



BaseDPsy II (PsyTablet)

Clinical and financial management software
For psychotherapists of all disciplines.

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Calendar v11 User's guide

BaseDPsy
Version 11

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Table of contents

1. Launching	3
2. The display options	3
Move between dates:	5
Display by week :	5
Display one day at a time:	6
Display of the list of appointments :	6
Default view	6
3. Add an appointent	7
3.1 Automatic addition of appointments	7
3.2 Automatic adjustment of appointments in the calendar from other sections	7
3.3 Adding an appointment directly in the calendar	8
3.3.1 Tools to create an appointment	8
3.3.2 Creating an appointment and a follow-up note at the same time	9
3.3.3 Special features for creating an institutional activity from the agenda	10
3.3.4 Modify an appointment from the calendar	11
4. Edit the colors of the appointments	11
5. Delete an appointment	13
Missing appointment	13

1. Launching

The calendar is displayed in a separate window from the main window, named "Calendar", which allows you to view two contents simultaneously.



To display the agenda, there is a button in the Menu section :

And an icon in the other sections:



2. The display options

In the header of the agenda, there are four buttons allowing you to choose the display by period, by colors, by user, by date.



Here is how the display looks by month. The box corresponding to the current date is in "light yellow".

The calendar interface for August 2015 includes a header with 'Close', 'Print', 'Colors', and 'Refresh' buttons. Below the header is a navigation bar with 'Add an event', 'Month', '-All Categories-', '-All Users-', and '2015/8/3'. The main calendar grid shows the following appointments:

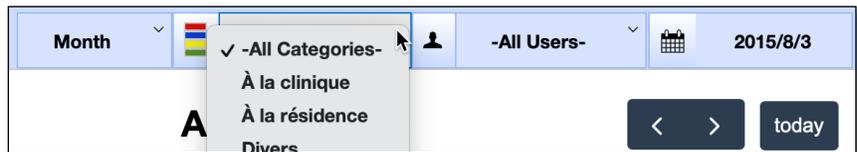
Sun	Mon	Tue	Wed	Thu	Fri	Sat
26 9a Latraverse, Arr 10a GroupeInChez	27 11a Tanguay, Isabt	28 8a Lamours, Carm 9a Ricardo, Sandri +2 more	29	30 12a Family Sauvé 3p Rappel le clie	31 8a Gironnaux, Myr 9a Lambford, Mavi 10a Labonté, Mich	1
2	3 8a GroupeInCentre 9a Jean Renoir 11a Tanguay, Isabt	4 8a Lamours, Carm 9a Ricardo, Sandri 10a Amherst, Joha	5 10a Labonté, Mich	6	7	8
9 10a GroupeInChez	10 8a Centre hospitali 9a Pafin, Jean 9a Pafin, Jean/nInt	11 9a Ricardo, Sandri 10a Amherst, Joha	12	13	14	15
16 10a GroupeInChez	17 10a Centre hospite	18 10a Amherst, Joha	19 12a Paul, Paul 8a Passe, Jean +3 more	20	21	22
23	24	25 10a Amherst, Joha	26 10a Suivant, Miché	27	28	29

The buttons for a selective display

The first button allows you to display a period (month, week, day) or a list of all appointments

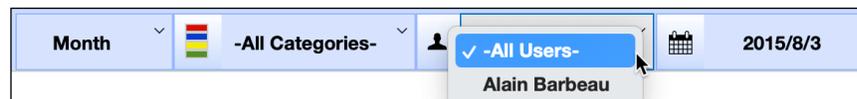


The second button allows you to display all the appointments or only those corresponding to a particular color. The colors are listed by the meaning that has been assigned to them.



The third allows you to display all the appointments or only those corresponding to a specific user. If you use BaseDPsy in Solo this tool is absent. But if you use BaseDPsy with the option "Multi-users", all the users having an access to BaseDPsy will be present in the list. And by selecting a name, only the appointments of this user will be displayed.

Moreover, if your access is limited to your files, only your name will be present and only your appointments will be available for display in multi-user mode, thus respecting the confidentiality criteria.



The fourth button displays a specific date. Click on the date to display a drop-down calendar, then click on the date of your choice



When you click the calendar display button from the Notes section, the date displayed in the calendar will automatically be changed to the session date displayed in the Notes section. You will have the same adjustment to the calendar date from the meeting date (Group section) or the activity date (Institution section).



Move between dates:

This tool allows you to display the previous or next date; or the previous or next month, as well as the week.



This tool allows you to display the current date. By clicking on the "Today" button, the day, week or month containing the current date will be displayed.

