Goldsmiths IT Services　　Guide C8.7

Getting Started with Oracle Calendar

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For details of other IT Services Guides relating to Oracle Calendar and on-line versions of these guides, please refer to:

<intranet.gold.ac.uk/cs/apps/calendar/>

Information in this Guide refers to Oracle Calendar version 10.

There may be minor differences if you are using an earlier version.

from another source without restriction.

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1. Introduction

Oracle Calendar is an enterprise-wide, group-scheduling software that is a client/server application. This powerful scheduling application is an integral part of your desktop because it provides the tools necessary to effectively and efficiently plan your time. You, as a user of Oracle Calendar, will be able to:

- schedule individual and repeating agenda entries;
- schedule group meetings and resources;
- check for conflicts and conduct free-time searches;
- view other users' agendas;
- control access of your agenda vis-à-vis other users;
- assign designates, resource designates, enter notes, track tasks,
- and choose from a plethora of printing options.

The IT Services Oracle Calendar page on the Web at <intranet.gold.ac.uk/cs/apps/ct/> gives the latest version number, and has detailed installation instructions for Windows and Macintosh versions.

To use Oracle Calendar via a Web browser, go to <https://secure.gold.ac.uk/cst/ctime/login.cgi> (you must include the *https://*).

2. Getting Started

How do I sign in?

1. Double-click on the Oracle Calendar icon -- the Sign-In dialog box appears.
2. Type in your IT Services userame, e.g. exs01jb
3. Type in your Password.
4. Check that the **Connect to** field says **calendar.gold.ac.uk**, and not **Offline**.
5. Click **Sign-in**.

TIPS

- The next time you Sign-In your User Name and Server Name will be automatically provided in the Sign-In dialog box. Also, the next time you Sign-In, your settings (i.e., day/week/month view) will be those from the previous time you used Oracle Calendar.

How do I quit the program?

1. Windows: Choose the <File | Exit> menu option
2. Macintosh: Choose the <Oracle Calendar | Quit Oracle Calendar> menu option

TIPS

- Oracle Calendar is a client/server application that operates in real-time. Therefore, your agenda is updated automatically and you **do not have to save your work**--this is done automatically.

Where do I find user preferences?

All user preferences can be changed individually by each user from the <Tools | Options> (Windows) or <Oracle Calendar | Preferences> menu. Under the <Options> menu, preference choices include Agenda and In-Tray Set-Up; Entry Defaults; Access Rights; and Working Off-Line.

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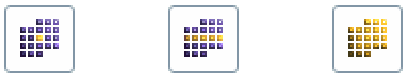
3. Manoeuvering within Oracle Calendar

How do I change the View (day/week/month) in my agenda?

1. Choose one of these three buttons on the toolbar to view your agenda in the Day View, Week View, Month View, respectively.



TIPS

- In the day view, you can resize the agenda time intervals by going to the <View> menu and clicking on either Decrease or Increase Time Interval.
- In the day and week view, you can resize the rows to change the number of hours displayed: go to the <View> menu and clicking on Decrease or Increase Row Size.
- In the week and month view, double-click on the gray bar at the top of a particular day and your agenda will display the day view of that day.
- If you are in the week view and you click on the Today button, it will bring your agenda to the current week. In the month view, clicking the Today button will bring your agenda to the current month.
- In the month view, a downward-pointing hand will indicate that a particular day contains more information than you can see.

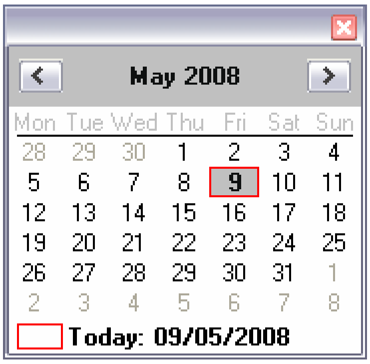
How do I change the Date in my agenda?

