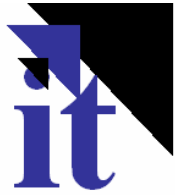


August 2004

Getting Started with Calendaring

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Introduction

This document is a brief introduction to the Calendar feature of the NEOUCOM DOCS Portal.

Overview

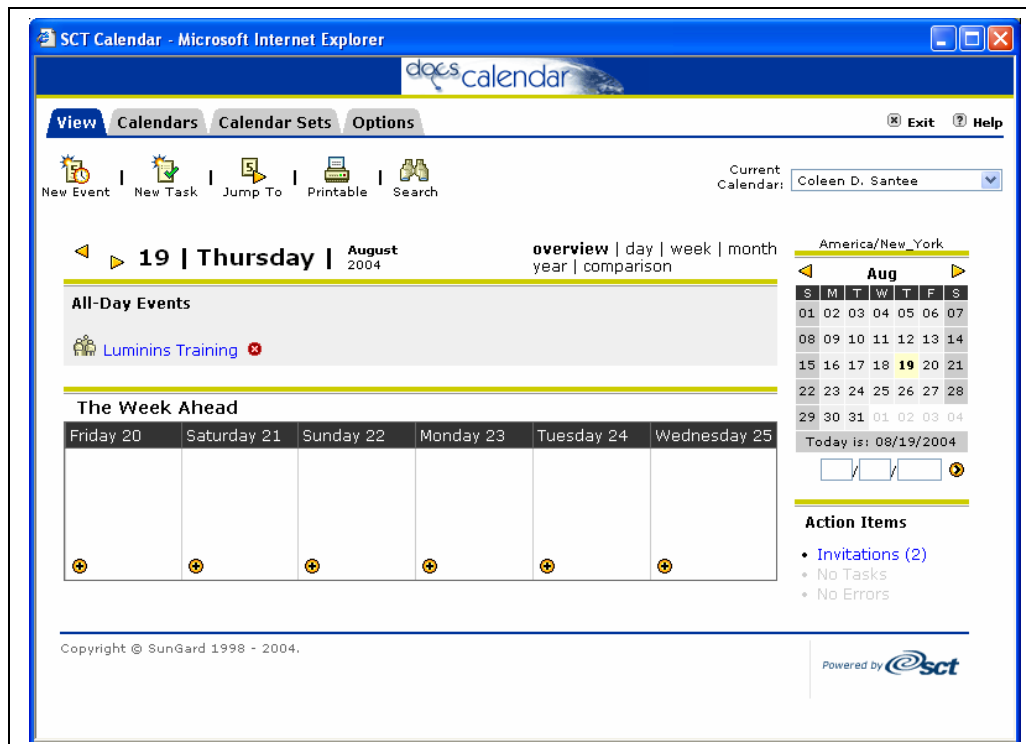
To access your calendar:

1. Login to the NEOUCOM DOCS Portal at <http://DOCS.neoucom.edu>
2. Click on the **Calendar** icon.



3. Your calendar will now be displayed.

When you first open your calendar, you will see the following window. This is the **Overview** view of your calendar.



The following is a brief description of the **Overview** window.

View tab

Click on this tab to view your calendar(s) in different ways. The figure shown is the "Overview" view. The shaded area will display whatever is on your calendar for today. The area immediately below will display the events you have in the coming week. You can also view your calendar one day at a time, one week at a time, one month at a time, or one year at a time by clicking on the appropriate links (day, week, month, year). Note that the year view will not display the events on your calendar, just show you a calendar of the entire year.

The comparison link is most useful when you are viewing a calendar set. A calendar set is calendars you've subscribed to, that you have decided should be put into one set together. This is usually so you can see everyone's busy and available times at a glance, without looking at each calendar individually.

