

**Prerequisite:**

Verify the matter on which you are working has a court or judge which has been associated with a **CalendarRules** jurisdiction. Jurisdiction associations must be created by your **System Administrator** or someone with access to the **System Management** module.

**Contents:**

- [\*\*Create an Event with a Trigger\*\*](#)
- [\*\*Review Triggers\*\*](#)
- [\*\*Edit Triggers\*\*](#)
- [\*\*Delete Triggers\*\*](#)
- [\*\*Delete Events with Triggers\*\*](#)

## Create an Event with a Trigger

There are five steps to complete this task:

1. [Open the Calendar for the Matter](#)
2. [Add an Appointment Event](#)
3. [Select a Trigger](#)
4. [Enter the Appointment Details and Save](#)
5. [Select Triggered Events to Add](#)

### Step 1. Open the Calendar for the Matter

With a matter open, select the "Calendar for this Matter" button in the **Module Toolbar**.



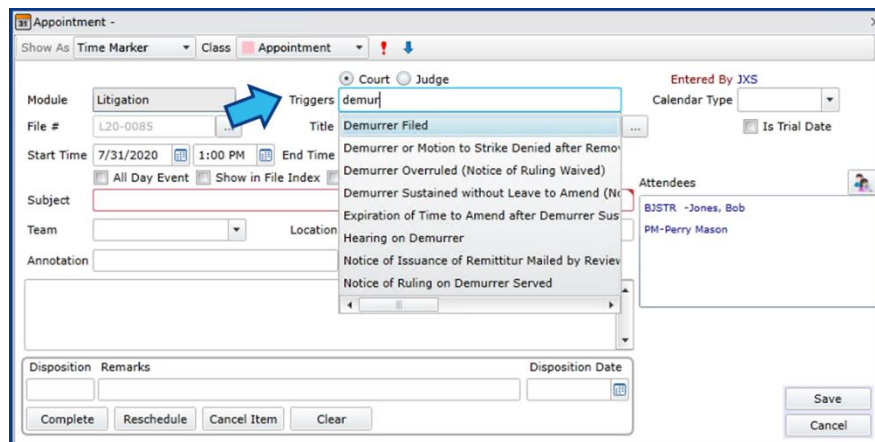
### Step 2. Add an Appointment Event

In the matter calendar, select the **Add Appt.** button at the bottom-left of the screen.



### Step 3. Select a Trigger

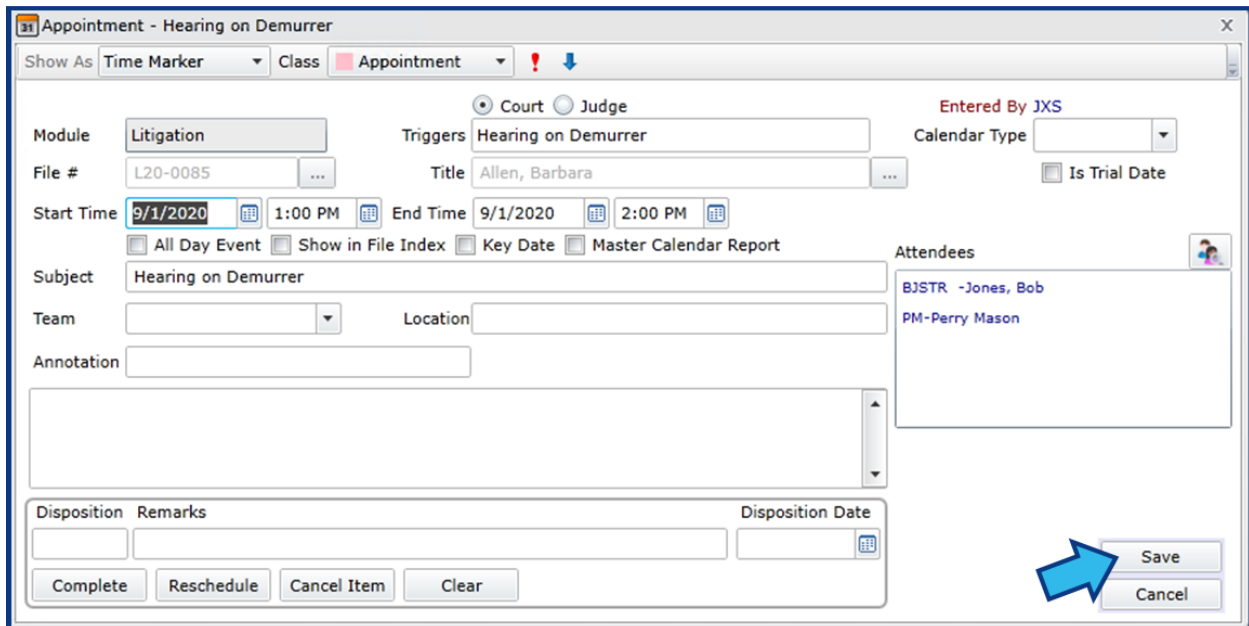
In the **Appointment** window, to create an event and the associated triggers, type a word in the **Triggers** field. In this example I have typed "demur". As you type, you will see a drop-down list appear, and the available selections will automatically filter down to only those triggers containing the characters you have entered.



**NOTE:** If a **CalendarRules** jurisdiction is associated with the court on your matter, then the **Triggers** field will be visible, near the top-center of the dialog. If the **Triggers** entry field is not visible, then a **CalendarRules** jurisdiction has not been associated with the court selected for this matter. Please ask your **System Administrator** to create the association. The following article provides instructions: [Associate a Court with a Jurisdiction](#)

### Step 4. Enter the Appointment Details and Save

Select the desired event from the list. Enter your event dates and times, the **Attendees** on the right-hand side of the **Appointment** entry window, and any other information for the event you wish. A **Subject** is required before you can save the event. When finished, press the **Save** button.

