The University Of Sheffield.

Introduction to the myCalendar Web Client.

CiCS

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Contents

1. Introduction

myCalendar is group calendar software that allows computerised diary scheduling. All users of myCalendar can set access permissions to allow selected groups of other users to view their schedule. Appointments and meetings can be arranged easily between relevant participants, and meeting rooms booked.

The service can be accessed using client software, a web browser, and by synchronising with a palmtop computing device. The system provides an integrated scheduling facility that you can consult and operate on campus, from home, or even whilst travelling abroad.

Such a system has been proven to improve communication and time management, particularly within organisations as expansive as The University of Sheffield.

This document is directed at those getting started with the myCalendar web client (Oracle Calendar) and using a PC anywhere in the world.

Web pages dedicated to using myCalendar, (including clients available for download), are provided on the CICS web pages starting at:

www.shef.ac.uk/cics/mycalendar

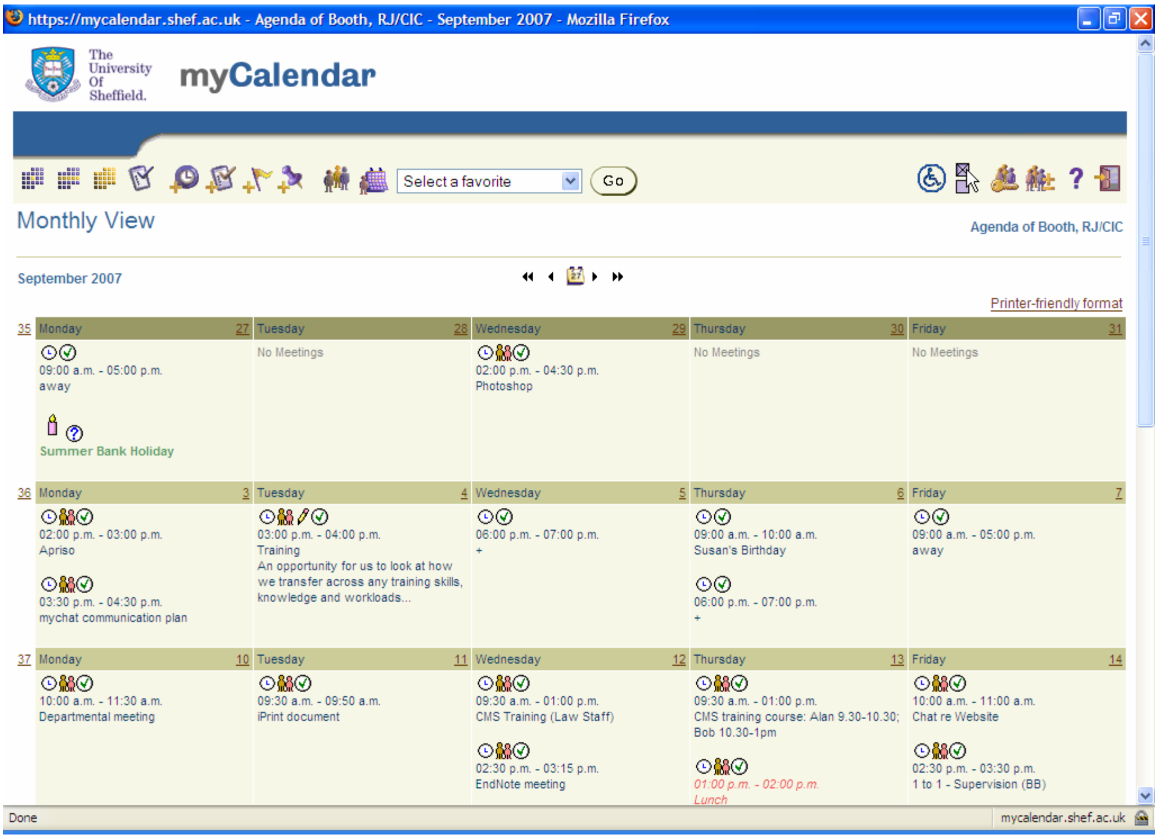
2. Accessing myCalendar

To use myCalendar start a web browser and go to any University web page. At the top of the web page, click the link labelled **Log into MUSE**. On the next screen log in with your usual username and password to access MUSE.

When MUSE loads, you will see a section, below your **myInbox**, labelled **myCalendar**. This displays a summary of your appointments for the current day.