Calendars tab

Click on this tab to create or subscribe to calendars. You can create more than one calendar for yourself (e.g. one for school items, one for personal items). You may also subscribe to other calendars (e.g. your friends or co-workers) if they've granted you access privileges. Once you've created or subscribed to calendars, you can access them under the "Current Calendar" drop-down menu under the View tab.

Calendar Sets tab

Click on this tab to create calendar sets. Calendar sets are calendars that you've chosen to group together so that you may see more than one person's availability at a chosen time. For example, you may manage student assistants and want to group all their calendars together to see when all are available for a meeting.

Options tab

Click on this tab to change your global calendar settings such as the start/end time of your work day, whether you want to be emailed reminders, and other options. You can also use this tab to import or export data in iCal or XML format. XML is a specific format for displaying a web page, while iCal is a format for calendar data (usually used with PDAs).

Action Items

This section on the lower right side of the screen is where you would check to see if you have any meeting invitations you need to reply to, tasks due that day, or errors in your calendar.

New event icon

Click on either New Event icon to create a new event or meeting on your calendar. You can also click on this icon anywhere you see it in your calendar, to create a new meeting or event.



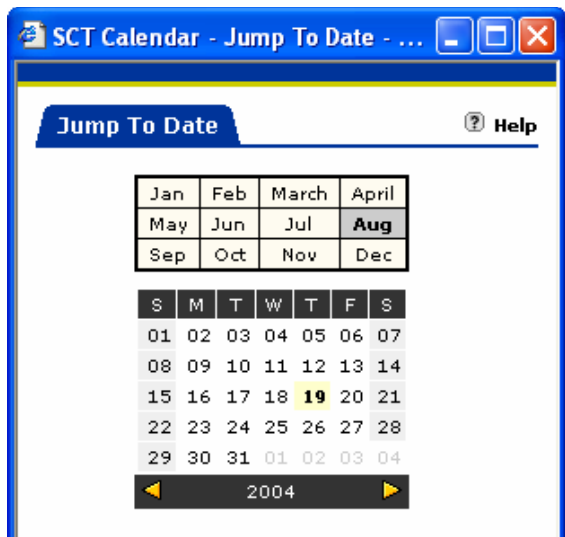
New task icon

Click on this icon to create a new task.



Jump to icon

Click on this icon to quickly jump to another day or year. Once you've clicked on this icon, you will see the following screen:



You can either type in the date you wish to jump to, select a day from the displayed month by clicking on it, select a different month from the current year by clicking on its name, or jump to another year by clicking on the yellow triangles. Once you have selected the date you wish to jump to, click on OK. You can also access this “Jump to date” window anytime you see this icon while creating an event or task:



Printable

Click on this icon to get a printable view of your calendar. This will change depending on what view (day, week, month) you are in before clicking on this icon.

Search

Click on this icon to search your calendar for a specific event or task. Note: the results will not be in chronological order.

Navigating through your calendar

Clicking on the yellow triangles all the way on the left will take you back or forth depending on what view you are in. If you are in the weekly view, it will take you back and forth one week. In the “Overview” view shown, it will take you back and forth one day. You can also use the small month calendar to the right to navigate around; click on the day of the month you want to view, or click on the yellow triangles to go back and forth by months.

Click on **Exit** (upper right) to exit your calendar.

Click on **Help** for on-line calendar help. There is extensive on-line help available. Please refer to this on-line help first for any questions not answered by this document.

Setting Global Calendar Options

1. Click on the **Options** tab.
2. This is where you can change various options for your calendar.

Group Invitations

By default, if you are viewing a calendar set and you create an event on that set, it will automatically send a meeting invitation to all the people who are a part of that set. If you do not want this to happen, uncheck this box.

Date

If you want to change the format of your dates from month, day, year select a different format from the popup menu.

Time

Select either 12 hour clock or 24 hour clock as you prefer.

Day

- a. Select the start and end times of your day.
- b. Select how you want to split your days. If you split your days on the half hour, your day at-a-glance and week-at-a-glance views will show times in that increment (7am, 7:30am, 8am, etc)

Note: The start and stop times can only be on the hour. So a start time of 7:45am is not possible.