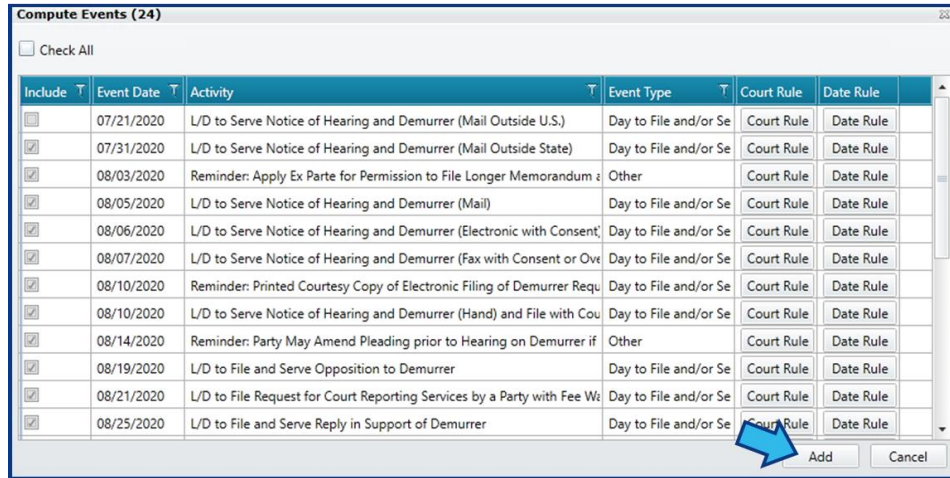


The screenshot shows a software dialog box titled "Appointment - Hearing on Demurrer". At the top, there are tabs for "Show As" (Time Marker) and "Class" (Appointment). Below this, there are radio buttons for "Court" (selected) and "Judge". The "Entered By" field is "JXS". The "Module" is "Litigation", "File #" is "L20-0085", and "Title" is "Allen, Barbara". The "Start Time" is "9/1/2020 1:00 PM" and "End Time" is "9/1/2020 2:00 PM". There are checkboxes for "All Day Event", "Show in File Index", "Key Date", and "Master Calendar Report". The "Subject" is "Hearing on Demurrer". The "Attendees" list includes "BJSTR -Jones, Bob" and "PM-Perry Mason". At the bottom, there are buttons for "Complete", "Reschedule", "Cancel Item", and "Clear". A blue arrow points to the "Save" button.

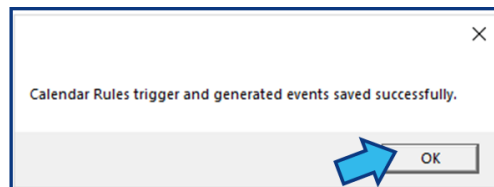
### Step 5. Select Triggered Events to Add

The **Compute Events** window appears, containing a list of events which correspond to your selected **Trigger**. At this point you may uncheck any events which do not apply to your current matter's situation, and they will not be created. If a computed event is triggered for a date which has already passed, that event will be unchecked by default in the list.

When you are finished reviewing the computed events, press the **Add** button in the lower right to create them.



You should receive notification the events saved successfully. Select **OK**.



You will now see the **Appointment** you created listed with all the **Due** events that pertain to that **Appointment**.

Reminder	Type	Date	Time	Subject	Location	Attendees
	Due	8/17/2020	04:00 AM	Meeting		JXS
	Due	8/19/2020		L/D to File and Serve Opposition to Demurrer		BJSTR , PM
	Due	8/21/2020		L/D to File Request for Court Reporting Services		BJSTR , PM
	Due	8/25/2020		L/D to File and Serve Reply in Support of Demurrer		BJSTR , PM
	Due	8/25/2020		L/D to File Proof of Service of Moving Paper		BJSTR , PM
	Due	8/27/2020		L/D to Request Delivery of File for Hearing (L)		BJSTR , PM
	Due	8/27/2020		Reminder: Request Court Reporter if Desired		BJSTR , PM
	Due	8/27/2020		L/D to Move to Disqualify Assigned Judge (C)		BJSTR , PM
	Due	8/27/2020		L/D to File Written Request to Introduce Oral		BJSTR , PM
	Due	8/28/2020		L/D for File to be Received by Department of		BJSTR , PM
	Due	8/28/2020		Reminder: Courtesy Copies of Electronic Filings		BJSTR , PM
	Due	8/28/2020		L/D to Provide Notice of Intent to Appear at		BJSTR , PM
	Due	8/31/2020		Tentative Ruling May Be Available (Confirm I)		BJSTR , PM
	Due	8/31/2020		L/D to Provide Notice of Intent to Appear at		BJSTR , PM
	Appointment	9/1/2020	01:00 PM	Hearing on Demurrer		BJSTR , PM
	Due	9/8/2020		Reminder: Prevailing Party Must Serve Process		BJSTR , PM
	Due	9/11/2020		L/D to Answer or Otherwise Plead to the Co		BJSTR , PM

## Review Triggers

There are two steps to complete this task:

1. [Open the Calendar for the Matter](#)
2. [Display the Auto Calendar View](#)

### Step 1. Open the Calendar for the Matter

With a matter open, select the "Calendar for this Matter" button in the **Module Toolbar**.



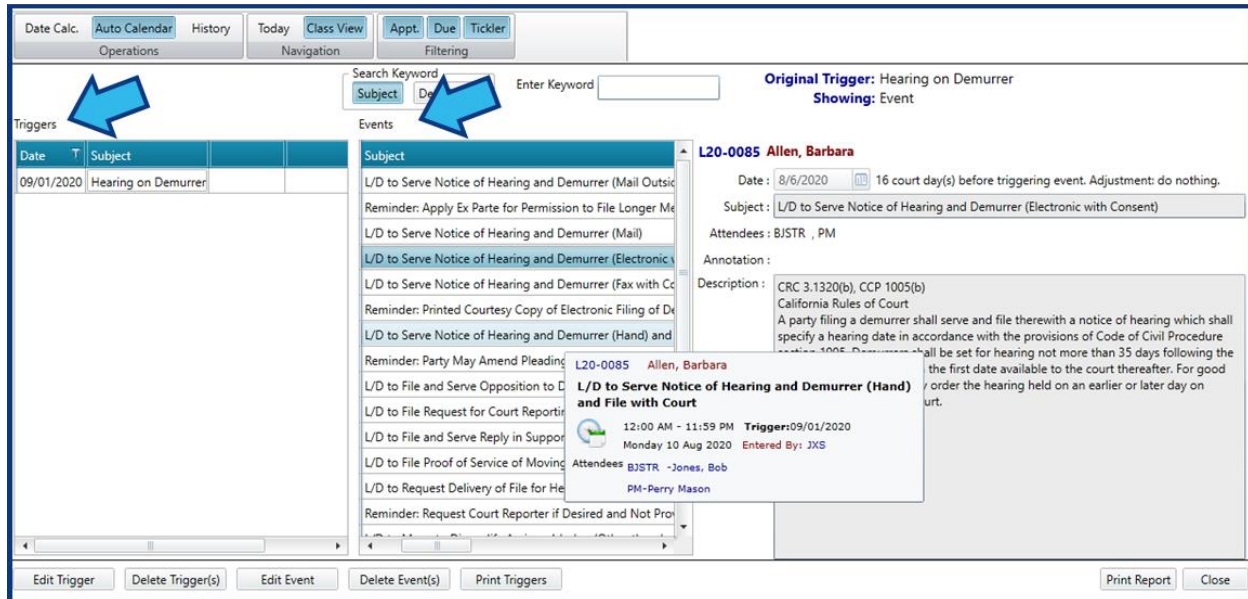
### Step 2. Display the Auto Calendar View

In the Calendar, press the **Auto Calendar** button to see the **Auto Calendar View**, which shows **Trigger** details.

