



USER GUIDE
CALENDAR FEATURES

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About MeritMail Calendar

The MeritMail Calendar lets you track and schedule your appointments, meetings, and events. Calendar includes the following features:

- Create different personal calendars
- Create appointments and schedule meetings and mark them as private, public or confidential.
- Create all-day events
- Use the QuickAdd dialog to quickly create an appointment
- Display your free/busy status
- View other peoples free/busy schedules to facilitate group scheduling
- Create recurring appointments
- View your calendars by various views, including day, 5-day work week, 7-day week, and month
- Quickly view your calendar schedule for the day from email messages or from the mini-calendar
- Accept/Tentative/Reject an invitation with one click
- Delegate manager access to your calendars
- Share your calendars with others
- Print your calendars

To open the Calendar view, select the Calendar tab. The Work Week view is the default and is displayed when Calendar is opened the first time.

You can change which view is displayed when Calendar is opened from the **Preferences, Calendar** tab. You can change your view from the **Calendar** toolbar, to see activities for a day, work week, full week, or month. Changing the Calendar view from the toolbar only changes the view for that session.

Creating calendars

One calendar is created for you, and you can create additional calendars to keep track of different types of functions. For example, you can create a calendar for work, for personal, and for company activities. You can use the **Schedule view** to see the calendars side-by-side.

To create a calendar

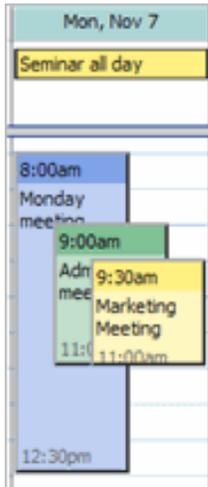
1. Select the Calendar tab.
2. Right-click **Calendars** in Overview pane, or on the toolbar click  **New** & select Calendar.
3. In the **Create New Calendar** dialog, type the name of the calendar and select a color to display the Calendar activities.
4. Click **OK**. The new calendar displays in the Calendar list.

To create a calendar and synchronize appointments from a remote calendar

1. Select the **Calendar** tab and right-click Calendars in the Overview pane, or on the toolbar, click  **New** and select Calendar.
2. In the **Create New Calendar** dialog, type the name of the calendar and select a color to display the Calendar activities.
3. Check **Synchronize** appointments from remote calendar. Enter a valid iCal file URL for the remote calendar.
4. Click **OK**.

Adding color to calendars

You can color-code calendars in your mailbox so that activities for that calendar always display in the chosen color. When you are looking at all activities in one of the views, the color signifies activities on different calendars. Eight colors are available. You can use a color more than once.

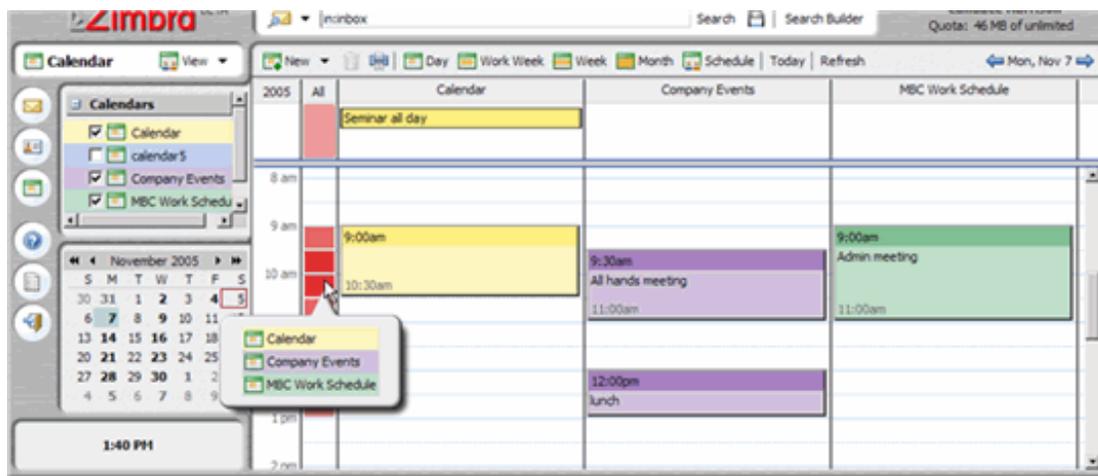


The above shows that blue, green, and yellow calendars have activities on November 7 and the yellow calendar has an all-day event.

