

## Introduction to Diary 4

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Welcome to Diary 4, the perfect tool for managing your group's time. Ideal for bands and similar groups of people needing to coordinate their time, Diary 4 allows members to share a powerful online diary, containing all the details of your events and allowing holidays and other member unavailability to be planned around.

Access to your group's diary is of course strictly controlled, but you can opt to publish selected events on your Diary 4 homepage or even on MySpace, ideal for linking from your existing website or for emailing to your fan-base.

This document is an introductory user guide to Diary 4, covering all aspects from creating your diary in the first place, to getting started with it, to obtaining further help using it.

## Diary 4 system requirements

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Each member of your group wishing to use Diary 4 will require:

- ▶ a functional internet connection
- ▶ an up-to-date graphical web browser with Javascript, cookies and pop-up windows enabled
- ▶ a working email address, not necessarily unique

## Creating your diary

If you have not already created your group's diary, you will need to do so. All being well you will be set up in under ten minutes.

### Entering your group's details

First of all, go to <http://diary4.com/signup> with your web browser.

Please note that none of the details entered during this process are fixed – you can change any of the settings at a later date as your group's needs (and even name) change.

Before you start you will need to know the name you wish initially to give your group, and the web name by which you want to be referred. The web name will be appended to **http://diary4.com** – so if you say choose a web name of **tropicalpenguins**, your diary's web address would be **http://diary4.com/tropicalpenguins**. The web name must be unique on Diary 4, that is to say, no-one can have the same web name, otherwise the web address would be ambiguous. If you enter a web name that is already in use or is not available for any other reason, you will need to review it before your diary is created.

You will also need to know your own email address, and those of up to three other group members you wish to add from the outset. If you decide to subscribe to Diary 4, you will be able to add many more group members. Note that you don't *need* to add other group members during the sign-up process; it's easy to add them at a later date. Email addresses must be valid and current, and will be automatically verified before use.

There is normally a  icon associated with each detail to be entered. Click on it to obtain further help and examples with what to type/select in each case.

In the first section of details you are asked for your group's time zone. This will be used by the email notification system to ensure that emailed reminders are sent at an appropriate time, and also to display other times and dates within the system accurately and helpfully for your location in the world.

If adding additional group members at this point, note that you must click **Add member** after entering the details of each. If you do not do so before clicking the big **Next >** button the details may not be stored. If you want to remove a member you have just added, click on **Remove** next to their details as listed.

Once your group, administrator and any member details you wish to add at this point have been entered, click on the big **Next >** button to proceed to the confirmation screen. If any details have been entered incorrectly, you will need to review them before proceeding.

### Confirming your group's details

All being well, you will be taken to the confirmation screen, where the details you entered will be repeated. Take special care to confirm that the email address for the group administrator is correct, because otherwise activation instructions may be sent to the wrong recipient and your newly created diary will be inaccessible.

Your current local time should be continually updated next to the confirmation of the group time zone. The time displayed is based on the Diary 4 system time adapted to your chosen time zone, so may not exactly match your computer's real-time clock.

If any details are incorrect, click on **< Back** to return to the previous screen.

You will need to read the conditions of use and confirm that you have done so by ticking the relevant box. In order to protect against abuse by the automatic bulk creation of diaries, you will be required to enter the six-digit numeric code displayed. Visually-impaired users may use the **Audible alternative** link to play back the numeric code as an mp3 audio file. In both cases the code is identical.

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When you have confirmed all the details, ticked the conditions of use box and entered the numeric code, click on **Create**. There may be a pause while this is processed.

You and your members will immediately be emailed verification messages. Click on or paste the link into your web browser to confirm that you have received the message and that the email address provided was valid. When each member does so, they will be emailed with their login details, including a confirmation of the group's Diary 4 web address, their login name and initial randomly selected password.

Congratulations, Diary 4 sign-up is now complete!

## Getting started with your diary

### Logging in

Note that in accordance with the Diary 4 system requirements, your web browser will need Javascript, cookies and pop-up windows enabled. Depending on which browser you choose to use, you may be able to set these permissions specifically for this site.