Reminder	Type	Date	Time	Subject	Location	Attendees
	Due	8/17/2020	04:00 AM	Meeting		JXS
	Due	8/19/2020		L/D to File and Serve Opposition to Demurr		BJSTR , PM
	Due	8/21/2020		L/D to File Request for Court Reporting Serv		BJSTR , PM
	Due	8/25/2020		L/D to File and Serve Reply in Support of De		BJSTR , PM
	Due	8/25/2020		L/D to File Proof of Service of Moving Paper		BJSTR , PM
	Due	8/27/2020		L/D to Request Delivery of File for Hearing (		BJSTR , PM
	Due	8/27/2020		Reminder: Request Court Reporter if Desirc		BJSTR , PM
	Due	8/27/2020		L/D to Move to Disqualify Assigned Judge (		BJSTR , PM
	Due	8/27/2020		L/D to File Written Request to Introduce Ore		BJSTR , PM
	Due	8/28/2020		L/D for File to be Received by Department ir		BJSTR , PM
	Due	8/28/2020		Reminder: Courtesy Copies of Electronic Filir		BJSTR , PM
	Due	8/28/2020		L/D to Provide Notice of Intent to Appear at		BJSTR , PM
	Due	8/31/2020		Tentative Ruling May Be Available (Confirm I		BJSTR , PM
	Due	8/31/2020		L/D to Provide Notice of Intent to Appear at		BJSTR , PM
	Appointment	9/1/2020	01:00 PM	Hearing on Demurrer		BJSTR , PM
	Due	9/8/2020		Reminder: Prevailing Party Must Serve Propc		BJSTR , PM
	Due	9/11/2020		L/D to Answer or Otherwise Plead to the Co		BJSTR , PM

**Triggers** are listed on the left under the **Triggers** label. **Events** are listed on the right under the **Events** label. Details of an event can be seen by hovering your mouse over the event listing (shown in the image below with mouse hovered over event three rows below

the highlighted event). Details about the court rules used to generate the highlighted event can be previewed on the far-right.



The screenshot displays the 'Manage Events with Triggers' interface. At the top, there are navigation tabs: 'Date Calc.', 'Auto Calendar', 'History', 'Today', 'Class View', 'Appt.', 'Due', and 'Tickler'. Below these are sections for 'Operations', 'Navigation', and 'Filtering'. A search bar is present with a 'Search Keyword' field and a 'Subject' dropdown menu. Two blue arrows point to the 'Subject' column in the 'Triggers' table and the 'Subject' dropdown menu in the 'Events' list.

The 'Triggers' table has the following data:

Date	Subject
09/01/2020	Hearing on Demurrer

The 'Events' list shows a list of events, with the following event selected:

- L20-0085 Allen, Barbara**
- Date: 8/6/2020 (16 court day(s) before triggering event. Adjustment: do nothing.)
- Subject: L/D to Serve Notice of Hearing and Demurrer (Electronic with Consent)
- Attendees: BJSTR, PM
- Annotation:
- Description: CRC 3.1320(b), CCP 1005(b) California Rules of Court. A party filing a demurrer shall serve and file therewith a notice of hearing which shall specify a hearing date in accordance with the provisions of Code of Civil Procedure section 1005(b). The hearing date shall be set for hearing not more than 35 days following the first date available to the court thereafter. For good cause shown, the court may order the hearing held on an earlier or later day on court.
- Trigger: 09/01/2020
- Entered By: JKS
- Attendees: BJSTR - Jones, Bob; PM - Perry Mason

At the bottom of the interface, there are buttons for 'Edit Trigger', 'Delete Trigger(s)', 'Edit Event', 'Delete Event(s)', 'Print Triggers', 'Print Report', and 'Close'.

## Edit Triggers

There are five steps to complete this task:

1. [Open the Calendar for the Matter](#)
2. [Display the Auto Calendar View](#)
3. [Select Edit Trigger](#)
4. [Edit the Trigger and Calculate the Changes](#)
5. [Save the Recalculated Events](#)

### Step 1. Open the Calendar for the Matter

With a matter open, select the "Calendar for this Matter" button in the **Module Toolbar**.



