Oracle Calendar: Advanced Tools

Access Right, Designates, Groups and Other Tools

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Overview

Oracle Calendar contains many advanced features that allow users to specify who has access, and the extent of that access, to their agenda. Advanced features include setting specific access rights for an agenda, setting up designate accounts from an agenda, and viewing and creating groups to more easily schedule meeting times. Other tools include how to have more than one agenda on a single computer, how to schedule resources at Ithaca College, how to search for a specific user's schedule, how to locate a person and how to print Calendar agendas.

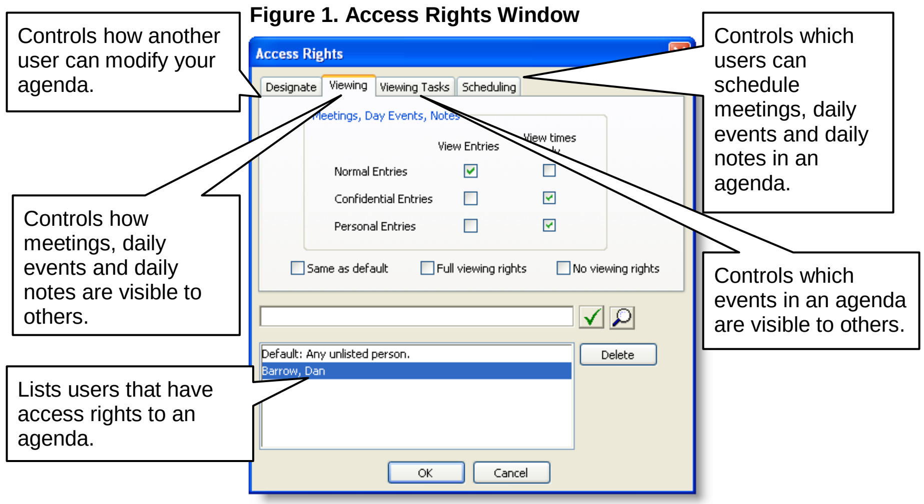
Determining Access

Calendar is a campus-wide application that all staff and faculty can access. Because there are many users who can view a Calendar agenda, a single user may want to set detailed access rights that specify what information other Calendar users can view or modify.

Setting Access Rights

It is important that access rights in an agenda be set so the appropriate people can view certain meeting details in an agenda and/or can modify an agenda as a designate. Users can also keep specific meetings and tasks private, so no one can view information. There are four categories that can be set; open the Access Rights window by clicking **Tools → Access Rights**… from the menu bar.

Figure 1. Access Rights Window



Suggested Guidelines

Viewing rights allows someone else to be able to see what is on an agenda. ITS suggests the access rights below for users. These suggestions attempt to balance the need to share information about availability, with consideration to privacy for confidential meetings, while also allowing Calendar to be a program used for personal time management.

The following details the suggested access rights for the Viewing category:

Meeting Type	Administrative Assistant	Up the Org Chart	Department Staff	Others
Normal	View Entries	View Entries	View Entries	View times only
Confidential	View times only	View Entries	View times only	View times only*
Personal	View times only	View times only	View times only	View times only*

*Not the default setting

Setting Access Rights for Designates

A designate is someone who shares access to an agenda and may modify that agenda on another's behalf. Designates are restricted by the specific access rights that the agenda's owner specifies. A designate does not share a user's password and is always identified as a designate when working in another user's agenda. It is recommended that designate access rights be set as follows:

To add a person as a designate:

1. Go to **Tools → Access Rights… → Designate**
2. Either search for the user's name (by clicking on the magnifying glass) or enter it in the field.

See below for suggested guidelines on setting access rights for **Designates**:

Meeting Type	Administrative Assistant	Up the Org Chart	Department Staff	Others
Normal	Modify	Modify	No rights (default)	No rights (default)
Confidential	View times only	Modify	No rights (default)	No rights (default)
Personal	View times only	View times only	No rights (default)	No rights (default)

Setting Access Levels

Using **Access Levels** is another way to determine the level of privacy of meetings, tasks, and notes. Access levels work in conjunction with access rights to determine who can view certain items in an agenda. The access levels of entries can be set individually when meetings, tasks, notes and day events are created, or can be set for all items created in Calendar by going to **Tools → Options…** (Windows) or **Oracle Calendar → Preferences… → Entry Defaults** (OS X). By default, access level for all items created is set to Normal.

