

Holladay Pediatric Scheduler

User Manual

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User Guide

Introduction

This User Guide will cover the steps to install and set up the program and database on a local machine, the credentials to log in, and all the features and functions of each page in the scheduler.

Installation and Using the Application

Installation Via Local Windows Machine

(This is a lengthy process with the potential to make setup errors)

My IDE Versions And Dependencies

IntelliJ IDEA 2021.1.3 (Community Edition)

Build #IC-211.7628.21, built on June 30, 2021.

Runtime version: 11.0.11+9-b1341.60 amd64

VM: OpenJDK 64-Bit Server VM by JetBrains s.r.o.

JDK Version: Java SE 17.0.6

JavaFX Version: JavaFX-SDK-17.0.6

Local Client Installation Steps

1: Within this link, download the MySQL Server Installer for Windows (8.0.33).

<https://dev.mysql.com/downloads/installer/>

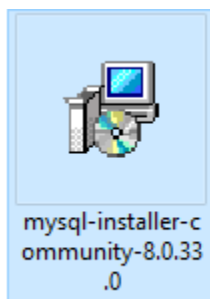
MySQL Installer 8.0.33

Select Operating System:
Microsoft Windows

[Looking for previous GA versions?](#)

Windows (x86, 32-bit), MSI Installer (mysql-installer-web-community-8.0.33.0.msi)	8.0.33	2.4M	Download
MD5: 2a330cf24915964cca87e04dbb34e5d3 Signature			
Windows (x86, 32-bit), MSI Installer (mysql-installer-community-8.0.33.0.msi)	8.0.33	428.3M	Download
MD5: 9b4ce33ab05ae7e0aa30a6c4f1a4d1c2 Signature			

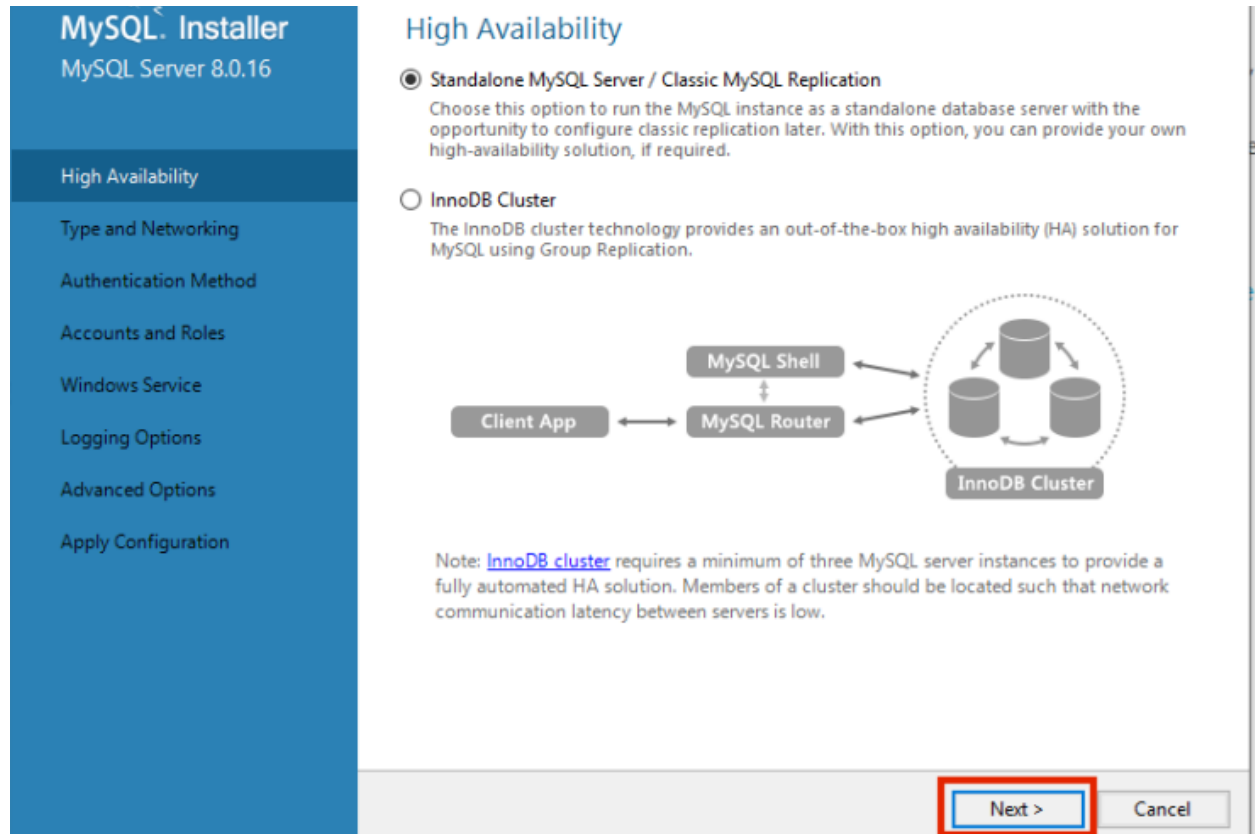
2: Open the downloaded file.



3: If the installer asks you about an upgrade, click yes. Leave most of the wizard options as default.

4: Click on MySQL Server and MySQL Workbench. Add them both. Then select and add Connector/OBDC x64 if it appears. Click next. Then click execute.

5: Within the MySQL Server installer, choose the default option and click next.



6: Leave most of the default settings selected and have the page match this image. Then click next.

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MySQL. Installer
MySQL Server 8.0.16

High Availability
Type and Networking
Authentication Method
Accounts and Roles
Windows Service
Apply Configuration

Type and Networking

Server Configuration Type
Choose the correct server configuration type for this MySQL Server installation. This setting will define how much system resources are assigned to the MySQL Server instance.

Config Type: **Development Computer**

Connectivity
Use the following controls to select how you would like to connect to this server.

☒ TCP/IP Port: **3306** X Protocol Port: **33060**
☒ Open Windows Firewall ports for network access
☐ Named Pipe Pipe Name: **MYSQL**
☐ Shared Memory Memory Name: **MYSQL**

Advanced Configuration
Select the check box below to get additional configuration pages where you can set advanced and logging options for this server instance.

☐ Show Advanced and Logging Options

7: Choose the strong password encryption method for Authentication and then click next.

8: For the MySQL root password, use type in a password of your choice. Repeat it on the next field then click next.

9: Use these settings then click next. Then execute the installer.

MySQL. Installer
MySQL Server 8.0.16

High Availability
Type and Networking
Authentication Method
Accounts and Roles
Windows Service
Apply Configuration

Windows Service

☒ Configure MySQL Server as a Windows Service

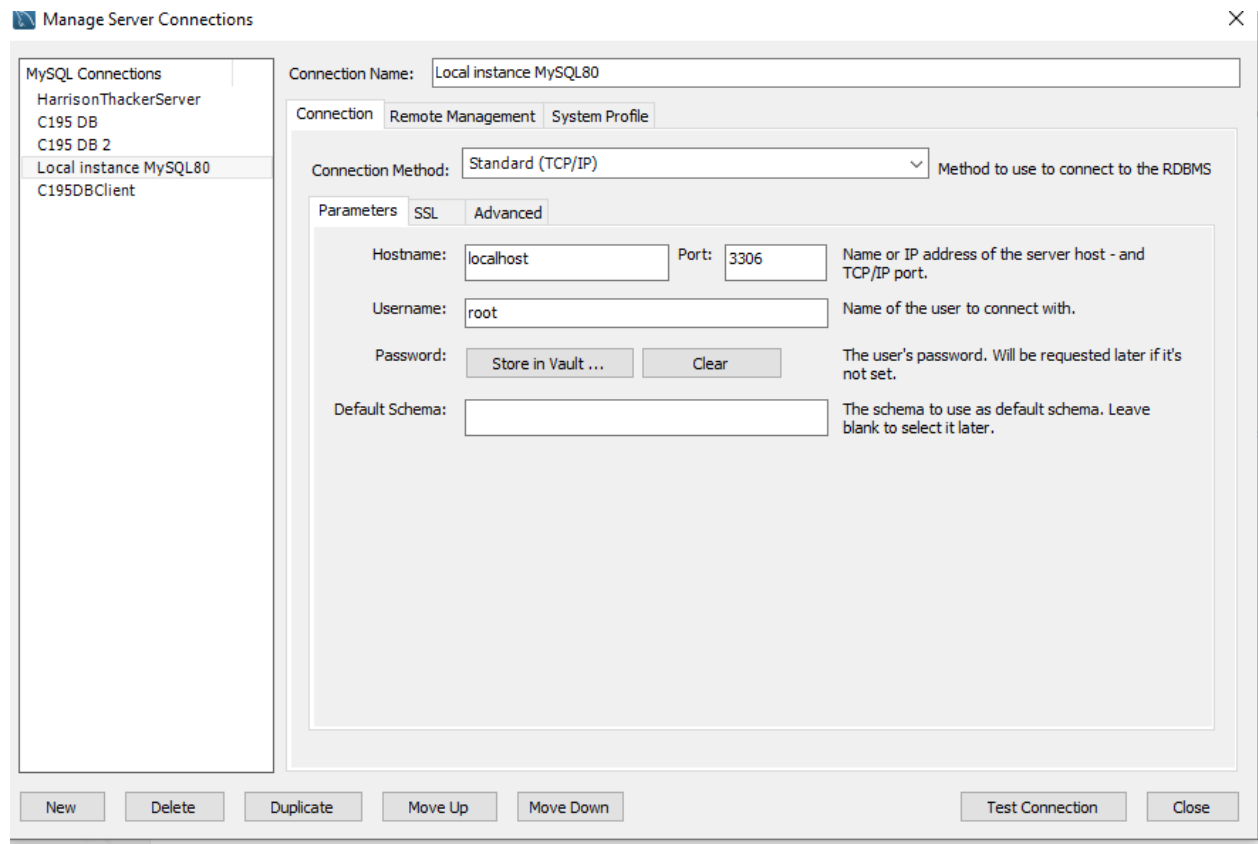
Windows Service Details
Please specify a Windows Service name to be used for this MySQL Server instance. A unique name is required for each instance.