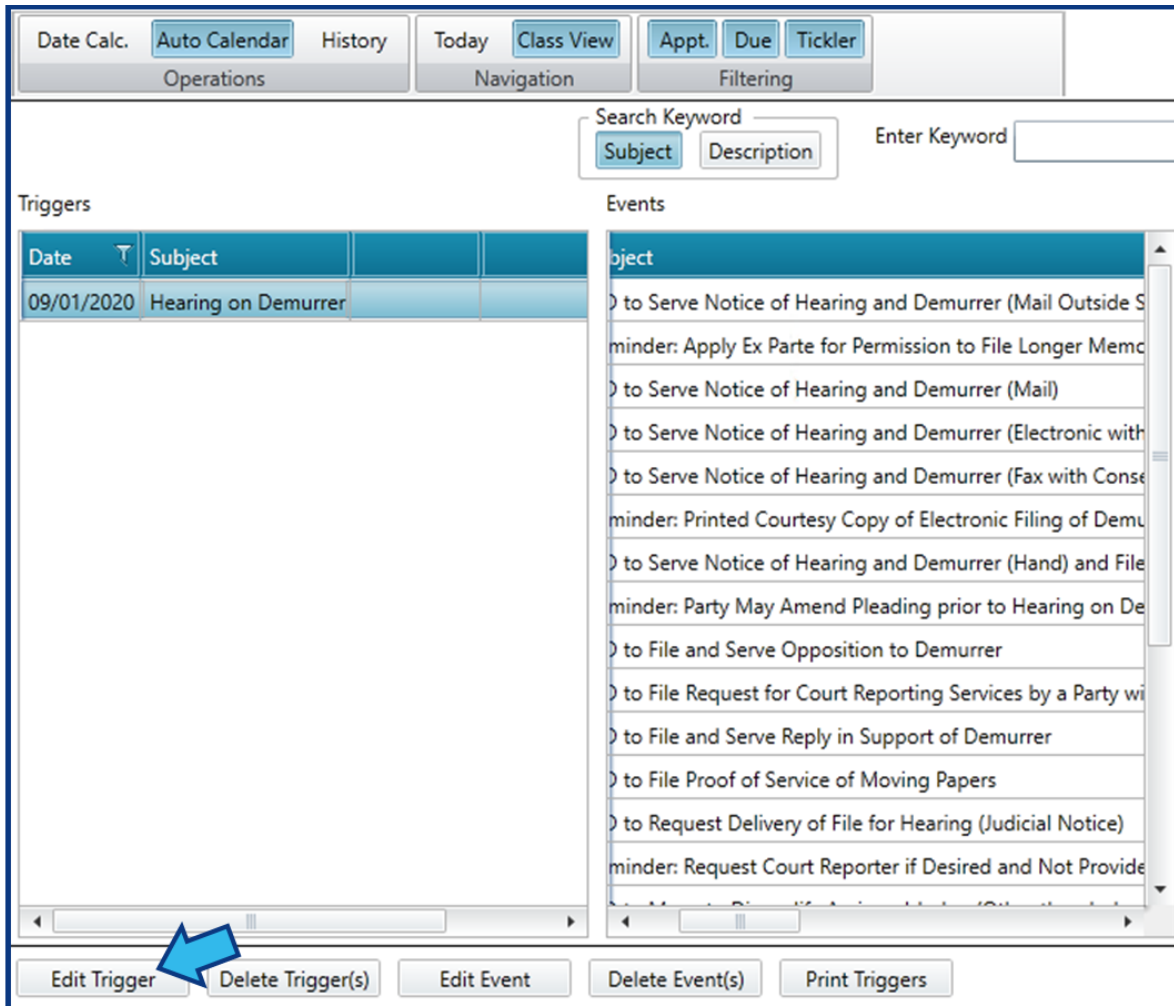
### Step 2. Display the Auto Calendar View

In the Calendar, press the **Auto Calendar** button to see the **Auto Calendar View**, which shows **Trigger** details.

Reminder	Type	Date	Time	Subject	Location	Attendees
	Due	8/17/2020	04:00 AM	Meeting		JXS
	Due	8/19/2020		L/D to File and Serve Opposition to Demurrer		BJSTR , PM
	Due	8/21/2020		L/D to File Request for Court Reporting Serv		BJSTR , PM
	Due	8/25/2020		L/D to File and Serve Reply in Support of De		BJSTR , PM
	Due	8/25/2020		L/D to File Proof of Service of Moving Paper		BJSTR , PM
	Due	8/27/2020		L/D to Request Delivery of File for Hearing (		BJSTR , PM
	Due	8/27/2020		Reminder: Request Court Reporter if Desirc		BJSTR , PM
	Due	8/27/2020		L/D to Move to Disqualify Assigned Judge (C		BJSTR , PM
	Due	8/27/2020		L/D to File Written Request to Introduce Ora		BJSTR , PM
	Due	8/28/2020		L/D for File to be Received by Department ir		BJSTR , PM
	Due	8/28/2020		Reminder: Courtesy Copies of Electronic Filir		BJSTR , PM
	Due	8/28/2020		L/D to Provide Notice of Intent to Appear at		BJSTR , PM
	Due	8/31/2020		Tentative Ruling May Be Available (Confirm I		BJSTR , PM
	Due	8/31/2020		L/D to Provide Notice of Intent to Appear at		BJSTR , PM
	Appointment	9/1/2020	01:00 PM	Hearing on Demurrer		BJSTR , PM
	Due	9/8/2020		Reminder: Prevailing Party Must Serve Propc		BJSTR , PM
	Due	9/11/2020		L/D to Answer or Otherwise Plead to the Co		BJSTR , PM

### Step 3. Select Edit Trigger

In the **Auto Calendar View**, highlight a **Trigger** and select the **Edit Trigger** button at the bottom-left of the screen. The **Appointment** will open to allow you to edit the event date.



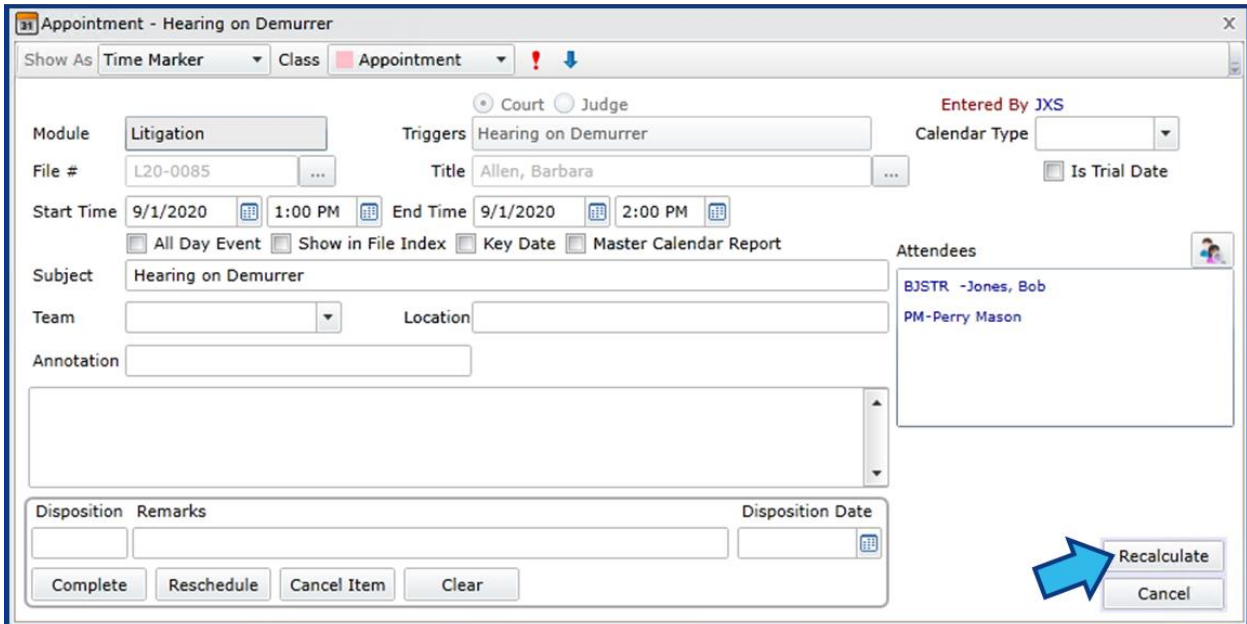
The screenshot displays the 'Auto Calendar View' interface. At the top, there are navigation tabs: 'Date Calc.', 'Auto Calendar' (selected), 'History', 'Today', 'Class View', 'Appt.', 'Due', and 'Tickler'. Below these are sub-sections: 'Operations', 'Navigation', and 'Filtering'. A search bar is present with 'Search Keyword' and 'Enter Keyword' fields, and buttons for 'Subject' and 'Description'. The main area is split into two panes: 'Triggers' and 'Events'. The 'Triggers' pane contains a table with the following data:

Date	Subject
09/01/2020	Hearing on Demurrer

The 'Events' pane shows a list of tasks related to the selected trigger, such as 'to Serve Notice of Hearing and Demurrer (Mail Outside S...', 'reminder: Apply Ex Parte for Permission to File Longer Memo...', 'to Serve Notice of Hearing and Demurrer (Mail)', 'to Serve Notice of Hearing and Demurrer (Electronic with...', 'to Serve Notice of Hearing and Demurrer (Fax with Conse...', 'reminder: Printed Courtesy Copy of Electronic Filing of Demu...', 'to Serve Notice of Hearing and Demurrer (Hand) and File...', 'reminder: Party May Amend Pleading prior to Hearing on De...', 'to File and Serve Opposition to Demurrer', 'to File Request for Court Reporting Services by a Party wi...', 'to File and Serve Reply in Support of Demurrer', 'to File Proof of Service of Moving Papers', 'to Request Delivery of File for Hearing (Judicial Notice)', and 'reminder: Request Court Reporter if Desired and Not Provide...'. At the bottom of the interface, there are five buttons: 'Edit Trigger', 'Delete Trigger(s)', 'Edit Event', 'Delete Event(s)', and 'Print Triggers'. A blue arrow points to the 'Edit Trigger' button.

### Step 4. Edit the Trigger and Calculate the Changes

Make the desired changes to the trigger date, then press the **Recalculate** button. The **Compute Events** window will open.



Appointment - Hearing on Demurrer

Show As Time Marker Class Appointment

Module Litigation Triggers Hearing on Demurrer Entered By JXS

File # L20-0085 Title Allen, Barbara Calendar Type

Start Time 9/1/2020 1:00 PM End Time 9/1/2020 2:00 PM

Subject Hearing on Demurrer

Team Location

Annotation

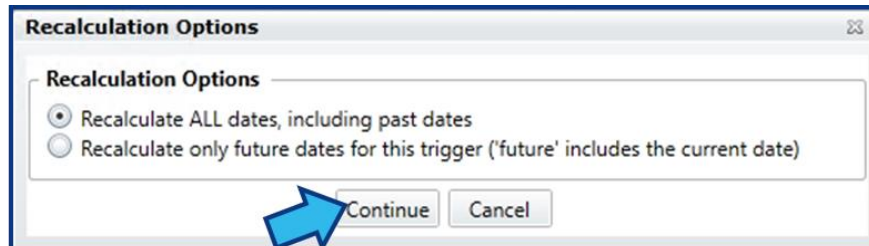
Attendees: BJSTR -Jones, Bob; PM-Perry Mason

Disposition Remarks Disposition Date

Complete Reschedule Cancel Item Clear

Recalculate Cancel

A **Recalculation Options** window will appear asking you to select to recalculate ALL dates or only future dates. Select the option you want and select **Continue**.



Recalculation Options


Recalculation Options

- Recalculate ALL dates, including past dates
- Recalculate only future dates for this trigger ('future' includes the current date)

Continue Cancel

## Step 5. Save the Recalculated Events

The **Compute Events** window shows all the recalculations which occurred as a result of the trigger edit. Review the recalculated triggers and press the **Save** button to accept the changes.



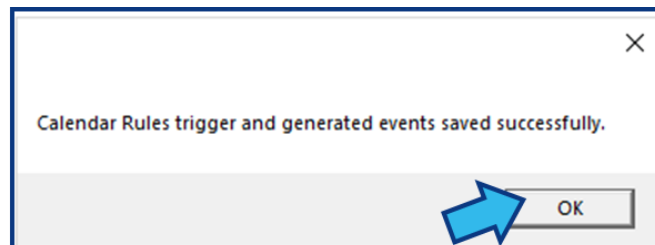
**Compute Events (24)**

Check All

Include	Event Date	Activity	Event Type	Court Rule	Date Rule
<input checked="" type="checkbox"/>	07/31/2020	L/D to Serve Notice of Hearing and Demurrer (Mail Outside U.S.)	Day to File and/or Se	Court Rule	Date Rule
<input checked="" type="checkbox"/>	08/11/2020	L/D to Serve Notice of Hearing and Demurrer (Mail Outside State)	Day to File and/or Se	Court Rule	Date Rule
<input checked="" type="checkbox"/>	08/12/2020	Reminder: Apply Ex Parte for Permission to File Longer Memorandum	Other	Court Rule	Date Rule
<input checked="" type="checkbox"/>	08/14/2020	L/D to Serve Notice of Hearing and Demurrer (Mail)	Day to File and/or Se	Court Rule	Date Rule
<input checked="" type="checkbox"/>	08/19/2020	L/D to Serve Notice of Hearing and Demurrer (Electronic with Consent)	Day to File and/or Se	Court Rule	Date Rule
<input checked="" type="checkbox"/>	08/19/2020	L/D to Serve Notice of Hearing and Demurrer (Fax with Consent or Ove	Day to File and/or Se	Court Rule	Date Rule
<input checked="" type="checkbox"/>	08/21/2020	Reminder: Printed Courtesy Copy of Electronic Filing of Demurrer Requ	Day to File and/or Se	Court Rule	Date Rule
<input checked="" type="checkbox"/>	08/21/2020	L/D to Serve Notice of Hearing and Demurrer (Hand) and File with Cou	Day to File and/or Se	Court Rule	Date Rule
<input checked="" type="checkbox"/>	08/28/2020	Reminder: Party May Amend Pleading prior to Hearing on Demurrer if	Other	Court Rule	Date Rule
<input checked="" type="checkbox"/>	09/01/2020	L/D to File and Serve Opposition to Demurrer	Day to File and/or Se	Court Rule	Date Rule
<input checked="" type="checkbox"/>	09/04/2020	L/D to File Request for Court Reporting Services by a Party with Fee W	Day to File and/or Se	Court Rule	Date Rule
<input checked="" type="checkbox"/>	09/08/2020	L/D to File and Serve Reply in Support of Demurrer	Day to File and/or Se	Court Rule	Date Rule

**Save** **Cancel**

You should receive notification the events saved successfully. Select **OK**.