First day of the week

Choose what day you want to be on the leftmost column in all of your views. You may want to change this to Monday if that is the first day of your work week; then Saturday and Sunday will be grouped together on the right. This option will be most obvious in the week-at-a-glance and month-at-a-glance views.

If you wish, you can check the box for Exclude Saturday and Sunday if you do not wish to see those days displayed in your weekly or monthly views.

Time Zone

This is the global time zone setting. All calendars you create will be displayed in this time zone unless you change the individual calendar's time zone. By default, it is set to Eastern Standard Time.

Event and Task Reminders

You can setup your calendar so that by default, you are reminded about all meetings, events, and tasks. You can also disable the global reminder option, and set a reminder event-by-event.

To setup a global reminder:

- a. Check the box next to **Email me a reminder...** Type the amount of minutes, hours, or days before each event that you wish to be reminded.
- b. In the box below, type the email address you want the reminder sent to. If you want the reminder sent to more than one email address, type in each address separated by commas or semi-colons.


Event Notifications

You may want to be emailed anytime someone else schedules something on your calendar. For example, if you get invited to a meeting or if you have a secretary and that person edits your calendar. To enable this feature, check the box next to **Email me a notification**. In the box below, type the email address (only one is allowed for this option) that you want the message sent to.

3. If you've made any changes to the above options, be sure to click on the **Save Changes** button or you will lose all your changes.

Creating a new event

An event is time you need to reserve on your calendar, either for an activity that you need to do yourself, or a meeting.

1. There are two ways to create an event. Click on the  icon closest to the day or time of the event, or click on the New Event icon.
2. If you have different calendars (such as one for personal and one for work events) you may click on the **Calendars** pop-up menu and choose the calendar to put the event on. You can only put the event on one calendar.
3. In the **Event Title** box, fill in a title for the Event, such as **Planning Committee meeting**.
4. In the **Date** box, type in the date for your event. If you wish, you may click on the icon to “jump to” a specific date.
5. In the **Time** box, fill in the start time and duration of your activity.

Note that the **All day** option does not reserve the entire day as it would seem. This option is for creating a “banner” at the top of your calendar that you can use to show that something is occurring on that day (e.g. you could use this to mark off the days for Spring Break). If you want to block off your whole day, type in enough hours in the duration boxes to cover your work day.

6. If this is a re-occurring event, select the **Repeat** option. See the section, *Setting the Repeat Option* for more information on how to setup a repeating event.
7. Under the **Privacy** pop-up menu, select the level of privacy you want for this event. If you select **Public Event**, then everyone with Read access to your calendar can see the date, time, title, and other information about this event. If you select **Time and Date Only**, then everyone with Read access to your calendar can only see the time and date of the event. All other information about the event, including the title, will not be seen. If you select **Private Event**, then nobody but you can see the event on your calendar. It will be completely invisible to others; you will appear to be free during that block of time.
8. In the **Location** box, type the location for the activity or meeting. In the **Description** box, you can type notes about the event, or an agenda for a meeting.
9. If this event is a meeting, type the **NEOUCOM Username** of the person you wish to invite in the box located under the **Invite other users or resources** section, then click on the **Invite** button. If you wish to simply inform the person of the meeting, click on the **Inform** button. [In general, “Invite” means their presence is required at the meeting, while “Inform” means that you want the

person to know about the meeting, but they are not required to attend.] Their name will then appear in the **Invitees** (or **Inform about Event**) box.

If you do not know the NEOUCOM Username of the person you are inviting, click on the **Search to Invite** button. A search window will appear. Type the name of the person you wish to invite into the box, and click on **Search**. You will get a list of results. Check the box next to the person you wish to invite, then click on the **Invite** button. Their name will then appear in the **Invitees** box.

To search for a person to inform about this event, follow the same steps, except start by clicking on the **Search to Inform** button.

