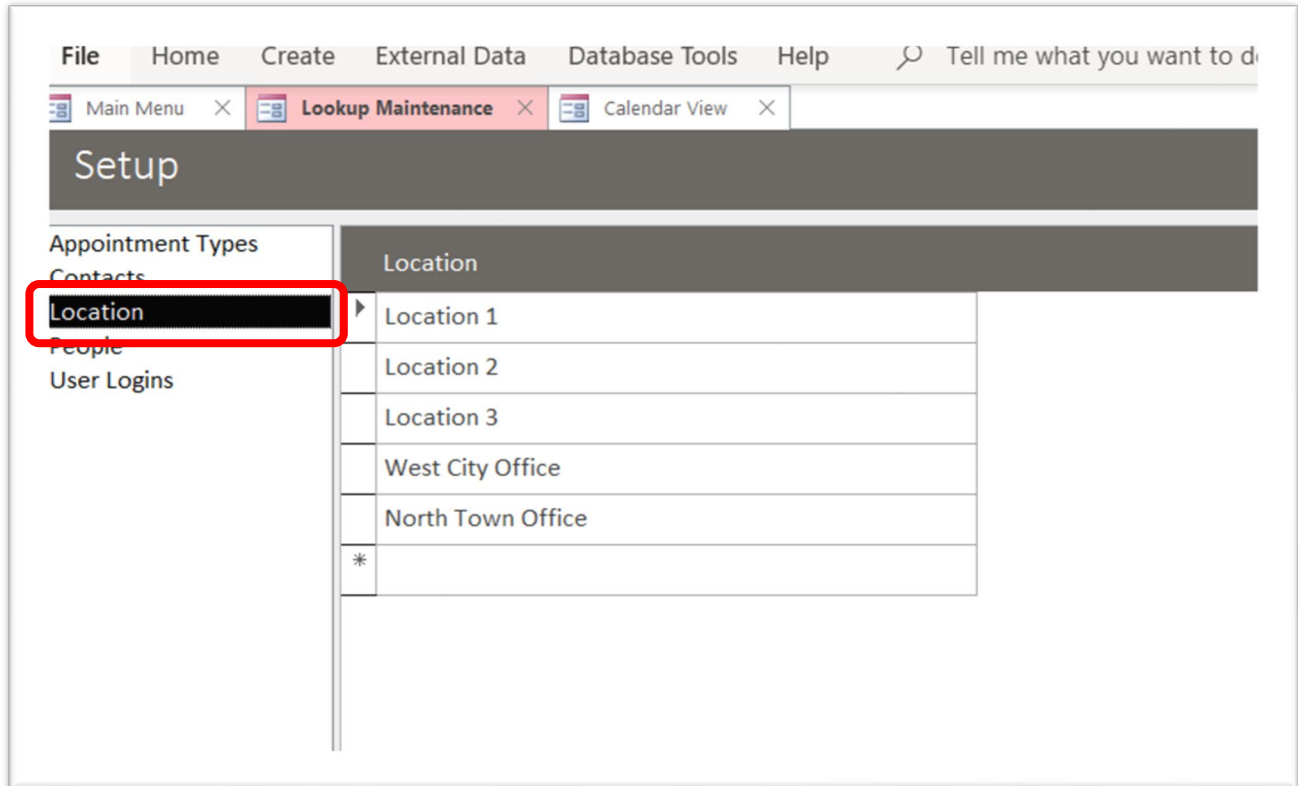

Figure 19 - Contacts

Once the cursor is in the record to change or add, type the new contacts information and select the Enter key to move to the next record, saving the record change.

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Location

Selecting Location allows the user to identify locations in the calendar dropdown box when setting up an appointment. When creating a calendar item, the location is not a required block to complete but selecting a location from the dropdown box will display the location title in the calendar item.

Figure 20 – Location

Once the cursor is in the record to change or add, type the new location and select the Enter key to move to the next record, saving the record change.

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People

Selecting People allows for the addition or change the names of people who appear in the Person dropdown box when creating a calendar item.

When creating a calendar item, the name in the Person column will appear in the Person dropdown box. This is not a required field to complete when creating a calendar item, but if the person is not added here, it cannot be manually added to the Person box in the calendar.