## Delete Triggers

There are four steps to complete this task:

1. [Open the Calendar for the Matter](#)
2. [Display the Auto Calendar View](#)
3. [Select the Trigger\(s\) to Delete](#)
4. [Select Delete Triggers and Confirm](#)

### Step 1. Open the Calendar for the Matter

With a matter open, select the "Calendar for this Matter" button in the **Module Toolbar**.



### Step 2. Display the Auto Calendar View

In the Calendar, press the **Auto Calendar** button to see the **Auto Calendar View**, which shows **Trigger** details.

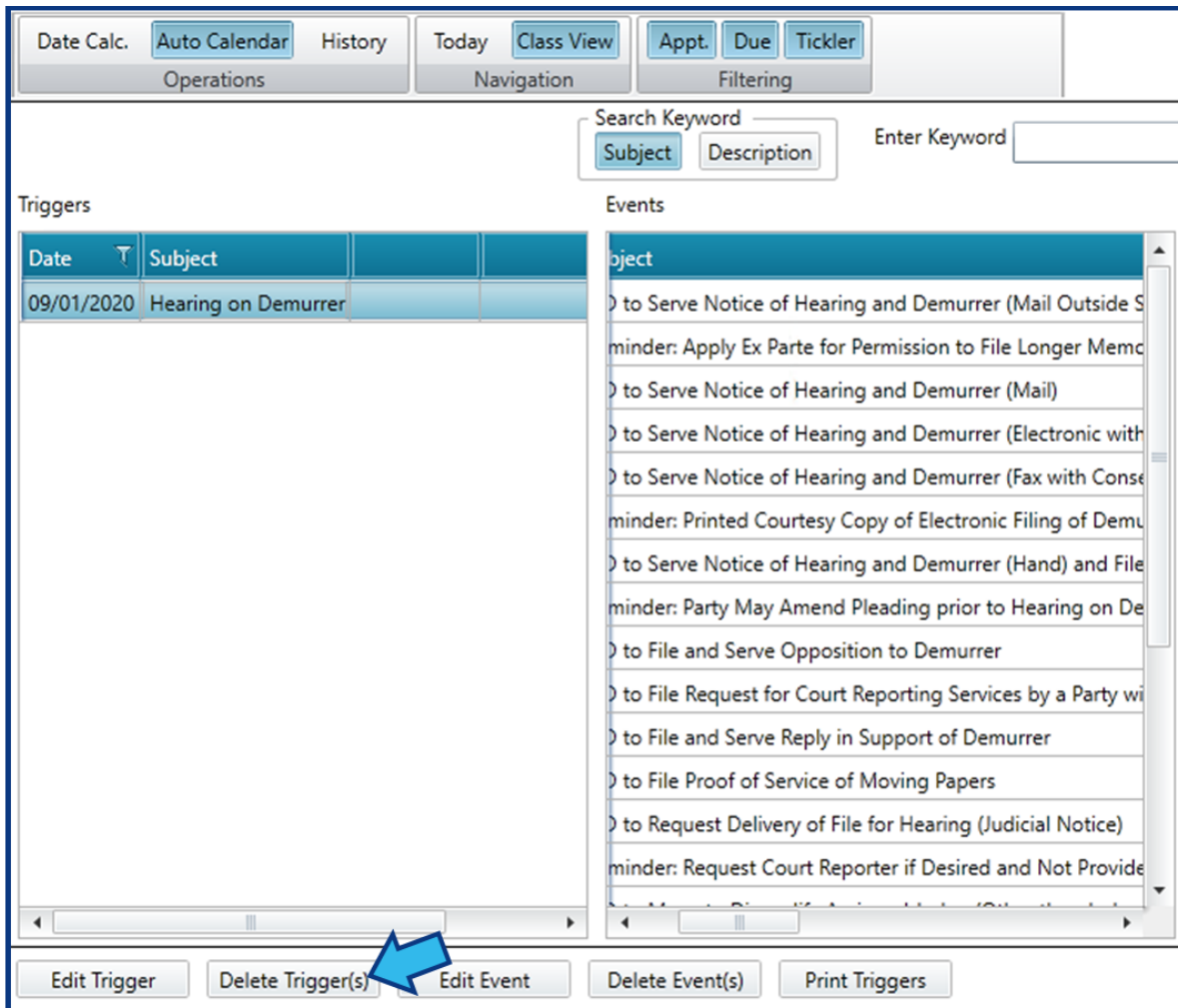
Reminder	Type	Date	Time	Subject	Location	Attendees
	Due	8/17/2020	04:00 AM	Meeting		JXS
	Due	8/19/2020		L/D to File and Serve Opposition to Demurr		BJSTR , PM
	Due	8/21/2020		L/D to File Request for Court Reporting Serv		BJSTR , PM
	Due	8/25/2020		L/D to File and Serve Reply in Support of De		BJSTR , PM
	Due	8/25/2020		L/D to File Proof of Service of Moving Paper		BJSTR , PM
	Due	8/27/2020		L/D to Request Delivery of File for Hearing (		BJSTR , PM
	Due	8/27/2020		Reminder: Request Court Reporter if Desirc		BJSTR , PM
	Due	8/27/2020		L/D to Move to Disqualify Assigned Judge (C		BJSTR , PM
	Due	8/27/2020		L/D to File Written Request to Introduce Ora		BJSTR , PM
	Due	8/28/2020		L/D for File to be Received by Department ir		BJSTR , PM
	Due	8/28/2020		Reminder: Courtesy Copies of Electronic Filir		BJSTR , PM
	Due	8/28/2020		L/D to Provide Notice of Intent to Appear at		BJSTR , PM
	Due	8/31/2020		Tentative Ruling May Be Available (Confirm I		BJSTR , PM
	Due	8/31/2020		L/D to Provide Notice of Intent to Appear at		BJSTR , PM
	Appointment	9/1/2020	01:00 PM	Hearing on Demurrer		BJSTR , PM
	Due	9/8/2020		Reminder: Prevailing Party Must Serve Propc		BJSTR , PM
	Due	9/11/2020		L/D to Answer or Otherwise Plead to the Co		BJSTR , PM

### Step 3. Select the Trigger(s) to Delete

In the **Auto Calendar View**, highlight the **Trigger(s)** you wish to delete.

