# OP 21.3 - New Calendar Setup

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**The content listed here is transitional documentation and is subject to change.**

Thank you for choosing to enable the New Calendar View! We value this opportunity and accept any feedback your practice has to ensure the delivery of user-friendly tools and workflows.

> 📅 OP will be rolling out the New Calendar in Jan/Feb 2024! Your practice will receive an email with more information including your roll-out date. Print out our checklists for **single** or **multi**-location practices to be ready for the update! We recommend attending one of our webinars, divided by and tailored for **single**- and **multi-location practices**. This more tailored education will help you learn about and navigate the new OP Calendar, as it applies directly to how your practice interacts with the Calendar in OP.
> There are several dates and times available. Please see the **Upcoming Webinars** page to register!

**Setup Requirements/Table of Contents:**

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## Must Schedule with Appointment Zones

The New Calendar works best when using **APPOINTMENT ZONES**, and is a **requirement if your practice has multiple locations**. Appointment Zones are used to designate times on the provider's schedule for specific types of appointments (e.g. "SICK ONLY", "WELL VISIT ONLY"), and are connected to the Location.

Your practice may have applied these Appointment Zones to provider schedules using:

- **Schedule Templates** or
- **Slots**

Failure to do so, if your practice has multiple locations, will result in issues, specifically around moving, adding, and viewing appointments (since Appointment Zones are tied to a location). If you move an appointment that is not tied to a zone, it will then default to the last used location. If your practice has not used Appointment Zones, or has blank spots on a provider's calendar, please see the above articles to apply Appointment Zones using Schedule Templates or Slots to your calendar.

> **Clean-up Tip:** In order for the functionality to work in the New Calendar for practices with **multiple locations**, a provider can only have a *single bookable Appointment Zone filled across all locations at any given time*
> - Bookable zones have a **purpose** of *anything except "*Do Not Book*".*
> - For multi-location practices that have used non-bookable zones such as "Out of Office" to indicate where a provider is not working at a specific location on a specific day: if these **overlap** with a bookable zone then they will be suppressed and the bookable zone will display.
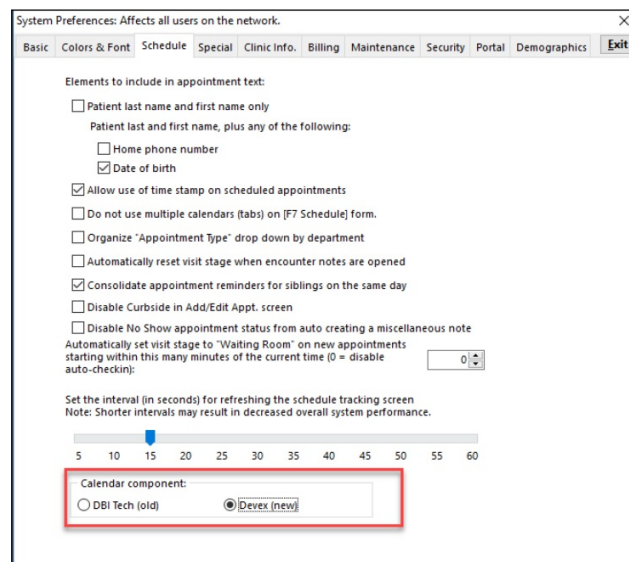>
> If you have overlapping bookable zones you will need to **clean-up the schedule** templates or slots in order to effectively use the new calendar.
>
> For example, you will need to ensure the **purpose** of "In other location" zones are set to "Do Not Book". For more information, see the **Appointment Zones** article on how to update the Zone purpose.

## Enable the New Calendar Component

You will need to enable the new calendar component after you take the 21.3 release.

1. Navigate to **Admin** > **Global Preferences** > **Schedule**.
2. Under Calendar Component, select the **Devex (new)** radio button.



## Update Display Preferences for Each Location Combination (For Multi-Location Mode)

You will need to **reconfigure your display preferences for each multi-location combination** when using multi-location mode. When viewing a single location, your settings will remain as they were on the old calendar.