The way the person is identified in the Display code column is the way their name will be displayed in the calendar event. Example: When setting up a calendar event for Dr. Sasha, their name will appear in the calendar as SM.

When in the expanded day view, the calendar will display up to 7 people. To select those to show up in the expanded day view, check the box to the far right of their name.
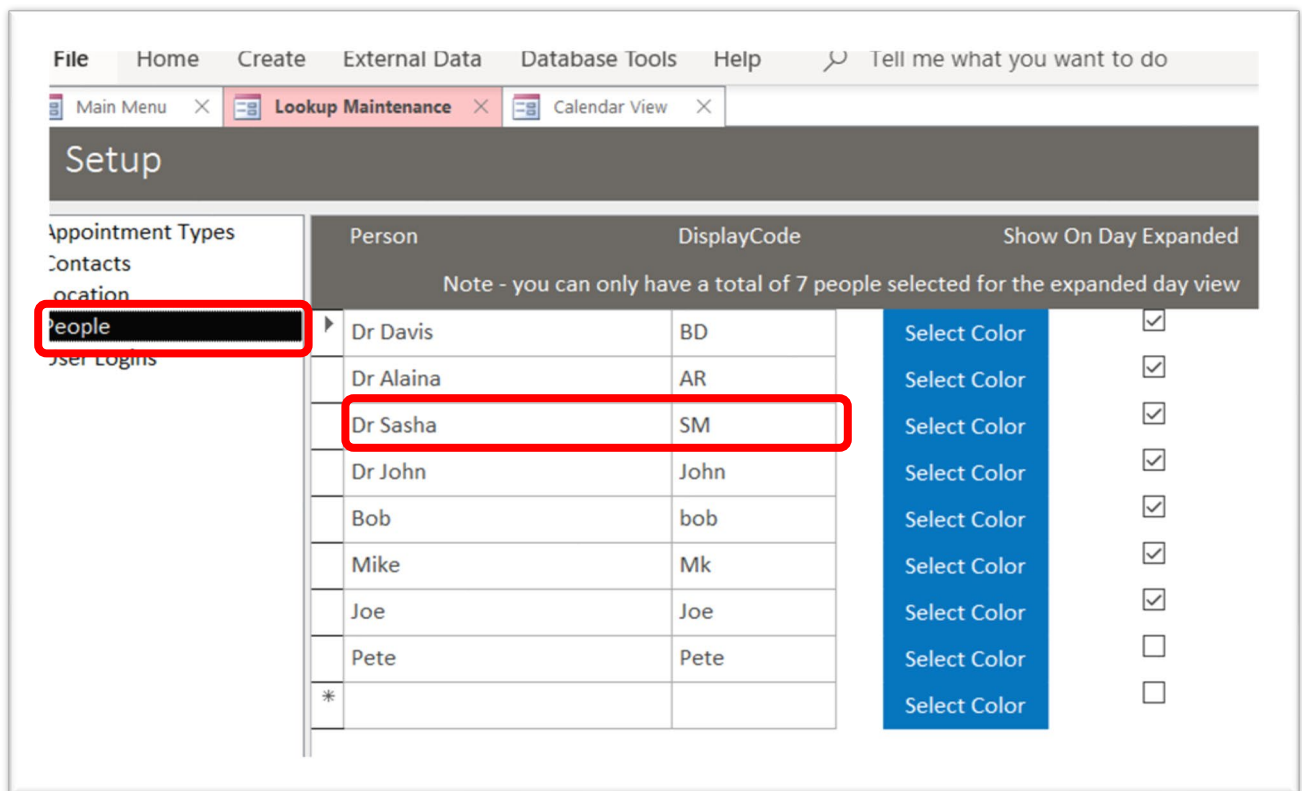