10. If you wish to have a reminder for this event emailed to you, click on the **Reminders** tab. In the appropriate boxes, type in the email address where you wish to receive the reminder, as well as the date and time of when you want to be reminded. If you do not wish to receive a reminder, uncheck the **Remind** box.
11. If you are scheduling a meeting, the **Availability** tab will show you if the people you've invited are free or busy at the time you've scheduled the meeting.
12. Click on the **Preview** tab to see a preview of what your event/meeting looks like, and the information it contains. If this is a meeting, it will also show a list of invitees. After you've sent this invitation, you can look at this tab again to see who's accepted/declined your invitation.
13. Click on **OK**. The event/meeting will now appear on your calendar. If you invited other people, they will see your invitation under their "Action Items" section the next time they open or refresh their calendar.

Creating a new task

1. Click on the New Task icon.
2. If you have different calendars (such as one for personal and one for work events) you may click on the **Calendars** pop-up menu and choose the calendar to put the task on. You can only put the task on one calendar.
3. In the **Task Title** box, type a name for the task, for example, **Write calendar document**
4. In the **Due Date** box, type the due date for this task. If this is an ongoing task, check the **Not Due** box.
5. In the **Time** box, type the time that the task is due. If there is no set time, check the **No Time** box.
6. If this is a repeating task, select the **Repeat** option. See the section, *Setting the Repeat Option* for more information.
7. Under the **Privacy** pop-up menu, select the level of privacy you want for this event. If you select **Public Task**, then everyone with Read access to your calendar can see the date, time, title, and other information about this task. If you select **Time and Date Only**, then everyone with Read access to your calendar can only see the time and date of the task. All other information about the event, including the title, will not be seen. If you select **Private Task**, then nobody but you can see the task on your calendar.
8. If applicable, fill in the **Location** and **Description** boxes.

9. If you wish to have a reminder for this task emailed to you, click on the **Reminders** tab. In the appropriate boxes, type in the email address where you wish to receive the reminder, as well as the date and time of when you want to be reminded. If you do not wish to receive a reminder, uncheck the **Remind** box.
10. Click on the **Preview** tab to see a preview of what your task looks like, and the information it contains.
11. Click **OK** when you are finished creating your task.

Setting the Repeat Option

You can follow this procedure anytime you select the Repeat option when creating a new event or task.

1. When creating a new event or task, select the **Repeat** option.
2. The Recurrence window will appear. You have a choice of repeat patterns -- Daily, Weekly, Monthly, or Yearly. The options in the box to the right will change depending on which repeat pattern you select. If you are trying to create a birthday event, you might want to select the yearly option. If you are marking off vacation days on your calendar, you might want to select the daily option.

In the following example, we will use the Weekly option, but the same principles apply to the other options. Select the **Weekly** option.

3. You can choose to repeat the event either every week (the event will repeat every week) or every XX week (the event will repeat every so many weeks, depending on what number you type in the box)
4. Under the **Repeat on** option, select the day of the week that you want the event to occur on.
5. Under the **Start** section, type the first date of the event.
6. Under the **End** section, type the last date of the event. Or, if the event will be a certain number of occurrences (say a 10-week course) you could type 10 in the **Create XX events** box. If this event does not yet have an end date, you can select No end date (selecting this option will create a maximum of 200 events).
7. Click **OK** to set the repeat pattern.

Editing an event

Editing an event

To edit an event, click on its name (it should be blue and underlined). You can now edit the event the same way you would edit a new event.

- If it is a repeating event, you can change the repeat pattern by clicking on the **Change repeat pattern** link.

Click **OK** to save any changes. If it is a repeating event, you will be asked if you want to apply the changes to just this one event, or this and all future events. If you want to apply the changes to just the one event, click on the **This one only** button. If you want to apply the changes to this and all future events, click on the **This and future ones** button.