> ⭐ **Example**: If you are a three (3) location practice then you will need to configure four (4) new views to optimize your use of this feature, including:
> - Location 1&2
> - Location 1&3
> - Location 2&3
> - Location 1, 2 & 3

To reconfigure your display preferences for multi-location mode:

1. Select the Location combination (multiple locations):

   a. Click the **Location** drop-down.
   b. Select the **checkbox** next to each location you want to include in this display, or click the**All** button to select all locations.
   c. Click off of the Location drop-down.

2. Click the **Gear** icon.
3. Set the **Schedule Properties** for this view:
   - **Staff/Resources**: You must select the staff/resources for every Location combination you are creating.
   - **Display Preferences**: Update the Display Preferences. Please note that this window has changed with the new calendar.
     - If you want your Display Preferences to be the same across all Locations and Location combinations, update the display preferences, then click **Save as Default**. This will save the **Display Preferences** setup for the remaining configurations.
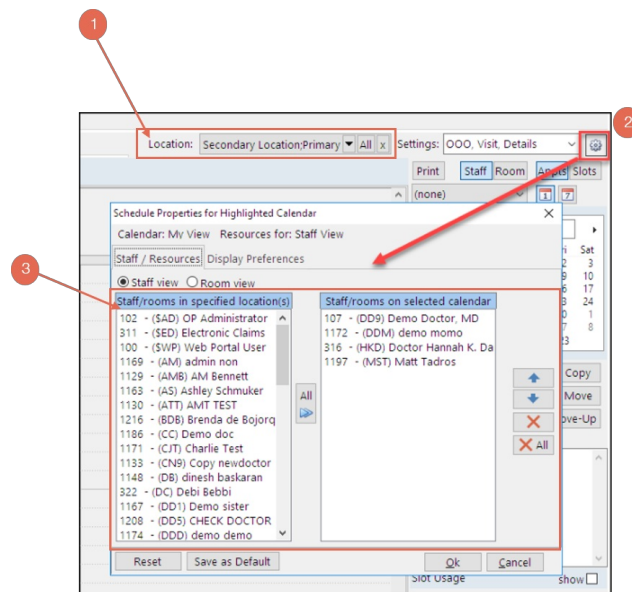


4. Click **OK**.
5. Repeat Steps 1-4 for each configuration. If you clicked**Save as Default** for the Display Preferences, you will only need to set the **Staff/Resources** tab for each of the remaining configurations.

> ⚠ **Disclaimer**: You will need to re-select the Staff/Resources and the Display Preferences for the new location combinations even if you have set them before.
>
> **Note**: Clicking the**Save as Default** button will only save the Display Preferences for the remaining configurations, and you still must select the **Staff/Resources** for each location combination.

## Update Scheduler Settings

The last remaining setup item that must be done for EACH configuration is theScheduler Settings. You will select, or de-select, each item you need for the calendar configuration you are working on.
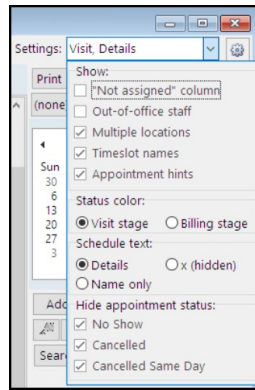
New items added to this setting feature are:

- **Multiple locations**: Checking this will allow you to select all locations or a combination of multiple locations.
- **Timeslot names**: This will display the zone name as well as the color in each appointment slot.
- **Appointment hints**: This will enable a popup when you hover over an appointment that displays the complete text of the appointment details.

A recent item added to this setting feature that you may want to utilize is **Hide Appointment Status**:

- **No Show**: Select this checkbox to hide broken appointments with a status of No Show.
- **Cancelled**: Select this checkbox to hide broken appointments with a status of Cancelled.
- **Cancelled Same Day**: Select this checkbox to hide broken appointments with a status of Cancelled Same Day.

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