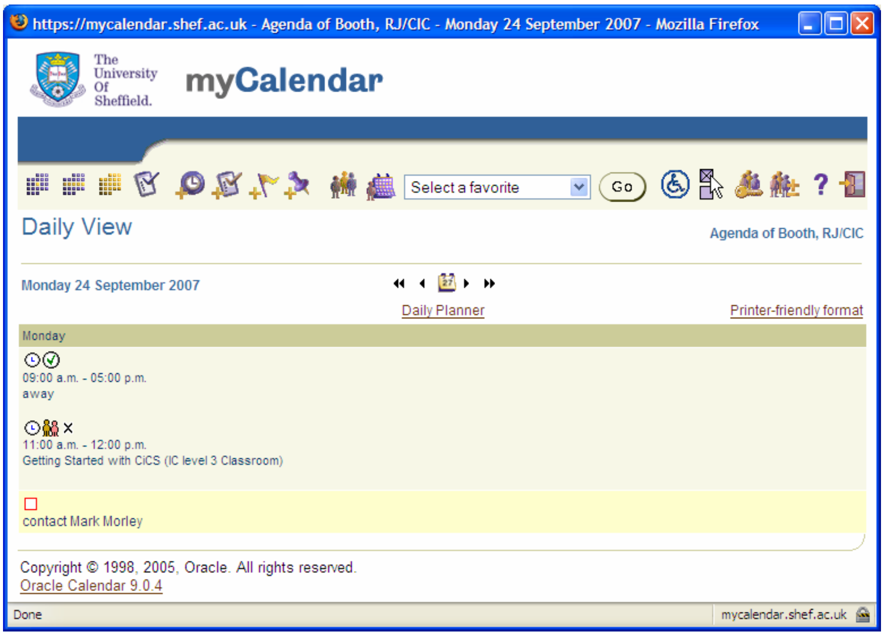
myCalendar

To access the complete myCalendar system, click the icon in the top-right corner of the MUSE screen. A new browser window will open and you will see your agenda for the current day, week, or month. The screen shot below shows the month view.



3. Your Agenda

The daily view of your Agenda window looks similar to:



The first time you run myCalendar you see the Agenda in this Daily view. On subsequent use you will receive the view that you were in when you last signed out of the software.

3.1. Changing Agenda View

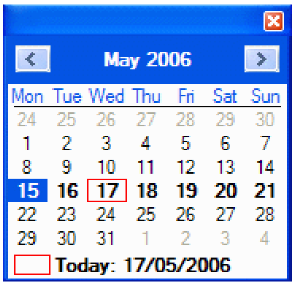
There are several ways to view your agenda by clicking on the appropriate buttons from the toolbar. With each of these views the navigation buttons can be used to jump between different time periods, as indicated in the following matrix.

Daily view	Back a week	Back a day	Forward a day	Forward a week
Weekly view	Back a month	Back a week	Forward a week	Forward a month
Monthly view	Back 6 months	Back a month	Forward a month	Forward 6 months

In the weekly view the current date appears as red text, other weekdays as black, and the weekends in blue. The coding is the same for the monthly view, with the addition that the current day box is yellow.

Clicking the small calendar button causes a calendar to appear for the month and year you are currently viewing.

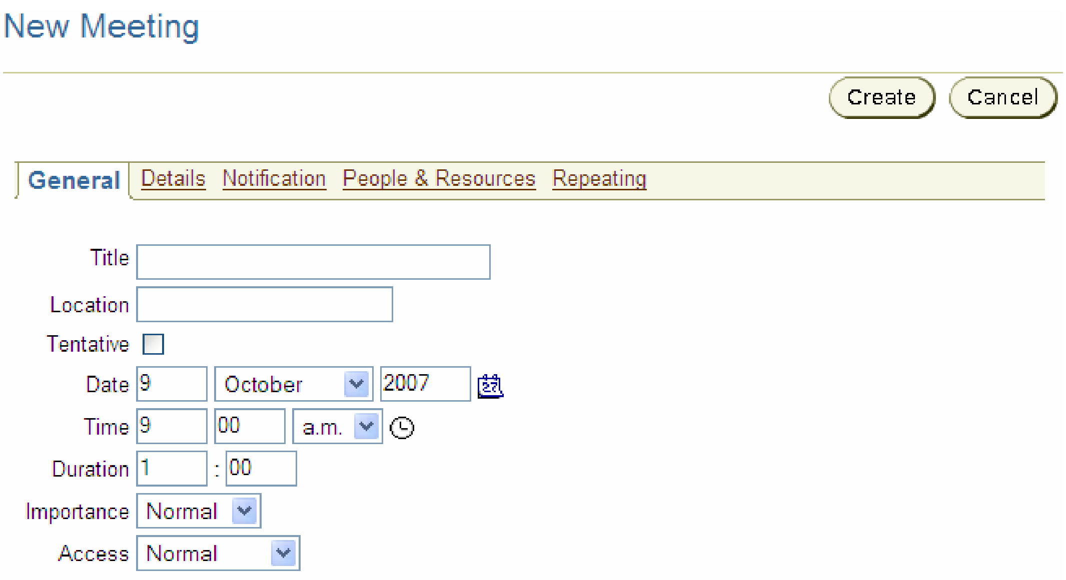
You can use this to choose any day, month and year.



4. Meetings

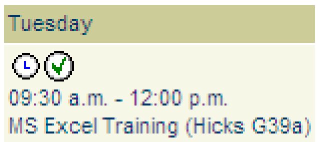
4.1. Creating a Simple Meeting

To add an item into your agenda, start on the Daily view and click the **New Meeting** button on the toolbar. You will see the **New Meeting** screen.



Provide a **Title** for the meeting and specify its **Location**. Change the **Date** if the one displayed is incorrect. In the **Time** field specify the start time of the meeting, then in the **Duration** field specify its duration.

Scroll down to the menu labelled **Access** and indicate whether the meeting is **Normal**, meaning people can see the details of the meeting, or either **Personal** or **Confidential**, meaning people can see that you have a meeting, but cannot see it details.

