

# Fast-Class File

Client Data System

## Volume 78: Creating Recurring Activities

### To create a series of recurring activities:

- Create a new timed activity in the CDS Calendar.

The screenshot shows the 'Activity Detail' window with the following fields and values:

- Last Nm,First:** [Empty]
- Type/Sub:** Meeting (dropdown), Team Building (dropdown)
- Keywords:** Business
- Due Date:** / /
- Priority:** Normal (dropdown)
- Status:** Active (dropdown)
- Assigned To:** [Empty]
- Created By:** DEMO
- Created On:** 01/13/2006
- Subject:** Weekly Staff Meeting
- Place:** 3rd Floor Conference Room
- Start Time:** Fri 1/13/2006, 09:30 AM
- End Time:** Fri 1/13/2006, 10:30 AM
- Reason:** Prospect Progress, Project Development, Goal Review
- Participants List:**

UserName
DEMO
ED
EILEEN
MARK
MIKE
NANCY

Buttons at the bottom: OK, Cancel, Options..., Recurring..., Help.

Figure 1: The Activity Detail window.

- Enter the details of the activity and click the **Recurring** button on the bottom of the **Activity Detail** window.
- Define **Pattern of recurrence** and establish **Range of recurrence** using options in the **Activity Recurrence** window.

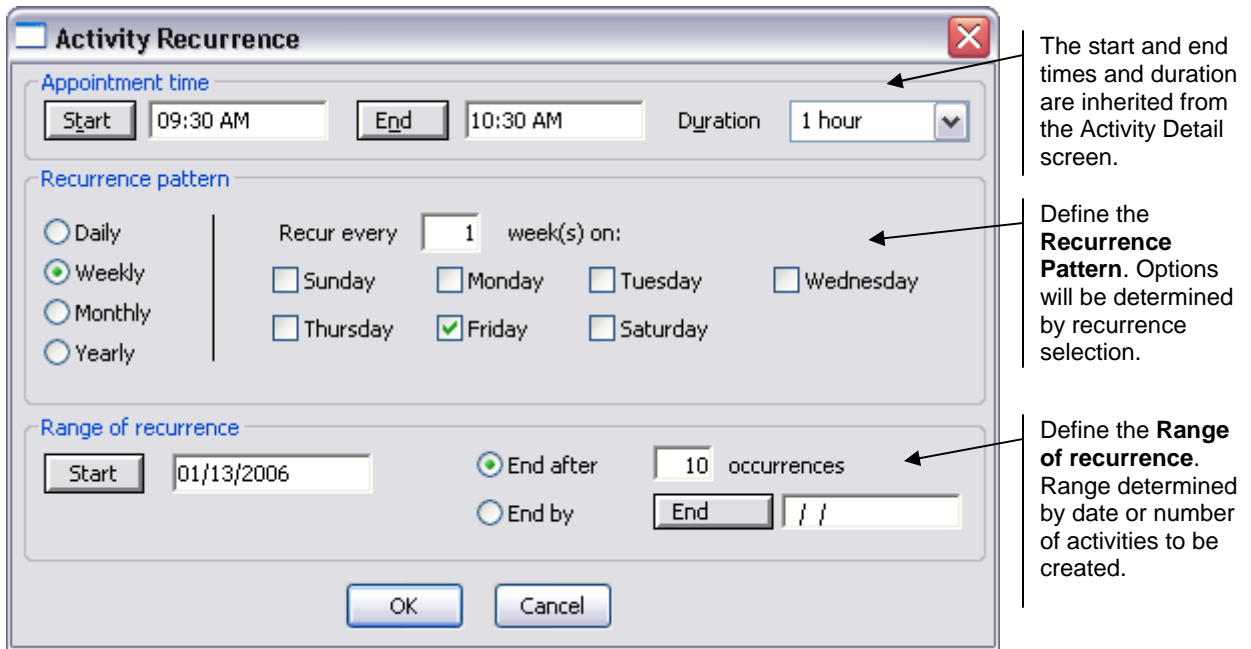


Figure 2: The Activity Recurrence window.

- After defining the **Recurrence pattern** and establishing the **Range of recurrence**, click **OK**.
- Click **OK** in the **Activity Detail** screen to schedule the activities.

### How to rescheduling a recurring activity:

- In the CDS Calendar, right-click on one instance of a recurring activity to open a context menu.
- Select **Reschedule** in the context menu.

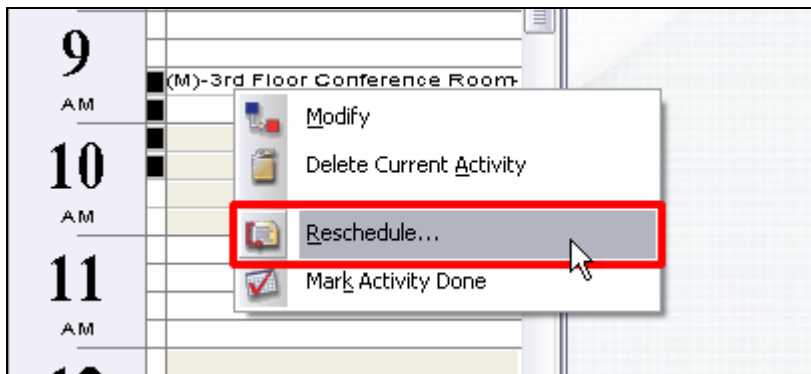


Figure 3: The Activity Context menu (Reschedule option highlighted).