Navigate to your diary's web address, e.g. <http://diary4.com/tropicalpenguins>, and click on the **Member login** link. A pop-up login box appears, something like:



The exact appearance of pop-up windows varies from browser to browser. For example Internet Explorer 7 includes the web address in an extra grey bar, whereas Mozilla Firefox (as above) includes the site address in the window's title bar.

Enter your username and initial password as sent in your activation email.

Click **Log in**, and all being well you will be taken to an overview of the current month.

If at any time you forget your password, enter your username only and click **Password reminder** to have your password sent to your registered email address. If you have not yet verified your email address, you will need to do that first, and another request will be sent for your convenience.

### The month view

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

The month view is the central "hub" of your diary, providing a simple overview of everything you and your members have planned for the month.

You can quickly flip between consecutive month by using the **◀** and **▶** icons, or you can choose any month within the allowable range of years by selecting the month and year from the drop-down lists and clicking **Display month**. Note that whatever month is displayed, you can always return quickly to the current month by clicking **Current month**. Today's date is always highlighted for your convenience.

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Each day on the month view has a  icon, which is used to create diary items for the day in question. If you click on one of these icons, a small menu appears with the options **New event**, **New unavailability** and **New day note**. Creating such diary items is explained in the following chapters. To hide the menu click again on the icon.

Diary items, once created, are shown on the month view according to their type. Events are shown with the icon  together with the event name and (if provided) start and/or finish times. Member unavailability is shown by the icon  and a coloured stripe labelled with the relevant member's name. Day notes are shown with the icon  and the note text. For all item types, unconfirmed status is indicated by a small question mark by the icon, i.e. ,  and  respectively. Member involvement in events and day notes is shown with coloured blobs – or “half blobs” in the case that they are involved but not selected to receive email notification. Flagged events and day notes are indicated with a coloured flag.

A combined example of these follows:



If you click on an item's icon, a small menu appears with **Edit**, **View**, **Cut**, **Copy**, **Delete** and either **Confirm** or **Unconfirm**. Click on the icon again to hide the menu.

### Logging out

To log out of Diary 4, click on the **Log out** link on the main page.

A confirmation box will appear, in which you should click **Yes** in order to proceed.

### Creating and editing events

Events are the primary type of diary item in Diary 4. They are the most flexible of the diary item types, allowing specific start and finish times to be attributed, and also (in the subscribed version) customisation of the information requested and displayed, file attachments and member comments.

To create a new event, click on the  icon for the chosen day, and select **New event**. A large pop-up window appears with a number of pre-populated and blank fields.

To edit an existing event, click on its  icon and select **Edit**.

For a new event, **Event date** will be pre-populated to the selected date on the month view. You can change it if you want to.

**Event name** will be used in the month view when listing events for each day, so enter something meaningful here. If you leave it blank, it will default to **t.b.a..**

For a new event, **Confirmed** will be pre-populated to **No**. This value is also used on the month view so make sure it's accurate for each event.

All the other event details are optional.

If you want to add a **Start time** or a **Finish time**, click on the relevant **Add** button and select the time(s) accordingly in 24 hour clock format. If used, these times will also be used on the month view for each event. Remove a time by clicking the relevant **Remove** button.

**Publish as** is used if you want to include details of an event on the public version of your Diary 4 group homepage. The details will be appended to the date. You can just enter some unformatted text, in which case it might appear on the homepage like:

#### Diary 4 The Tropical Penguins

September 2007

12 September Playing at the Dog & Duck, 8pm

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Powerfully, though, you can use the backslash character \ to introduce “tabs” to the displayed text. For example if you instead entered **Live Night\Dog & Duck\8pm**, the listing on the homepage might now appear in a neatly tabulated form like:

### Diary 4 The Tropical Penguins

September 2007			
12 September	Live Night	Dog & Duck	8pm
October 2007			
20 October	The Big Gig	Somewhereville Odeon	8pm

Remember, this is potentially visible to the world, so only publish what you are happy for the world to see! Apart from the date prefixing each event, you can choose entirely what wording appears, subject to the requirements of the conditions of use. You might choose to include contact telephone numbers, postcodes etc. It's up to you if and how you use the tabulated formatting – if you choose to use publishing at all.