Navigating using the Date Control Bar

Agenda View					
Day View	Back one week	Back one day	Pop-up calendar	Forward one day	Forward one week
Week View	Back one month	Back one week	Pop-up calendar	Forward one week	Forward one month
Month View	Back six months	Back one month	Pop-up calendar	Forward one month	Forward six months

Navigating using the Calendar Icon

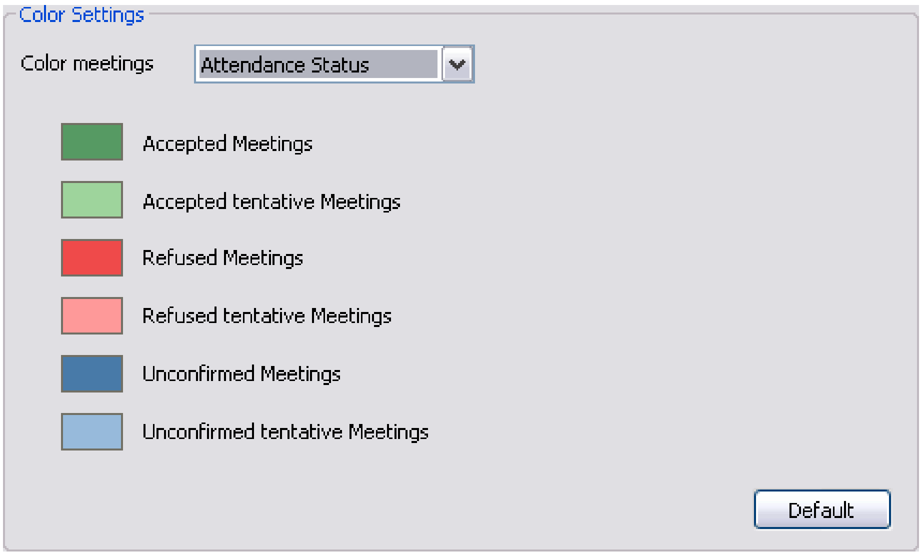
TIPS



- Clicking on the Today button will always take you back to the current date. If you are in a week or month view, the Today button will bring you to the current week or month view.
- Always select the day button last in order to finalize a request when moving your agenda view to another month or year.
- The current day appears in yellow and the weekends are in red; week days appear in black.

What do the agenda colours mean?

There are three colour schemes in Oracle Calendar. They can be found under the <Tools | Options | Agenda | Colors> menu. The colour schemes that exist are Importance Level, Attendance Status, and Ownership. Your agenda can be viewed in only one option at a time. The colours associated with each option are display in the legend within the dialog box. Once you choose a colour scheme and click OK, then your agenda entries will be coloured according to the legend shown.



How do I search the database?

1. Click on the <Tools | Search Directory> menu or F3 (Windows) or Command+S (Macintosh), and a 'Directory Search' dialog box will appear.
2. Choose the 'People', 'Resources', or 'Group' tab--depending upon your search.
3. Fill-in one or more parameters (e.g. surname, resource name, etc.) and click on the 'Search' button. Or, leave the parameter boxes blank and click on the 'Search' button in the middle of the dialog box to do a general search.
4. Click on the person, resource, or group name to highlight it. This will make available the 'Information' and 'Print' button at the bottom of the dialog box. (Information reveals additional information about the person or resource. The print option will print out the entire list.)

TIPS

- Any time you click on the Search feature icon, a 'Directory search' dialog box will appear.

4. Developing Entries

How do I create a basic entry?

1. In the day view of your agenda, click within a desired time frame.
2. Type the title of your entry, e.g., 'review literature'.
3. and press Enter.

TIPS

- The duration of entries created by this method depends upon the time interval set by the user. For example, if your intervals are set at 15 minutes and you create an entry using the 'type and enter method', than the entry will be set for a duration of 15 minutes.
- Once an agenda entry has been created, it can be rescheduled by clicking once inside the entry; placing the mouse pointer on the boarder of the entry (the blue part); dragging the entry to the desired time frame; and dropping it.
- To delete an agenda entry, click within the boarder to highlight it then press DEL.