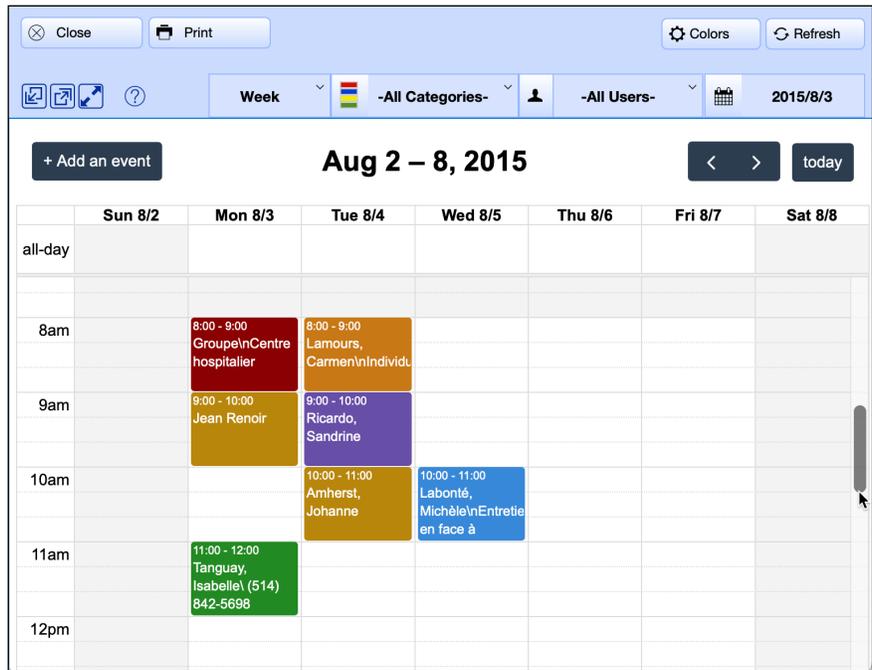
Display by week :

	Sun 8/2	Mon 8/3	Tue 8/4	Wed 8/5	Thu 8/6	Fri 8/7	Sat 8/8
all-day							
8am		8:00 - 9:00 Groupe\nCentre hospitalier	8:00 - 9:00 Lamours, Carmen\nIndividu				
9am		9:00 - 10:00 Jean Renoir	9:00 - 10:00 Ricardo, Sandrine				
10am			10:00 - 11:00 Amherst, Johanne	10:00 - 11:00 Labonté, Michèle\nEntretie en face à			
11am		11:00 - 12:00 Tanguay, Isabelle\ (514) 842-5698					
12pm							

To view the hidden hours, click in the window to reveal the sliding bar. If your screen allows it, you can also enlarge the window to display more hours simultaneously.

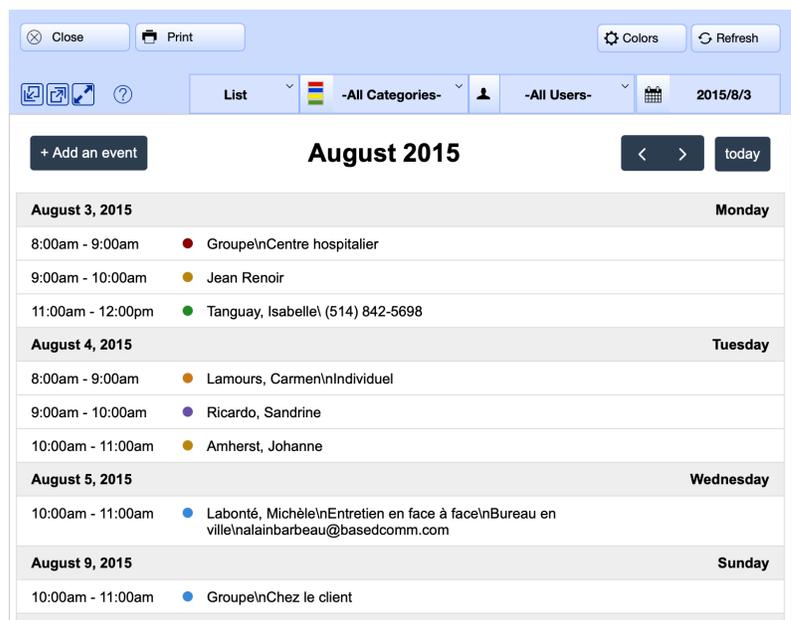
Display one day at a time:

First choose the date in the button for that purpose, then display it by "Day". To display the hidden times, you can either use the sliding bar on the right of the window, or enlarge the window, if your screen allows it.



Display of the list of appointments :

All appointments are displayed sorted by date of the same month.