Windows Service Name: **MySQL80**
☒ Start the MySQL Server at System Startup

Run Windows Service as ...
The MySQL Server needs to run under a given user account. Based on the security requirements of your system you need to pick one of the options below.

☒ **Standard System Account**
Recommended for most scenarios.
☐ Custom User
An existing user account can be selected for advanced scenarios.

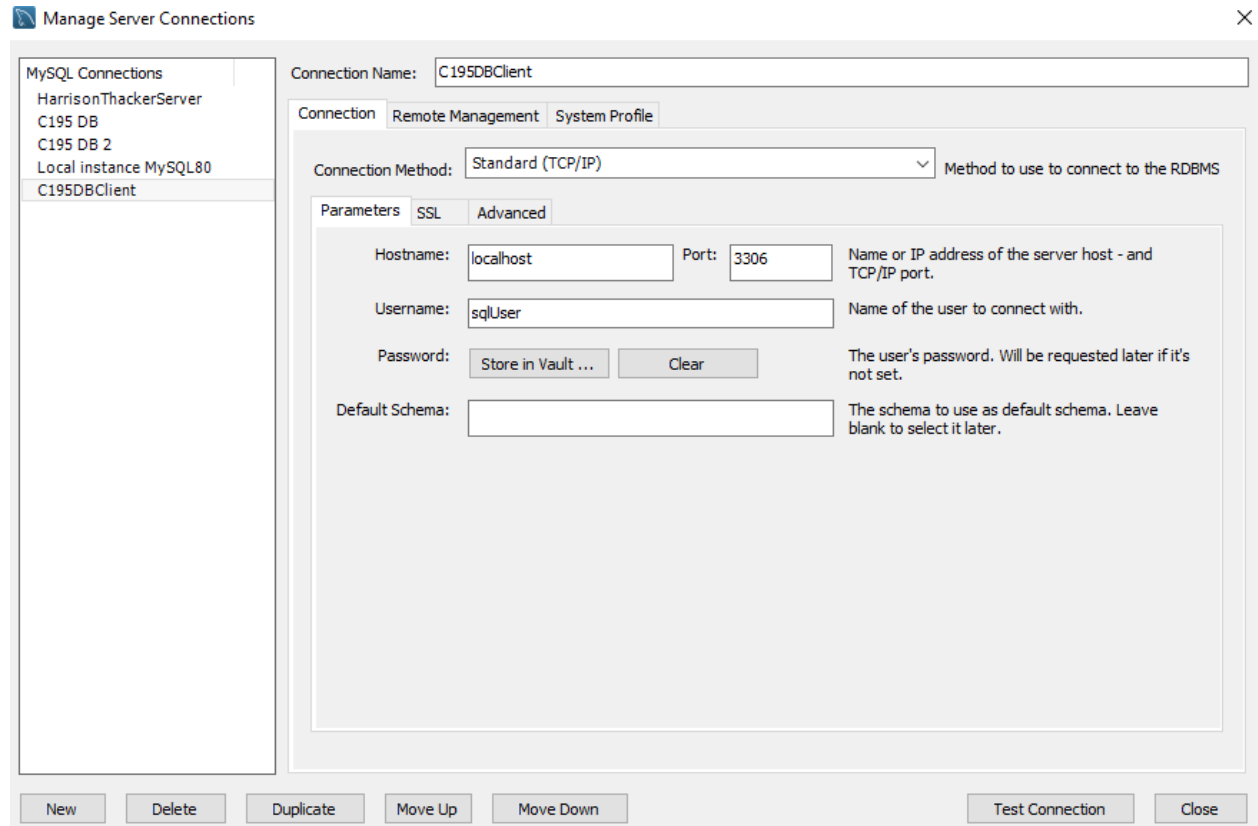
10: Open up MySQL Workbench. Click the plus icon to create a new connection. When creating, use these parameters. The password is the same as the root MySQL password that you chose.



11: Click “Test Connection”. If everything is correct, you’ll be informed of the successful connection. Exit out of the window.

12: Create another new connection. Use the following parameters. The password for this connection is Passw0rd! which matches the SQL connection string. These parameters match the client_schedule database. Type in client_schedule as your database schema. Test your connection. If everything works, you’ll be notified of the successful connection. Next, exit out of this window.

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The "Manage Server Connections" dialog box is shown. On the left, a list of MySQL connections includes "C195DBClient", which is selected. The main area is divided into tabs: "Connection", "Remote Management", and "System Profile". The "Connection" tab is active, showing the "Connection Name" as "C195DBClient" and the "Connection Method" as "Standard (TCP/IP)". Below these are fields for "Hostname" (localhost), "Port" (3306), "Username" (sqlUser), "Password" (with "Store in Vault ..." and "Clear" buttons), and "Default Schema". Descriptive text for each field is provided on the right. At the bottom, there are buttons for "New", "Delete", "Duplicate", "Move Up", "Move Down", "Test Connection", and "Close".

MySQL Connections

- HarrisonThackerServer
- C195 DB
- C195 DB 2
- Local instance MySQL80
- C195DBClient

Connection Name: C195DBClient

Connection Method: Standard (TCP/IP) Method to use to connect to the RDBMS

Parameters SSL Advanced

Hostname: localhost Port: 3306 Name or IP address of the server host - and TCP/IP port.

Username: sqlUser Name of the user to connect with.

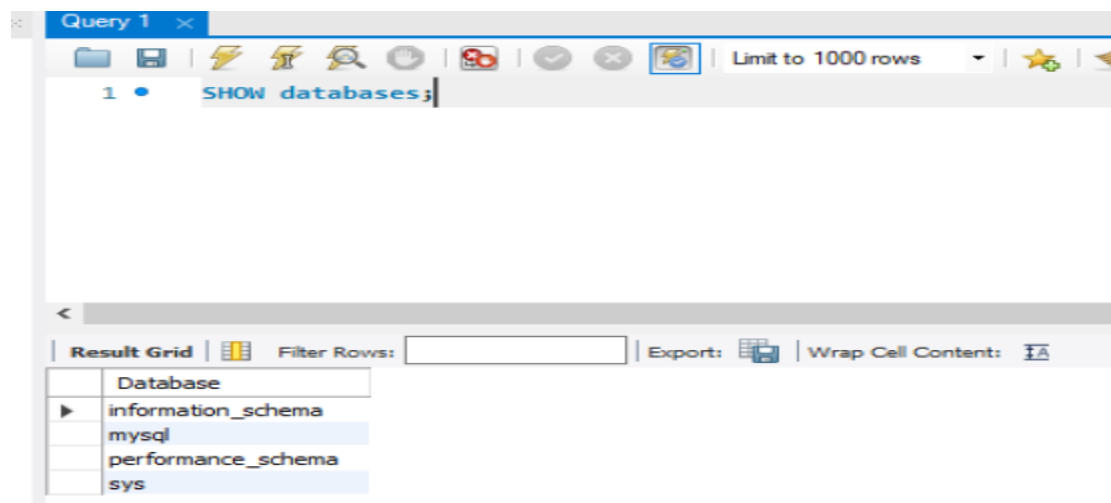
Password: Store in Vault ... Clear The user's password. Will be requested later if it's not set.

Default Schema: The schema to use as default schema. Leave blank to select it later.

New Delete Duplicate Move Up Move Down Test Connection Close

13: Open up the new DB Client Connection. Enter the particular password for this connection if you're asked for it.

14: Now enter the following in the query editor. You should get these results.



The screenshot shows a query editor window titled "Query 1" with the SQL command "SHOW databases;". Below the editor is a "Result Grid" showing the output of the query. The grid has a single column labeled "Database" and four rows of results: "information_schema", "mysql", "performance_schema", and "sys". The "mysql" row is highlighted. The interface includes a toolbar with various icons and a "Limit to 1000 rows" dropdown.