How do I create a new meeting?

1 Click on the 'New Entry' icon on the toolbar or double-click on a time block in the agenda page. This action will reveal the 'New Meeting' dialog box.

2 Fill in the areas defined by each subsection: Title, Location, Date, Start time, Duration, and End time.

3 You can add people to the entry in the 'People and Resources' box. If the entry needs no other details to be entered, click on the 'Create' button.

How do I edit a meeting?

1. Double-click on any agenda entry created by you. This action will reveal a 'Edit Entry' dialog box.
2. Edit the appropriate fields: Title, Location, Importance level, Access level, Date, Start time, Duration, and End time. Click OK.

How do I invite others to a meeting?

1. Double-click in the agenda portion of the agenda or click on the New Entry button.
2. Set the details of the meeting; title, location, date, start time, end time, and duration.
3. In the People and Resources area, type in the individual's name and click the green checkmark or press Enter.
4. Add as many people as necessary to the entry.

TIPS

- If you are not sure of someone's name, use the Search feature to obtain a listing of everyone entered into the database. 
- You can save time by entering the initials of the person you want to add-you do not have to type the entire name. For example, if you want to add 'Mary Doette' then type 'm d' and it will be automatically listed.
- You can get a quick listing of resources or groups by typing r: or g: in the add box, respectively.

How do I create a repeating meeting?

1. Click on the Repeating Tab in the New Agenda Entry dialog box.
2. Click on the down arrow in the Frequency area and choose your desired repetition frequency.
3. In the Start and End dates, fill in the desired duration of the repeating meetings.
4. Decide whether or not you want to display Conflicts.
5. Decide whether or not you want to include Saturdays, Sundays, or Holidays in your repetition.
6. Choose any Additional Dates that do not fall within the repetition.
7. Delete any unwanted dates by selecting them and then clicking on the Delete button. Click OK

How do I add comments to my entry?

1. Click the Details tab
2. Type information in the text area area; or use CUT, COPY, and PASTE feature from another application
3. Click OK

TIPS

- A pencil icon will appear on the entry in the agenda when details are present.

How do I create an attachment in my entry?

1. In the Attachments tab of the New Meeting or Edit Meeting click on the Attach button
2. A dialog box called 'Select file to attach' will pop-up, locate the file you want to attach to the agenda entry
3. Click on OK

TIPS

- When an attachment is added, the file name and associated application icon will appear in the right side of the area below.

- A paper clip will appear on the entry in the agenda when an attachment has been added.
- It is only possible to have *one* attachment per meeting.

How do I set a reminder (pop-up window or upcoming display)?

Setting up a **Pop-up Window** (a reminder in the form of a window that pops up on your screen that will alert you of an upcoming meeting)

1. Click on the Reminders tab
2. Choose the Remind me option and select Pop-up window
3. Specify the time duration to be used by clicking the down arrow (hours, days, weeks)
4. Set the number of hours, days, or weeks by clicking in the box and typing the desired number.

TIPS

- As long as Oracle Calendar is minimized, the Pop-up Window will pop-up while using other programs.
- Pop-up Windows can be snoozed like an alarm clock after they go off.

Setting up an **Upcoming Display** reminder (a note that will appear a full day in the notes section of the agenda--at the bottom)

1. Click on the Reminders tab
2. Choose the Display Upcoming For by clicking on the down arrow where Pop-up Window is displayed and selecting it
3. Specify the time duration to be used by clicking the down arrow (days, weeks, months, years)
4. Set the number of days, weeks, etc., by clicking in the box and typing the desired number

TIPS

- The Upcoming Display reminder will show in the notes section a day or more before the meeting and will use a hand and clock icon to indicate that it represents something that is upcoming.
- If a reminder is set for an agenda entry, then a bell icon will appear on the entry in the agenda when a reminder is set.
- All reminders are individually set by each user. When one sets a reminder for an agenda entry then that reminder will apply only to that user--not to others who may be included in the meeting.