Default view

You can choose the default display in the "Options" section of BaseDPsy under the tabs: "General/Open",

3. Add an appointent

3.1 Automatic addition of appointments

BaseDPsy is a record keeping software and the main activity of its users is to write follow-up notes.

It is therefore desirable that when you create a follow-up note in BaseDPsy, you do not have to create an equivalent appointment in the agenda.

Consequently,

In the Notes section, each time you create a new session, an equivalent appointment will be added in the agenda.

In the Group section, each time you add a new meeting, an equivalent appointment will be added to the agenda.

In the Institution section, each time you add a new activity, an equivalent appointment will be added to the agenda.

3.2 Automatic adjustment of appointments in the calendar from other sections

In the Notes, Group Meetings, Activities sections, the appointment in the calendar will be updated (modified, adjusted) each time you modify any of the following items:

- Start date
- End date
- Start time
- The end time
- The choice of color

The automatic adjustment of appointments in the calendar does not apply (does not work) to all appointments imported from the old BaseDPsy calendar.

3.3 Adding an appointment directly in the calendar

3.3.1 Tools to create an appointment

As soon as you click on the "Add an appointment" tool, the appointment is created, all that remains is to define its title and modify the dates and times of the appointment.



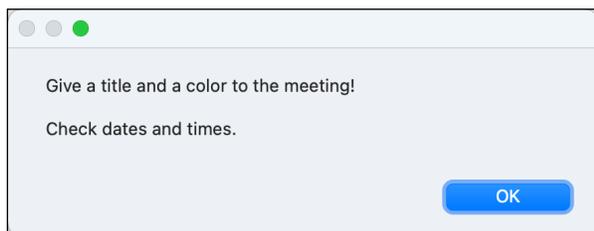
Each time you use the "Add an appointment" tool, the date defined in the default date tool window is automatically added. It is therefore preferable to define the default date before adding an appointment.



If after opening the RVD window, you don't want to add any more appointments, you have to use the "Delete" tool at the bottom of the window.



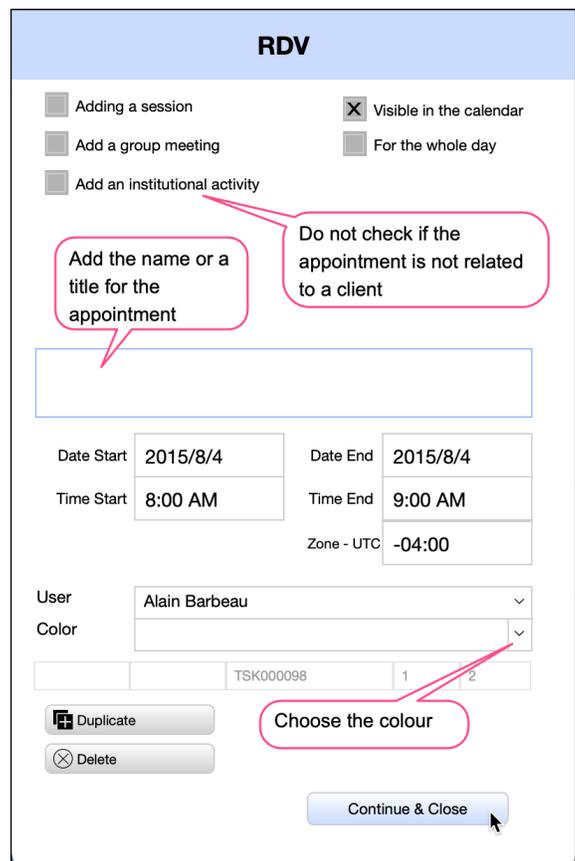
By clicking on the "Add an appointment" tool, a message reminding you of the specific elements of each appointment is displayed, followed by a temporary window to enter the content of the appointment.



Let's say you want to set up a dinner date with a friend in your calendar. All you have to do is write his name in the title space or even the name of the restaurant and adjust the dates and times of the appointment.

Then you click "Continue & Close".

Choosing the right time is easier with this new calendar, because you can move the appointment window to the side of the calendar window and continue to move around (change the calendar date) in the calendar window and find the best time for the new appointment.



RDV

Adding a session Visible in the calendar
 Add a group meeting For the whole day
 Add an institutional activity

Add the name or a title for the appointment

Do not check if the appointment is not related to a client

Date Start: 2015/8/4 Date End: 2015/8/4
 Time Start: 8:00 AM Time End: 9:00 AM
 Zone - UTC: -04:00

User: Alain Barbeau
 Color:

Duplicate Delete

Choose the colour

Continue & Close

3.3.2 Creating an appointment and a follow-up note at the same time

As said before, if you create a follow-up note in one of the other sections of BaseDPsy, the appointment is automatically created in the agenda.