Query 1

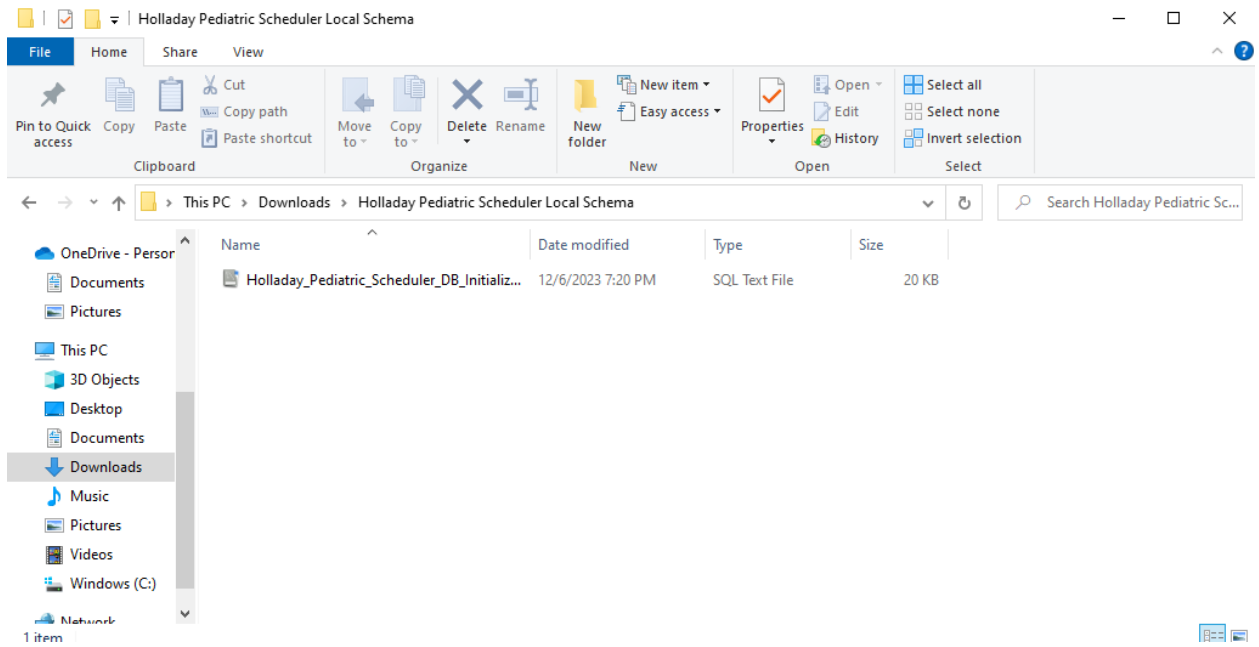
1 • SHOW databases;

Result Grid

Database
information_schema
mysql
performance_schema
sys

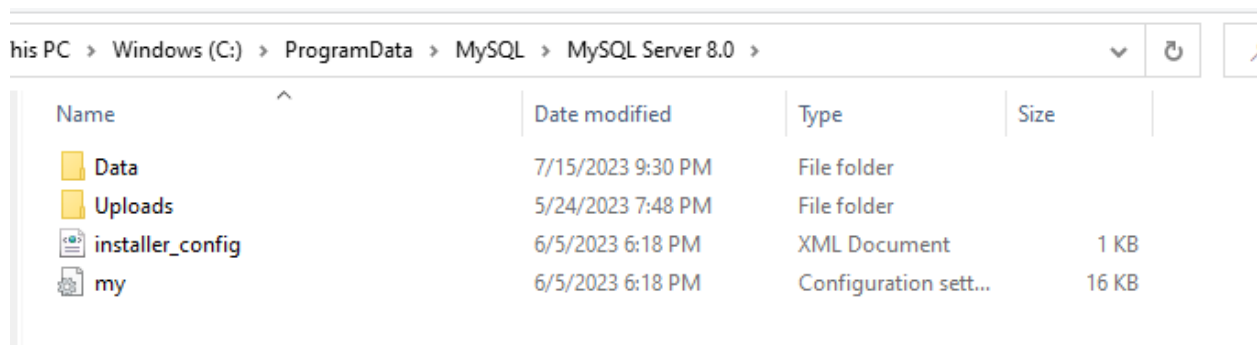
Holladay Pediatric Scheduler

15: It's now time to create the database schema. Extract the Local Schema zip file found within the GitHub repository. Within the unzipped folder, open up the SQL file(Open with Notepad or something similar).



16: Scroll and select everything within the file, then copy it. Paste it all into the DB Client query editor. Scroll and select everything within the query editor, then click the lightning bolt icon to run everything. The client_schedule schema should be created, along with all the tables, and the sample data contained within them.

17: The local database needs to be running in UTC. Navigate to this directory on your machine:

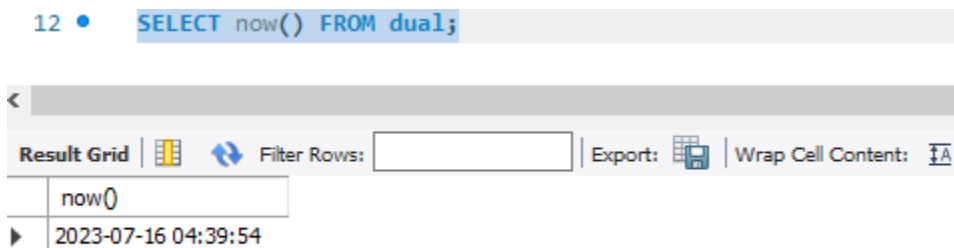


18: Click on the my.ini file(open in Notepad). Scroll down to the “mysqld” section. Insert the following text below. Then save the file and close it.

```
[mysqld]  
default-time-zone="+00:00"
```

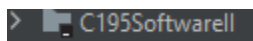
19: Either reset your machine or restart the MySQL80 Windows service for the database change to take effect.

20: Open up MySQL Workbench, and click on your database client. Within the query editor, type: (SELECT Now() FROM dual);. Your output should show the time in UTC(several hours ahead of what your time may be).



21: Open up IntelliJ IDEA on your local machine. Install it if you don’t already have it.

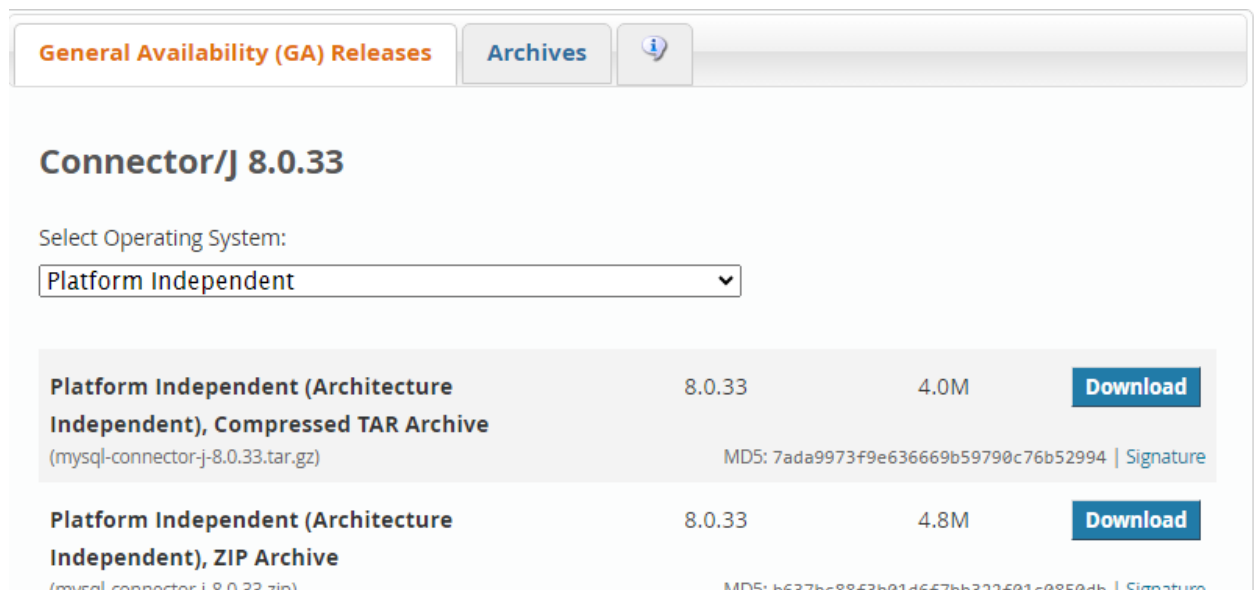
22: Click File, Open, then navigate to the directory where you unzipped Section B. Select the Software II folder within and click Ok.



23: Click File, Project Structure, Libraries. Delete the mysql-connector-java-8.0.25 with the squiggly lines.

24: Click the plus sign, select Java, then navigate to the directory where mysql-connector-java-8.0.25 (what I used) or a similar connector is installed. Select the jar file within that folder and click ok.

25: Click Ok on each window until the library is successfully added. Then hit apply and click ok to exit the Project Structure window. If you haven't installed the MySQL connector, download it from this link. You can choose your version from the archives section.



