

### Why is Clio releasing a new Calendar?

We heard the need for increased transparency into activities at a glance, and the ability to take more actions with ease.

Built to serve lawyers, Clio's modernized Calendar delivers legal-specific features that help you to stay on track, save time, and deliver better client service.

The new Calendar also helps move the Clio application onto newer technology; with which we hope to be able to deliver more frequent feature improvements going forward.

### What new features/functionality are being released?

We are releasing a complete overhaul of the Calendar's user interface. Highlights include:

#### Viewing and navigating the Calendar:

- A full redesign of the Calendar interface: information is easier to scan with improved spacing, text, and contrast.
- Quick actions - including edit, delete, matter links, clickable description links, and time entry creation - are available with a single click on a Calendar event.
- To clean up the view, you can now click on events in order to see basic event details.
- The Calendar view more clearly displays the current time and day of the week.
- The Calendar view now displays all-day events without obstructing the rest of the view.
- The Calendar now has the option to limit the Calendar view to business hours only.
- A better datepicker improves navigation through the Calendar.
- Improved accessibility and keyboard navigation.
- The new "My Calendars" section shows your Calendars separate from those owned by others at the firm.
- A new, printable agenda view has been added to the Calendar.
- Improved backend speed; the new Calendar view loads events approximately 50% faster.

#### Adding and editing Calendar entries:

- Creating and editing events requires fewer clicks, with everything displayed on a single screen.
- Elite plan subscribers can now add Court Calendaring Rules from the Calendar view.
- Changing and understanding when recurring events are scheduled is much easier.
- A new ability to mark scheduled tasks as complete from the Calendar view.
- Suggested contacts appear when creating a Calendar event, if a matter has been selected.
- Optional email notifications for firm users when they are invited to events, and when events in their schedule are updated or deleted.

#### Other areas in Clio:

- Improved display of events in the "Calendar" subtab on a matter, with the ability to filter out past events.
- Events can now be created from the global create button.

#### What is not included in this release?

- Enhancements to the new Calendar will not impact how Clio syncs with third party Calendars, specifically Office 365 and Google Calendars.
- The ability to add the firm Calendar as an attendee to an event is not available in the new Calendar.
- The ability to hover on an event to see event details has been replaced with a single click.

#### Why did Clio replace the ability to hover on an event to see event details with a click?

Event hovering was a contentious feature that some of our customers loved, but others disliked. We have replaced the hover functionality with a single click for five reasons:

- Many users reported that the hover functionality created additional noise and clutter when working on a busy Calendar.
- Hover functionality is much less usable from an accessibility perspective for users that are not able to use their mouse to navigate the Calendar.
- Our user testing indicated that clicking was an acceptable alternative to hovering (similar time delay in access to event details).

- Clicking is more in-line with other modern Calendars (for example, Google Calendar).
- Clicking now allows you to take quick action from the preview modal, such as adding a time entry or clicking on a URL in the meeting description.

### **How do I print from the new Calendar?**

In order to print, please use the “Print/Export” option, located in the “More” dropdown. This will generate a printable PDF for you.

### **Why do I now have to scroll from side to side to see everyone’s Calendar?**

We received a lot of feedback from customers about event readability in the old Calendar when there were multiple calendars visible and many columns were compressed. Our goal with the new Calendar is to solve this issue.

### **What are some of the areas in which Clio is interested in further improving the new Calendar?**

Clio is interested in hearing about ways that we could improve event scheduling, calendar organization, and task integration on the new Calendar. However, we do not have any concrete plans to enhance these areas in the near future. If you would like to see richer functionality in these areas, please ask a Clio support agent to log a feature request on your behalf.

### **Can Clio re-enable the old Calendar for my account?**

The new Calendar is now being released permanently to Clio customers. If you have a specific obstacle that is preventing you from effectively using the new Calendar, please ask a Clio support agent to log a feature request on your behalf.

### **What happens to my existing data and events when I switch to the new Calendar?**

Your data is automatically carried over and displayed in the new Calendar.

### **Who has access to this feature/functionality?**

All customers, on any Clio plan, will have access to the new Calendar.