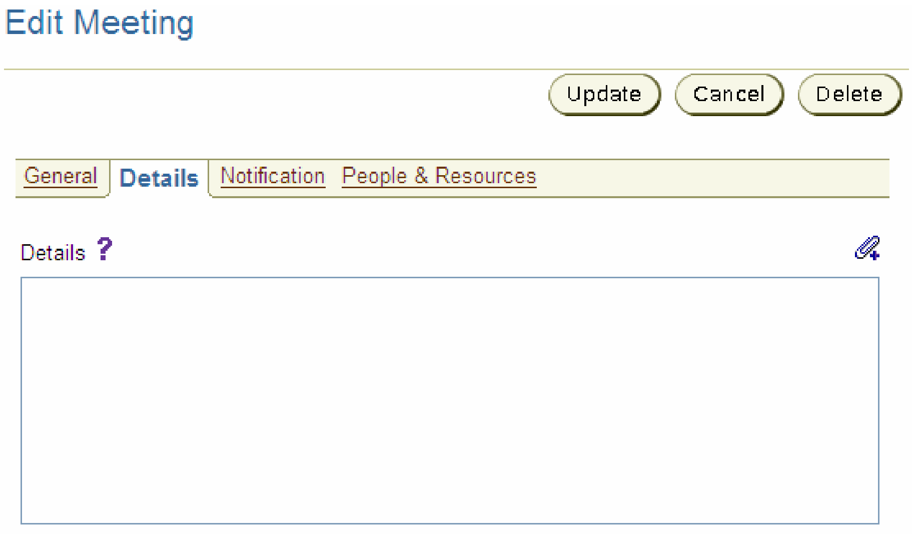


Click the **Create** button to place an entry in your agenda that forms a personal reminder of the meeting.

You can edit the meeting by clicking the clock icon.

4.2. Adding Meeting Details

When creating or editing a meeting, click the **Details** link You will get a new screen in which you can supply a detailed description of the meeting, so that you and anybody else can see exactly what the meeting is about.

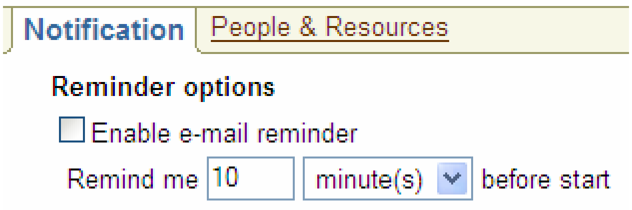


Attachments

You can add documents you want to circulate to attendees. Click the paperclip icon to attach files.

4.3. Reminding Yourself

When creating or editing a meeting, click the **Notification** link to set up a reminder for a meeting.

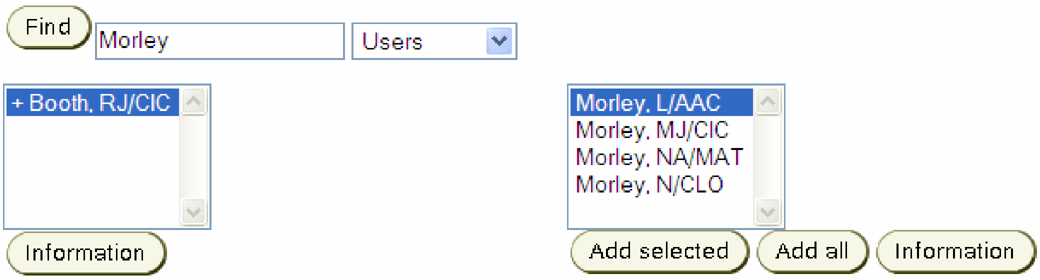


Click the checkbox and specify the time delay.

4.4. Inviting People to Meetings

When creating or editing a meeting, click the **People & Resources** link to invite people to a meeting you are setting up.

Type an intended attendee's surname into the first field and click the **Find** button. If more than one person has that surname you will receive a list from which to choose.



The names should be listed as surname followed by first initial and department code. If it is not you can change your preferences as detailed in section 7.1.

Select the correct name from the list and click the **Add Selected** button. You can then continue to supply names of people to invite to the meeting.

Once you have added everyone to the meeting you can click on the **Check conflicts** button. If there are any diary clashes, these will be listed at the bottom of the window; you may have to scroll down to see. You can then click the **Suggest Date & Time** button, which will generate a list of alternative dates and times when all attendees would be available. You can set the dates between which you would like the meeting, and the general times within those dates, then click on **List suggestions**. A list is generated and you simply click on the one most convenient, and then click **OK**.

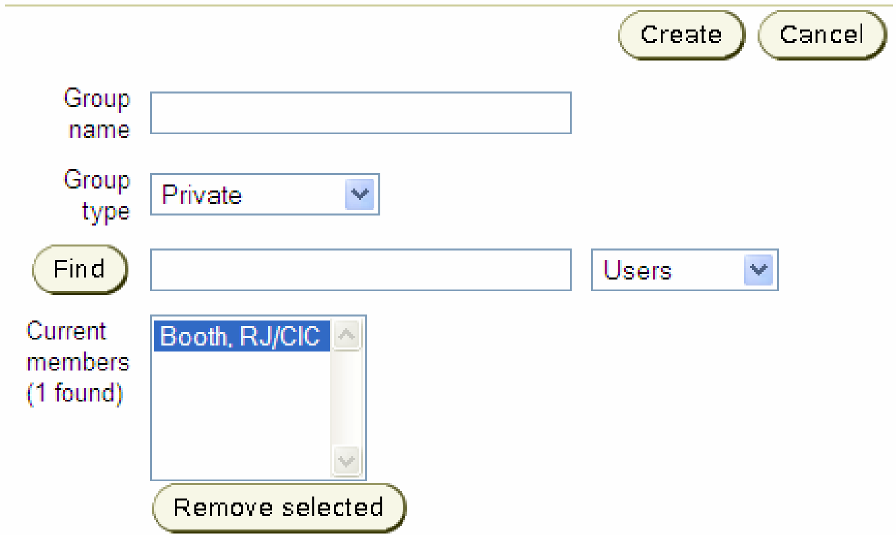
When you are ready to set up the meeting, click the **Create** or **Update** button.

