Oracle Calendar: Fundamentals

Managing an Agenda

Overview

About Oracle Calendar

Oracle Calendar is a calendaring and scheduling software solution that allows an organization to schedule time, personnel, and resources.

The Scope of this Guide

This guide introduces the tools and components that are needed to use Oracle Calendar, and demonstrates most of the common tasks including: getting Oracle Calendar started, setting up preferences, scheduling individual meetings, creating group meetings and scheduling resources.

Macintosh and PC Compatibility

Calendar is available for Windows and Macintosh computers. There are no compatibility issues when creating meetings on one operating system and then viewing those meetings on a different system.

In This Guide

Related Guides

Oracle Calendar: Archiving Meetings
Oracle Calendar: Advanced Tools

Getting Started

Opening an Agenda

When Calendar is launched, a dialog box will appear prompting the user to sign in.

1. Make sure that **calendar.ithaca.edu** is displayed in the **Connect to** field. If **Off-Line** is displayed, follow the instructions in the **Setting a Server Connection** section below.
2. Enter a username and password (identical to a Netpass username and password).
3. Click on the **Sign-in** button.

If prompted for an off-line path, select **Do Not Download These Files**. If multiple agendas need to be accessed from one computer, refer to the **Working as a Designate** section in the **Oracle Calendar: Advanced Tools** Quick Guide**.**

Setting a Server Connection

All information entered into Calendar is saved on the Calendar server, not on the computer being used. To set the server connections so that Calendar may log into the server, follow these steps:

1. In the Sign-In dialog box, click on the **Other** button to open the Connection Manager window.
2. Click on the **New** button to open the Connection Editor.
3. In the Connection Editor window, enter **calendar.ithaca.edu** in both the **Connection Name** and the **Server** fields.
4. Click on the **Lookup** button. The Node, Authentication, Compression and Encryption options at the bottom of the window will automatically have the appropriate settings applied to them and **they should not be changed**.
5. Click on the **OK** button to return to the Connection Manager window.
6. Make sure that **calendar.ithaca.edu** is selected and click on the **Make Default** button to set it as the default sign-in option.
7. Click on the **OK** button to close the Connection Manager and return to the Sign-In window.

Closing an Agenda / Exiting Oracle Calendar

Calendar makes changes to an Agenda in real time; changes do not need to be saved before exiting the program.

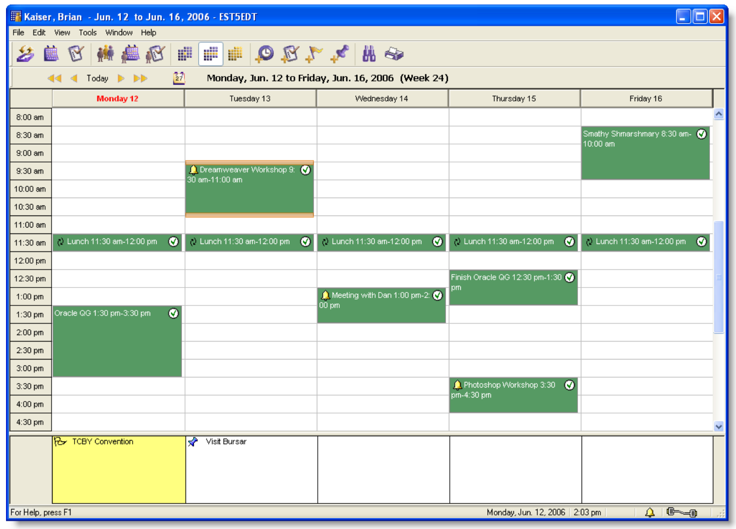
- Choose **File → Close** to close an Agenda.
- Choose **File → Exit** to close all Agendas and exit Calendar entirely.

Overview of the Oracle Calendar Environment

Calendar will, by default, automatically open both the Agenda and the In-Tray after signing in.

There are a number of different items in an Agenda:

The Oracle Calendar Agenda



- **Meetings** are Entries that take up a specific block of time in an Agenda. Other members can be invited to meetings and meetings can be set to repeat a certain number of times.
- **Tasks** are used to keep track of any work that needs to be done. Tasks can be linked to Meetings, have start and due dates, Reminders, and Priorities. Tasks are listed in the To Do list, which is only visible in Daily View.
- **Day Events** are created to mark special occasions and other important dates; invite others, make Day Events repeating, set Reminders and Access levels. Day Events do not block off any time in an Agenda.
- **Daily Notes** are notes to the Agenda owner. It is possible to “invite” others and add a Note to their Agenda, make Daily Notes repeating, set Reminders and Access levels. Daily Notes do not block off any time in an Agenda.