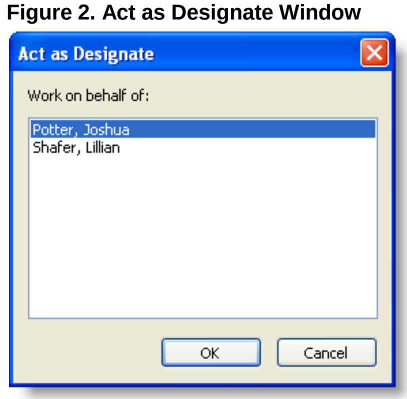
The four access levels are:

Public	Viewable by anyone with a Calendar Account.
Normal	Regular, work related business hours meetings.
Confidential	Work related, but where the content of which needs to remain confidential (e.g. a personnel problem, a private meeting concerning a sensitive employee benefits question, etc.).
Personal	Non-work related personal business, whether during business hours or not.

Access Rights vs. Access Levels

It is important to note the difference between Access Rights and Access Levels; Access Rights are applied to individuals, while Access Levels are applied to Meetings, Tasks, and Notes.

Figure 2. Act as Designate Window



Working as a Designate

A Designate is anyone who is authorized to manage another user's Agenda. People who create, accept or modify meetings for other agendas should work as designates. **Alternate methods of creating meetings for others, such as sharing passwords or inviting the person who should be proposing the meeting will create problems in Calendar and should not be used.** Working as a designate keeps the designates personal agenda separate from the agenda being managed, and also clarifies who created, modified, accepted or declined a meeting. Because these actions are performed in the owner's agenda, ownership of the meeting is always apparent.

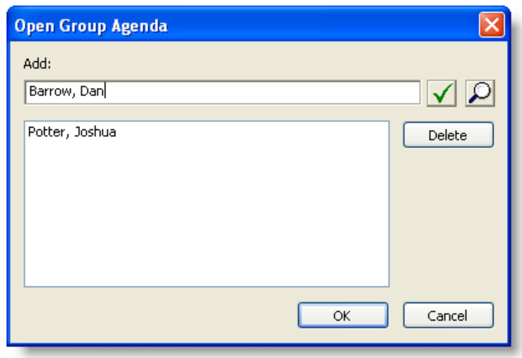
To start working as a designate:

- Meet with the agenda owner and suggest that Designate rights be established.
- Come to an agreement with the agenda owner about what designate rights should be given, and have the agenda owner give those rights in their calendar.
- Initially, it's good to communicate in person about how the Designate rights selected are working efficiently, and if they need to modified.

To begin working as a designate in someone else's agenda:

1. Choose **File → Open As Designate → Agenda…** (Windows) or **File → Agenda → Open As Designate** (OS X). The **Act as Designate** window will appear (Figure 2), listing all the agendas that can be opened as a designate.
2. Select the agenda to work on, and click the **OK** button. Note that if there is only one agenda that can be opened as a designate, Calendar will automatically open that agenda.

Figure 3. Open Group Agenda Window



To open a group view:

1. Choose **File → Open As Designate → Group Agenda… (Windows) or File → Group Agenda → Open As Designate… (OS X)**. Select the Agenda to manage from the Act as Designate window.
2. In the Open Group Agenda window (Figure 3), add which agendas to include in the group by typing the names of the user's agenda in the **Add:** field.
3. Click on the green check mark after each entry.
4. After all names are listed click on the **OK** button.

Scheduling Resources

Most users are able to invite a resource. A Resource is a room or a piece of equipment that has its own Agenda in Calendar. At Ithaca College, only rooms have resource accounts; this gives the room its own Agenda that can be managed as if it was an individual, preventing scheduling conflicts or confusion. Please note the differences between using a resource, using a resource as a Designate, and managing a resource, as described below.

Using a Resource

In order to schedule a resource as part of a meeting access rights are needed to that Resource. The manager of the resource gives access rights to other users. After obtaining access rights to the resources view the agenda for the resource and invite it to meetings in order to schedule its use. To confirm the booking of a resource, the manager of that resource accepts the entry in Calendar.