Figure 21 – People

Once the cursor is in the record to change or add, type the new information and select the Enter key to move to the next record, saving the record change.
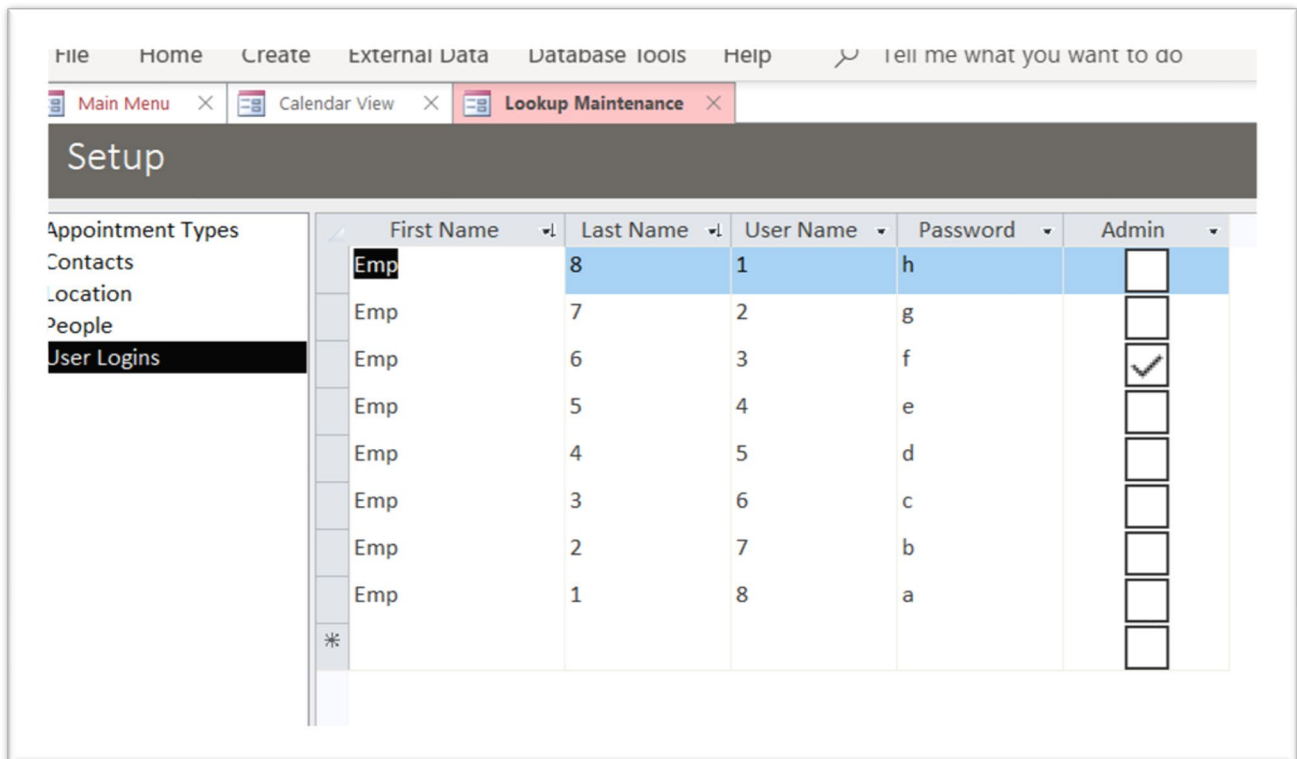
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User Logins

Selecting User Logins allows for the addition or change of users. Information required for user login is:

- First Name
- Last Nate
- User Name
- Password

By selecting the check box in the far-right column, the user can assign administrative rights. This database allows for multiple users to have administrative rights.

Figure 21 – User Logins

Once the cursor is in the record to change or add, type the new information and select the Enter key to move to the next record, saving the record change.

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System Setup Button

Selecting the System Setup button allows the user to change:

- Calendar Options
- Calendar Colors

Calendar Options Tab

Change the first day of the week by selecting any day, Monday through Sunday

Landscape or portrait option

Time can be displayed can be 12- or 24-hour mode

Change the calendar default view

Select checkbox to activate User Login

Change the calendar default to Full Week (7 days) or Work Week (5 days)

Changes the calendar view when in Day mode.

When selected, the location of the appointment appears on the calendar

Calendar can be displayed by 15 min., 30 min., or hour increments

Time can be viewed by minute, 5, 10, 15, 30, and hour on the calendar

Display time as: mm/dd/yyyy or dd/mm/yyyy

Select to apply color option to calendar items

General Setup

| Calendar Options | Calendar Colors |

First Day of a Week — Monday

Week Type — Show full week

Print Type — Landscape

☑ On Day View, In "All" Mode, Show Time

☐ Print Detail
☑ Print Color
☑ Show location in Day and Week view.