The In-Tray

The In-Tray consists of 4 different folders. The In-Tray lists each type of entry in chronological order in each folder. To view the contents of a closed folder or hide the contents of an open folder, click on the folder once.

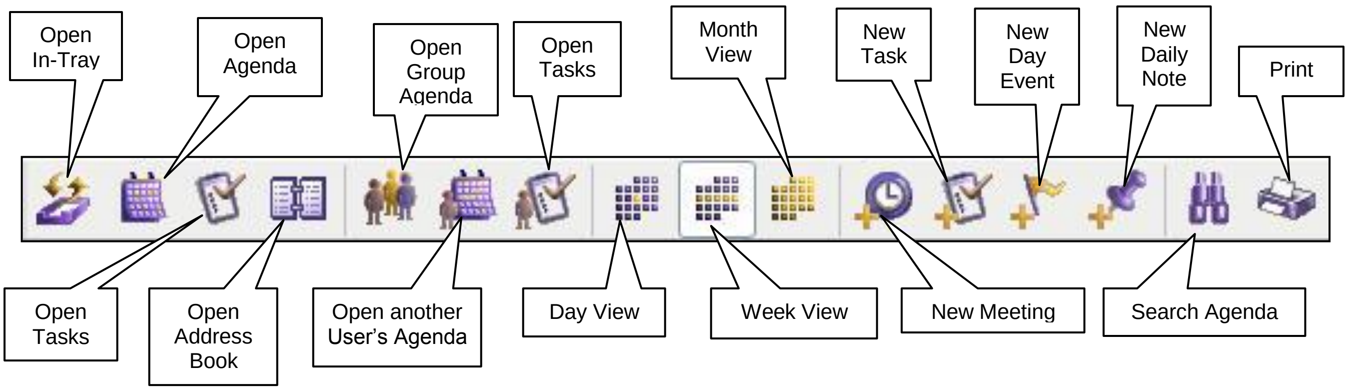
Folder Name	**Contents**
New Entries	Lists unconfirmed entries.
Entries accepted	Lists confirmed entries.
Entries sent out	Lists entries that involve another Calendar user.
Entries refused	Lists entries which have been refused.

Agenda Views

The Agenda view displays the user's agenda in a day, week or month view. It allows the user to go back and forth in the calendar and see past and future agenda entries.

Toolbar

The Toolbar provides shortcuts to the mostly commonly used tasks.



Navigation Bar

The Navigation bar is located just below the Toolbar, and is used to navigate within the Agenda.

Day View

In Day View all types of entries are visible; Meetings, Day Events, Daily Notes and Tasks can be seen. The Day View shows only one calendar day, and has 3 different sections. The **Agenda Pane** displays blocks of time and shows scheduled meetings for the day. The **Task Pane** displays any tasks that have been set. The **Notes Pane** displays Daily Events and Day Notes that have been set for the day.

The Day View allows for the greatest amount of information to be displayed regarding Meetings, Notes, Tasks, and Events. When navigating through an Agenda in Day View, note that the **Move** buttons move back and forth one day at a time, while the **Move "Fast"** buttons will jump one week in either direction.

Week View

The Week View shows a schedule for an entire week; Meetings, Day Events, and Notes can still be seen, **but the Tasks List is not shown.** This view has 2 different sections; the **Agenda Pane** displays blocks of time and shows scheduled meetings. The **Notes Pane** displays Day Events and Daily Notes below each day.

When navigating the Agenda in Week View, the **Move** buttons will move around one week at a time, while the **Move "Fast"** buttons will move the calendar four weeks in either direction.

Month View

The Month View shows an entire calendar month. In this view, Meetings will be listed by their start time, with only their title. Day Events can be seen as small flags with their titles. Notes are designated by small pushpin icons. Double clicking on a day will open that day in Day View.

When navigating in **Month View**, the **Move** buttons will move around one month at a time, while the **Move "Fast"** buttons will move forward or backwards six months at a time.

Types of Entries

There are 5 different types of entries on Calendar. These are Meetings, Tasks, Daily Events, Daily Notes and Holidays.

Entry Type	Description
Meetings	Blocks of time where a person and/or resources are scheduled; represented by a colored block in Daily and Week view.
Tasks	"To do list" that contains work items that can be prioritized, dated and assigned to individuals.
Day Events	Events assigned to an entire day, represented by a flag icon in all views.
Daily Notes	Notes or daily reminders assigned to a day; represented by a pushpin icon in all views.
Holidays	Special days determined by HR and recognized by a candle icon in all views. Holidays apply to everyone with a Calendar account and are assigned by the Calendar system administrator.