Deleting an event

You can delete an event in two ways. The first way is to click on the **red x** (✖) that appears next to the title of the event you wish to delete. You will be asked if you are sure you want to delete the event. If you are, click **OK**, else click **Cancel**. Note: clicking on the red x does not work in Internet Explorer on the Macintosh.

The second way would be to click on the title of the event you wish to delete (it should be blue and underlined). In the window that appears, click on the **Delete** button in the lower left corner. You will be asked if you are sure you want to delete the event. If you are, click **OK**, else click **Cancel**.

In both cases, if you are deleting a repeating event, you will be asked if you want to delete just this one event, or this and all future events. If you want to delete just the one event, click on the **This one only** button. If you want to delete this and all future events, click on the **This and future ones** button.

Editing a task

1. If necessary, click on the **Overview** link so you can see your **Action Items** section.
2. Under the **Action Items** section, click on **Tasks**.
3. The **Task List** window will appear with a list of tasks. If the Task is completed, you can check the **Done** box next to its name. If you want to delete the task, check the **Delete** box next to its name. To edit a task, click on its name (it should be in blue). The task will open, and you can edit it as you would a new task.
4. Be sure to click on the **OK** (if editing a task) or **Save and Close** button (if editing the Task List) to save any changes.

Creating a new calendar

You can create as many calendars as you want, and use them for different purposes. For example, you could have one calendar for work items, one calendar for personal items, another calendar for your child's sports events, and so on.

1. Click on the **Calendars** tab
2. Click on the **New Cal** icon
3. In the **Calendar Identifier** box, type a short name (no spaces) for your new calendar. The Calendar Identifier is a very short description of what the calendar is for, or some way to identify this calendar. The Calendar Identifier for each calendar you create must be unique. This identifier will appear when you view calendar sets that include this calendar.
4. In the **Display Name** box, type a name for your calendar, for example, **Personal**.

Note: your full name will automatically be pre-pended to the name of any calendar you create. This is to avoid people creating calendars with the exact same name.

5. Change other options as you wish (see the sections *Granting permission to view your calendar* and *Individual calendar options* for more information on these options). When you are finished, click **OK**. Your new calendar will be created and will appear in your list of subscribed calendars.

6. To view your new calendar, click on its name (the name should be blue and underlined). You can also view the calendar by clicking on the **View** tab, then selecting the calendar's name from the **Current Calendar** drop-down menu.

Subscribing to a calendar

If you would like to see someone else's calendar, you need to subscribe to it. The person must first grant you rights to their calendar or you will be unable to see anything.

1. Click on the **Calendars** tab.
2. Click on the **Subscribe** icon.
3. In the **Search** box, type the first or last name, or the NEOUCOM Username, of the person whose calendar you want to subscribe to, then click on **Search**.
4. A list of results matching what you typed will be returned. Check the box next to the calendar you wish to subscribe to. If you do not get the result you wanted, try again with less characters in the search string. If you still get no results, it's possible the person has not used their calendar yet, or they have disabled the Everybody option from accessing their calendar and not given you access.
5. Click on **OK**. The person's calendar will now be listed in your list of calendars.
6. To view the person's calendar, click on their name (their name should be blue and underlined).

You can also view a person's calendar by clicking on the **View** tab, then selecting the calendar from the **Current Calendar** drop-down menu. Note that if the person has not given you access to their calendar, you will be able to open their calendar and may check their availability, but no items on their calendar will be displayed.

Granting permission to view your calendar

By default, Everybody (all users of the portal) subscribe to your calendar and see if you're busy or not (but not the items you're actually busy with) and invite you to meetings. To change these permissions, or to grant specific people different levels of access, follow these steps.