You can select a color when you create a calendar and accept a calendar to share. You can edit the calendar's properties to change the color.

Viewing multiple calendars

The **Schedule View** lets you see multiple calendars selected from your Calendar list. The day-view shows a time bar, a free/busy indicator, and the calendars side-by-side. The calendar name is in the header.



All of your calendars including shared calendars are visible in your Calendar list. Each calendar in your Calendars list has a check box to the left of its name. Check the boxes for the calendars you want to view.

The All column is a color-coded free/busy indicator for the viewed calendars. White means that no activity is schedule at that time on any of the shown calendars. As more calendars have activities scheduled at the same time, the color in the Add columns become deeper. When the color is deep red, most calendars have activity during that time.

Move the mouse over the All column to see which calendars have activity scheduled within a time period.

Deleting calendars

You can delete any calendar in your Calendars list, except your default calendar.

1. Right-click on the calendar to be deleted. Click Delete.
2. On the Confirmation page, click Yes.

The calendar is immediately deleted. There is no undo.

The meetings that were created from this calendar are not automatically deleted from invited attendee's calendars.

Sharing your calendar with others

You can share your calendar with the following:

- **Internal users or groups.** You select the type of privileges to grant, either:
 - **Viewer.** The Grantee can see the activities posted to your calendar and the status of meeting requests, but cannot make any changes to your calendar.
 - **Manager.** The Grantee has full permission to create meetings, accept or decline invitations, and edit and delete activities from your calendar.

None is an option to temporarily disable access to a grantor's shared calendar without revoking the share privileges. The Grantee still has the calendar in their calendar list but cannot view or manage activities on the grantor's shared calendar.
- **External guests.** You create a password to access the shared calendar. Guests must enter this password to view the calendar. They cannot make changes to the calendar.
- **Public.** Anyone that knows the URL to the shared calendar can view it. They cannot make any changes to the calendar.

To share your Calendar

Right-click on the calendar you want to share and select **Share Calendar**.

On the Share Properties dialog select whom to share with.

- Internal Users or Groups
- External guests
- Public

Editing or revoking permission

1. You can edit or revoke permissions at any time.
2. Right-click a shared calendar.
3. Click **Edit Properties**. Users sharing the folder are listed.
4. Click **Edit** to change permissions, **or** Click **Revoke** to remove permissions.
5. Select whether a message describing the change should be sent. Click **OK**.

Accepting access to shared calendar

If you receive an email notice that you have been granted access to share another person's calendar, you can accept or reject the share invitation. When you accept the share, the shared calendar displays in your Calendar list.

To accept access to a shared calendar

1. Click **Accept Share** in the email. The Accept Share dialog opens and describes the role granted to you.
2. Before you accept you can customize the calendar name and select a color for messages to be displayed.
3. Check the Send mail about this share, to send a confirmation back to the Grantor. (optional)
4. Click **Yes**. The new shared calendar is added to your Calendar list. The message is moved to your Trash folder.

Declining a calendar share invitation

When you get an invitation to a shared calendar, the email messages gives you the option to decline the share invitation.

A **Decline Share** dialog displays. You can either decline and not send a message to the grantor, or you can send a reply and explain why you are declining.