Use the check-boxes in the **Involvement** section to indicate whether each member of the group is involved with the event, and if they require an email notification. To quickly select or deselect all members, click on the **all** or **none** button under the relevant column. Members who have already received a notification of this event, or who have opted out of receiving such notifications, are indicated. Note that it is perfectly allowable for a member to be not involved in an event but still receive a notification; the two functions are completely independent.

To save the changes made, click **Save**, or to abandon any changes, click **Cancel**.

If there were members listed as having already been sent notifications, to save “spamming” them with extra notifications in respect of minor changes, you'll see an extra check-box option **Don't re-notify members who have already been notified**. It's up to you whether you send further notifications – your choice will depend on the substance of the edits made to the event.

### Flags (subscribers only)

Subscribed groups have the facility to attach coloured flags to events and day notes. Use the check-boxes in the **Flags** section to determine whether each listed flag should apply to this event. If a flag is specified, it is added to the event or day note's entry on the month overview.

See the chapter *Edit flags* below for information on how to define the flags you want to use.

### Event attachments (subscribers only)

Subscribed groups also have the facility to attach files to events.

Initially, your group's attachment store is empty, so the only option by **Attachments** in the event editor is to upload a new file. Exact details for this depend on your web browser, but typically you click on **Browse** to locate a file on your own computer. When you save the event as described above, the file will be uploaded, which may take a few seconds depending on the size of the file. Note that your attachment store has a limited size. If you attempt to upload a file that would exceed that size, an error message is displayed, but any other changes made to the event are retained.

Once you have uploaded one or more files to your group's attachment store, an extra drop-down list appears, allowing you to select a previously uploaded file:

The screenshot shows the 'Attachments' section of an event editor. It includes a dropdown menu labeled 'Select one...', a 'Browse...' button, and a list box showing a file named 'website.jpg'. Below this is a 'Comments' section with a text input field.

If you select a previously uploaded file, your storage quota will not be further reduced – that is to say, you can use any one file in as many events as you like with no storage penalty. If on the other hand you *upload* the same file, your storage quota will be reduced accordingly, so reuse previously uploaded files by preference.

When one or more attachments have been added to an event, they are listed with a icon, and can be opened or downloaded by clicking on their name:

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The screenshot shows the 'Attachments' section of the Diary 4 interface. It displays a file named 'website.jpg' (15 KB) with a 'Remove' link. Below this is a file upload area with a 'Select one...' dropdown, an 'or' button, and a 'Browse...' button. A note indicates 'Current usage: 15 KB out of 1000 KB (985 KB free)'. At the bottom, there's a 'Comments' section with a 'Add new...' link.

You can remove an attachment from an event by clicking **Remove**. It will only be removed when you save the event. If you remove an attachment such that it is no longer referenced by *any* event, it will be deleted entirely from the Diary 4 system and the appropriate storage quota released for use by future uploaded files.

## Member comments (subscribers only)

Members of subscribed groups are able to add their own comments to events. If some text is entered in the **Add new...** box next to **Comments**, it will be visible (together with the time and date it was added) when the event is subsequently edited or viewed:

The screenshot shows the 'Comments' section of the Diary 4 interface. It lists a comment from 'Steve Someone' stating 'This is a comment' with a 'Remove' link, timestamped '11-Sep-07 16:52'. Below this is a 'Comments' section with a 'Add new...' link.

As with attachments, comments may be removed by clicking on the **Remove** link.

## Creating and editing unavailability

You and your members can mark days and longer periods when they are not available, due to holidays, other commitments etc. This does not prevent events being added that clash, but provides a visual aid to deciding dates for events.

To create a new unavailability, click on the icon for the chosen day, and select **New unavailability**. A large pop-up window appears with a number of pre-populated and blank fields.

To edit an existing unavailability, click on its icon and select **Edit**.

**Group member** will default to you, but can be changed. This is the group member to whom the unavailability refers.

**Start date** and **Finish date** will default to the selected date, but can be changed. Note that the finish date will be corrected if it earlier than the start date! The inclusive length of the unavailability is previewed underneath in days.

As with events, the **Confirmed** setting, defaulting to **No** will be used on the month view.

You can add a short note with **Note** if required, but this is entirely optional.