However, if when creating an appointment from the agenda, you want to add either a corresponding session in the Notes section, or a group meeting or institutional activity, we have added tools in the appointment interface to make this possible.

1. Check the appropriate section
By checking one of these options, other steps and tools are added

First of all click the tool to choose the client:

Regardless of the option chosen (session, meeting, activity) the client list tool appears and contains all clients.

2. Choose the client

Click on the tool to display the list of clients. In the list, click on the name of the client, this will add his name in the two sections "With" and "Appointment title".

In the "Appointment title" field containing the client's name, you can add details, in addition to the name or in replacement of the name.

3. Adjust the dates and times of the appointment
Do not forget to define a color, otherwise the default color (blue) will be added.
4. Click on the corresponding tool at the bottom of the window

In case you have checked "Add a corresponding session", the tool will be named "Create a session".

By clicking on the tool, you will create a follow-up note and an appointment simultaneously, and the appointment window will close.

RDV

Adding a session Visible in the calendar
 Add a group meeting For the whole day
 Add an institutional activity

Check either of these options to create a corresponding follow-up note in either of these sections of BaseDPsy

Title of the RDV or activity

RDV

Adding a session Visible in the calendar
 Add a group meeting For the whole day
 Add an institutional activity

Clients List

With

Once an option is checked, a list of clients becomes available for selection

Title of the RDV or activity

Clients List

CLOSE

A B C D E F G H I J K L M
N O P Q R S T U V W X Y Z

	Active	Closed	N°ID
1	Bourget, Lillianne		148
2	Champêtre, Lili		138
3	Chika, Tella		170
4	Family Lambford		30
5	Family Sauvé		80
6	Gilmore, Alexis		150

Clients List

With Chika, Tella 170

Chika, Tella

Create a session

3.3.3 Special features for creating an institutional activity from the agenda

Check "Add an institutional activity" then click on "List of organizations" then choose the name of the organization and click on it.



Since institutional activities are linked to both an organization name and a mandate number, the mandate number must be defined in the window for creating a new appointment



When the number of the organisation is added, a new tool is displayed.



You must click on "List of mandates" and then click on the title of the mandate concerned.

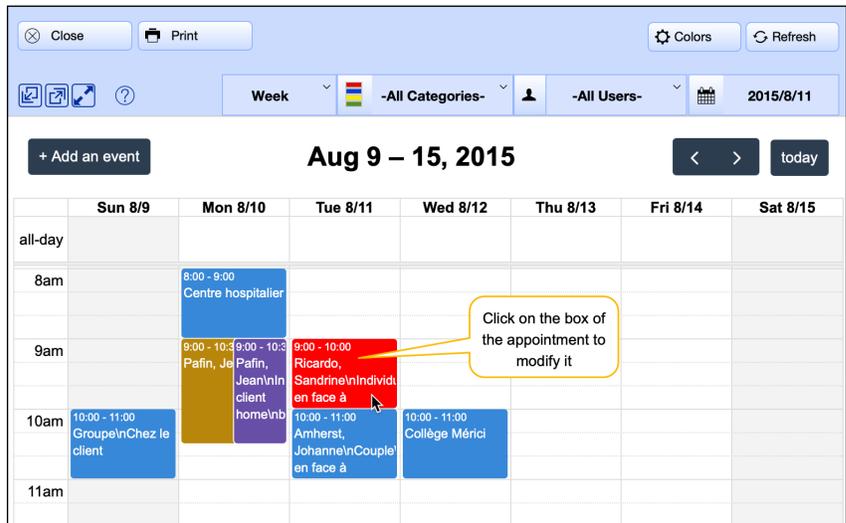


This action will define the mandate by its unique identification number (ID number) which is necessary in the definition of the activity.

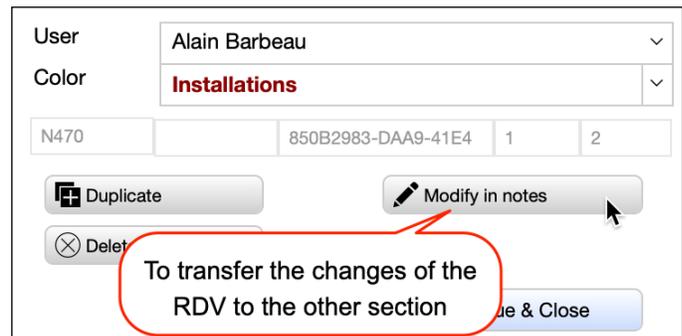


3.3.4 Modify an appointment from the calendar

From the calendar window, you can edit any appointment. Just click on the box of the appointment, which will display an additional window containing the details of the appointment.