Requesting access to a shared calendar

If you would like to access/view a person's shared calendar, you can request access by:

1. Right-click on "Calendars" tab. A menu will appear that lists "New Calendar," "Link to Shared Calendar," etc.
2. Click on "Link to Shared Calendar."
3. A window will appear that has three input boxes (Email:, Path: and Name:). In the "Email:" input box, type the email address of the person that you wish to view a calendar. If you don't know the path for the "Path:" input box, type "Calendar" in the box and click the "OK" button. Most people have "Calendar" as the name of their shared calendar, so this should work. If not, you will need to ask the person what the name of their shared calendar is in under the "Calendars" tab. Then, type that name in the "Path:" input box and click the "OK" button. This will allow you to view the person's shared calendar.

Importing your iCal calendar

You can import iCal calendars that are saved in the .ics format.

1. Go to **Preferences, Calendar**.
2. Click **Browse** to locate the .ics file to import.
3. Click **Import**.

Calendar view options

The Work Week View is displayed when Calendar is opened the first time. You can change your view at any time from the Calendar toolbar. Changing the Calendar view from the toolbar only changes the view for that session. You can change which view opens in Calendar from the Preferences, Calendar tab. You

The views are as follows:

- **Day** view is one day's activities
- **Work Week** view displays Monday through Friday activities
- **Week** view displays seven days of activities. From the Preferences, Calendar tab, you can select which day is the first day of the week.
- **Month** view displays a month's activities
- **Schedule** view is used when you have more than one calendar. Each calendar is displayed in a separate column.

Printing a calendar

You can print individual calendars in any of the views. The printed schedule includes present and previous month calendar, as well as meetings displayed per day.

If you view more than one calendar and then print that view, all schedules are combined on one calendar, but the printed calendar does not specify the calendar's name.

How to Print a Calendar

Display the calendar view to print, daily, weekly, monthly.

Click on  the toolbar. Your printer dialog appears and the Calendar view to be printed displays.

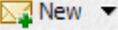
Click OK on your printer dialog. Close the calendar print view.

Making appointments

Activities you schedule are either appointments, meetings or events.

- **Appointments.** An appointment is an activity without other people. When you schedule an appointment, no email is sent to confirm the appointment. You can set recurring appointments. QuickAdd can be used to quickly create an appointment.
- **Meetings.** Meetings are appointments that include other people. When you create a meeting, you select attendees and send an email invitation to them. You can reschedule meetings and set up recurring meetings.
- **Events.** An event is an activity that lasts all day. Events do not display as time on the calendar, they appear as a banner at the top of the calendar schedule.

All three types of activities can be entered in several ways. You can schedule an appointment from any view except Preferences. To create an appointment you can do one of the following:

- On the toolbar, click the arrow on  and select Appointment. This is available in any view, except the Preferences view.
- Enter appointments directly on the calendar. In any view, except Month, select the date and a start time, double-click or drag through the time and the **QuickAdd Appointment** dialog opens.
- Right-click on either the mini-calendar or the start time in one of the calendar views. You can select to create a **New appointment** or a **New all day appointment**.
- Within an email message, certain text is interpreted as a date and triggers the ability to right-click to create an appointment. Text such as today, tomorrow, and a day of the week or an exact date are highlighted in messages. Hover the mouse over this type of text to see if you have an appointment scheduled. Click on the highlighted text to open your calendar.

Planning an appointment

You can create single or recurring appointments, meetings or events, see if attendees are free before inviting them, reserve a room and equipment, and write a message from within the Appointment view. **When you click Save, an email is sent inviting the attendees and reserving the resources you requested.**

The Appointment view consists of five tabs so you can quickly find attendees, locations, and resources (equipment) and see their free/busy schedule before finalizing the appointment.

On the Appointment page, you enter information about the appointment as follows:

- **Subject of the meeting.** The text added here becomes the description in the calendar.
- **Location of the meeting.** If the location is in the company directory, when you start to type, locations that match are listed. You can also go to the Find Locations tab to search.
- **Show As** is used to determine your Free/Busy options for the time. You can select, Busy, Free, Tentative, and Out-of-Office. This information displays on the Schedule Attendees page.
- **Calendar** drop-down list shows all calendars in your Calendar List. The first calendar displayed is your original Calendar. When you have multiple-calendars, you can create an appointment and select the calendar. The appointment is added to whichever calendar is selected.
- **Mark as** lets you mark an appointment as private, public, or confidential. Details about events that are marked private or confidential do not display in a grantee's shared calendar. Only the start and end time, duration, recurrence information, and the organizer's identity are shown in the shared calendar.