Click **Save** to save changes made, or **Cancel** to abandon them.

## Creating and editing day notes

Sometimes you will want to add an item associated with a particular day that is not an event per se. For example, a group member's birthday, or when a booking deposit is due to be paid. For these kinds of scenario you can use a Diary 4 day note.

To create a new day note, click on the icon for the chosen day, and select **New day note**. A large pop-up window appears with a number of pre-populated and blank fields.

To edit an existing day note, click on its icon and select **Edit**.

**Date** will default to the selected date.

**Confirmed** will default to **No**.

You should enter something for **Note** otherwise it will be set to **t.b.a.** by default.

As with events, with the **Involvement** section you can set the involvement of each group member and whether they should receive an email notification about the day note. Please refer to the chapter *Creating and editing events* for more information on this functionality.

As with events, with the **Flags** section (if a subscriber) you can attach defined coloured flags to your day note. Please refer to the chapters *Flags* above and *Edit flags* below for more information.

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Click **Save** to save changes made, or **Cancel** to abandon them.

### **Viewing diary items**

To view a diary item, click on its icon or and select **View**, or double-click on its icon. This brings up a non-editable view of the item as a pop-up window. From this window, you can click on **Edit** to go to the editable version, or **Print** to print the information to your connected printer. **Close** closes the pop-up window.

### **Moving and copying diary items**

Diary items can generally be moved by editing them and changing the date(s) contained. However a much simpler mechanism is provided from the month view.

To move an item, click on its icon or and select **Cut**. Go to the desired date, click on its icon and select the previously hidden option **Paste unavailability**, **Paste event** or **Paste day note**. The item will immediately be moved.

Similarly to copy an item, click on its icon and select **Copy**, then proceed as above.

If you decide after clicking **Cut** or **Copy** that you do not wish to proceed, you can click on the **Cancel cut (or copy) operation** link underneath the month grid. This is however entirely optional. You don't have to paste the diary item immediately, and if you later cut or copy a different item, Diary 4's internal clipboard's contents will be replaced, so don't worry if you forget.

### **Deleting diary items**

To move an item, click on its icon or and select **Delete**. You will need to confirm that you really want to delete the item.

If you delete a diary item it cannot be recovered, so do use with care!

When you delete an event, all associated member comments are automatically deleted, but file attachments are only deleted if they are no longer associated with any other events.

### **Confirming and unconfirming diary items**

Diary items can be confirmed and unconfirmed by editing them and changing the **Confirmed** setting to **Yes** or **No** as appropriate. However their status can also be quickly changed directly from the month view. Click on a diary item's icon or and select **Confirm** or **Unconfirm** as appropriate. The item's icon will immediately gain or lose the question-mark annotation associated with unconfirmed events.

### **Setting a diary item to repeat**

Diary items can be set to repeat. Click on a diary item's icon or and select **Repeat**. You will be presented with a pop-up dialogue where you can set the frequency of repetition and how far into the future you wish the repetition to apply. Click **Set repeat** to create the sequence of repeated items as requested. Please note that this feature creates a duplicate diary item for each repetition, and there is no way to edit or delete a sequence of items as a whole – so use with care!

## **Diary settings – member tools**

All members have access to the **Member tools** tab from the main window, which contains a number of options.

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## Diary 4 The Tropical Penguins

Logged in as **Steve Someone** [group administrator]

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Each option brings up a pop-up window, explained in the following chapters.

### **Update my email address**

Use this option to update your email address. Note that as with your initial email address it must be valid and current. A verification message will be sent to the new address entered which you will need to respond to in order for the new address to be used for email notifications. Until you do so, your old address will be used.

If you already have an unverified email change request outstanding, you will be warned, but this will not prevent you from requesting another change. If you do so, the previous request will be discarded and its verification email link will not work.

Note that as with most of the member and administrator tool screens, your current password will be required, as a double check that who are who you say you are!

Enter the **New email address** as requested and your **Password confirmation**, and click on the button **Update email address** to proceed. Click **Return to diary** to abort the change.

### **Change my password**

Use this option to change your password. Your **New password** must be at least eight characters long. In common with most systems you are requested to enter your new password twice to protect against errors, and once again you are required to confirm your **Current password**.