A better way to create a meeting involving several people is to use the Scheduler as detailed in section 6.3.

4.5.Defining Groups of People

It can become tedious having to type in the same attendee names time and again when organising a regular meeting. The process can be made easier by creating a group incorporating the regular names.

Click the **Manage Groups** button then on the next screen click the **New** button. You will see a **New Group** screen similar to:



Type in a suitable name for the group in **Group name**. You have the option to set the **Group type** to either **Private** or **Members-Only**. Private groups can only be used by the person who created them. Members-Only groups are available for use only to the members of that group.

Now type in the surnames of the intended group in the Users field, clicking the **Find** button between each entry. Click the **Create** button to create the group, and you will return to the Manage Groups dialog box.

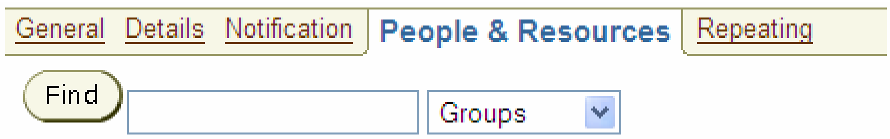
If in the future you need to amend a list, then you can click to highlight the list in question, and then click the **Edit** button to get back to the **Edit Group** box.

Click **OK** to exit the **Manage Groups** screen.

Inviting Groups

Now, when you are inviting people to meetings, you can use the groups you have set up to save time.

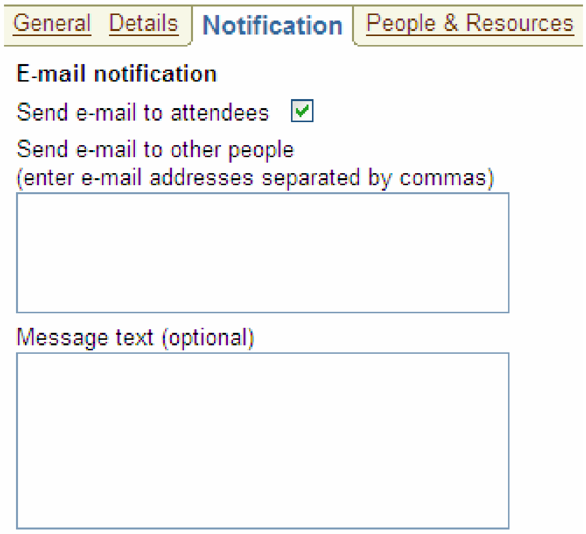
When adding people in the People and Resources screen, select **Group** from the menu to the right of the **Find** field.



Type all or part of the group name into the text field and click the **Find** button. All matching groups will be listed. Select the required group, and click the **Add Selected** button. The names of all people belonging to that group will be listed, and you can go on the check conflicts as usual.

4.6. Notifying People of Meetings

When creating or editing a meeting that involves other people, click the **Notification** link to let people know about the meeting.

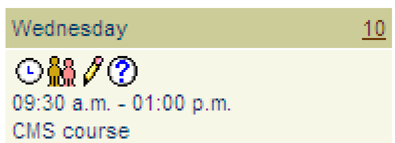


Tick the checkbox to specify that an email message is sent to the people whom you have invited. You can also notify other people by typing their email addresses into the upper text box.

People will receive a standard message, notifying them about the meeting. However, you can create a custom message by typing into the lower text box.

4.7. Monitoring your Meeting

When you create a meeting, the people that you have invited can indicate whether they will be attending, and similarly you can indicate whether you will attend meetings to which others have invited you. You can find the status of a meeting by looking at the icons associated with it.



- The clock icon lets you read about and edit the meeting.
- The two-people icon indicates that there is more than one person invited.
- The pencil icon indicates that additional information is available in the Details screen.
- The circle will contain a tick, cross, or question mark depending on whether you have said that you will attend.

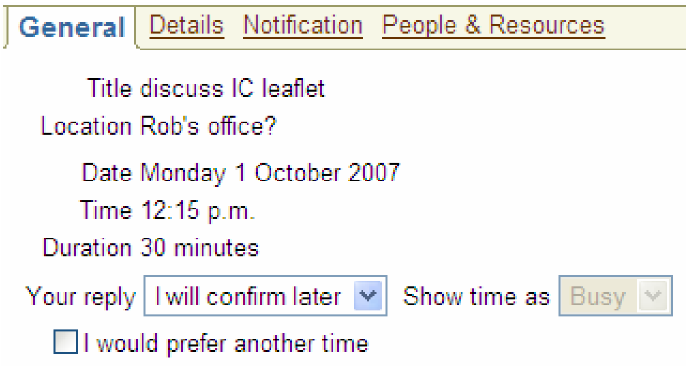
To find out whether the other people invited will be attending or not, click the clock icon to display more information about the meeting, then click the **People and Resources** link.

+ by the name means the person has said they will attend.

