

SmartAdvocate®

Tip of the Week

Use “Filters” on the SmartAdvocate Calendar to display only those appointments you want to see.

By default, the SmartAdvocate Office calendar will display all appointments, for all staff members, for all cases scheduled for the current day. It is natural, therefore, for the calendar to be pretty “crowded” especially for larger firms. Most users (except, perhaps the ‘Calendar Clerk’) may not want to see appointment for everyone by default, but may only want to see his/her appointments or the appointments of those on his/her team by default. The best way to customize your view of appointments is to use the many filters available on the calendar. Here’s an example:

Let say that you want to have the calendar only show you the appointments for those on your team by default. Here’s how you would set that up - from the Office Calendar:

- (1) Click the drop down for Attending Staff to display the names of the staff members in your firm
- (2) Select the names you want (i.e., the names on your team) by checking the box to the left of the respective name(s) as displayed on the drop-down list
- (3) Click the ‘Close’ tab at the bottom right corner of the dialog box displaying the names

SmartAdvocate® Cases: Open Closed All Case # / Plaintiff

Recent Cases Case Wizard Case Browse Contacts Dashboards Office Calendar Tools Reports Project Details Admin Favorites Help My SmartAdvocate

Add Appointment Hide Filters Activities from 11/18/2018 12:00 AM to 11/18/2018 11:59 PM Filter:

From: 11/18/2018 12:00 AM To: 11/18/2018 11:59 PM

Appointments Tasks Critical Deadlines

Show Appointments

Attending Staff:
Baez, Dayhanara M., Blidy, 1

Name	Selected
Aleksandrov, Yuri	<input type="checkbox"/>
Baez, Dayhanara M.	<input checked="" type="checkbox"/>
Blidy, Nataliya	<input checked="" type="checkbox"/>
Cicali, Joseph	<input type="checkbox"/>
De Jesus, Lourdes	<input checked="" type="checkbox"/>
Doshi, Rahul G.	<input type="checkbox"/>
Doshi, Ruchi	<input type="checkbox"/>
Dreier, Harry	<input checked="" type="checkbox"/>
Fishman, Amy	<input type="checkbox"/>

2 3 Close

Case Staff: Case Type: Case Status: Office: Activity: Court County:

Completed Adjournd Over Due Confirmed Pending

Save Filter Reset Filters Apply Filters

Export

Activity Info	Case	Case Type	Subject/Description
No data to display			

- (4) Click the 'Save Filter' tab on the right middle of the calendar screen
- (5) A dialog box will popup allowing you to enter a name for your filter. Enter a name of your choice that you want to give to this filter
- (6) Check the box for Default Filter
- (7) Click OK

The screenshot shows the SmartAdvocate Office Calendar interface. At the top, there are navigation tabs including 'Recent Cases', 'Case Wizard', 'Case Browse', 'Contacts', 'Dashboards', 'Office Calendar' (selected), 'Tools', 'Reports', 'Project Details', 'Admin', 'Favorites', 'Help', and 'My SmartAdvocate'. Below the navigation is a filter bar with 'Add Appointment', 'Hide Filters', and a date range 'Activities from 11/18/2018 12:00 AM to 11/18/2018 11:59 PM'. A calendar view for November and December 2018 is displayed, with a 'Filter' dropdown set to 'All'. A 'Saving filter' dialog box is open in the foreground, containing the following fields and controls:

- Filter Name: * (5)
- Default Filter: (6)
- Buttons: Ok (7), Cancel

Below the dialog, a legend shows appointment status colors: Open (white), Canceled (purple), Completed (blue), Adjourned (orange), Over Due (red), Confirmed (grey), Pending (green). At the bottom, there are buttons for 'Save Filter', 'Reset Filters', 'Apply Filters', and 'Export'.

Now, by default, when you go to the calendar it will only show you appointments for those on your team.

You can create different filters with different selections (such as a filter for Depositions Scheduled, one for Motions, one for Scheduling Conferences, one for IME's scheduled, etc.). Naturally, only one filter can be set as the default, but a list of all your filters will show on the drop- down list.

SmartAdvocate Cases: Open Closed All Case # / Plaintiff

Recent Cases Case Wizard Case Browse Contacts Dashboards **Office Calendar** Tools Reports Project Details Admin Favorites Help My SmartAdvocate

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Appointments Tasks Critical Deadlines

Show Appointments

Attending Staff:

Appointment Status:

Appointment Type:

Activity:

Court County:

Case Staff:

Case Type:

Case Status:

Office:

November, 2018

Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3							
4	5	6	7	8	9	10	2	3	4	5	6	7	8
11	12	13	14	15	16	17	9	10	11	12	13	14	15
18	19	20	21	22	23	24	16	17	18	19	20	21	22
25	26	27	28	29	30		23	24	25	26	27	28	29
							30	31	1	2	3	4	5

Next Week Two Weeks This Month Next Days

Open Canceled Completed Adjourned Over Due Confirmed Pending

Save Filter Reset Filters Apply Filters

Grid Day Work Week Week Month Timeline Report Export

#	Date and Time	Staff	Activity Info	Case	Case Type	Subject/Description

No data to display

You can quickly display appointments for a specific filter by simply selecting the desired date range and then select the appropriate filter from the list of predefined filters.

While on the calendar (even with a default filter set) you can always go back to the system default (all appointments for the current day) by clicking the 'Reset Filter' tab to 'clear' things out temporarily.

Here are links to videos clips of a couple examples:

Setting a **Default** Calendar Filer in SmartAdvocate https://www.youtube.com/watch?v=_LVKsNcdzSk&t

Setting Calendar Filters in SmartAdvocate <https://www.youtube.com/watch?v=LWnlJBy4rNQ&t>