Click **Change password** to proceed, or **Return to diary** to abort the password change.

It is strongly recommended that you change the initial randomly selected password sent to something more personally memorable.

### **Set my notification preferences**

Use this option to change your notification preferences. By default you receive email notifications for events and day notes that you are involved with 24 hours in advance. From this screen you can set that time to any number of hours. You can also turn off either or both of the two types of notification altogether if you don't want to be bothered by emails – but make sure you have some other means of knowing what the rest of your group is doing!

<b>Events</b>
<input checked="" type="radio"/> Send me event notifications <input type="text" value="24"/> hours in advance
<input type="radio"/> Do not send me event notifications at all
<b>Day notes</b>
<input checked="" type="radio"/> Send me day note notifications <input type="text" value="24"/> hours in advance
<input type="radio"/> Do not send me day note notifications at all
<b>Password confirmation</b> <input type="password" value="*****"/>
<a href="#">Update preferences</a> <a href="#">Return to diary</a>

Events and day notes are handled independently. Select the preferred radio-button option for each, and if opting to receive notifications, enter the required number of hours ahead in the relevant box. The number of hours must be at least 1. The best value(s) will depend entirely on your needs.

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Enter your **Password confirmation** as requested and click **Update preferences** to proceed, or **Return to diary** to abandon any changes made.

### Generate Flash widget HTML

Diary 4 has the ability to publish selected event details not only to the group's public homepage as described in the chapter *Creating and editing events* above, but also to a Flash widget that can be embedded in many websites, even including MySpace. An exact preview of the widget, using your currently published information, is shown on this tool's page, for example:

The screenshot shows a 'Widget preview' section. At the top, it says 'Diary 4 The Tropical Penguins' and 'October 2007'. Below that, it lists an event: '20 October The Big Gig Somewhereville Odeon 8pm'. At the bottom, there is a URL: 'http://diary4.com/tropicalpenguins/'.

### HTML code

```
<object type="application/x-shockwave-flash" allowScriptAccess="never"
        allowNetworking="internal" height="300" width="400" align="middle"
        data="http://diary4.com/system/publish/publish.swf">
```

The Flash widget has to be able to refer exactly to your group. There are two slightly different ways you can do this, and this option lets you generate the HTML code as required accordingly.

Your group has a numeric identifier, which is allocated when you sign up, and can reasonably be expected never to change. Choose **Select by group ID** if you want to use this preferred method.

However you might prefer to refer to the group by its web name, e.g. **tropicalpenguins**, in which case you should choose the **Select by group web name** option. You should be aware however that if your group ever changes its web name, the widget is liable to stop working, and if someone else subsequently chooses the same web name, it will in fact refer to the wrong group altogether!

In either case, click on the **Update HTML code** button to adjust the HTML code output.

The HTML code box contains the source code you should use on your website. It can also be pasted into many of the boxes in the MySpace profile editor, and has been designed to accommodate MySpace's limitations with regard to embedded Flash widgets and their internet connectivity. The precise procedure will depend upon the exact browser version you are using, but typically you can right-click on the code box and click **Select all** on the browser's context menu, then right click again and select **Copy**, in order to copy the HTML code fragment to your computer's clipboard.

A simple web page to use the generated HTML code might read something like this, with the pasted code emboldened for clarity:

```
<html>
<head>
<title>The Tropical Penguins gig list</title>
</head>
<body>
<object type="application/x-shockwave-flash" allowScriptAccess="never"
        allowNetworking="internal" height="300" width="400" align="middle"
        data="http://diary4.com/system/publish/publish.swf">
    <param name="allowScriptAccess" value="never" />
    <param name="allowNetworking" value="internal" />
    <param name="movie" value="http://diary4.com/system/publish/publish.swf" />
    <param name="quality" value="high" />
    <param name="bgcolor" value="#035;eeeeff" />
    <param name="flashvars" value="groupname=tropicalpenguins" />
</object>
</body>
</html>
```

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When you have finished with this screen click on **Return to diary**.

### Manage referrals

From this screen you can determine your group's referral link. You can copy and paste this link into emails, or use it in HTML. An example code snippet, personalised to your group, is provided.