Day/Week Start Time — 08:00 AM

Day/Week End Time — 20:00 PM

Day View by — Every 15 Minut

☑ Show Time in 24 Hour Mode

Time View by — All

Default Calendar View — Day

Day Format — mm/dd/yyyy

☐ Show Total Time in Bi-Weekly and Monthly View

Total Time Format — hh:mm

☐ Show Dates From Right To Left in Weekly, Bi-Weekly and Monthly View

☐ Activate User Login

☑ Apply color for Appointment Type to Appointment

# of Daily Overlaps — 5

Save and Close

Calendar Colors Tab

Selecting any of the color palette icons will change the color

Example of color palette changes as they will appear on the calendar view.
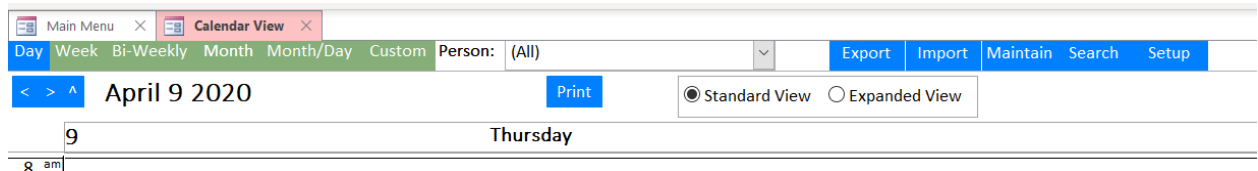
Add a Calendar Item

To add a calendar item, select the Calendar View button on the Main Menu page. Once the Calendar View button is selected, the calendar will appear in the day view format with the Standard View radio button selected.

With the calendar in the Standard View, double clicking on the date and time, will open the calendar in the Appointment View format, allowing the user to add a calendar item.
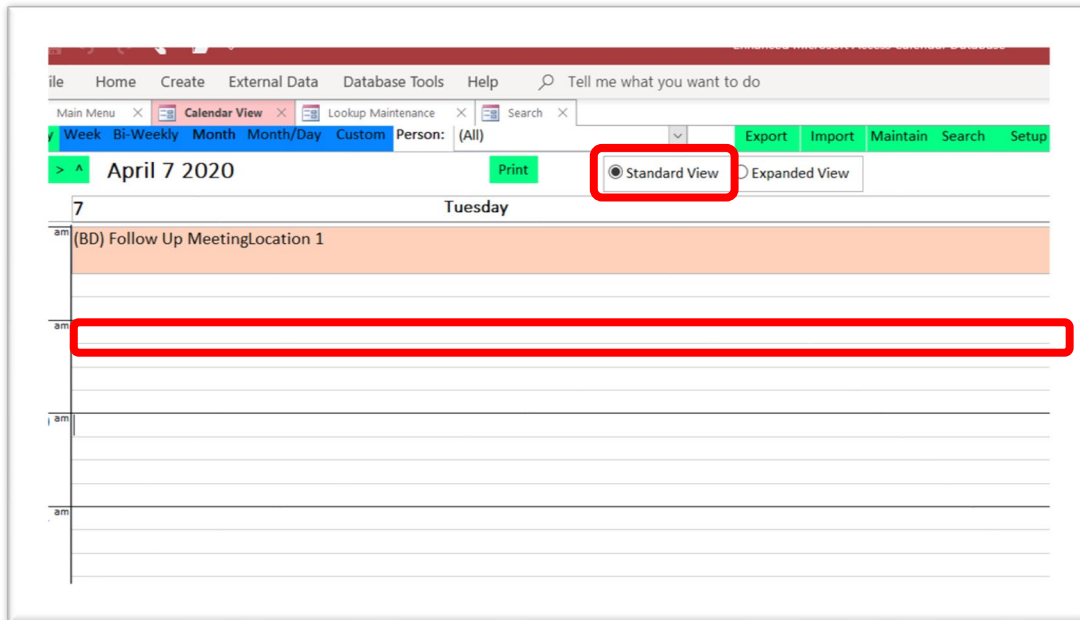

Figure 22 – Add Calendar Item from Standard View

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Add a Calendar Item from Standard View

With the Appointment Setup box open, the user can create the calendar item by selecting the items from the Person, Location, and Type dropdown options. Manual text entry is used for the Subject field.