5. Your In-Tray

How do I open my In-Tray?

1. Click on the In-Tray icon on the toolbar .
   OR
2. Windows: click on the <File | Open | In-tray> menu or press CTRL + I.
3. Macintosh: click on the <File | Open In-tray> menu or press Command+ I.

How do I open the In-Tray folders?

1. Click once on a folder (New entries, Entries you've accepted, Entries you've sent out, and Entries you've refused) to expand and display the contents.

How do I view the distribution list and responses of attendees?

1. Click once on an event icon (event icons are found in the In-Tray folders). This action will reveal a list of all the users and resources invited to that event. Also, their responses will be indicated by the response icons.

How do I reply in the In-Tray?

- Windows: right-click an entry and select your response from the options
- Macintosh: ctrl+click an entry and select your response from the options

TIPS

- Agenda entries can be moved from one folder to another using the Drag and Drop method without restriction. In other words, you can always change your mind and drag an entry back to where it came from or you can drag it to another place.

How do I edit my entries from the In-Tray?

1. Only entries that you have created are modifiable by you
2. Identify the agenda entry to be edited in the ENTRIES YOU'VE SENT OUT folder
3. Double-click on the title of the entry and an Edit Entry dialog box will appear
4. To edit an entry go to How do I edit an entry?

TIPS

- When in the In-Tray, a quick way to view all the attendees for a particular agenda entry is to **single-click** on the clock icon preceding the entry title. This action will reveal a list of all the people invited to the meeting and it will also indicate their responses. To hide the list, simply single-click once again on the clock icon.

6. Getting Together

How do I check for conflicts?

After people/resources have been added to the People and Resources area and a time and date have been set, click on the Check Conflicts button. If a conflict exists you are presented with the Details of Conflick dialog box. This contains details of who is busy and the times that they are busy.

TIPS

- Revealing the Details of the Conflict will show who or what is in conflict and which agenda entry they are in conflict with.
- The Check for conflicts command can be used before or after an entry has been created. In other words, the Check conflicts button is available in both the New Agenda Entry **and** Edit Entry dialog boxes.

How do I open my agenda?

1. Click on the Open Agenda icon, the 'Open an Agenda' dialog box will appear.
2. Your name will appear, pre-selected.
3. Click OK.

TIPS

- Windows: open agenda shortcut is Ctrl+O, open agenda as designate is Ctrl+Alt+O
- Macintosh: open agenda shortcut is Command+O, open agenda as designate is Shift+Command+O

How do I open another person's agenda?

1. Click on the Open Agenda icon and the Open an Agenda dialog box will appear
2. Type in the name of the user whose agenda you want to see or search the directory
3. Click OK. The user's agenda will appear in a separate window

TIPS

- When entering the name of a user whose agenda you want to see, you could type the person's initials instead. However, the initials must be separated by a SPACE only.

How do I open a group agenda?

1. Click on the 'Open group agenda' icon on the toolbar
2. In the dialog box that appears, add the names of the people you wish to include in the group agenda by typing in their names or initials (add the

names individually, i.e., after each name is entered press Enter or click on the green checkmark)

3. Once all the user's names whose agendas you want to view are listed below--Click OK

TIPS

- If you do not know the name of the user that you want to add to the list, use the Search button to browse in the database for that user. Use the Group icon for a quick listing of your accessible groups so that the names of a particular group are added automatically.
- The group agenda will show all of the users' agendas side-by-side (day view) with the added Combined column. To add or remove someone from the group agenda after it has been made, click the add/remove icon.
- Resources can also be included in the Group agenda. In the add box simple type in **r:** to display a listing of the resources available to you. Select the appropriate resource and it will be added to the list and its agenda will also be displayed.