If the appointment corresponds to a session (Notes section) or a group meeting or an institutional activity, another tool will be present. Once you have made your changes to the dates or times or color, you will need to click on the tool present to transfer these changes to the follow-up note.



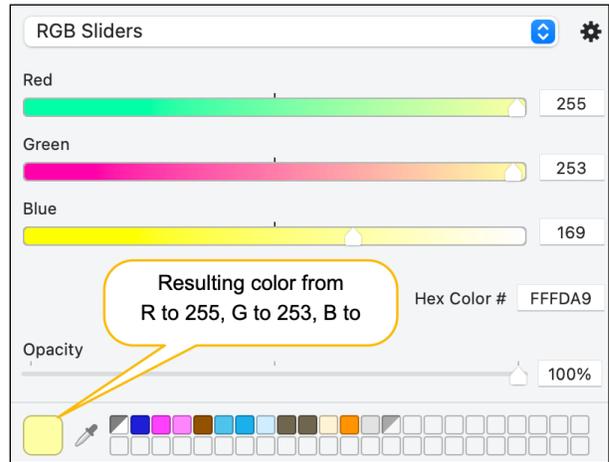
4. Edit the colors of the appointments

The colors in an agenda allow you to quickly see a category of appointments based on its color.

It is therefore necessary to give a particular meaning to each color. For example, different colors would allow you to quickly identify which meetings (appointments) will be made via videoconferencing and which will be made face to face.

The intensity of each color is defined by a number between 0 and 255. The number 255 corresponds to the maximum of the color, while the 0 corresponds to its absence. And each color is a mixture or not of the following three colors: Red, Green, Blue; usually identified by the letters R.G.B.

The tool shown here is not available in the agenda, but it is available as a utility in MacOS computers under the name "Colors".



With Windows, you can open the "Paint" application and then display "Brushes" and click on the color to get a tool to define it by RGB.

These tools are present here for information purposes, you don't really need them to define a color.

In the agenda interface, click on "Colors" to display the list of available custom colors.



The tool available in the agenda contains a section to define the meaning given to the color and three sections to determine the intensity of each of the constituent colors.

Simply click on the "Add Color" tool to create a new color.



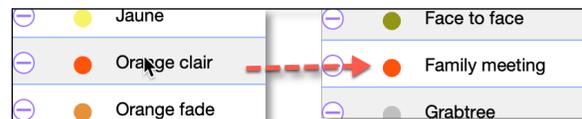
You can delete the ones you won't use.

You can use the existing default colors and you can change their names to give them the meaning you want. Click on the name to change it.

Appointment colors		R	G	B
+ Adding a color				
Meanings				
Face to face		145	150	20
Grabtree		192	192	192
Grayhound		128	128	128
Home clinic				167
Installations		139	0	0
Orange clair		245	245	100
Orange clair		255	83	8
Orange fade		230	145	56
Pêche		255	169	122
Rencontres		255	0	0

Here is an example of a modification.

Click on the "X" at the top left of the window to close it.



5. Delete an appointment

Each time you use the tool: "Add an appointment" the appointment is automatically created and added to the calendar. But you may change your mind after clicking on the tool and this addition is no longer necessary.

To delete it, click on the tool at the bottom of the appointment definition window.

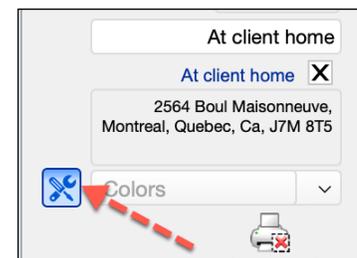
If you delete an appointment that matches a note in another section, only the appointment in the agenda is deleted. To delete both entries, the one in the agenda and the one in another section of BaseDPsy, for example in the "Notes (follow-up)" section. We suggest that you display the two windows side by side, display the same appointment in each section and then delete them.

Missing appointment

If you have deleted an appointment by mistake in the agenda corresponding to a session in the "Notes (follow-up)" section:

Display the affected note in the "Notes" section and click on the tool next to the item to set the color. This tool is only visible if there is no appointment in the Calendar corresponding to this note.

Moreover, when the appointment does not exist in the agenda, the color choice field is also empty.



On the other hand, this tool, which is normally hidden if an appointment has been created in the agenda, will be visible for all appointments imported from the old BaseDPsy calendar; therefore, it should not be used for these old appointments, otherwise you will create duplicates in the agenda.

The same tool is present in the Institutional Activities and Group Meetings sections.