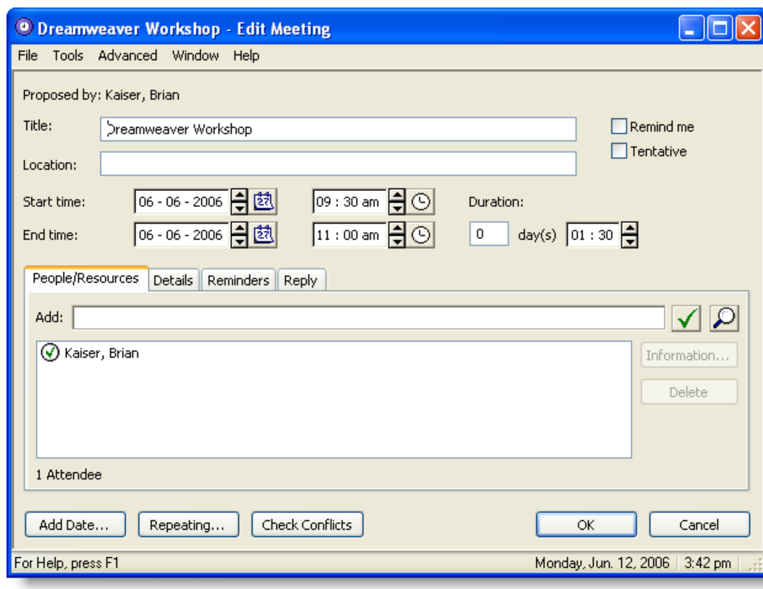
Meetings

Creating a Meeting

To create a meeting in an Agenda, follow these steps:

1. Click and drag the mouse pointer to highlight a block of time in the Agenda in Day or Week view.
2. Double-click in the highlighted area.
3. In the **Edit Meeting** window, fill in the required fields for the new meeting. There is more information about this window below.
4. Click **OK**.

Edit Meeting Window



The Meeting Window

The Meeting window is used to view or change an entry's information. **Entry Information** shows the person who proposed, or who owns, the meeting. A **Title** must be entered, and a **Location** for the meeting may be included; these will be displayed in the Agenda. Here it is also possible to change the **Date**, **Start time**, **End time**, and the **Duration** of the meeting by using the arrow buttons beside each setting, or the calendar/clock buttons to choose a specific date or time.

The **People/Resources Tab** allows a user to invite other Calendar users to a meeting. Also, a Resource such as a room can sometimes be added to the meeting and therefore be reserved (only if the user has permissions to invite and/or schedule a Resource). To invite another Calendar user or group, type their name into the **Add** field and click on the green check mark. Clicking the Search button will open a window allowing a search for Calendar users, groups and Resources. If a contact needs to be removed from the list, select their name and click the **Delete** button.

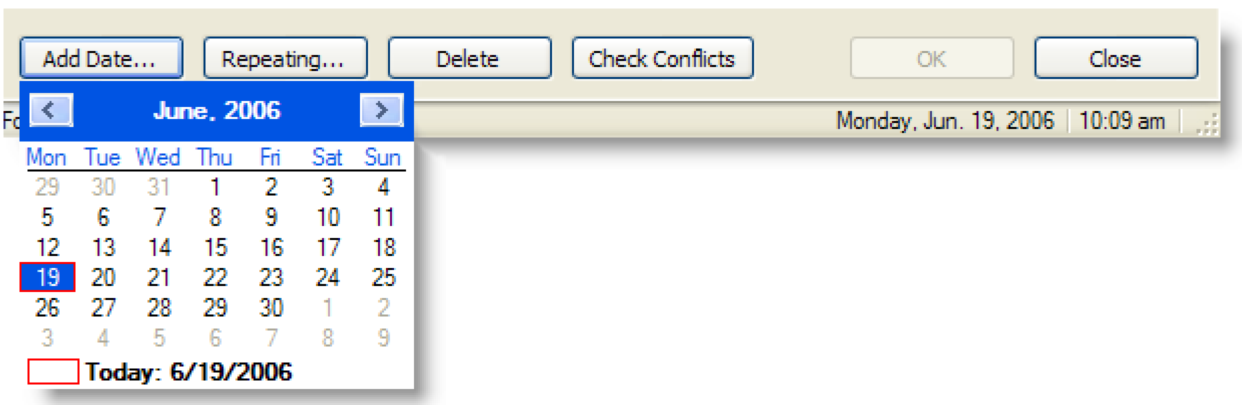
The **Details Tab** contains space where a **Description** about the meeting can be added. The **Attachment** function can be used to attach a single document to the meeting. The **Importance Level** and **Access Rights** of the meeting can also be changed by PC users.   For Mac users, these options are located under the Location text box at the top of the window regardless of what tab is currently being viewing.