- CDS will open a prompt with options to reschedule only the selected instance of the series of recurring activities or to reschedule the entire series.



Figure 4: The Reschedule Recurring Item window.

- Select the appropriate option and click **OK**.

#### Rescheduling one occurrence -

- Selecting the **Reschedule the occurrence** option will open the **Reschedule** window for the selected instance of the series of activities.

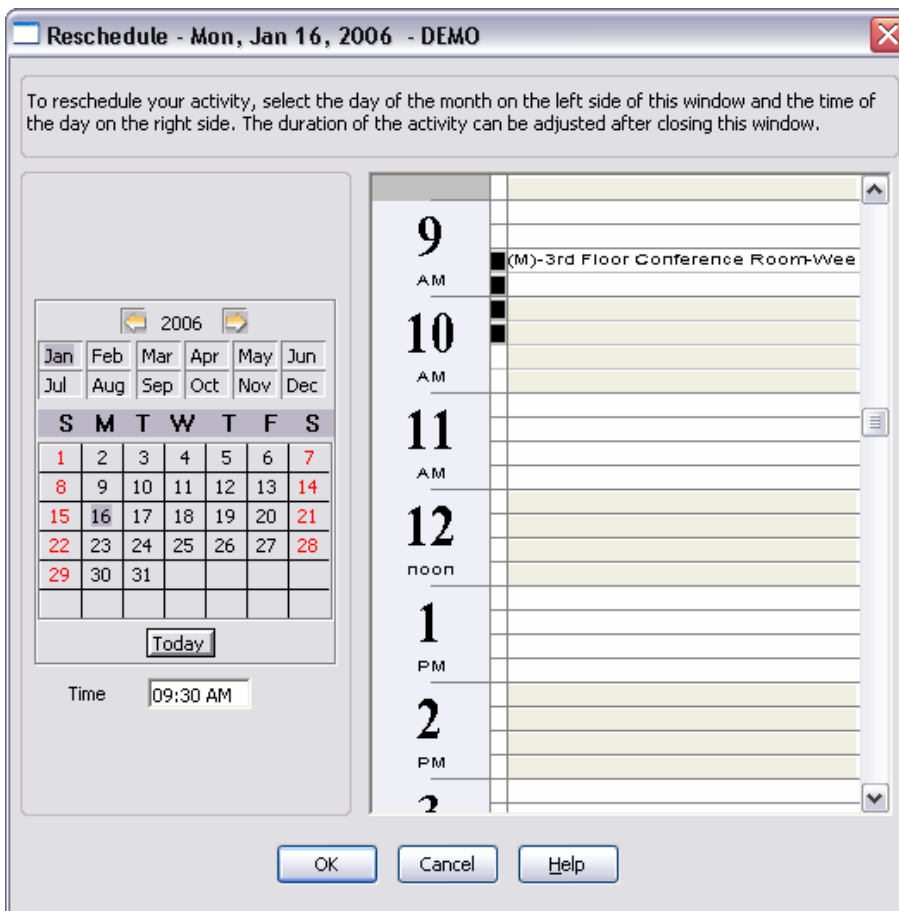


Figure 5: The Reschedule Activity window.

- Reschedule the activity as needed and click **OK**.

#### Rescheduling a series of activities –

- Selecting the **Reschedule series** will open the **Activity Recurrence** window (see Figure 2).
- Reschedule the series as needed by updating **Recurrence pattern** and **Range of recurrence** options.
- When finished, click **OK**.

#### How to make modifications to a recurring activity:

- Double click on one instance of a recurring activity in the CDS calendar.
- CDS will open a prompt with options to make modifications to only the selected instance of the series of recurring activities or to modify the entire series.

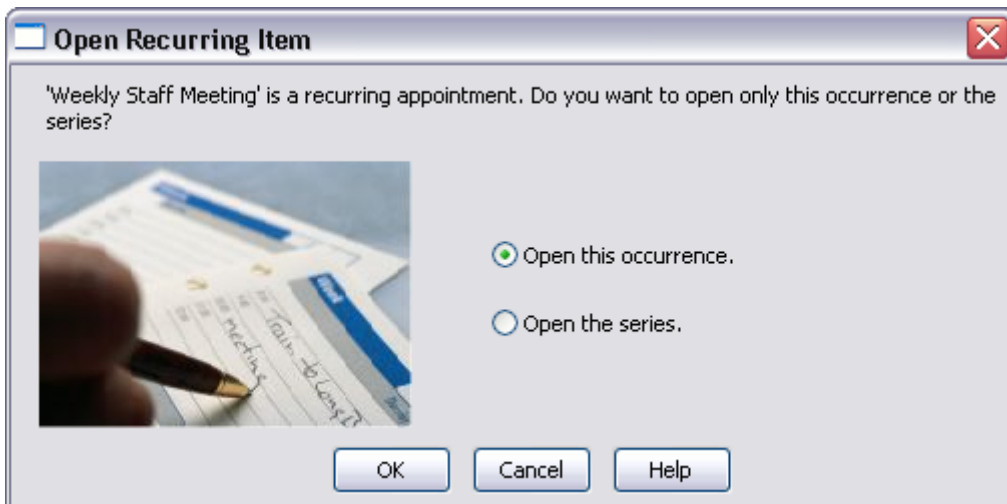


Figure 6: The Open Recurring Item window.

- Select the appropriate option and click **OK**.
- Make modifications in the **Activity Detail** window.
- When finished, click **OK** and the selected instance or the entire series of activities will be updated, based on your selection in the **Open Recurring Item** window.