General Availability (GA) Releases Archives

Connector/J 8.0.33

Select Operating System:
Platform Independent

Platform Independent (Architecture Independent), Compressed TAR Archive (mysql-connector-j-8.0.33.tar.gz)	8.0.33	4.0M	Download
Platform Independent (Architecture Independent), ZIP Archive (mysql-connector-j-8.0.33.zip)	8.0.33	4.8M	Download

MD5: 7ada9973f9e636669b59790c76b52994 | [Signature](#)

MD5: b637bc88f3b01d66f7bb322f01c0850db | [Signature](#)

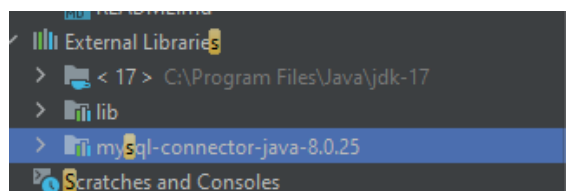
<https://dev.mysql.com/downloads/connector/j/?os=26>

If you don't already have JDK 17 and JavaFX 17 installed, here are the respective links:

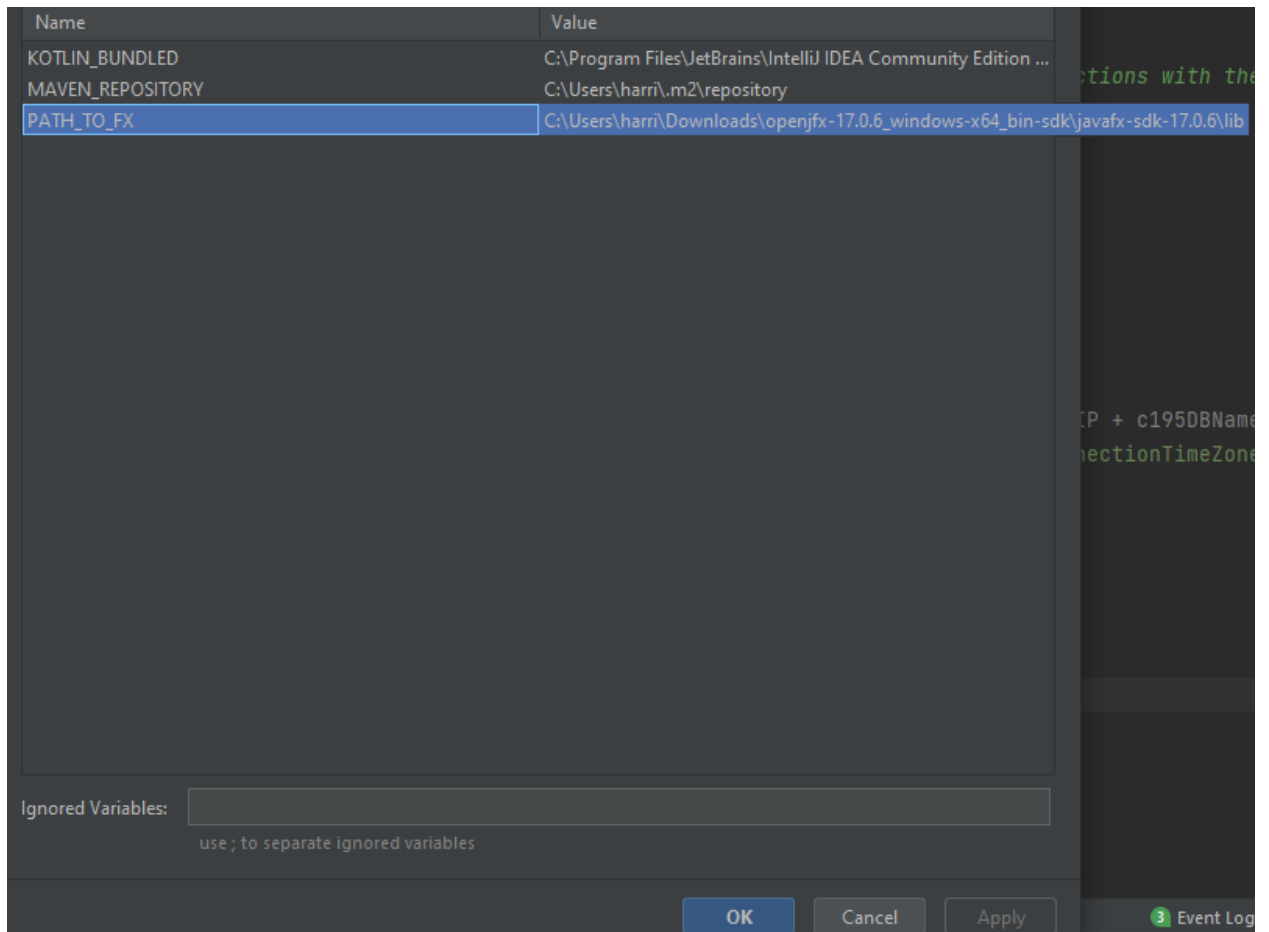
<https://gluonhq.com/products/javafx/>

<https://www.oracle.com/java/technologies/javase/jdk17-archive-downloads.html>

26: Navigate down the left-hand corner of the screen to the external libraries. You should see mysql-connector-java-8.0.25 or your chosen version as a new addition.

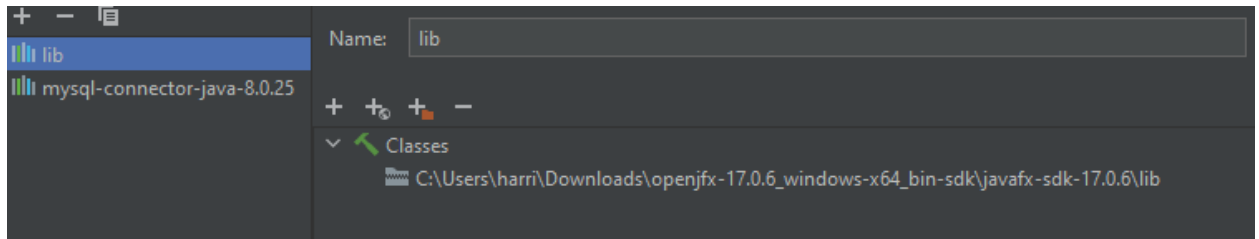


27: Navigate to File > Settings > Path Variables. Use the plus icon to create a new path called PATH_TO_FX. Navigate to the directory where you installed your JavaFX SDK. Select the lib folder within the SDK, and click ok. Click apply and then click Ok to exit the window.

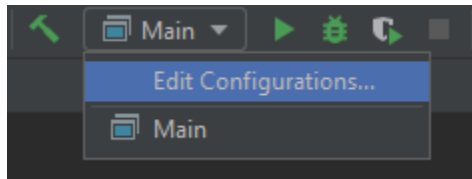


28: Navigate to File, Project Structure. Add a new Java library that is the lib directory for your JavaFX SDK. Select the lib folder and click ok. Add the library. Then click apply and exit the window.

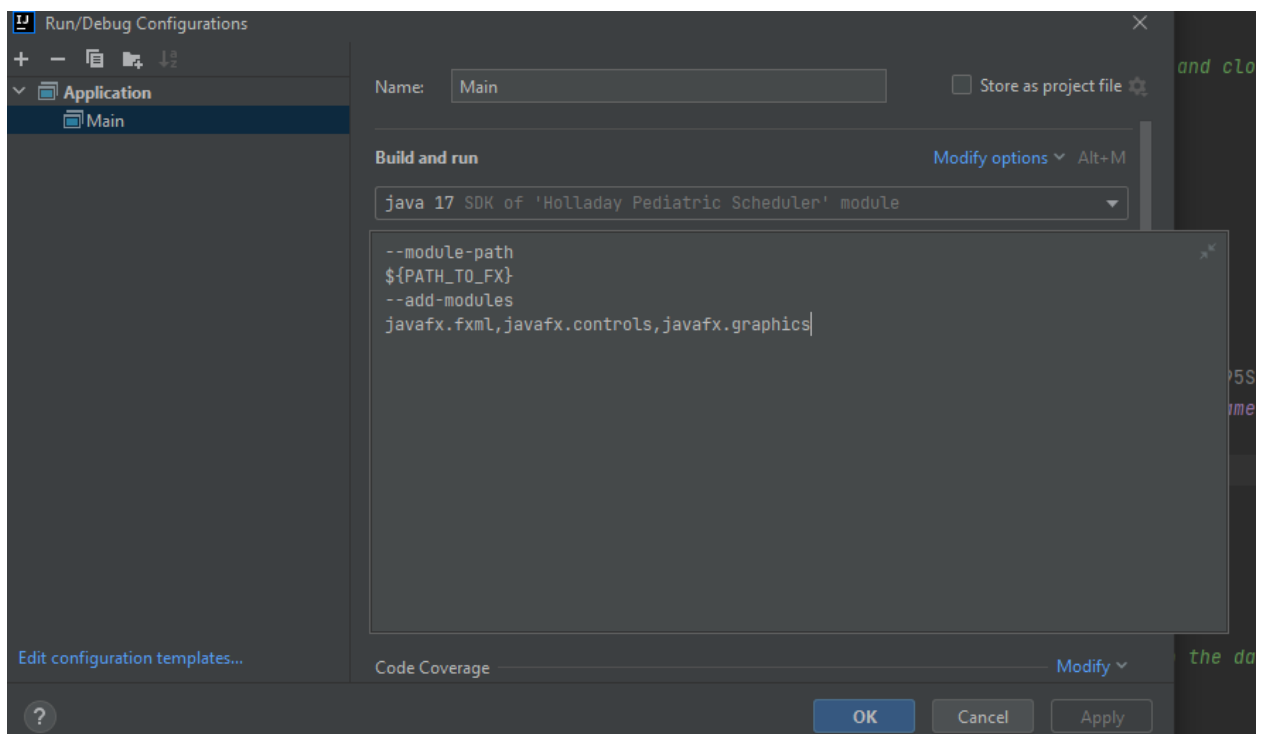
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29: Navigate to Main, Edit Configurations.