- by the name means the person has said they will not attend

? by the name means that person has not said whether they will attend

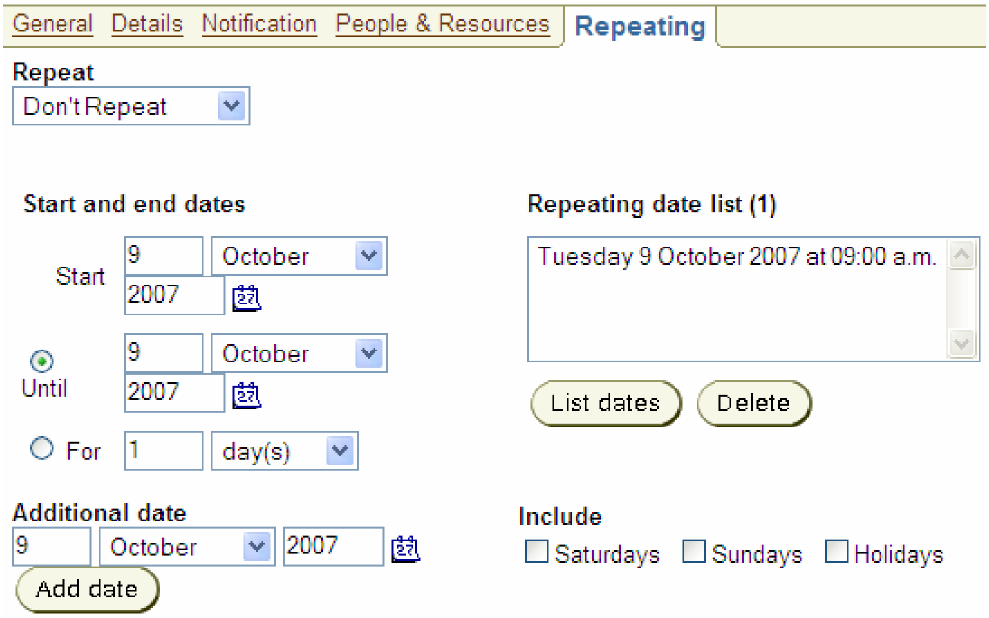
You can indicate whether you will be attending the meeting by clicking the **General** link then specify your decision in the **Your reply** menu.



4.8. Creating a Repeating Meeting

If you have a meeting that occurs on a regular basis or an activity that you will be repeating one or more times, then there is a mechanism to create the meeting just once and have myCalendar apply it to your agenda multiple times. Quite elaborate criteria can be set for the repeat frequency.

Create an agenda entry on the first date the activity will take place and then click the **Repeating** link.



Use the **Repeat** drop down menu to set the frequency as **Daily**, or **Weekly**, etc. Once you have set the frequency, you can specify the duration of the regular meeting by specifying the start and end dates, or the actual number of repeats. You can also include specific additional dates. You can choose to include weekends and holidays if you wish. Click the **List dates** button to review your choices.

The Repeating function is also useful for setting regular times when you would not be available for other meetings, for example regular lunchtimes and annual leave periods.

5. Daily Notes, Events, Tasks

5.1. Daily Notes

A daily note is an individual reminder for a specific day but not a specific time. It is used to serve as a reminder, for example to telephone or email someone on a specific day.

To create a daily note, click on the **New Daily Note** icon. In the new screen, enter a title, select the date and click the **People & Resources** link to add the names of anyone else who is to receive the Note. Click the **OK** button.

5.2. Daily Events

Daily events are entries that run for an entire day without blocking off time in your agenda. An example might be if someone is due to visit your department on a particular day and you will be meeting them at some point, but their itinerary is not yet fixed. You can create a daily event to indicate that some part of the day is going to be blocked off with a meeting at some point.

To create a daily event, click on the **New Daily Events** icon. In the new screen enter a title, select the date and click the **People & Resources** link to add the names of anyone else who is to receive the Event indicator. Click the **OK** button.

Creating a Day Event does not cause other appointments in that day to be flagged as conflicts. You are advised **not** to enter annual leave using a Daily Event; instead use a repeating meeting.

Both Daily Notes & Events appear at the bottom of Daily and Weekly agenda view and after meetings on Monthly agenda pages.

5.3. Tasks

Tasks allow you to manage and track projects. You can note start and/or end dates and times, maintain percentage completion, and assign a priority level.

To create a task, click on the **New Task** icon and fill in the necessary information. Tasks appear as a list on the right hand side of Daily agenda pages only.

6. Other People

6.1. Viewing Others' Agendas

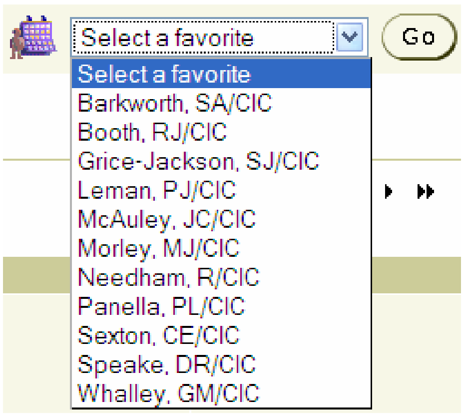
You can check the agendas of colleagues by clicking the **View Agendas** icon. In the new screen, type the surname of the person you are looking for then click the **Find** button.

You will see a list of people with matching names. The names should be listed as surname followed by first initial and department code, if it is not you can change your preferences as detailed in section 7.1.

Select the name of the person you are looking for, then click the **View** button to see their agenda. If you need to view this person's agenda regularly, you should click the **Add to favorites** button to make their agenda easily accessible.

6.2. Viewing a Favourite Agenda

You may need to view the agenda of your manager, your staff, or your team regularly. To assist with this you can build up a list of favourites and then view their agendas by selecting them from a menu.