Add Date… Button

For a meeting that will occur at the same time on an additional day, click on the **Add Date…** button. This will create a duplicate meeting with the same options as the original meeting. Clicking **Add Date…** will bring up a calendar box below the button, which can be used to navigate to the desired date for the new meeting.

Please note: If creating a meeting that will repeat several times within a short span of time, it is **not** recommended that the **Add Date…** function be used. Instead, set a meeting to repeat several times over a given span by setting the various options in the **Repeating** window.

Figure 4:   Add Date… Button



Repeating Button

This function is used to make a meeting repeat several times over a period of time. This function is very helpful and saves the time of recreating the same meeting over and over again. The Repeating window is divided into several sections. **Frequency** will set how often a meeting will occur. The days of the week on which a meeting will take place can be set by checking the appropriate boxes.

The **Result** section will display the dates Calendar has determined for the meetings; these are the **proposed** dates only. If a meeting will occur regardless of occasion, click the **Include Holidays** checkbox to display meetings that occur on holidays.

Check Conflicts

After creating a meeting that repeats or adding another Calendar user to a meeting, click on the **Check Conflicts** button to see if there is a conflict for anyone involved. Conflicting meetings appear with a red “X” mark next to them.

Oracle Calendar Options

Calendar allows various preferences to be set from the menus **Tools → Options…** for Windows or **Oracle Calendar → Preferences…** for Macintosh. (Please note that **Addresses** in Calendar is not supported by ITS).

Figure 5: Options for Windows

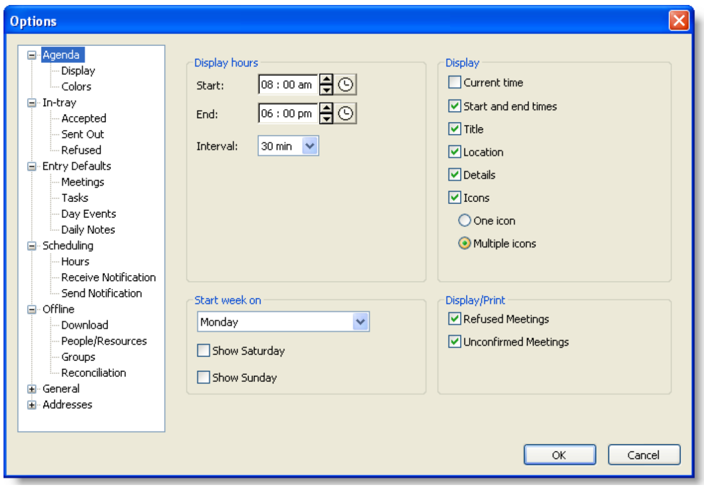
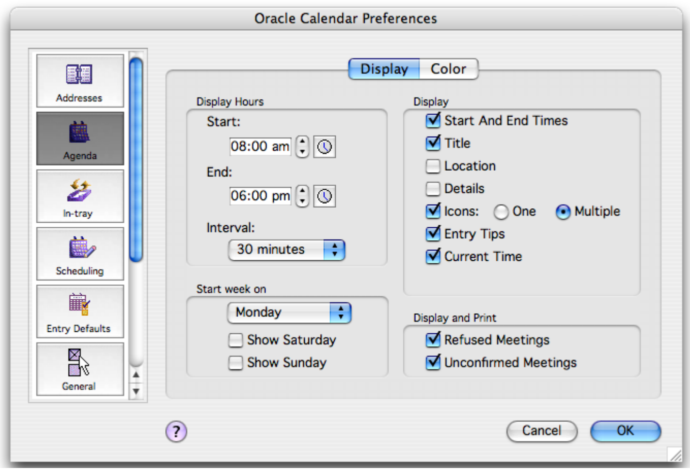


Figure 6: Options for Macintosh



Agenda

Agenda preferences have two categories that can be modified; **Display** and **Colors**. Display options change the appearance of the Agenda. Under **Display hours**, set which hours to display in the Agenda by default (though all hours are available to view) and what intervals of time are used. Users can also determine the amount of information available in the Agenda under Display.

In the **Start week on** section, set the day to begin the week and whether or not to display weekend days. Finally, the **Display/Print** section determines if refused or unconfirmed meetings are displayed in the Agenda.

The Colors option menu customizes the color-coding method applied to Entries in the Agenda.