To open the Agenda of a resource:

- **Select File → Open → Agenda...** (**Windows) or File → Agenda → Open (OS X)**.
- Then type in "**res:**" and the name of the resource. Alternately, the **Search** button (the small magnifying glass) can be clicked and then searched for the resource by name.

Please be aware that many rooms are scheduled through methods other than Calendar (Conference and Events, TLC, etc.). Contact the appropriate office to determine how to schedule a room.

Using a Resource as a Designate

If Designate rights have been granted by the manager of a Resource, it is possible to sign on to that Resource and modify its Agenda. A Designate may create entries as if they were that Resource. In this case, the Resource is scheduling itself and is capable of inviting other people. Refer to the **Working as Designate** section above for information on managing another Agenda as a Designate.

Managing a Resource

In order to begin managing a Resource, it is necessary to sign on to Calendar as that Resource. This means that if Calendar is already running the program must be closed down completely. When Calendar is restarted, sign on again with **res:** preceding the name of the resource. For example, to begin managing a Resource called ITS Conference Room, sign in as **res:ITS Conference Room**. While managing a Resource, you cannot view entries.

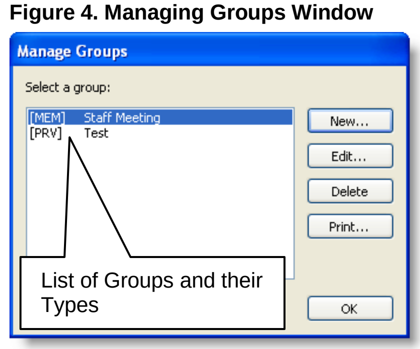
The initial password is the same as the original Calendar password for the user managing the Resource. This password will automatically be emailed to the manager when they are given management rights to a Resource. While managing a Resource, it is possible to change the password for the Resource's account, and assign access rights. Both options are available from the **Tools** menu. To change the password for the Resource, select **Options → Change Password…**.

To modify Designate rights, Viewing rights, or Scheduling Rights, select **Options → Access Rights**. Tasks do not typically apply to Resources. Designate, Viewing, and Scheduling Rights are handled the same way for Resources as they are for normal Agendas. Please refer to the **Access Rights** section above for more information on this topic.

Managing Groups

Calendar allows groups of users and resources to be created. This function becomes most useful when trying to schedule many meetings during an extended period of time for the same group of individuals. Creating a group in Calendar will help reduce the amount of time spent scheduling meetings that call for the same set of people or resources. Calendar users at Ithaca College may create two types of groups:

Figure 4. Managing Groups Window



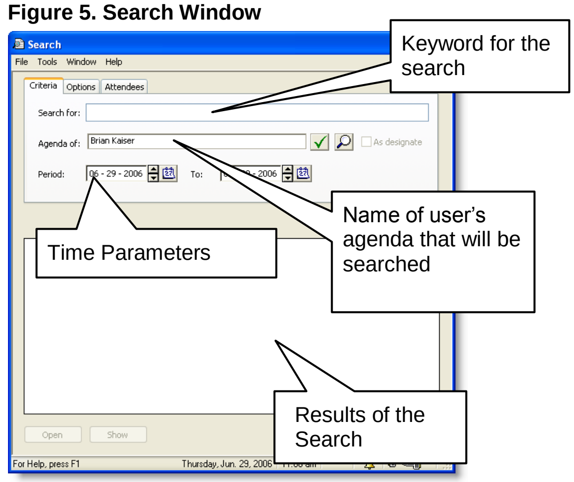
- **Private -** Can only be used by the person who created the group.
- **Members-Only -** Can only be used by members of the group.

To create a new group, or to manage an existing group that is already created, go to **Tools → Manage Groups…** for Windows users and **Directory → Manage Groups** for Macintosh users. This will open the **Manage Groups** dialog box; from here you may create new groups and edit or delete previously created groups.

To create a new group:

1. Click on the **New…** button. The Manage Groups window (Figure 4) will appear.
2. Click the **New…** button and the New Group window will appear.
3. In the appropriate fields enter the group name, the type (private or members-only) and in the **Add member** field type either the name of a Calendar user or a resource (with **res:** before the name). Click the Green Check Mark or hit Enter to add the user to the group.
4. Click **OK** to create the group.