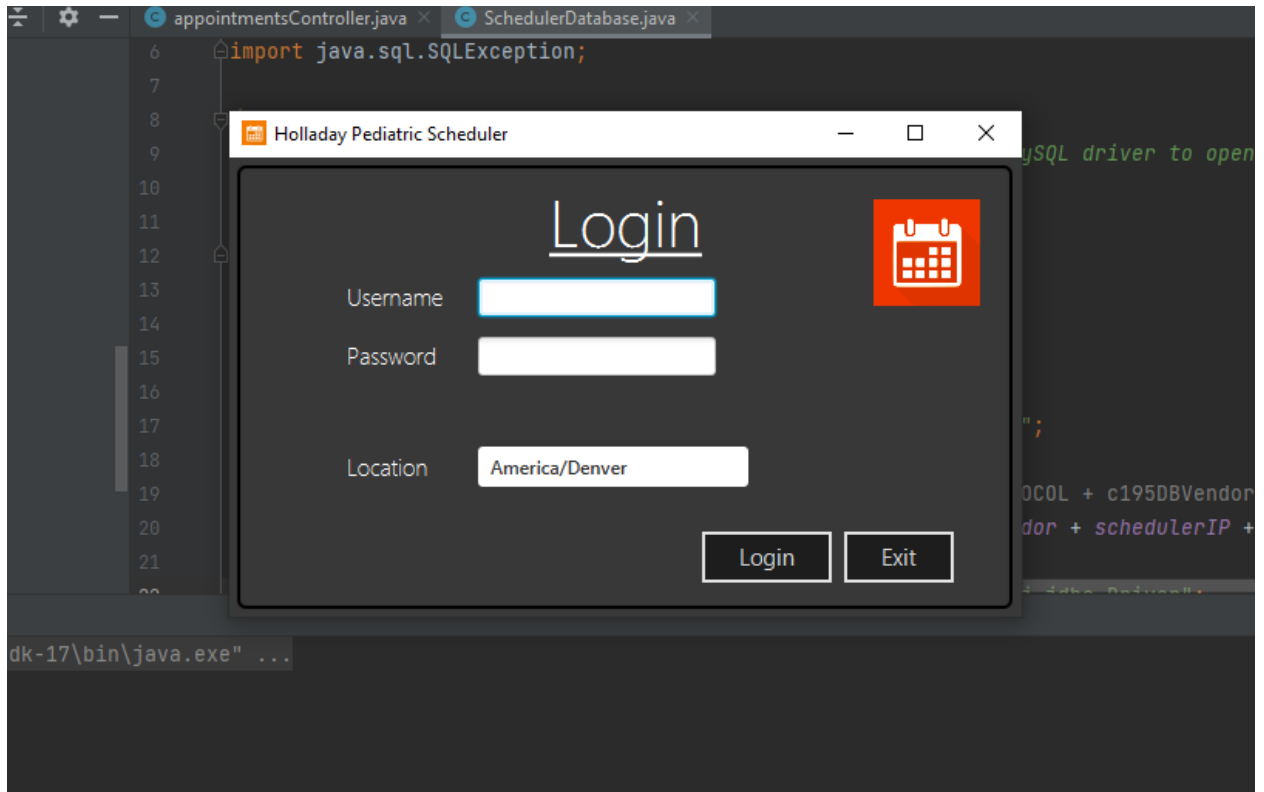
30: For the VM Options field, enter the following:



Then click Apply and Ok to exit out of the window.

31: Run the program. If all is successful, then you'll be greeted with the Login page.

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Guide To Operate Holladay Pediatric Scheduler

The remainder of this user guide will be spent detailing how to operate Holladay Pediatric Scheduler. Each functionality of the application's pages will be shown and demonstrated to the user.

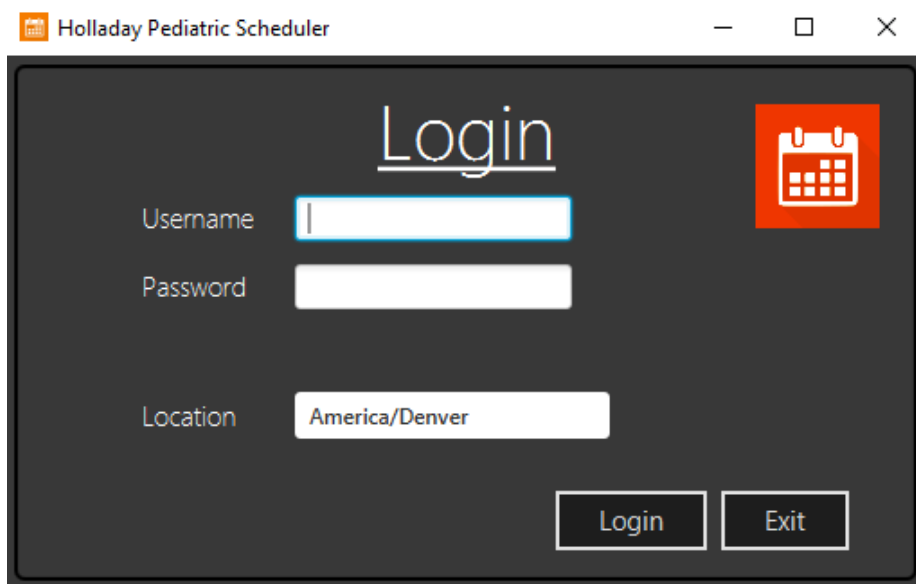
Login and Signup

When the user starts the scheduler application, he or she will be greeted by the Login page. At the moment, there are only two login credentials in the database. The first is username: test, password: test. The second is username: admin, password: admin. The user must use the test credential for both username and password fields, or the admin credential for both fields. You will get an error notification if you type in a credential that isn't one of the current two. After both fields are filled, click the Login button to proceed. Upon logging in with one of the two

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credentials, the user will be successfully logged in and redirected to the navigator page. A log file of the login history is in **login_activity.txt**. It details the particular user, and whether the login at a particular time was successful or not.

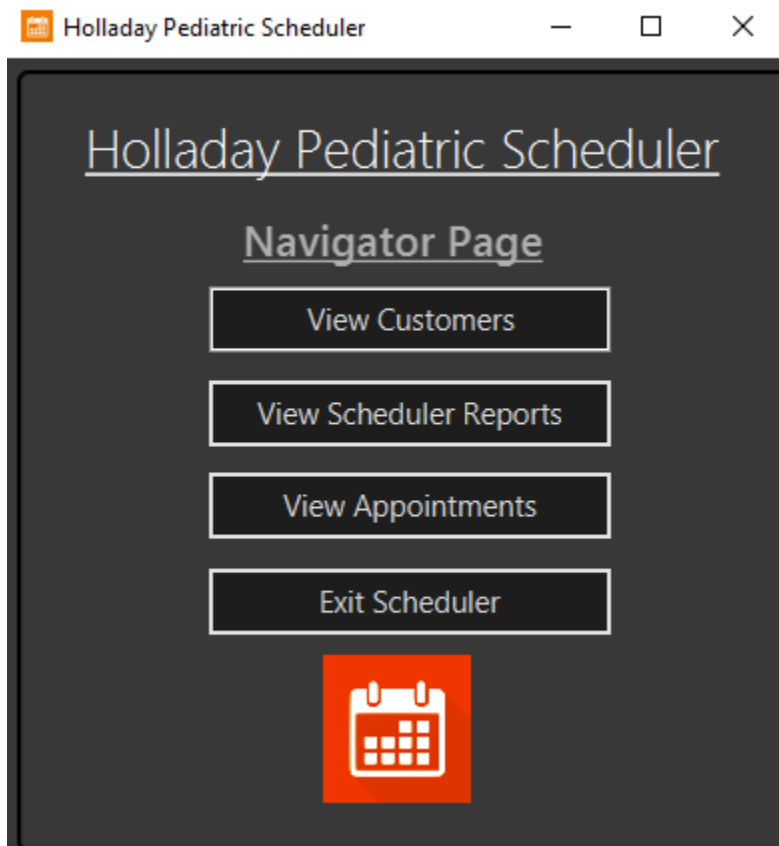
Login Page

A screenshot of a web application window titled "Holladay Pediatric Scheduler". The window has a dark gray background. In the top right corner, there are standard window control buttons (minimize, maximize, close). The main content area features the word "Login" in a large, white, serif font at the top center. To the right of the text is a red square icon containing a white calendar symbol. Below the title, there are three input fields: "Username" with a white text box, "Password" with a white text box, and "Location" with a white text box containing the text "America/Denver". At the bottom right of the form area, there are two buttons: "Login" and "Exit", both with white text on a dark gray background.

Navigator Page

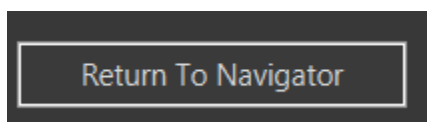
Here an employee or user can navigate through the scheduler application by clicking the particular page buttons. A user may also exit the scheduler if they so choose. The users can access the Customers page, Appointments page, and Scheduler Records page. This particular records page showcases details about the current customer data plus the schedule of a user's chosen appointment contact/pediatrician.

Navigator Page



Return To Navigator

At the top left corner of the customers, appointments, and reports screens is a button that closes out the currently open window, redirecting the user back to the navigation page. Select Yes on the confirmation dialog, and the page will be closed.



Viewing Reports For Holladay Pediatric Scheduler

In the scheduler reports page, there are three different pediatric scheduler reports available for a user to observe. They are as follows:

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1: Two table views that show the totals for Customer appointments by month and appointments tallied by their respective types.

2: The current appointment schedule for a customer's chosen appointment contact(pediatrician/employee).

3: Table view that showcases the total count of customers by their own respective countries and first-level divisions.

Totals For Appointments

This is the first report the user sees when they launch the page. They can always navigate right back to it by clicking the "Totals For Appointments" tab above the Table view. These reports serve multiple purposes. Not only can the business owners gauge their performance by seeing the total number of customer appointments by month, but also they can tally the total amount of specific appointment types. This allows the company to determine which appointment types are more successful than others so they can focus on those more in the future.