### Step 4. Select Delete Triggers and Confirm

Press the **Delete Trigger(s)** button.

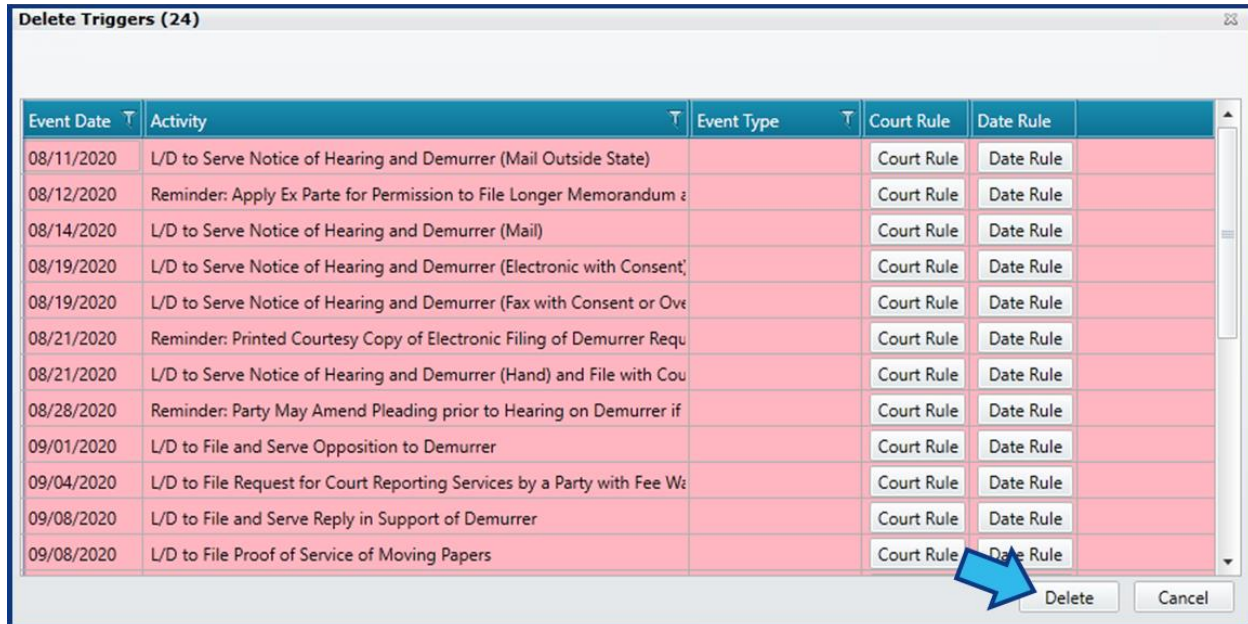


The screenshot shows the software interface with the following components:

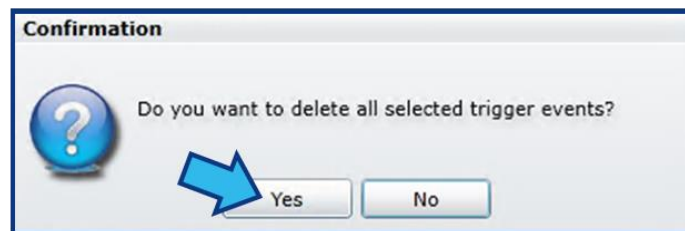
- Top Navigation:** Date Calc., Auto Calendar (selected), History, Today, Class View, Appt., Due, Tickler.
- Search:** Search Keyword (Subject, Description), Enter Keyword.
- Triggers Table:**

Date	Subject
09/01/2020	Hearing on Demurrer
- Events List:**
  - to Serve Notice of Hearing and Demurrer (Mail Outside S
  - minder: Apply Ex Parte for Permission to File Longer Memc
  - to Serve Notice of Hearing and Demurrer (Mail)
  - to Serve Notice of Hearing and Demurrer (Electronic with
  - to Serve Notice of Hearing and Demurrer (Fax with Conse
  - minder: Printed Courtesy Copy of Electronic Filing of Demu
  - to Serve Notice of Hearing and Demurrer (Hand) and File
  - minder: Party May Amend Pleading prior to Hearing on De
  - to File and Serve Opposition to Demurrer
  - to File Request for Court Reporting Services by a Party wi
  - to File and Serve Reply in Support of Demurrer
  - to File Proof of Service of Moving Papers
  - to Request Delivery of File for Hearing (Judicial Notice)
  - minder: Request Court Reporter if Desired and Not Provide
- Bottom Buttons:** Edit Trigger, Delete Trigger(s) (highlighted with a blue arrow), Edit Event, Delete Event(s), Print Triggers.

The **Delete Triggers** window appears, showing the affected **Due** events. Select the **Delete** button to delete the **Trigger** along with all the associated **Due** events.



You will be prompted with a **Confirmation** window to confirm you wish to delete the **Trigger** and its **Events**. Select **Yes**.



## Delete Events with Triggers

There are four steps to complete this task:

1. [Open the Calendar for the Matter](#)
2. [Display the Auto Calendar View](#)
3. [Select the Event\(s\) to Delete](#)
4. [Select Delete Events and Confirm](#)

### Step 1. Open the Calendar for the Matter

With a matter open, select the "Calendar for this Matter" button in the **Module Toolbar**.



### Step 2. Display the Auto Calendar View

In the Calendar, press the **Auto Calendar** button to see the **Auto Calendar View**, which shows **Trigger** details.