1. Click on the **Calendars** tab. You will see a list of the calendars you are subscribed to, or that you have created. To change a specific calendar's options, click on the **Edit** link to the right of its name. Note: you can only change permissions (and other options) for your calendar and calendars you have created.
2. Another window will open with the Calendar tab options displayed. Click on the **Permissions** tab. These are the different types of access you can grant someone.
 - *Availability* the person can tell if you are busy or not. If you are busy they will not be able to see why; just that the time is blocked out.
 - *Invite* the person can invite you to meetings
 - *Read* the person can view your calendar (and all events) but not edit anything.
 - *Delete* the person can delete events from your calendar (only works if you have also given Read permission)

- *Modify* the person can modify events that are on your calendar (only works if you have also given Read permission)
3. To give someone access, type their **NEOUCOM Username** in the **User Name** box, and click on **Add User**. After they have been added to your list, check the appropriate boxes for the type of access you wish to give them.
 4. Click on **OK**. The person now has the access rights you granted them.

Individual calendar options

Calendar tab

- The **Display Name** is a way to differentiate different calendars you may have created. In this box, you should type something that describes the calendar's purpose, such as "work", "personal", "tennis team schedule" etc.
- The Description is a description of what the calendar is for.

Owners tab

This is where you can designate someone as an owner to your calendar, and they may act on your behalf. You may want to do this if you will be away from your calendar for an extended period of time.

To add another owner, type in the person's **NEOUCOM Username** in the **Owner Name** box and click on the **Add Owner** button.

To delete an owner, check the box next to the person's name and click on **Delete Owner**.

Time Zones tab

To change the time zone of a specific calendar you have created, click on this tab, and select a new time zone. To save any changes, click on **OK**.

Creating a calendar set

Calendar sets are calendars you've subscribed to, that you have decided should be put into one set together. This is usually so you can see everyone's busy and available times at a glance, without looking at each calendar individually. For example, if you have five student assistants, you might wish to create a calendar group with all five of their calendars so you can see at a glance when all five are available.

Note: you must be subscribed to the person's calendar before you can add it to a calendar set.

1. Click on the **Calendar Sets** tab.
2. Click on the **New Set** icon.
3. In the **Set Name** box, type a name that describes your calendar set, such as **Student Calendars**.
4. Leave the Calendar ID box blank.
5. Under the **Quick Add** pop-up menu, select the first calendar that you wish to add to the set. Keep doing this until all calendars you want in the set have been added. The calendars you have added will appear in the **Set Members** box.

6. If this calendar group should use a different time zone than the default time zone, click on the **Time Zone** tab and choose the appropriate time zone.
7. When you are finished, click on **OK**. The set should now be listed under your **Calendar Sets** tab.

To view your calendar set, click on its name under the **Calendar Sets** tab or click on the **View** tab and select the set from the **Current Calendar** drop down menu. If necessary, click on the **Comparison** link. This will show you all the calendars at once, and you will be able to see when everyone is busy or available.

Known Calendar issues

- If you are in the View tab, then go somewhere else (say the Calendar Sets tab), when you click back on the View tab, you return to the default view (Overview), not the view you were in.
- There are no customizable print layout features, such as the ability to print out the day's schedule on 3x5 index cards.
- You can only start and end days on the hour.
- If you want to subscribe to someone's calendar, they need to have opened their calendar at least once, or your search for their calendar will return no results.
- There is no easy way to keep track of the meetings you have initiated.
- There is only PC syncing for PDAs. There is no Macintosh syncing for PDAs.
- Macintosh users do not receive the "timeout" warning unless they are using Netscape.
- Clicking on the red x to delete an event does not work in Internet Explorer on the Macintosh.
- When you search your calendar(s), the results are not displayed in chronological order.

Getting Help

Click on the **Help** link (usually in the upper right hand corner of the window) for on-line calendar help. There is extensive on-line help available. Please refer to this on-line help first for any questions not answered by this document.

Additional Help

For additional assistance, please phone IT Desktop Support at (330) 325-6911, send email to help@neoucom.edu, or fax (330) 325-5928.

Or see the IT Desktop Support home page at www.neoucom.edu/IT/help
The IT Desktop Support office is located in C-174.