To add information in the Appointment Details tab, select the start and stop time for the meeting. Like other calendar setups, a large text section is available to add notes.

The information in the dropdown options are set up under the Maintenance Lookups button on the Main Menu. *See Maintenance Lookup button.*

Calendar Details

Figure 23 – Appointment Setup - Details

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Under the Invite Attendees tab, select the name from the Existing Contact dropdown option to add an attendee.

The information in the Existing Contact dropdown option is set up under the Maintenance Lookups button on the Main Menu. ***See Maintenance Lookup button.***

Figure 24 – Appointment Setup – Invite Attendees Tab

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By selecting the Select Custom Color button on the lower left side of the Appointment View box, a color can be added to the calendar item. The color selected is shown on the calendar, along with the calendar item information.

When the Select Custom Color button is selected, the Color box appears. In this box, colors can be selected by either the preset colors in the Basic Colors box or by selecting the Define Custom Colors button.

Selecting the Define Custom Colors button allows the user to create a custom color by selecting a color from the additions box with the gradient colors. When the custom color is selected, select the Add to Custom Colors button.

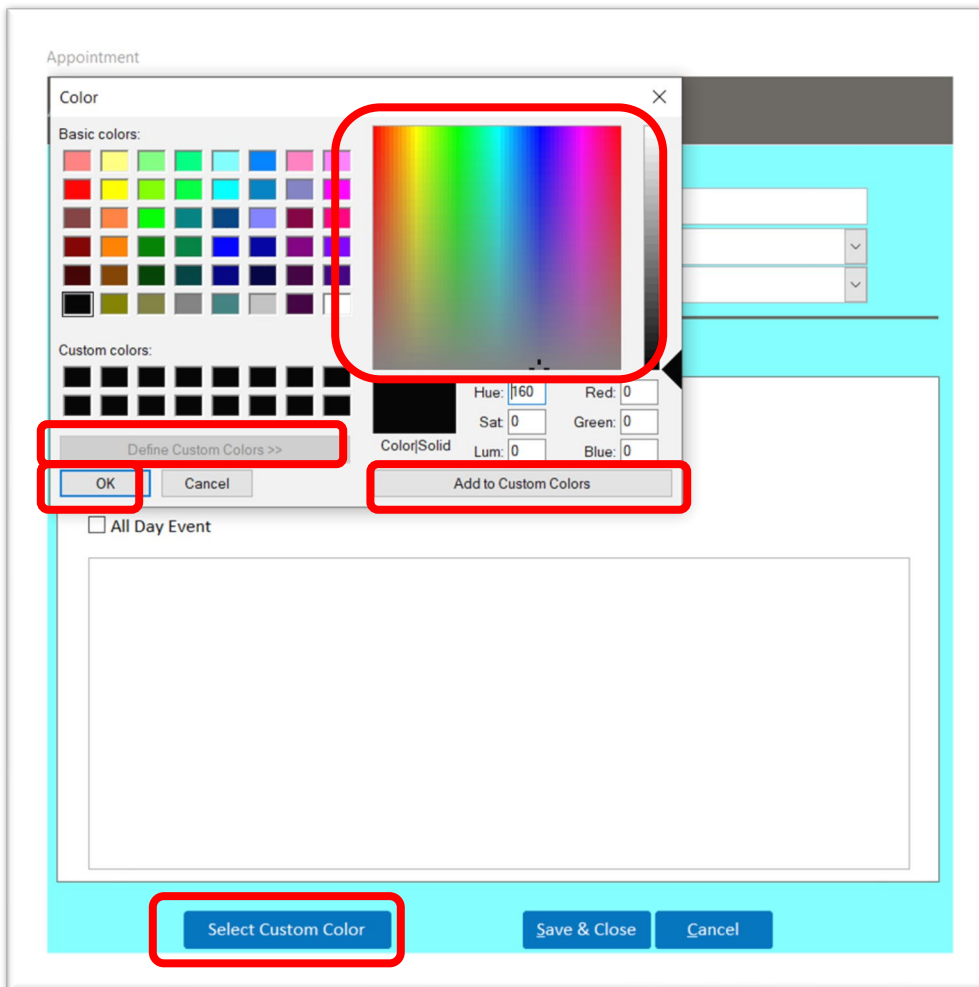After the color has been determined and selected, select the OK button to save this change.

