



Activities

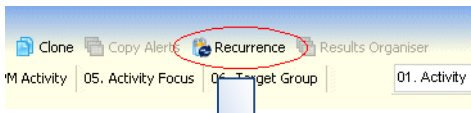
Recurring Activities

Creating a Recurring Series

Recurring Activities are a repeated series of Activities based on the details entered for an original Activity. The original Activity will then become a **Main Activity**.

You can only add one recurring series to each Main Activity - if you try to create a second recurring series you will be asked to confirm that you wish the first series to be deleted and a new series created based on your choices.

1. Click the **Recurrence** button in the task bar to open the **Activity Recurrence** window.



2. Define the pattern for the recurring series of Activities and click **OK**.

Start and End Times default to those for the Main Activity but can be edited. They will be the same for each recurrence.

Duration is calculated automatically based on the Start and End times.

The content of this section varies according to the Recurrence Pattern - see below.

Recurrence Pattern defaults to weekly.

The default is 10 occurrences and the **End by** date is calculated according to this. As the recurrence pattern is changed, so the **End by** date will change. Click the radio button to edit this manually.

The **Range** of the series is defined by the Start Date, and either a number of occurrences **or** the date by which the series must end.

Recurrence Pattern

Daily: set the pattern to be either every (x) no. of days or every day excluding weekends.

Recurrence pattern: Daily, Weekly, Monthly, Yearly

Every 1 day(s) or Every weekday

Weekly: set the days of the week and the number of weeks apart the recurrences are to occur.

Recurrence pattern: Daily, Weekly, Monthly, Yearly

Recur every 1 week(s) on: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday

Monthly: set the date and how many months apart the recurrences are to occur.

Recurrence pattern: Daily, Weekly, Monthly, Yearly

Day 23 of every 1 month(s)

If you enter e.g. the 31st, for months without 31 days the Activity will recur on the closest earlier date (i.e. 28th, 29th or 30th, depending on the month and year).

Yearly: set the month and date for one recurrence each year.

Recurrence pattern: Daily, Weekly, Monthly, Yearly

Every November 23



Activities

Recurring Activities

3. Click **OK** to return to the Activity Details, then click **Save** on the Activity Details task bar to list the Activities making up the recurring series you have just created in the Recurring Activity panel.

Activity Type	Start Date	Start Time	End Date	End Time	Complete By	Service Team	Description
Activity Code 1	23/12/2009	09:00	23/12/2009	12:00		: service team	Meeting with child and parent(s) to discuss progre
Activity Code 1	23/01/2010	09:00	23/01/2010	12:00		: service team	Meeting with child and parent(s) to discuss progre
Activity Code 1	23/02/2010	09:00	23/02/2010	12:00		: service team	Meeting with child and parent(s) to discuss progre
Activity Code 1	23/03/2010	09:00	23/03/2010	12:00		: service team	Meeting with child and parent(s) to discuss progre
Activity Code 1	23/04/2010	09:00	23/04/2010	12:00		: service team	Meet
Activity Code 1	23/05/2010	09:00	23/05/2010	12:00		: service team	Meet
Activity Code 1	23/06/2010	09:00	23/06/2010	12:00		: service team	Meet
Activity Code 1	23/07/2010	09:00	23/07/2010	12:00		: service team	Meet

4. You can double click on one of the recurrences to open up its Activity Details and make any required changes - e.g. to change the linked people, edit the timings etc.

02. Activity Duration

Start Date: 23/11/2009 Start Time: 09:00

End Date: 23/11/2009 End Time: 12:00

Complete By: 23/11/2009 Main Activity:

Recurring Activity:

You will notice that the Activity you started with now has the Main Activity and Recurrence checkboxes ticked...

02. Activity Duration

Start Date: 23/03/2010 Start Time: 09:00

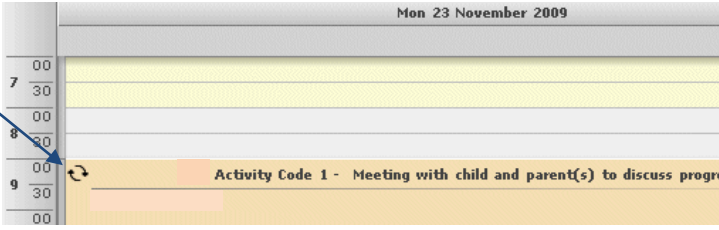
End Date: 23/03/2010 End Time: 12:00

Complete By: Main Activity:

Recurring Activity:

...whereas those Activities that are part of the recurring series have the Recurring Activity box ticked, but the Main Activity box marked with an x. The **Complete By** date has not been set.

A Recurring Activity is indicated with a icon on the Activity Calendar. On saving an Activity, if the Owner has a valid Outlook email address **and** has **Update Online Calendar** set to true in **One v3**, then the Activity is also added to their Outlook Calendar. If the Activity is Recurring then all the recurring appointments will be added.



Recurring Activities and Linked People

If you change the name of an **Activity Owner** and the Activity has Linked and/or Recurring Activities, the Owner of the Linked/Recurring Activities will be updated to be the new person.

- If an Activity has Linked People and you then create a recurring series from it, the Linked People will be copied to the recurrences.
- If you link people to a Main Activity **after** creating a recurring series, they will not be copied to the recurrences but must be linked to each Recurring Activity separately if needed.

Other Useful Reference Guides:

- Activities_Creating an Activity
- Activities_Activities and Linked People
- Activities_Activity Calendar
- Activities_Link to Results Organiser