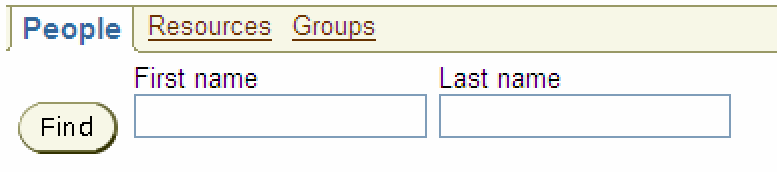


To build up your list of favourites, search for an agenda then click the **Add to favorites** button, as described in the previous section. You can easily move from your agenda to another agenda by selecting a favourite from your menu and clicking the **Go** button.

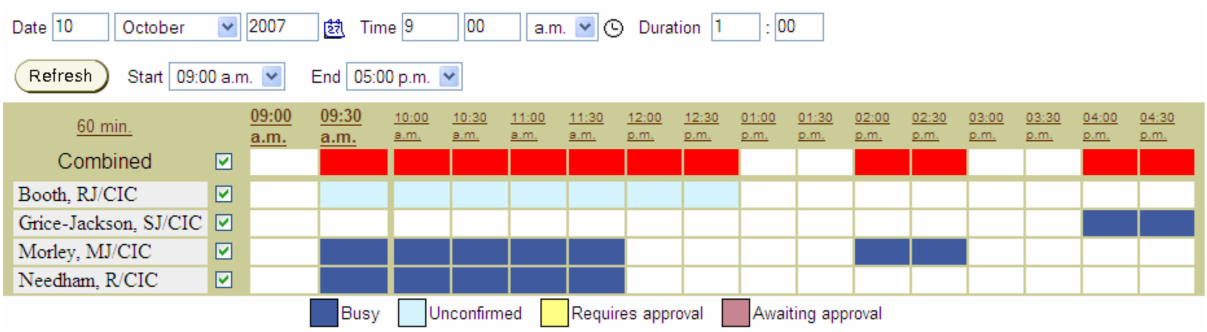
6.3. The Scheduler

In section 4.4 we described how to invite a group of people to a meeting and check for conflicts. The scheduler provides a far superior technique to set a meeting involving several people.

To access the scheduler, click the **Open Scheduler** icon. On the new screen you can search for people to invite to a new meeting, or you can click the **Groups** link to invite one of your defined groups.



As you assemble a group of people, you create a grid of combined availability in the lower half of the screen .

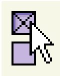


In the example above we can see that it would be possible to schedule meetings 1pm-2pm or 3pm-4pm. If we needed to schedule a 2 hour meeting, we would need to change the date in the top field then click the **Refresh** button to browse for a free 2 hour timeslot.

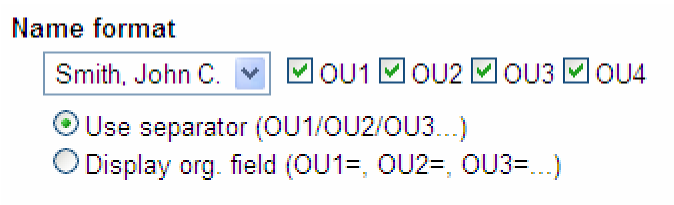
7. Setting Preferences

7.1. Name Format

You need to ensure that names are displayed as Surname, Initial/Department to make it easy to find people.

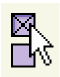


Click the **Preferences** icon, then in the new screen choose the correct name format as follows:



Click the **Ok** button when finished.

7.2. Other Preferences



There are many other things you can configure. Click the **Preferences** icon.

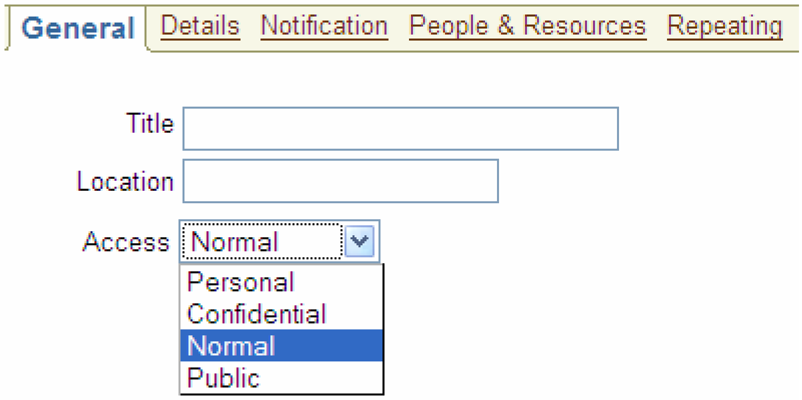
- In the **General** section, you can choose 12 or 24 hour time format.
- In **Display** you can choose whether to show weekends, and specify the times at which the agenda day starts and ends.
- In **Colors** you can specify colours for meetings that you will or will not attend.
- In **Security** you can enable automatic sign on.
- In **Entry Notification** you can specify the actions that cause automatic emails to be sent out.
- In **Entry Defaults** you can specify default reminders.

Click the **Ok** button when finished.