Figure 5. Search Window



To edit a group, first select the group name by clicking it once, then click the **Edit…** button. The Edit Group window will appear and members of the group can be added or deleted. The type of group can be changed and the list of group members can be printed by clicking **Print…**. To delete an entire group, select the group in the Manage Groups window and select **Delete**. A list of all groups and their members can be printed by clicking **Print** in the Manage Groups window.

Search Tools

Two types of search tools exist in the **Tools** menu in Calendar. These search tools allow users to search agendas and directories as well locate other Calendar users.

Search Agenda

This tool allows the user to search any agenda for a keyword or specific attendee. To open the search, go to **Tools → Search Agenda** in the file menu. A search window (Figure 5) will open with three tabs along the top. The search works within the time periods specified in the Period section.

- The **Search Criteria** tab sets up the time periods in which the search will work.
- The **Search Options** tab determines what areas should be searched.
- The **Search Attendees** tab specifies what attendees will be searched for. Search Attendee looks into the user's personal agenda by default, but someone else's agenda can be searched using the Agenda **of: field**.

To search an agenda:

- Type the keyword into the **Search for:** field and/or type the attendee to search for under the Attendees tab in the **Add Attendee to search:** field.
- Set up the time constraints to search between under **Period**.
- Once all information is selected, click **Search**. The **Search Results** displays all the matching results. To see details for one of the results, double-click on the entry.

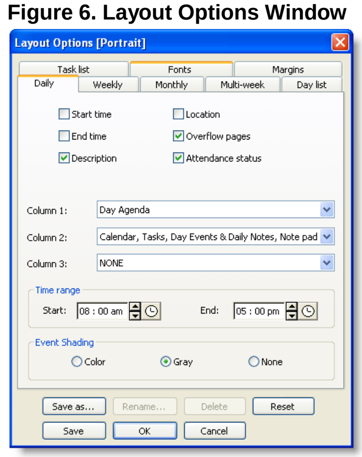
Search Directory

This tool is a directory search engine that references people, resources and groups, which can be searched for by selecting the appropriate tab in the Directory Search window. To open the window, go to **Tools → Search Directory** in the file menu. Search results will be displayed in the lower frame of the window after search criteria is entered into the appropriate fields and **Search** is selected. If more information about a specific user is needed, double-click on the name listed after the search is complete.

Locate a Person

Locate a Person helps Calendar users check the availability of a specific person or a resource for a specific time. To open the Locate Person window go to **Tools → Locate a Person** in the file menu. In the Locate Person window type the user or the resource name, select the date and time to search for and then click on the green check mark. If the person or the resource doesn't have a scheduled entry for the given day and the time, "**No available Information**" will be displayed. Otherwise the entry for the given time frames will be displayed. When the search is complete, select **Done**.

Figure 6. Layout Options Window



Printing Agendas

To print an agenda, select **File → Print** from the menu bar. There are many options when printing an agenda, which can be specified by selecting **Options** in the **Layout** section of the Print window (Figure 6). These options customize how the agenda will look when printed. Daily, weekly, and monthly schedules can be printed.

Changing the agenda's password

To change the password for a user, select **Options → Change Password**. Calendar will ask the old and new password to be entered.

NOTE: When a password is changed in Calendar, it will also change the password for access to the Ithaca College Webmail and email system.

Calendar Etiquette

Many people like to look at Calendar as a tool rather than the be-all and end-all of scheduling meetings. Remembering the human side to scheduling meetings and talking about them in person can be helpful. When responding to scheduled meetings in Calendar, remember that there are a few choices. The meeting can be accepted, declined or confirmed later. If the meeting time is inconvenient, double click on the meeting to display the **View Entry** window, and then select the **Reply** tab. From this window, the person who scheduled the meeting can be informed that this is a busy time simply by marking the box next to **I would prefer another time**, giving them the opportunity to modify the meeting. A small icon of a clock with a red line through it will appear in the Entry Information window when the attendees of the meeting are viewed. You can always accept or decline the meeting, and still let them know that you would prefer another time.

For More Information

For more information on Oracle Calendar, go to the go to the ITS Support Site at https://www.ithaca.edu/computing/support/. For additional help, contact the ITS Helpdesk at helpdesk@ithaca.edu or 4-3282.