

4.3: Recurring Work Records

Welcome to Work Records video 3 of 4: Recurring Records.

Recurring records are easy to set up in advance when planning regular sessions or services and each instance can be edited individually in retrospect to update the attendance table, add session notes, and record any other details.

The key thing to remember when setting these up is that you set the details of the first instance, and then use the recurrence function to replicate it on different dates.

As an example, we'll create a series of six sessions starting today, and carrying on for six weeks. I start by creating a work record, just as in the previous video.

The time and date from is today, 6pm.

The time and date to is also today, at 7pm.

Unless the event goes on into the wee hours, or includes an overnight stay, these two dates will always be the same, as they are the start and end of just one instance of the recurring event.

Ignoring the recurrence option for the moment, I'll detail the rest of the record, entering any information that will be common to all the sessions.

I'll enter a workarea, location, expected attendees, and a summary. Now I'll go back to the 'When and Where' tab and set up the recurrence.

The recurrence field offers various options. I'll start with 'weekly', for six weeks.

As today is a Friday it's showing every Friday The date field allows us to specify when the recurring sessions will end. It's essential to note this text, which says 'until (but not including)'.

I'll click the calendar icon and work my way through the weeks. This means that the last session will take place on 8th June.

As the records will recur until (but not including) the date I specify, I'll choose the day after my final session.

This means that our records will start today and run for six sessions, there being no more as of the date we entered.

Upon saving, you'll see we've now created six recurring records.

Let's open it again and take a look at the other options.

If you choose 'weekly' recurrence, you'll see another drop-down menu to the right. Currently the option's set to every week, but you can choose every two, three, four or five weeks.

- Selecting 'daily' will automatically select every day, every week.
- Selecting 'weekdays' will automatically select just the weekdays.
- Selecting 'monthly' reveals a different set of options, based on the day of the week of the first session. You can specify the event will take place on every first, second, third, fourth or fifth instance of that day, every one, two, three, four or five months.
- Selecting 'annually' will mean it recurs on the same date each year.
- Selecting 'custom' allows you to choose a series of specific dates. Click 'add' to include the first session in the list of dates below. Then enter the next date and click 'add' again. Do this until all dates have been included.

Managing Recurring Records

Let's consider how recurring records are linked—understanding this will help in using them without hiccups.

When records are created in this way, are all linked and all identical apart from the dates. While they are still identical, they can be edited simultaneously.

Through the contextual menu in the diary, or in a table of work records, there is the option to edit either all recurring records in the series or a single record.

While the records are still linked and identical, you can edit the whole series at once. But once you change a single record, it is separated from the set and no longer linked to the others.

Back to our example, a series of six sessions, set up as a recurring record. I've added all six expected attendees. Following the first session, I want to update the attendance table and add notes.

I'll edit that single work record, recording who attended and who didn't by changing their attendance type, and adding my notes before saving. As this session has now been edited singly, it's no longer linked to the series.

One attendee, James, also told me that he won't be coming to any more sessions, so I want to remove him from all the rest of the recurring records.

Navigating to a record that's still in the series, I'll now choose 'edit all records in the series' and remove James from the attendance table. I could also add in a new member or make any other changes affecting all remaining sessions.

The best way to familiarise yourself with how this works is to try it. Why not pause the video, create a recurring record, edit one instance and then make a change to the remaining set.

Troubleshooting Recurring Records

Once you get used to recurring records, they're very intuitive, but there is a common mistake people make when first learning.

When creating a recurring record, it can be tempting to use the 'Time and date to' field as the date the series will end. If I were to put my date six weeks from now into this field, I will have created a single session, continuing day and night without stopping, from the first date to the last. I will also have another record the same the following week, and soon I'll have six of them stretching through every day in the diary. To fix it, I will simply edit the whole set, and adjust the dates correctly.

In the next video, we'll look at viewing and editing work records in a profile. Thanks for watching!