Scheduler Records Page (Appointment Totals)

Totals For Appointments				Appointment Schedule For Contacts				Customer By Country + Division			
Customer Appointments By Month		Total Amount		Type Of Appointment		Total Amount					
MAY		2		Planning Session		1					
				De-Briefing		1					

Appointment Schedule For Contacts

By selecting the “Appointment Schedule For Contacts” tab, the user can view the current appointment schedule of a given contact(pediatrician/employee). To view the schedule for a given contact, click on the drop-down combo box, and make a selection. The table view down below is populated with the schedule of the chosen contact. By cycling through this information, a user or customer can decide on which contact would fit their particular schedule the best.

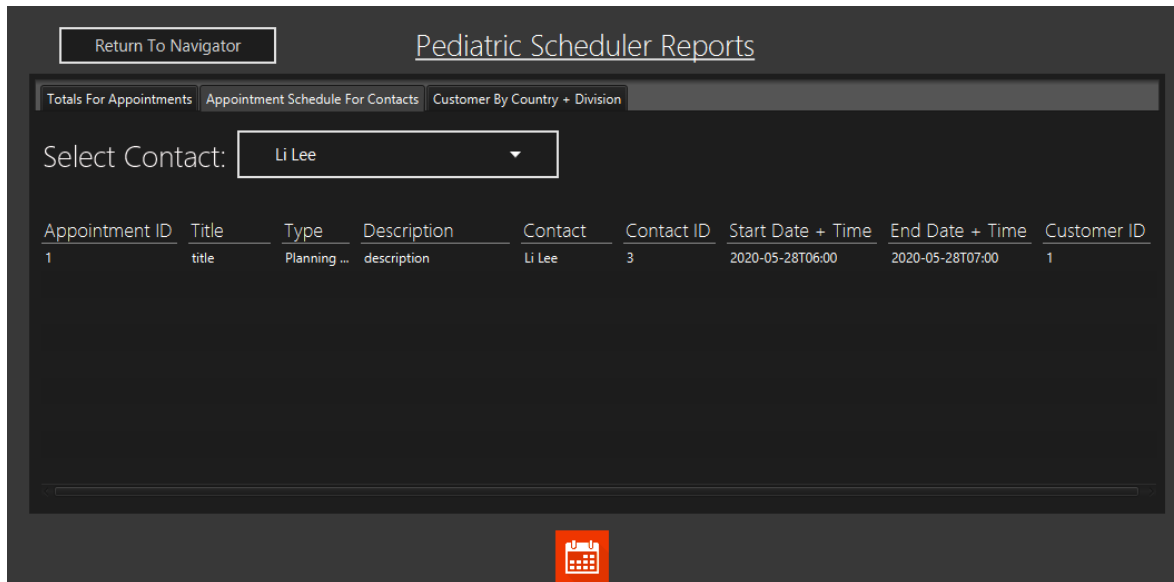
Select Contact:

▼

Anika Costa
Daniel Garcia
Li Lee

Appointment ID	Title	Location	Contact
----------------	-------	----------	---------

Appointment Schedule For Contacts



The screenshot displays the 'Pediatric Scheduler Reports' interface. At the top, there is a 'Return To Navigator' button and the title 'Pediatric Scheduler Reports'. Below this, three tabs are visible: 'Totals For Appointments', 'Appointment Schedule For Contacts' (which is active), and 'Customer By Country + Division'. A 'Select Contact:' dropdown menu is set to 'Li Lee'. Below the menu is a table with the following data:

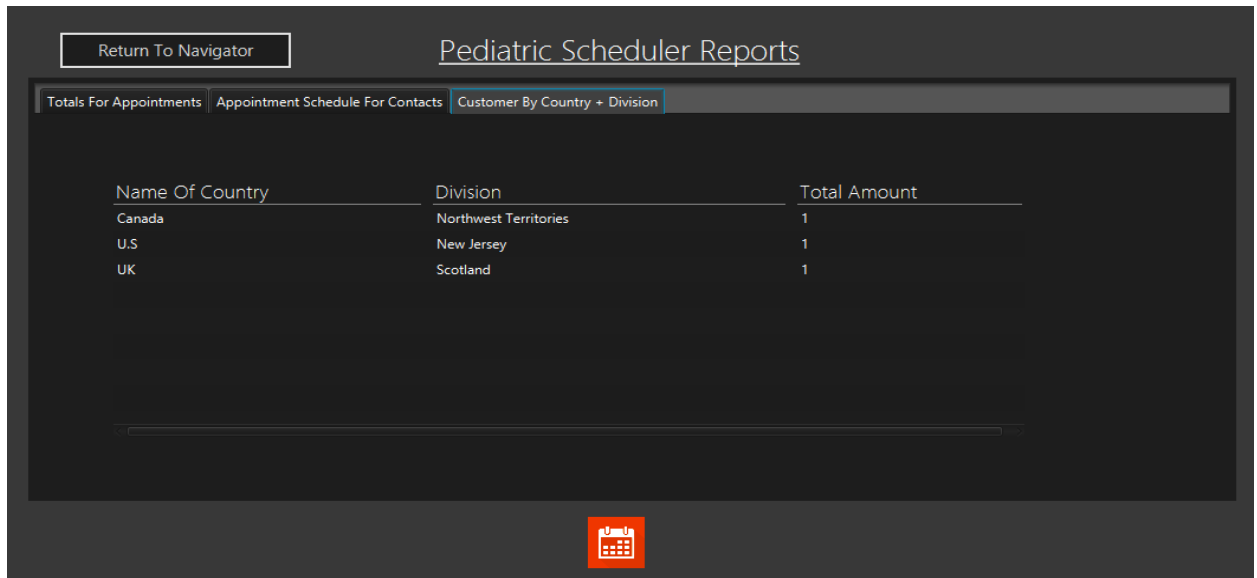
Appointment ID	Title	Type	Description	Contact	Contact ID	Start Date + Time	End Date + Time	Customer ID
1	title	Planning ...	description	Li Lee	3	2020-05-28T06:00	2020-05-28T07:00	1

At the bottom center of the interface is a red calendar icon.

Customer By Country + Division

By clicking on the “Customer By Country + Division” tab, the user can view the total number of customers not only by their respective country but also the first-level division within said country. This report may be helpful when looking up customers in a given country, as well as the division. Depending on how many customers from a division and country visit Holladay Pediatric Scheduler, this may allow the business owners to gauge their most successful demographics and adjust their marketing and customer service styles accordingly.

Customer By Country + Division



The screenshot displays the 'Pediatric Scheduler Reports' interface. At the top, there is a 'Return To Navigator' button and the title 'Pediatric Scheduler Reports'. Below the title, a navigation bar contains three tabs: 'Totals For Appointments', 'Appointment Schedule For Contacts', and 'Customer By Country + Division', which is currently selected. The main content area shows a table with three columns: 'Name Of Country', 'Division', and 'Total Amount'. The table contains three rows of data. At the bottom of the interface, there is a red calendar icon.

Name Of Country	Division	Total Amount
Canada	Northwest Territories	1
U.S	New Jersey	1
UK	Scotland	1


Managing And Viewing Of Scheduler Customers

The Customers page is where employees and users can look up pedicure customers and display their information. New customers can be added to the records, or a pre-existing customer can be edited and updated with new information. When removing a customer from the scheduler records and database, any appointments associated with them will be deleted as well. The table view updates itself after an action is performed, which informs the user of changes made to the records.

Customers Page

[Return To Navigator](#) [Holladay Pediatric Scheduler](#) [Save To Records](#)

Records For Customers



Customer's ID:

Postal Code:

Customer's Name:

Country:

Customer's Address:

Province (State):

Customer's Phone:

Add Customer

Customer Edit

Remove Customer

Searching For Customers

At the bottom of the Customers page is a search field that is used to look up specific customers by their name or respective ID. Partial fragments of a name will also be interpreted by the search function. Type in a customer name and the table view above will display a result that matches your search. If the search doesn't recognize the input values, an alert will notify the user of their search not returning any results.

Holladay Pediatric Scheduler

Customer ID	Name	Address	Postal Code	Phone	Province	Country
3	Dudley Do-Right	48 Horse Manor	28198	874-916-...	Northwest ...	Canada

DudleyS

Selecting Countries and Province (First-Level Divisions)

When adding or updating a customer, the user must select a country and province (first-level division). The country and province combo boxes filter available divisions depending on the country the user selects. This allows the user to only select the divisions that are part of a specific country. In the example shown below, the UK is selected for the country, and the available provinces are only the ones that are part of the UK.

Country:

U.S

UK

Canada

Province (State):

Country:

UK

Province (State):

England

England

Wales

Scotland

Northern Ireland

Customer Edit

Remove

Postal Code

Phone

City

01201

860-905

11111

Adding A New Customer

Addition of a new scheduler customer is accomplished by filling in every single one of the information fields and combo boxes. The only field not required by the user is the customer ID since that is autogenerated. Once all fields have been input with information from the user, click on the “Add Customer” button. Select yes to the confirmation dialog asking if the user is sure. The table view then refreshes itself, showing the newly added customer as part of the records.



Adding A New Customer

Customer's ID:	<input type="text"/>	Postal Code:	<input type="text" value="84117"/>
Customer's Name:	<input type="text" value="Harry"/>	Country:	<div>UK ▼</div>
Customer's Address:	<input type="text" value="5451 Indian Rd"/>	Province (State):	<div>England ▼</div>
Customer's Phone:	<input type="text" value="801-372-3177"/>		

Making Edits To An Existing Customer

To update information about an already existing customer, select your customer of choice in the table view below. Then click the “Customer Edit” button. This will fill in the fields and combo boxes with the selected customer’s information. Make any changes to the information as you require, then click “Save To Records” to save the changes made to the customer. Select yes within the confirmation dialog, and the table view row will update with your modified customer data.