Figure 25 – Appointment Setup – Custom Color

Add a Calendar Item from Expanded View

When the calendar opens in the Expanded View, the calendar item is added by the persons identified in the People field of the Maintenance Lookup button.

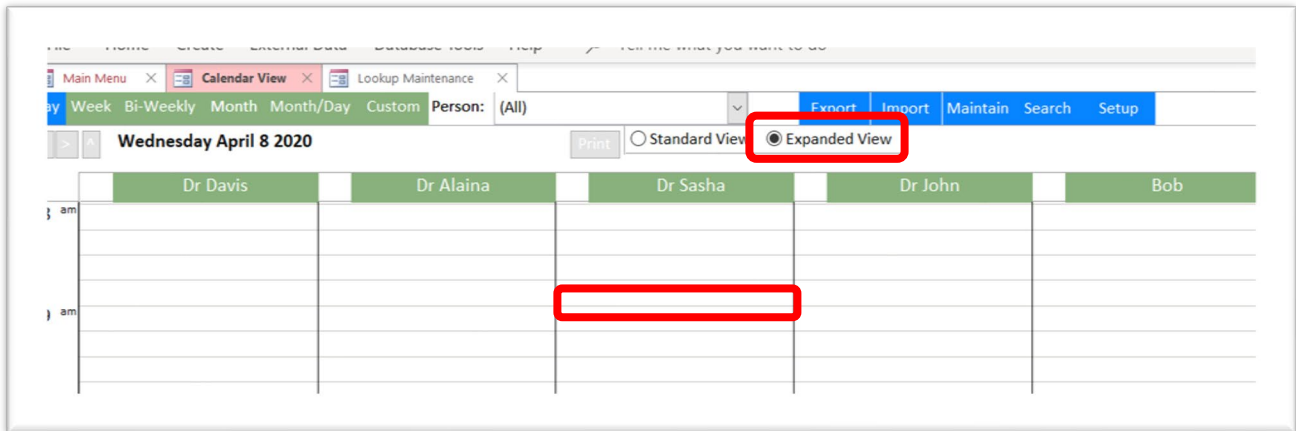By double clicking a time under a specific person's name, the calendar item can be added.

Figure 26 – Add Calendar Item from Expanded View

The Appointment Setup box appears so the calendar item can be added. Since the calendar selection was for a specific person, their name is automatically added in the Person field. The calendar and invitation for attendees is completed in the same manner as in the Standard View. **See Calendar Details** for instructions on completing the Details, Appointment Details, and the Invite Attendees sections of the calendar items.
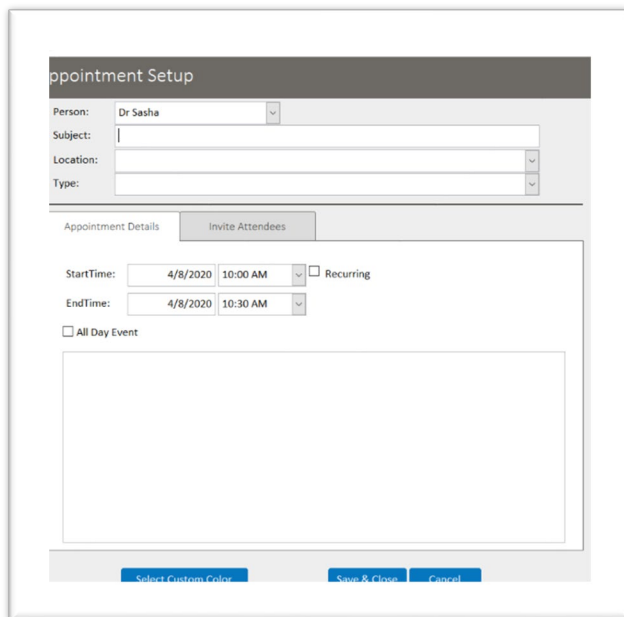