How do I create groups?

1. Choose <Tools | Manage Groups> menu
2. Type in a name for the group in the Manage Groups dialog box.
3. Choose the Group Type (see the box below in the **TIPS** section) by clicking on the down arrow next to Private
4. Add the group members by clicking in the Add member box
5. Type the name of the person you want to include in the group and click the green checkmark
6. Add any other names that you want to include in the group
7. Click OK to return to the Manage Grops dialog box and click OK again to return to your agenda.

TIPS

- This table describes the group types. Note that only those with special rights are allowed to use the Public and Administrative categories.

Group Type	**Description**
Public (**PUB**)	These groups can be accessed and used by anyone. They are *owned* by the person who created it. However, special rights are required to create this type of group and the rights are given by the Sysop.
Private (**PRV**)	These groups can only be used by the person who created them. Anyone can create this type of group--no special rights are needed.
Administrative (**ADM**)	These groups can be accessed and used by anyone. They are *owned* by the Oracle Calendar system (Sysop). Special rights are required to create this type of group.
Members Only (**MEM**)	These groups can be accessed by anyone. However, they are available for use only to the members of the group. No special rights are needed to create this type of group.

7. Editing Entries

How do I delete an entry?

1. Click on the entry to select it
2. Press DEL on your keyboard
3. A confirmation message will appear--Choose OK.

TIPS

- A user can only delete entries that they have created. One cannot delete entries that they have been invited to. However, a user can choose not to display declined entries in their agenda. To do this, choose the <Tools | Options> (Windows) menu and <Agenda> or <Oracle Calendar | Preferences> (Macintosh). At the bottom right of the dialog box deselect the command 'refused entries' to be displayed.

How do I edit an entry?

1. Double-click on the agenda entry you want to edit and the Edit entry dialog box appears
2. Select the appropriate tab (Details, Reminders, etc.), depending on the changes that you want to make
3. Make the necessary modifications
4. Click OK

TIPS

- A user can only edit entries they have created. One cannot edit entries that other users have made. If you want an entry to be modified but you are not the creator, you can use the *mail message* feature to e-mail a request of modification to the creator.

How do I edit a repeating entry?

1. Double-click on an instance of the agenda entry and the Edit Entry dialog box will appear
2. Select the entry you wish to edit from the list of repeat dates.
3. Make the changes you need to make.
4. Click OK

TIPS

- When modifications are made from this dialog box, the modifications will be applied to those instances which are highlighted in the repeat dates window at the bottom..

8. One Step Ahead

How do I create a Daily Note?

1. Click on the New Daily Note icon, or double-click in the Notes area at the bottom of the agenda page
2. Title the note, select the date, and add any users' names in the People/Resources tab who should receive the note
3. Click on the Create button

TIPS

- Daily notes provide a convenient method for intra-office communication. When adding people to the daily note, it ensures that they will be informed or reminded-- i.e., think of it as a F.Y.I.

How do I create a Day Event?

1. Click on the Day Event icon
2. Title the event, select the date, and add any users' names in the People/Resources tab who should receive the notification of the day event
3. Click on OK button

How do I create a Task?

1. Click on the New Task icon, or double-click on the white area in the Task section on the right-hand side of the agenda page (day view only)
2. Title the task, select the start and due date, priority, and any other details
3. Click on OK

How do I sort my Tasks?

Select the Open Tasks icon from the toolbar
To sort your tasks, choose the <View | Sort by> menu
Sort (or view) your tasks according to the description (alphabetical); priority; start date; due date; completion level or percent complete

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9. Communication

How do I reply to an entry?

Replying to an entry from your agenda:

1. Double-click on an existing agenda entry, as if to edit or view it.
2. Click on the last tab--'Reply/Notes'.
3. Select the appropriate attendance response. Click OK.