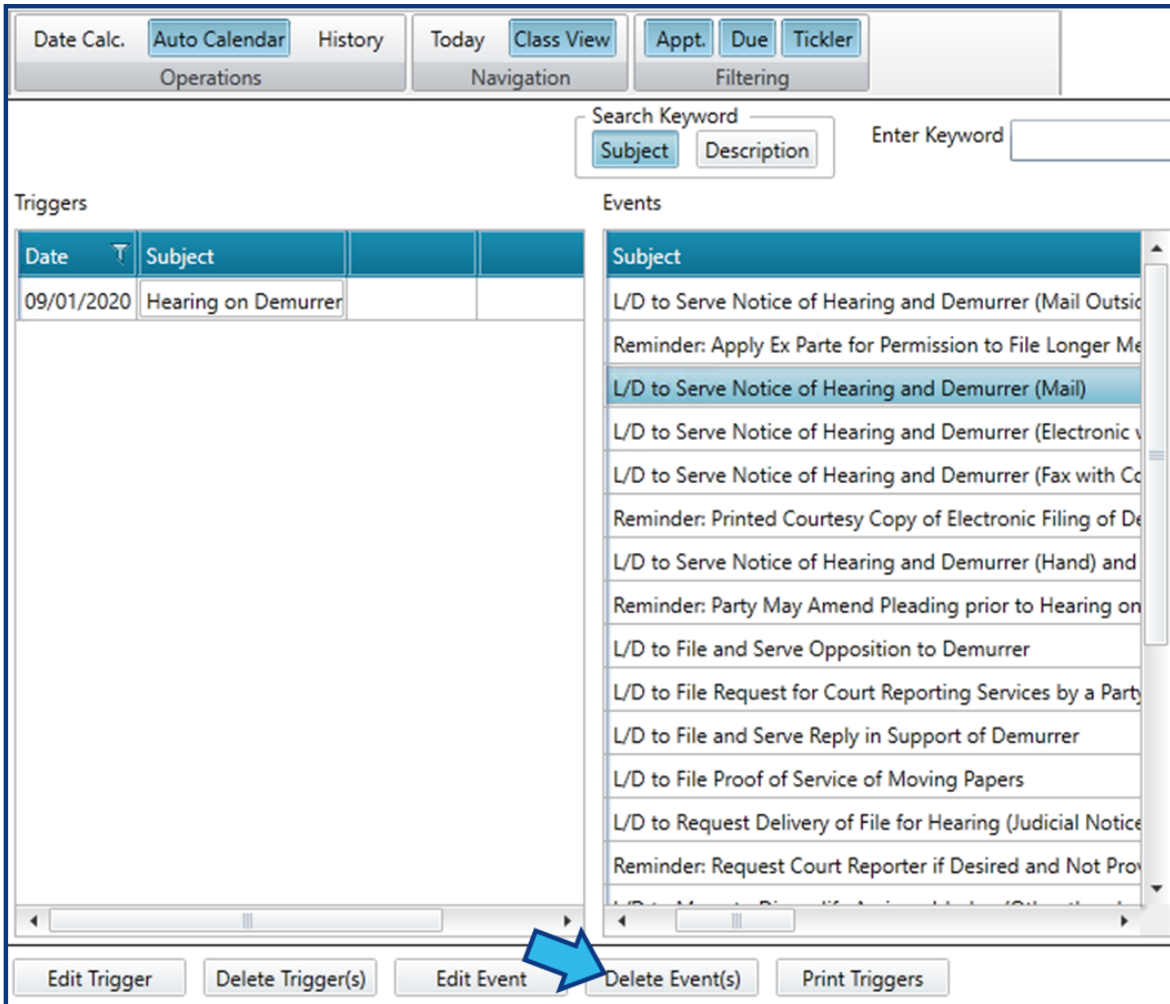
Reminder	Type	Date	Time	Subject	Location	Attendees
	Due	8/17/2020	04:00 AM	Meeting		JXS
	Due	8/19/2020		L/D to File and Serve Opposition to Demurr		BJSTR , PM
	Due	8/21/2020		L/D to File Request for Court Reporting Serv		BJSTR , PM
	Due	8/25/2020		L/D to File and Serve Reply in Support of De		BJSTR , PM
	Due	8/25/2020		L/D to File Proof of Service of Moving Paper		BJSTR , PM
	Due	8/27/2020		L/D to Request Delivery of File for Hearing (		BJSTR , PM
	Due	8/27/2020		Reminder: Request Court Reporter if Desirc		BJSTR , PM
	Due	8/27/2020		L/D to Move to Disqualify Assigned Judge (C		BJSTR , PM
	Due	8/27/2020		L/D to File Written Request to Introduce Ora		BJSTR , PM
	Due	8/28/2020		L/D for File to be Received by Department ir		BJSTR , PM
	Due	8/28/2020		Reminder: Courtesy Copies of Electronic Filir		BJSTR , PM
	Due	8/28/2020		L/D to Provide Notice of Intent to Appear at		BJSTR , PM
	Due	8/31/2020		Tentative Ruling May Be Available (Confirm I		BJSTR , PM
	Due	8/31/2020		L/D to Provide Notice of Intent to Appear at		BJSTR , PM
	Appointment	9/1/2020	01:00 PM	Hearing on Demurrer		BJSTR , PM
	Due	9/8/2020		Reminder: Prevailing Party Must Serve Propc		BJSTR , PM
	Due	9/11/2020		L/D to Answer or Otherwise Plead to the Co		BJSTR , PM

### Step 3. Select the Event(s) to Delete

In the **Auto Calendar View**, highlight the **Event(s)** you wish to delete.

### Step 4. Select Delete Events and Confirm

Select the **Delete Events** button.



The screenshot shows the software interface with several tabs: 'Date Calc.', 'Auto Calendar', 'History', 'Today', 'Class View', 'Appt.', 'Due', and 'Tickler'. Below these are sections for 'Operations', 'Navigation', and 'Filtering'. A search bar is present with 'Search Keyword' and 'Enter Keyword' fields, and buttons for 'Subject' and 'Description'. The main area is divided into 'Triggers' and 'Events'. The 'Triggers' table has columns for 'Date' and 'Subject', with one entry: '09/01/2020 Hearing on Demurrer'. The 'Events' list contains various legal notices and reminders, with 'L/D to Serve Notice of Hearing and Demurrer (Mail)' selected. At the bottom, a row of buttons includes 'Edit Trigger', 'Delete Trigger(s)', 'Edit Event', 'Delete Event(s)', and 'Print Triggers'. A blue arrow points to the 'Delete Event(s)' button.

You will be prompted with a **Confirmation** window to confirm you wish to delete the **Events**. Select **Yes**.