Figure 27 – Appointment Setup – Expanded View

Change Existing Calendar Item

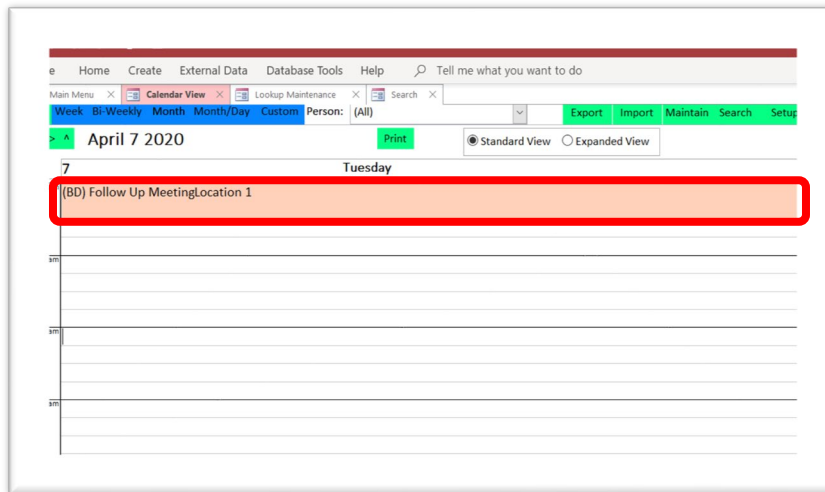To change a calendar item currently in the calendar, double click the item.

Figure 28 – *Change Calendar Item from Standard View*

Change Existing Calendar Item in Appointment Setup Box

When the calendar item is double clicked, the Appointment Setup box will open, This allows the user to make changes to an existing calendar item.

The calendar and invitation for attendees is completed in the same manner as adding a new calendar item. **See Calendar Details** for instructions on completing the Details, Appointment Details, and the Invite Attendees sections of the calendar items.
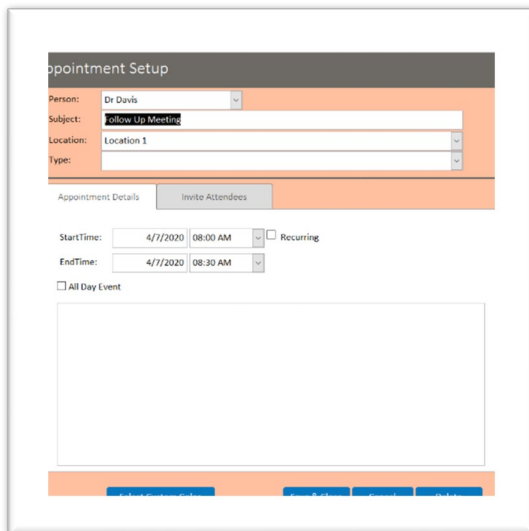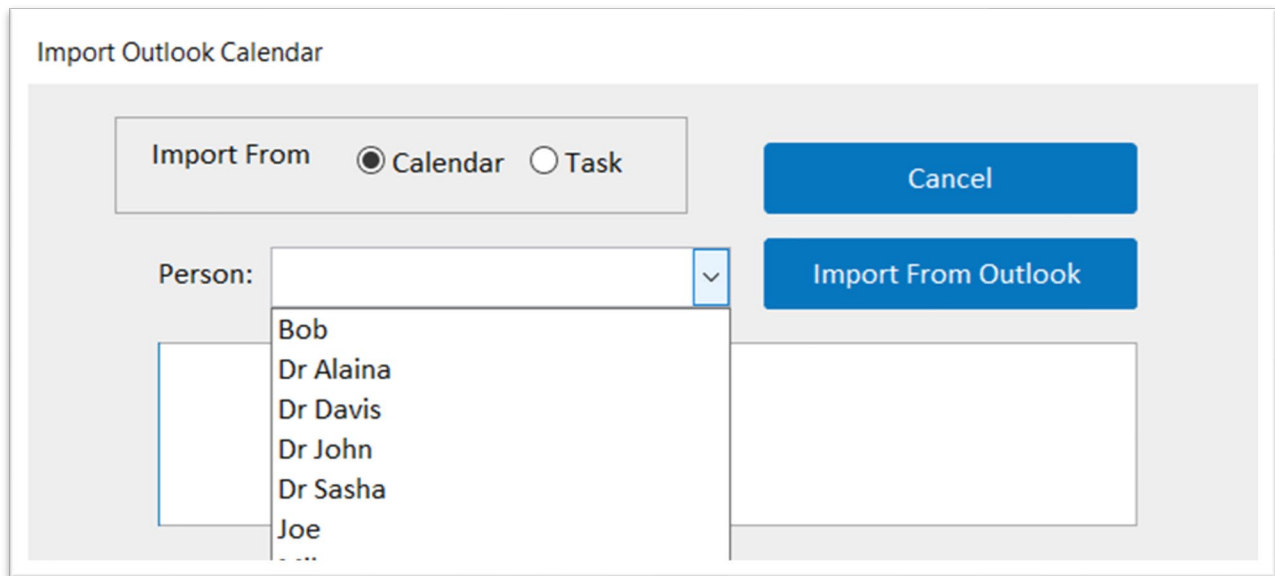