You can also review those groups you have successfully referred, and whether they have subscribed. Remember, only groups who subscribe earn you referral bonuses to your membership.

Click on **Return to diary** to close the window and return to the diary.

### Help and support website

This is a courtesy link to the website <http://help.diary4.com>, which includes a support forum and a facility for raising private support requests. Note that if raising a private support request, it is helpful if at all possible to complete the group web name and username/password boxes, since these will authenticate who you are and enable more efficient support service in most cases.

Help for the forum itself is available at <http://help.diary4.com/forum/?action=help> or by clicking on the button within the forum itself marked **HELP**.

## Diary settings – administrator tools

Group administrators also have access to the **Administrator tools** tab from the main window, which contains a number of options. Normal members will not see this tab and cannot access the functions within.

The screenshot shows a blue header bar with the text "Diary 4 The Tropical Penguins". Below this is a white content area. At the top left of the content area, it says "Logged in as Steve Someone [group administrator]" and has a "Log out" link. Below that is a horizontal menu with three items: "October 2007", "Member tools", and "Administrator tools". Underneath the menu is a list of administrative tasks, each with a blue link:

- Manage group subscription
- Edit group profile
- Edit group members
- Change group administrator
- Edit flags
- Customise event fields
- Email database backup
- Cancel group membership

Each option brings up a pop-up window, explained in the following chapters.

### Manage group subscription (administrator only)

This screen will let you subscribe to Diary 4 in order to use the service beyond the free trial period and obtain access to all the extra features like event attachments and member comments.

It will tell you the current state of your membership, i.e. whether you are subscribed or using a free trial, and when that membership is due to expire.

It also lists the subscription options available to you together with their costs.

If you wish to take out or extend your paid subscription to Diary 4, click on the option button of your choice to be taken to PayPal and complete the transaction. All prices are charged in pounds sterling and will be converted to your local currency if necessary at PayPal's prevailing rates.

Note that Diary 4 itself does not process or hold any of your payment card or bank details.

If you do not wish to take out or extend your subscription at this time, click on **Return to diary**.

### Edit group profile (administrator only)

This screen allows you to review and change the overall settings for your group as provided during the sign-up process. If you change the web name, as during the sign-up process it must remain unique on Diary 4 to ensure there is no ambiguity in the web address, and your verified group members will be automatically emailed to let them know of the change of address.

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As usual, you will need to confirm your password for changes to be stored.

Click **Save changes** to proceed with any changes made, or **Return to diary** to abandon.

### Edit group members (administrator only)

This screen allows you to add, remove and edit your group's members.

Your existing members' details can be edited directly, or removed using the **Remove** link for each.

New members (up to the limit allowed by your membership) can be added with the **Add member** button.

A colour code is associated with each member. These are automatically issued during the initial sign-up process, but on this screen you can choose a different colour if you prefer. Note that you will need to choose a colour for any new members you add before you can save their details.

If you change a member's email address, it will need to be verified before it will be used.

If you change a member's username, they will be emailed to let them know, otherwise they wouldn't be able to log on any more.

As usual, you will need to confirm your password for changes to be stored.

When you are happy with your line-up click **Save changes** to store, or **Return to diary** to abort.

### Change group administrator (administrator only)

Under various circumstances it may be necessary for the group to change its administrator, and this process needs to be initiated by the existing administrator if it is to be carried out automatically. In the unlikely event that it is impossible for the existing administrator to do this, please contact us via the private support request form on <http://help.diary4.com>.

You can choose any *verified* group member to be the new administrator, and as usual you will need to confirm your password.

To change the administrator, click **Change administrator**, or click **Return to diary** to abort.

If you proceed, an extra check is made to confirm what you're doing; if you change the administrator to be someone else, your access to all administrative functions, including this screen, will be withdrawn with immediate effect.

### Edit flags (administrator only, subscribers only)

On this screen you can define up to five coloured flags to associate with events and day notes. You can edit the existing flags, if any, specifying their description and colour. You can remove a flag (and all references to it from events and day notes) by clicking on its **Remove** link. New flags, up to the limit of five per group, can be added with the **Add flag button**.

Note that this option is available only to groups with an active paid subscription.

