Calendar and Scheduling

Calendar & Activities · https://learnpcr.pcrecruiter.net/site/docs/activities/schedule/

The Calendar in PCR can automatically sync items made in PCR to the calendar you already use, such as Outlook or Google Calendar. For information on installing and setting up the Outlook integration click HERE or contact the support team.

Once the calendars are synced, you can work from either PCR or your personal calendar and see the same information in both places. This is most often used when scheduling interviews from the Pipeline or Follow-Up appointments via Activities.

Viewing the Calendar

Click **Calendar** in the main menu. Old links and bookmarks to the Schedule page open the Calendar.

- **Views.** Choose **Day**, **Week**, **Month** or **List** at the top of the page. List view shows two weeks at a time, grouped by day. Weeks start on Sunday.
- **Moving between dates.** Click **Today**, or use the previous and next arrows. The small calendar on the left jumps to any date. Days with items show a dot.
- **Other users' calendars.** If other users share their calendars with you, use the user dropdown next to the page title to pick a user, or choose **All users**. In All users, each item shows its owner's initials.
- **Filter by item type.** The **Item Types** list on the left shows each type in its color, with a count. Clear a type's checkbox to hide its items. Items with no type are listed as **Unassigned**.
- **Keyboard shortcuts. T** goes to today, the left and right arrow keys move back and forward, **N** starts a new item, and **1** to **4** switch to Day, Week, Month and List.

The Calendar remembers your last view, the user you picked and the types you hid.

Adding Items to the Calendar

Start a new item in any of these ways:

- Click **New** at the top of the page, or press **N**.
- In Day or Week view, click an empty time to make a 30-minute item, or drag down to set its length.
- In Month view, click an empty spot on a day. If a day shows **+N more**, click it and choose **+ Add item**.

The **New scheduled item** panel opens. Fill in the item:

1. Enter a **Title**. A title is required.
2. Click a colored **Type** to choose the item type.
3. Set the **Date**, **Start** time and **Duration**, or turn on **All day**.
4. To make the item repeat, see Repeating items.
5. If you can see other users' calendars, choose whose **Calendar** the item goes on.
6. To link a record, see To link an item to a record.
7. Enter a **Location**. This can be a room, an address or an online meeting link.
8. Enter **Notes**.
9. To get a reminder, turn on **Remind me** and choose the **Lead time**. See Reminders and Calendar Alarms.
10. To email an invite, see To send a meeting invite.
11. Click **Create**.

Repeating items

1. In **Repeats**, choose **Daily**, **Weekly**, **Monthly** or **Yearly**.
2. Set **Every** to repeat every 1 to 30 days, weeks, months or years.
3. For a weekly item, click the days of the week. For a monthly item, choose a day of the month (for example, on day 15) or a weekday (for example, on the last Friday).
4. In **Ends**, choose **Never**, **After a number of times**, or **On a date**.
5. Check the summary under the repeat settings, then click **Create series**.

To link an item to a record

1. In the item panel, click **Name**, **Company** or **Position**.

2. Search for the record and select it. The record shows as a card in the panel.
3. To remove the link, click the × on the card.

The linked record's name shows on the item in the calendar. Click the name to open the record beside the calendar.

To send a meeting invite

An invite is an email with a calendar file attached. People you invite can add the item to their own calendar.

1. In the item panel, open the **Calendar invite** section.
2. In **To**, type one or more email addresses, separated by commas. If the item is linked to a Name record, that person's email is filled in.
3. Choose the **From** address, and check the **Subject** and **Message**. The message starts with the item's title, date, time, location and notes.
4. For a new item, leave **Send when created** on and click **Create & send invite**. For a saved item, click **Send invite**.

- For a repeating item, the invite covers the whole series. To send it, choose **Entire series**.
- Editing or deleting an item does not email the people you invited. After a change, send the invite again.

Joining online meetings

When the **Location** holds a Zoom, Microsoft Teams, Google Meet, Webex, RingCentral or GoTo link, the item shows a join button, such as **Join Zoom**. Any other web link shows **Open link**. From 10 minutes before the start until the end, the button reads **Join now**. The meeting opens in a new browser tab.

The join button appears on the item in the calendar, in the item panel, and on the item's reminder.

Reminders and Calendar Alarms

PCR can remind you of upcoming items while you work. Reminders can be set when adding an item to the Calendar, adding an activity, or from within the Pipeline.

Setting a reminder

Reminders are set for each item. In the item panel, turn on **Remind me**, then choose the **Lead time**: at the start time, or from 5 minutes up to 1 day before. The default is 15 minutes before.

The first time you turn on a reminder, your browser may ask to show notifications. If you allow it, reminders also appear as desktop notifications when PCR is in a background tab. If you block it, reminders still appear inside PCR while it is open.

Interacting with Calendar Alarms

Calendar alarms appear in the bottom right-hand corner of the screen. Each alarm shows the date, the item's title in its type color, and the time. If several alarms appear at once, they stack.

- Click **Show Details** to see the meeting link, the notes and any linked record. Click the record's name to open it. This is useful when you want to be reminded to call someone at a set time.
- Click the alarm to open the item in the Calendar.
- Click **Snooze** to hide the alarm for 10 minutes. To choose a different time, from 10 minutes to 7 days, use the arrow next to Snooze.
- Click **Dismiss** to remove the alarm. A dismissed alarm does not come back, but the item stays on the Calendar.
- If the item has a meeting link, click the join button to open the meeting. This also dismisses the alarm.

Snoozing or dismissing an alarm clears it in every PCR tab you have open.

Editing an item

1. Click the item on the Calendar to open it.
2. Change any of the details.
3. For a repeating item, under **Apply changes to**, choose **This occurrence** or **Entire series**. Saving one occurrence makes it a separate item, and the series skips that day.
4. Click **Save changes** (or **Save occurrence** or **Save series**).

Note: Editing an item does not email the people you invited. To tell them about the change, send the invite again.

To move an item

In Day or Week view, you can drag items:

- Drag an item to a new time, or to another day in Week view.
- Drag the top edge of an item to change its start time, or the bottom edge to change its end time.

Times snap to 15 minutes. Dragging one occurrence of a repeating item makes it a separate item, and the series skips that day. All-day items, and items in Month or List view, can't be dragged. To move them, open the item and change its date.

To delete an item

1. Click the item on the Calendar to open it.
2. Click **Delete**. For a repeating item, first choose **This occurrence** to click **Remove occurrence**, or **Entire series** to click **Delete series**.
3. Click the button again (**Confirm delete** or **Confirm remove**) to finish.

Deleting a series also deletes any occurrences you edited separately.

Managing item types

Item types color-code your Calendar. Types are shared with the classic scheduler.

1. Next to **Item Types** on the left, click **Edit**.
2. In **Manage item types**, rename a type, click its color swatch to pick a new color, or click the trash can to remove it.
3. To add a type, enter a name and pick a color under **Add a type**, then click **Add**. You can have up to 21 types.
4. Click **Save types**.

- Every type needs a name before you can save.
- A type with items in the current view shows a lock and can't be removed. Move its items to another type first.

Permissions

Your Scheduling permissions control what you can do. **Create** is needed to add items. **Update** is needed to edit or drag items and to manage item types. **Delete** is needed to delete items. Without Update, items open as read-only.