Figure 29 – *Change Existing Calendar Item from Standard View*

Import Button

When the Import button is selected, a text box appears. This allows the user to import data to Outlook. This function is the same as the Import button in the calendar.

Items can be imported as a calendar item or task. This information can also be imported based on a specific person or all persons with items scheduled in the calendar.
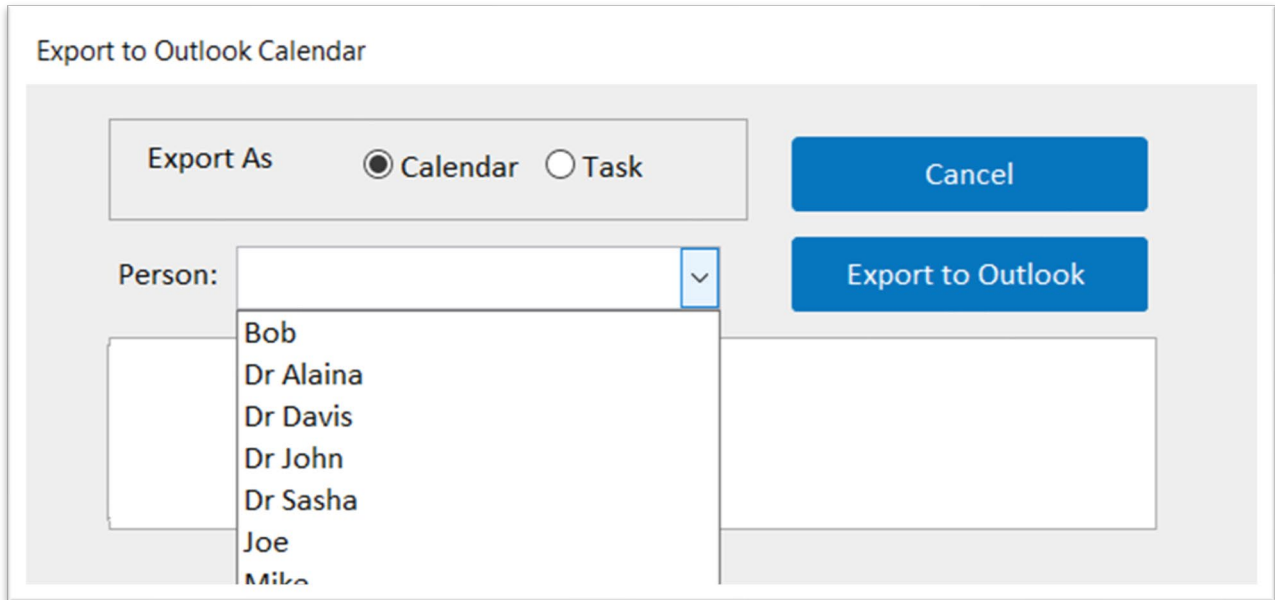

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Export Button

When the Export button is selected, a text box appears. This allows the user to export data to Outlook. This function is the same as the Export button in the calendar.

Items can be exported as a calendar item or task. This information can also be exported based on a specific person or all persons with items scheduled in the calendar.

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