87	Harry	5451 Indian Rd	84117	801-372-...	England	UK
----	-------	----------------	-------	-------------	---------	----

Customer Edit

Making Edits To An Existing Customer

Customer's ID:	<input type="text" value="87"/>	Postal Code:	<input type="text" value="84047"/>
Customer's Name:	<input type="text" value="Yvette Chapek"/>	Country:	<input type="text" value="Canada"/>
Customer's Address:	<input type="text" value="5451 Indian Rd"/>	Province (State):	<input type="text" value="Ontario"/>
Customer's Phone:	<input type="text" value="801-372-3177"/>		

Save To Records

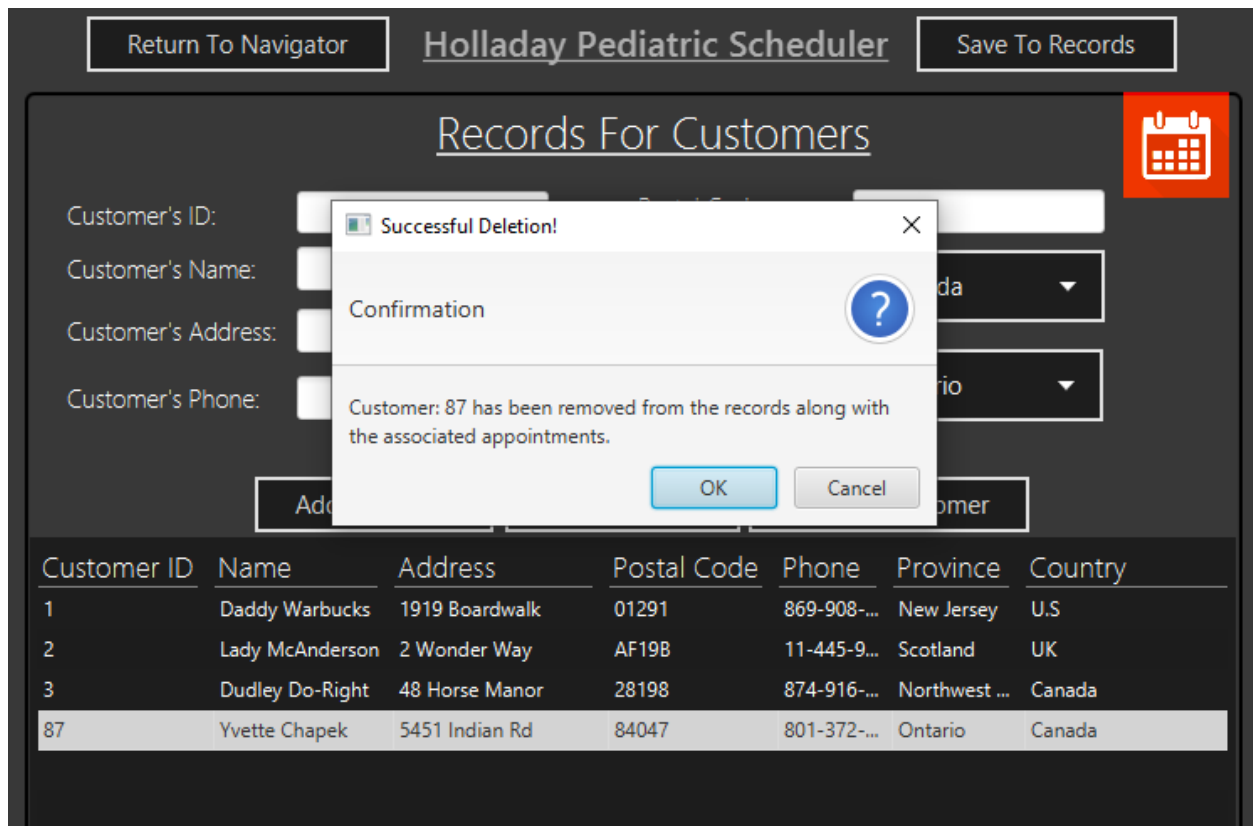
87	Yvette Chapek	5451 Indian Rd	84047	801-372-...	Ontario	Canada
----	---------------	----------------	-------	-------------	---------	--------

Removing A Customer From The Records

To delete a customer from the scheduler records, select your choice from the table view down below. Click the “Remove Customer” button, and click Yes in the confirmation dialog if you’re sure about this decision. Not only will the customer be wiped from the records, but all appointments associated with him or her as well. The user will then receive a confirmation dialog about the successful deletion of the customer.

Remove Customer

Removing A Customer From The Records



Managing And Viewing Of Scheduler Appointments

The Appointments page is where users, customers, and employees alike can view pediatric appointments and display their information. New appointments can be added to the records. In addition, pre-existing ones can be modified and then updated with new data. The table view refreshes itself after any addition, update, or deletion action is performed, informing the user of changes made to the records.

Appointments Page

Return To Navigator

Holladay Pediatric Scheduler

Save To Records

Records For Appointments

Appointment ID:
Appointment Title:
Appointment Description:
Appointment Location:
Contact For Appointment:

Appointment Type:
Appointment Start Date:
Appointment End Date:
Customer:

Appointment Start Time:
Appointment End Time:
User:

Add New Appointment

Appointment Edit

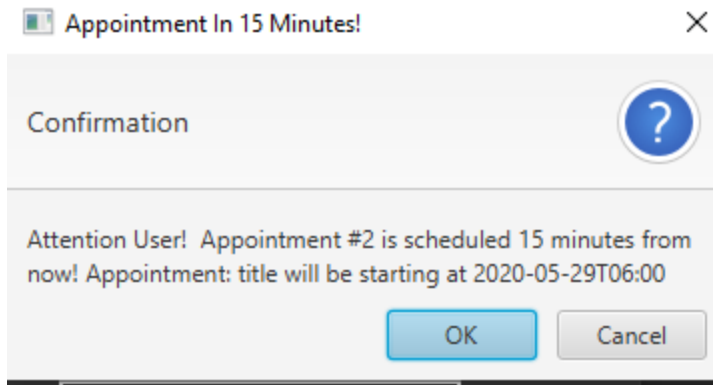
☐ View All
☐ Sort By Week
☒ Sort By Month

Remove Appointment

Appointment ID	Title	Description	Location	Contact	Type	Start Date + Time	End Date + Time	Customer ID	User ID
1	title	description	location	Li Lee	Plannin...	2020-05-28T06:00	2020-05-28T07:00	1	1
2	title	description	location	Daniel Garcia	De-Brie...	2020-05-29T06:00	2020-05-29T07:00	2	2

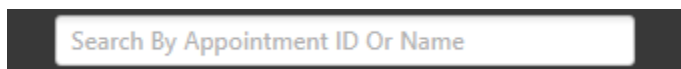
Appointment Notification

Upon first opening the Appointments page after logging in, the user is notified of an appointment starting 15 minutes from now. This exists to remind users or customers of a scheduled appointment so that they can arrive on time and not miss it. If no appointments are present, then the alert dialog will inform the user that no appointments are scheduled for now.



Searching For Appointments

At the bottom of the Appointments page is a search field that can look up a specific appointment by its name or associated ID. Partial fragments of a name will also be interpreted by the search function. Type in the name of the given appointment, and the table view above will display a result that matches the given search. If the search doesn't recognize the values input by the user, then an alert will notify the user of their search not returning any results.



Sort Appointments By Week Or Month

By default, the user views all appointments in the records. If the user wants to see them sorted by week or month, they can select the respective radio buttons above the table view. The table view also allows the ability to sort the appointments in ascending and descending order. Anytime the user wants to view all appointments again, they can select the "View All" radio button.

Appointment Edit			<input type="radio"/> View All <input type="radio"/> Sort By Week <input checked="" type="radio"/> Sort By Month			Remove Appointment			
Appointment ID	Title	Descript...▲	Location	Contact	Type	Start Date + Time	End Date + Time	Customer ID	User ID
49	Chec...	Long lasting	Office 3	Anika Costa	Pediatric	2023-07-18T09:45	2023-07-18T10:00	3	1
47	Toen...	Severe	Office 10	Anika Costa	Removal	2023-08-18T14:30	2023-08-18T15:00	1	1

Holladay Pediatric Scheduler

To switch between ascending and descending appointment sorts, click on a column of your choosing, and the table view will refresh with the appointments sorted in ascending or descending order.

Appointment...	Title	Description	Location	Contact	Type	Start Date + Time	End Date + Time	Customer ID	User ID
47	Toen...	Severe	Office 10	Anika Costa	Removal	2023-08-18T14:30	2023-08-18T15:00	1	1
49	Chec...	Long lasting	Office 3	Anika Costa	Pediatric	2023-07-18T09:45	2023-07-18T10:00	3	1

Adding A New Appointment

Addition of a new scheduler appointment requires the user to fill in every single one of the information fields, date pickers, and combo boxes. The only field not required by the user is the appointment ID since that is autogenerated. Once all fields have been input with information from the user, click on the “Add New Appointment” button. Select yes to the confirmation dialog asking if the user is sure. The table view will then update itself, showing the newly added appointment as part of the records.