When you are happy with your flags, click **Save changes** to store, or **Return to diary** to abort.

### Customise events fields (administrator only, subscribers only)

This is perhaps the most complex screen within Diary 4, but one that can be used to streamline your group's usage of the system by creating new event fields and hiding ones you don't use.

Note that this option is available only to groups with an active paid subscription.

Under **Current state** the customisable event fields currently set up are displayed. Note that certain fields are not customisable in this way, so are not listed here. For your convenience, the number of times each field is used by all your events is shown – this may highlight fields that are candidates for hiding.

Under **Edit custom fields**, you can define up to five custom fields. To add a new field:

1. tick its **Enabled** box

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2. enter the **Field name** by which you wish it to be known
3. select the **Type** of information you plan to store – this can currently be a time, a date or arbitrary text
4. select with **Insert before** which of the current fields you want it inserted before, or choose the **[Insert at end]** option to append it to the list of fields

To remove a custom field, untick its **Enabled** box.

Under **Show and hide standard fields**, use the **Visible** tick box for each to control visibility.

When you're happy, enter your password to confirm, and click **Save changes** to store the new settings, or click **Return to diary** to abandon any changes made.

### Email database backup (administrator only)

From this screen you can email yourself a backup of your event, unavailability and day note data. It takes the form of three spreadsheet attachments, compatible with Excel, OpenOffice and other applications. If you are a subscriber you also have the option to include your own uploaded file attachments in this email – tick the box marked **Include uploaded file attachments in backup email** as required.

Remember, this email will be sent to your *verified* email address only!

Enter your password to confirm, and click **Email backup** to proceed or **Return to diary** to abort.

### Cancel group membership (administrator only)

This option is for if you need to cancel your membership – subscription or free trial. Please note that refunds are not normally offered for cancellations initiated by the group administrator.

You must tick the box labelled **I want to cancel this group's membership altogether, and understand the implications of so doing** in order to proceed.

If you tick the box labelled **Please attempt to email me all stored data relating to the group before it is deleted**, so long as your email address is verified, you will be sent an email containing spreadsheets (compatible with Excel, OpenOffice and other applications) of all your event, unavailability and day note data – together with any file attachments you had uploaded if you were a subscribed member. If you would prefer to be emailed a copy of your data without attachments, see the chapter *Email database backup* above.

Naturally, you are required also to confirm your password.

Click **Cancel membership** to proceed with the cancellation, or click **Return to diary** to abort.

There will be an extra check to ensure you really want to cancel your group's membership.

If cancellation is successful, you and your group members will no longer have access to the diary.

## All about email notifications

Email notifications are one of Diary 4's most powerful features. Your group members don't need to check the website every day because they will be sent email reminders relating to what's coming up.

### What diary items generate notifications?

Email notifications are generated by events and day notes.

### Who receives notifications?

By default, notifications are currently sent to all members with a verified email address. Note that if a member has a pending email change verification, notifications will continue to be sent to their old address. However it is possible to choose which members receive notifications with respect to each event and day note. See *Creating and editing events* for more information on this functionality.

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## **When are the notifications sent?**

By default, notifications are sent 24 hours ahead of the event or day note in question.

For day notes and for events without a specified start time, that means midnight the night before.

For events with a specified start time, the notifications are sent 24 hours before that time.

The time ahead of events and day notes that the notifications are sent can be set by each group member. Notifications for each type of diary item can also be turned off altogether. See the chapter *Set my notification preferences* above for more information on overriding the default settings.

Notifications are sent every 10 minutes at present, so an event with start time of 21:45 for example will have its notifications sent out at 21:50 the previous day.

The times notifications are sent are adjusted according to your group's time zone setting.

If an event or day note is edited subsequent to its notifications being sent out, members can be notified again – this choice is made by whoever edits the event or day note when they save it.

Again, please see *Creating and editing events* for more information on this functionality.

## **Getting more help**

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Hopefully this introduction has covered pretty much everything, but should you need further assistance, go to <http://help.diary4.com>.

On this website is a useful support forum, where you can get assistance from Diary 4 developers and users. It contains additional FAQ type resources as well as other relevant announcements.

If necessary, you can also raise a private support request via the website.