7.3. Access Rights

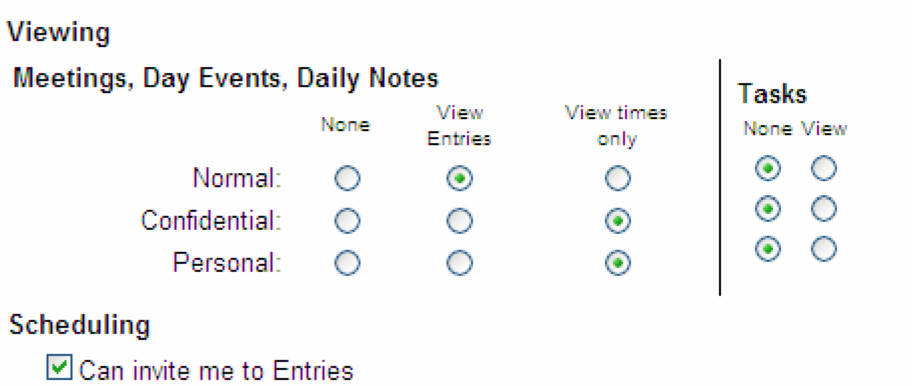
When you use myCalendar to schedule your meetings, people will see when you are available and when you are not. However, it may be that you schedule personal or sensitive entries in your myCalendar, and although people can see you are not available, you may not want them to see why.

When setting up a meeting you can specify whether the meeting is Normal, Personal or Confidential.



You can then use access rights to specify whether others can se the different meeting types. To set access rights, click the **Edit Access Rights** icon.

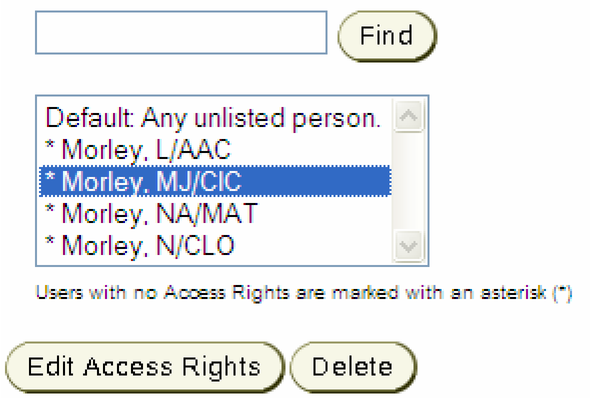
Ensure **Any unlisted person** is selected in the lower field, then click the **Edit Access Rights** button.



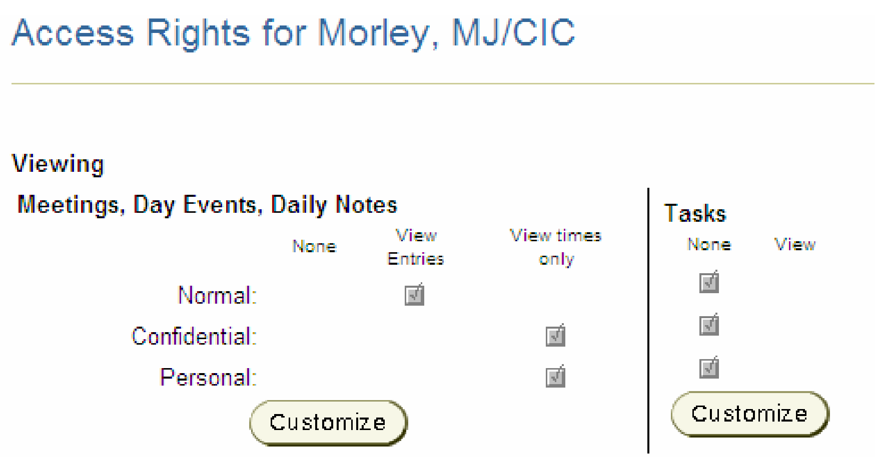
By default, anyone can see your **Normal** diary entries, but they can only see the times of your **Confidential** and **Personal** diary entries.

However, if you click the **OK** button to return to the original access rights screen, you can search for individuals, your manager or friends perhaps, who have additional access rights.

Use the upper fields to search for a specific person, then select their name from the list.



Click the **Edit Access Rights** button to see the access right for this person.



You can then click the **Customize** button to change the access rights for this specific person.

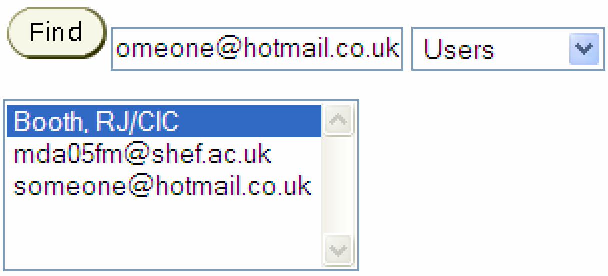
8. Non-University Members and Students

People who are not members of the University do not, of course, have access to myCalendar. Undergraduates have no access to myCalendar. Postgraduate students do have access to myCalendar, but the staff and postgraduate accounts are held in different databases. This means that postgrads can't access staff diaries, and vice versa.

However, the web client of myCalendar does provide ways in which external people and students can be invited to meetings and can view your diary.

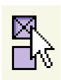
8.1. Inviting External People to Meetings

You can invite students and non-University people to meetings by typing in their email address and clicking the **Find** button. Their email address will be added to the participants list.

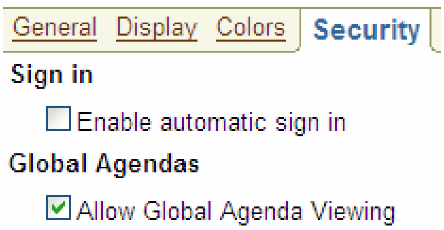


When creating a meeting that includes external people you should specify the **Access** to be **Public**.