TIPS

- Your reply will be displayed with a corresponding response icon in all the attendees' agendas.

- You can also respond in this manner in the In-Tray by double-clicking on the title of an entry. This action will bring up a 'View' or 'Edit' entry dialog box from which you can choose the 'Reply/Notes' tab.

How do I send an e-mail from Oracle Calendar?

1. Right-click (Windows) or Ctrl+click a meeting in your agenda.
2. Select the ‘Send Mail’ option
3. Add or remove the name of mail recipients
4. Add to the message text, or delete any of the text, if required. Click on Send.

TIPS

- Do not confuse the 'Mail Message' icon and function with that of the 'Launch Mail' icon (on the toolbar) which invokes your e-mail application.
- The Oracle Calendar system will send the e-mail message to the e-mail queue of the recipient. If the intended recipient does not have an e-mail account then that individual will not receive the message.
- It is the 'Mail Message' dialog box that will appear when you click on 'Yes' to the **Mail message to attendees?** dialog box.

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10. Resource Management

How do I search for a resource in Oracle Calendar?

1. Click on the <Tools | Search Directory> menu.
2. Choose the 'Resources' tab in the Directory Search dialog box.
3. Click on the Search button to do a general search. (This action will list all of the resources entered in the database.) **Or**, fill in one or more of the available fields (resource name/number), and click the Search button. (This will narrow down your search.)
4. To view the information about a certain resource, click on the resource to highlight it and then click on the Information button.

TIPS

- Whenever you do a search for resources whether it is just a general search or browsing to book a resource, type in **r:** in the ADD box to get a quick listing of all of the available resources.

How do I book a resource?

Note that College resources in Oracle Calendar are normally only bookable by designated staff responsible for the management of the resource, who will need to be contacted to make a booking.

TIPS

- All resources on the Oracle Calendar system have their own agenda view just like any other user. The agendas of resources can be opened and viewed for free-time as if it were another user on the system. Usually, a resource designate is appointed to manage the agenda of a resource. This measure is to ensure that all queries made of the resource are handled properly.

How do I restrict access to resources?

1. Open the Oracle Calendar application and Sign-In as the resource.
2. Click on the <Tools | Access Rights> menu and choose the 'Scheduling' tab.
3. When the *Default: Any unlisted person* is highlighted, deselect the box labeled *Can invite me to events*. (This will prevent just anyone from booking the resource.)
4. In the Add box, add the people who are able to book the resource. (Their names will appear in the field at the bottom of the dialog box.)
5. For each person you list, a *Same as Default* box will appear as selected, deselect the *Same as Default* and then select the *Can invite me to events*. (As a result, only to those listed will be able to book the resource.)
6. Click OK.

TIPS

- Those who try to book a resource and have been prevented from doing so using the method above, will view a dialog box telling them that they are not allowed to access that resource. Use this feature for those resources that are reserved for certain personnel.

11. Your Security

How do I control what other's see of my agenda?

1. Preferences for the viewing rights of others are set in the <Tools | Access Rights> menu, under the <Viewing> tab.
2. For each access level (normal, confidential, personal) choose the setting you want to associate with that access level. Click in the box of your choice.

Access Level	Details	Busy Time	Neither Box Selected
Normal Confidential Personal	If the preference of 'details' is selected for either normal, confidential, or personal; then a user who views an agenda entry labeled as such, will see all details associated with that entry.	If the preference of 'busy time' is selected for either normal, confidential, or personal; then a user who views an agenda entry labeled as such, will view only the duration of the entry. No details are revealed.	If neither box is selected for the access level, then a user viewing your agenda will see nothing associated with that agenda entry. The actual time frame will be blank.

Please refer to the IT Services document Oracle Calendar Access Rights (C808) for recommended sttings.

How do I change my password?

- **Do not** attempt to change your password in Oracle Calendar. If you need to change your general Computer Services password, please consult IT Services Guide A1.11 *Changing Your Password*.