Planning an appointment (Continued)

- **Time** defines when the appointment will occur, day, hours, all day events and recurring appointment parameters.
- **Attendees.** Add attendees either by typing a name in the Attendees field, going to the Find Attendees tab to search or the Schedule tab to see attendees' free/busy schedule.
- **Resources.** This field shows any equipment that you request. If the resource is in the company directory, when you start to type in the field, resources that match are listed. You can also go to the Find Resources tab to search for resources.
- In the **Text** area compose a message that will be sent with the email invitation to the attendees.

Creating an appointment

You can schedule meetings and appointments from any view except Preferences. You can schedule an appointment for yourself, or you can schedule a meeting and invite attendees.

Scheduling a single meeting from the Appointment page

1. In any view except Preferences, from the toolbar click the arrow on  and select Appointment.
2. In the Details sections, enter the subject location, free/busy status, where it is a private meeting or not.

The **subject** becomes the description in the calendar and is required.

Locations that have been created as resource accounts by your system administrator can be reserved. If you know the name of the location enter it in the Location field. If you do not, go to the Find Location tab to search for the location. When you select it, the location appears in this field.

The **Show as** selection determines if this appointment displays as free or busy on the Schedule Attendees page.

Mark as lets you mark the message as private, public, or confidential.

If you have multiple calendars, select which calendar is setting up the event from the Calendar menu.

3. In the **Time** section, set the meeting date and time. Enter the Start date or click the down arrow to display a calendar and pick a date. Select the **End** date.

Note: If the time zone is displayed (**Preferences>Calendar**), it reflects the time zone that you are in. You usually do not need to change this. When you schedule meetings with attendees in different time zones, the invitation is sent reflecting the meeting time in their time zone. For example, if you create a meeting with attendees in California and New York, the invitation displays Pacific time for attendees in California and Eastern time (three hours later) for attendees in New York.

4. Add resources. If you know the name of the resource, enter it in the Resource field, If you do not, go to the **Find Resources** tab to search for available resources.
5. Enter the names of the attendees. You can enter attendee names in any of the following ways:

Creating an appointment (Continued)

- Go to the **Find Attendees** tab. Type a name and select which list to use, either Contacts or Global Address List. Select the names and press Add. When complete, click **OK**.
 - In the **Attendees** text field, type the email addresses, separating addresses by a semicolon (;). Names in your Contact list matching what you type are displayed as you type.
 - To see the free/busy schedules for attendees, click the **Schedule Attendees** tab. As you enter attendees' names and email addresses, if attendees' schedules are known, availability appears in horizontal bars next to the names. Return to the Appointment tab when the attendee's list is complete.
6. Use the **Text** field to add additional information to include in the email. To add attachments, click Add Attachments on the tool bar.
 7. Click **Save**. An email invitation is sent to all attendees and the appointment is displayed in their calendars.

If you are adding an appointment to a shared calendar, you may need to refresh the screen to see the appointment.

Seeing free/busy times

When you schedule meetings, you can view attendees, location and resource schedules as you set up the meeting. To see the free/busy schedules, open an Appointment and click the **Schedule Attendees** tab.

In the first column, select the type of object to schedule - attendee, location, or resource. In the next column enter names and email addresses. Availability appears in horizontal bars next to the names, if the schedule is known.

The free/busy information shows whether the attendee is busy, out of office, tentatively busy, or free.

Scheduling resources

When you schedule your meetings, you can reserve a location or equipment for the meeting. When you want to schedule these resources, you invite them to a meeting. The resource receives the invite and if it is free, accepts the meeting.