Adding A New Appointment

Records For Appointments

Appointment ID: Appointment Type: Appointment Start Time:

Appointment Title: Appointment Start Date: Appointment End Date: Appointment End Time:

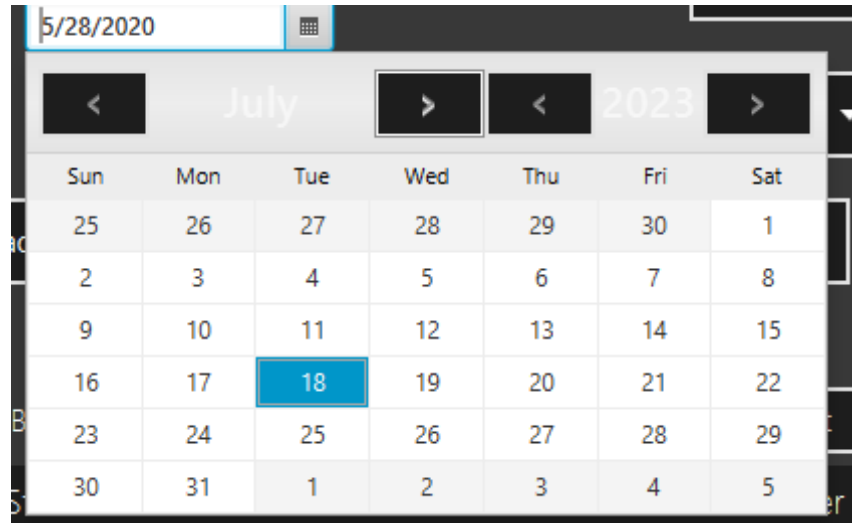
Appointment Description:

Appointment Location:

Contact For Appointment: Customer: User:

☐ View All ☐ Sort By Week ☐ Sort By Month

Holladay Pediatric Scheduler



For the appointment start date and end date, there are date pickers that must be utilized by the user or customer. The left and right arrows at the top left corner allow the user to cycle through months, and the top right corner's arrows can cycle forward and backward between years.

Holladay Pediatric Scheduler

The screenshot shows a portion of the application interface. At the top, there is a label 'Appointment End Time:' followed by a dropdown menu currently displaying '07:00'. Below this, a 'User:' label is followed by a dropdown menu displaying 'test'. To the right of the 'User:' dropdown, a vertical list of time slots is visible: 13:00, 13:15, 13:30, 13:45, 14:00 (highlighted in blue), 14:15, 14:30, 14:45, 15:00, and 15:15. Below the time slots, there is a 'Remove Ap' button. At the bottom, a table is partially visible with columns 'Date + Time' and 'Customer'. The first row shows '05-28T07:00' and '1'. The second row shows '05-29T07:00' and '2'.

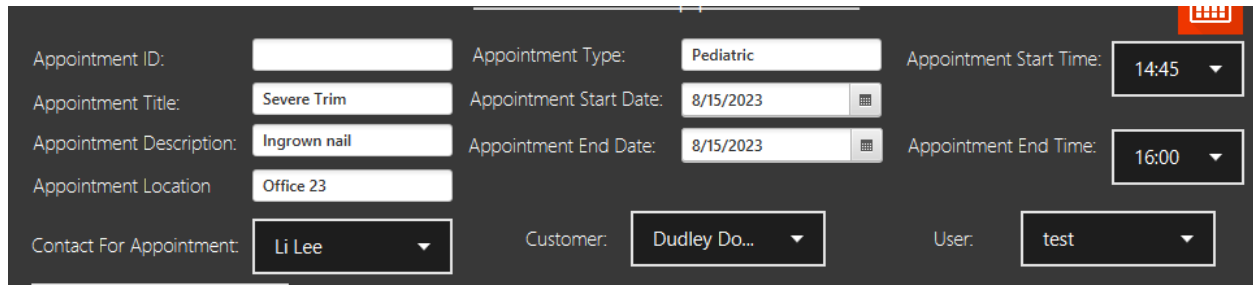
To set the appointment start time and end time, the user must select times in 15-minute increments. The start time combo box must have its value earlier than that of the end time. Alert dialogs are in place to make sure the start and end time values fit together and work with the requirements of an appointment. They cannot be the same value, and the end time cannot be before the start time.

The screenshot shows a horizontal row of three dropdown menus. The first is labeled 'Contact For Appointment:' and displays 'Daniel Garcia'. The second is labeled 'Customer:' and displays 'Lady McAn...'. The third is labeled 'User:' and displays 'test'.

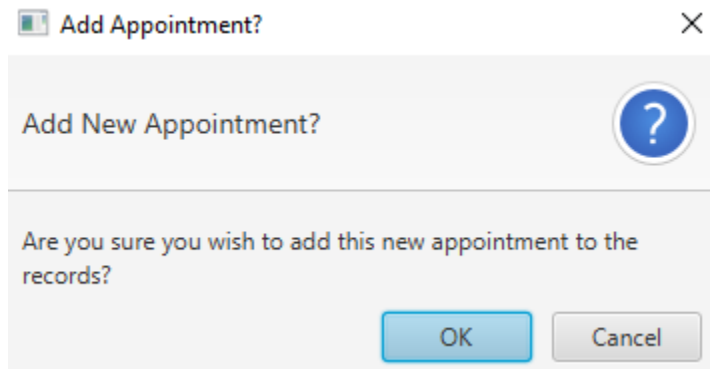
Selections must also be made for the current user of the scheduler, the contact (pediatrician) of choice for the appointment, and the customer that will be attending the appointment. Once all these combo box selections are made, the scheduler user is ready to create a new appointment. After clicking yes in the confirmation window, the table view refreshes with the newly added appointment as part of the records.

Add New Appointment

Holladay Pediatric Scheduler



A screenshot of a web application form for scheduling pediatric appointments. The form is organized into two main columns. The left column contains fields for Appointment ID (empty), Appointment Title (Severe Trim), Appointment Description (Ingrown nail), Appointment Location (Office 23), and Contact For Appointment (Li Lee). The right column contains fields for Appointment Type (Pediatric), Appointment Start Date (8/15/2023), Appointment End Date (8/15/2023), Appointment Start Time (14:45), Appointment End Time (16:00), Customer (Dudley Do...), and User (test). Each date and time field includes a small calendar icon. The form has a dark grey background with white text and input fields.



A dialog box titled "Add Appointment?" with a close button (X) in the top right corner. The dialog has a light grey background. It contains the text "Add New Appointment?" followed by a blue circular icon with a white question mark. Below this, it asks "Are you sure you wish to add this new appointment to the records?". At the bottom, there are two buttons: "OK" (highlighted in blue) and "Cancel" (grey).

33	Sever...	Ingrown nail	Office 23	Li Lee	Pediatric	2023-08-15T14:45	2023-08-15T16:00	3	1
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Making Edits To An Existing Appointment

To change a specific appointment's information, the user must click on an appointment within the table view. The fields, date pickers, and combo boxes will then be populated with the data from that selected appointment. From here, the user can modify the fields, and select different dates and times should they choose to. Edits may be useful if an appointment contact faces schedule conflicts and cannot join the customer. An alternative contact can then be selected so the customer can still attend the appointment. Once the edits are made, they can be saved by having the user click the "Save To Records" button. After clicking yes in the confirmation dialog, the table row will be updated with the new information.

Making Edits To An Existing Appointment

Records For Appointments

Appointment ID: Appointment Type: Appointment Start Time:

Appointment Title: Appointment Start Date:

Appointment Description: Appointment End Date: Appointment End Time:

Appointment Location:

Contact For Appointment: Customer: User:

☐ View All ☐ Sort By Week ☐ Sort By Month

Appointment ID	Title	Description	Location	Contact	Type	Start Date + Time	End Date + Time	Customer ID	User ID
47	Toen...	Severe	Office 10	Anika Costa	Removal	2023-08-18T14:30	2023-08-18T15:00	1	1
49	Chec...	Long lasting	Office 3	Anika Costa	Pediatric	2023-07-18T09:45	2023-07-18T10:00	3	1
2	title	description	location	Daniel Garcia	De-Brie...	2020-05-29T06:00	2020-05-29T07:00	2	2
67	Trim...	Ingrown nail	Office 15	Daniel Garcia	Pediatric	2023-08-17T15:00	2023-08-17T16:00	2	1

Save To Records?

Save Edits To Appointment?

This will save edits to the selected appointment. Do you wish to proceed?

Appointment ID	Title	Description	Location	Contact	Type	Start Date + Time	End Date + Time	Customer ID	User ID
47	Toen...	Severe	Office 10	Anika Costa	Removal	2023-08-18T14:30	2023-08-18T15:00	1	1
49	Chec...	Long lasting	Office 3	Anika Costa	Pediatric	2023-07-18T09:45	2023-07-18T10:00	3	1
67	Sever...	Ingrown nail	Office 25	Anika Costa	Pediatric	2023-07-21T16:00	2023-07-21T16:15	1	1
2	title	description	location	Daniel Garcia	De-Brie...	2020-05-29T06:00	2020-05-29T07:00	2	2
1	title	description	location	Li Lee	Plannin...	2020-05-28T06:00	2020-05-28T07:00	1	1
33	Sever...	Ingrown nail	Office 23	Li Lee	Pediatric	2023-08-15T14:45	2023-08-15T16:00	3	1

Removing An Appointment From The Records

To remove a given appointment from the scheduler records, select an appointment within the table view. Then click the “Remove Appointment” button. Click yes within the confirmation dialog box. The user will receive a notification about the appointment being successfully deleted, and the table view will refresh automatically. That appointment will no longer be present in the records.