8.2. Setting Up Global Access



You will need to change your preferences to allow students and external people to access your diary. Click the **Preferences** icon, then click the **Security** link and ensure that **Allow Global Agenda Viewing** is checked.

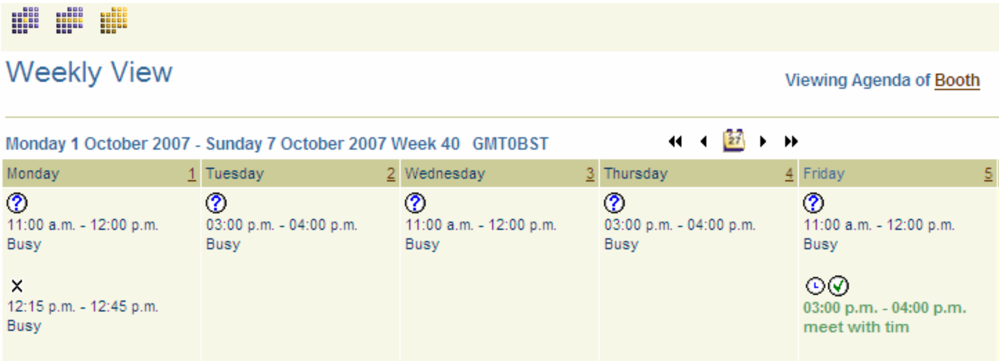


Click the **Ok** button and return to your agenda. You will notice a new link that allows you to email your agenda to others.

8.3. Giving Access to your Agenda

To let somebody see your agenda, click the **E-mail Agenda** link. In the new screen, supply their email address and click the **Send** button. You will return to your agenda, and your external colleague will receive an email message containing a web link.

When your external colleague clicks the link, their web browser will go to a page with a version of your agenda in it.



All normal, confidential, and personal meetings will simply be marked as **Busy**. However, if you have flagged any meetings as **Public**, your external colleague will be able to click on the clock icon to view any meeting details, and retrieve any files that have been attached to the meeting.

8.4. Implications

This link to your diary will allow your contact to access your diary indefinitely, they can look at the month view and click the arrow button to move forwards and backwards through your agenda.

They could even forward the link to somebody else, who could also view your agenda.

However, although they will be able to see when you have meetings, they would only be able to view the details of meetings that you have flagged as public.

9. Guidelines for use

Although it may be possible to carry out certain procedures or work in different ways with myCalendar, it is desirable to maintain a consistent approach within the University. The following guidelines set out the common approach to be taken when using myCalendar and have been approved by the Registrar and Secretary.

1. Accessing another person's diary is only proper for the purposes of determining their availability. Browsing someone else's diary for any other purpose is a misuse of the system.
2. In all cases, the **minimum** level of Viewing Access Privilege must be **View times only**. This blocks out time in your diary visible to others, but gives no further details. It allows others to arrange meetings during your free periods.

   It is not acceptable for anyone to set Access Rights to **No viewing rights**.

   In general, the default Viewing Access Privileges should be retained.

   However, your department may have a separately defined policy setting out the level of Access Privileges, but this must adhere to the University minimum level.

   Note: Some departments (central services) may need to alter Viewing Access Rights for reasons of privacy due to the nature of their work.
3. When creating an agenda item (meetings, etc.) you must consider the sensibilities of the people you invite. They may feel sensitive about particular appointments and want them kept private. Therefore, social meetings should normally be marked Personal so that although the time is blocked out, other details are not available to third parties.
   - The person who creates an agenda item sets the Access level.
   - Only that creator has the rights to change this Access level.
   - The Access level is an attribute of the agenda item.
   - Agenda items with Normal Access Rights will be fully visible to all users*.
4. When changing Access Rights due to departmental policy, or when creating a sensitive Personal or Confidential meeting, it is advisable to ask a colleague to view your agenda from their myCalendar to check that the Viewing Privileges are set as you expected, ensuring that only the people you require to see agenda entry details can actually do so. You need only perform this check once.
5. Unless it is your secretary or PA who enters all meeting into your diary, you must have the **Can invite you to Entries** ticked to allow others to invite you to meetings.
6. Usage logs of myCalendar are recorded, and can be accessed by authorised personnel if a complaint is made, harassment cases for example.

7. The access level for annual leave should be set to Normal*****. Annual leave must be booked as a meeting otherwise time is not blocked out in your agenda. Leave of more than one day can be set up using a repeating meeting.

   Annual leave should be marked in your agenda using the title **Annual Leave** to allow consistency when agenda searching.

   The Access level to be used for annual leave entries is set by your head of department. If the access level used is Normal*****, it is advised not to put any further details about your possible whereabouts for reasons of home security. If you use myCalendar as a self reminder of your intended whereabouts, it is advised you place a daily note set to confidential Access level with full details, in addition to the **annual leave meeting entry** as described above.

8. To deter others from booking meetings in your diary during periods when you will be busy, it is advised that you block the time off by creating a meeting marked **Keep Free** or with the name of the work task you are undertaking.

   It is also advisable to block off time when you might be travelling between sites, or returning from meetings external to the University.

9. As a courtesy, when creating a meeting you should send an email to the proposed attendees informing them of the meeting details. There is an automatic option to do this from the client version of myCalendar.

10. Creating a meeting in someone else's diary is merely a proposal, which they can confirm or reject. It is perfectly acceptable to decline attendance of a meeting, or request that another time be proposed.

***** This assumes that Normal has not been redefined for **Default: Any unlisted person**.