In-Tray

In-Tray preferences allow for control of the time frame that Calendar uses to display entries in the Accepted, Sent Out, and Refused folders of the In-Tray. Adjust the duration of time so that it includes all meetings that need to remain in the In-Tray.

Entry Defaults

Default values can be set for new entries by setting the various **Entry Defaults** options. This will change the default values for Importance Level, Access Level and Default Reminders for Meetings, Tasks, Daily Notes and Day Events. Once set, every type of entry created will have these as their starting values.

Scheduling

Calendar users can specify their Hours and Agenda Notifications by selecting the **Scheduling** options.

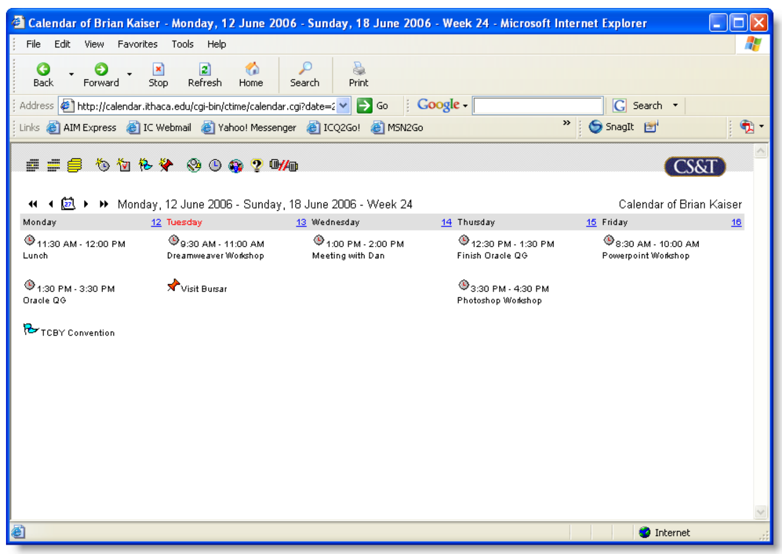
To set default normal hours, set the **Start** and **End** times in the **Normal Hours** category and then click on the **Apply to All** button. To see extended hours, perform the same action in the **Extended hours** category. **Normal** and **Extended** hours are the times that the **Suggest Date/Time** feature uses when looking for convenient times to schedule meetings with other users. Clicking on the **Apply to All** button will apply these hours to all days of the week; clicking the **OK** button will apply the settings only to the selected day.

Notifications Notification settings are broken down into two sections; **Received** and **Sent**. Options in the **Received** section determine how Calendar will notify a user of invitations that are received and how often the Calendar account should be updated. Options in the **Send** section determine how to notify others when sending, modifying, or deleting a meeting.

In the Receive Notification options, **Allow others to notify me of new Entries by e-mail** determines whether someone else's Agenda will display a user's name in the list of people to be informed by email during the creation of, or change to, a meeting that is being proposed.

Check for new entries every XX minutes should always be checked, where "XX" represents the intervals at which Calendar should check for new Entries. This option allows Calendar to update an agenda frequently. It is recommended that the number of minutes be left at the default value of 60 minutes. To force Calendar to look for any recently scheduled meetings at an unscheduled time, select **View → Refresh All** from the Menu Bar to manually check for new entries.

Oracle Calendar Web Interface



In the **Send Notifications** options, check the boxes for the instances when Calendar should ask if an email should be sent to other users who are involved in a meeting.

Using Oracle Calendar on the Web: calendar.ithaca.edu

Calendar also allows users to access their accounts over the Internet. To log on to Calendar over the Web, open a web browser and go to calendar.ithaca.edu/login (there is no "www"), then enter the appropriate username and password.

Notice that the menu bar that is available in the Calendar application is not available in the Web interface. Users can still view and modify their Agenda, and schedule meetings for themselves and other Calendar users. **However, the Web interface will not allow a user to work as a Designate**. For more information about working as a designate, refer to the **Oracle Calendar: Advanced Tools** Quick Guide.

In order to access options while using the Calendar Web interface, use the button bar at the top of the screen.

For More Information

A variety of support services are available from ITS if you would like additional help:

Computer training on a variety of topics is available to faculty, staff, and students at no charge through the Technology Learning Center (TLC). Check out the current TLC training schedule online at https://www.ithaca.edu/its/workshops

Online documentation and tutorials on IC-supported computing software and systems are available at https://www.ithaca.edu/its/traindoc

Frontline computing support is available through the ITS Helpdesk in 104 Job Hall; send e-mail to helpdesk@ithaca.edu or call 607-274-1000.

Backline consulting support is available in the Technology Learning Center, room 101 Friends Hall.