You receive an email from the resource that either accepts or declines the meeting. A meeting is declined if the resource already has a meeting scheduled for that time or for recurring meetings, if a meeting is scheduled for any of the dates and times of the recurring meeting schedule. You receive an email showing which dates conflict.

Administrator set up resource accounts with the email addresses and configures availability. Some resources may not be scheduled for more than one meeting per invite.

Turning messages and contacts into a meeting request

You can quickly create a meeting request by simply dragging and dropping a message, conversation, or contact to a date on the mini-calendar. When you drag and drop a message or conversation, the information in the message is used to populate many of the fields on the Appointment page.

- The Subject of the appointment is the subject of the message.
- The attendees are the email addresses in the **To:** and **Cc:** fields of the message or for conversations, the most recent message in a conversation. When you drag a contact from your Contacts list to the mini-calendar, the contact's first email address is added to the attendee field.
- The text of a message or the text of all messages in a conversation thread becomes the text of the invitation. Message attachments are not attached to the appointment request.

Turning messages and conversations into meeting requests

1. Click on a specific message or conversation and drag it to a date on the mini-calendar. The appointment page opens.
2. Review the meeting request details and make any necessary changes.
3. Set the time for the meeting, and, if this meeting recurs, set any recurrence.
4. Click **OK** to send the invitation.

Turning contacts into meeting requests

Click on a name from your Contact list and drag the name to a date on the mini-calendar. The appointment page opens with the contact name in the Attendees field.

Complete the Appointment information and click **OK** to send the invitation.

Using QuickAdd to create an appointment

The QuickAdd dialog makes it easy to quickly create an appointment. On your calendar, you select a start time, double-click or drag through the time and the QuickAdd Appointment dialog opens.

QuickAdd is an option. If you would prefer to always open the Appointment page when you double-click or drag on the calendar, disable this feature from your Options page.

To create a quick appointment

1. On the Calendar for the appointment, click the time for the appointment or click and drag from the start time to the end time for the appointment. The **QuickAdd Appointment** dialog appears.
2. To create an all-day appointment, from the Day or Week view, at the top of the calendar, click and drag over one or more days.
3. Enter the subject, location, and if this is a repeat appointment, select a repeat mode.
4. Click **OK**. The appointment displays on the calendar.

If you need to invite attendees or change repeat options, click **More Details** to open the Appointment page.

Scheduling all-day events

You can create an all day or multi-day event such as a conference. The event displays at the top of the calendar for the day of the event.

Scheduling an all day appointment

1. In any of the views except from **Preferences**, click the arrow on  and select Appointment.
2. Enter the **Subject**. The subject becomes the description in the calendar and is required.
3. Enter a **Location**. You can enter any location. Locations that have been created as resource accounts by your system administrator can be reserved. If you know the name of the location enter it in the **Location** field. If you do not, go to the **Find Location** tab to search for the location. When you select it, the location appears in this field.
4. Select the **Start and End** date. Check **All day event**, on the right of the time.
5. If you have multiple calendars, from the **Calendar** drop down, select which calendar is setting up the event.
6. Add resources. If you know the name of the resource, enter it in the Resource field. If you do not, go to the **Find Resources** tab to search for available resources.
7. Enter the names of the attendees. You can enter attendee names in any of the following ways:
 - Go to the **Find Attendees** tab. Type a name and select which list to use, either Contacts or Global Address List. Select the names and press **Add**. When complete, click **OK**.
 - In the **Attendees** text field , type the email addresses, separating addresses by a semicolon (;). As you type, names in your Contact list that match are displayed.
 - To see the free/busy schedules for attendees, click the **Schedule Attendees** tab. As you enter attendees' names and email addresses, if attendees' schedules are known, availability appears in horizontal bars next to the names. Return to the **Appointment** tab when the attendee's list is complete.
8. Enter any additional information about the meeting in the text area. To add attachments, click **Add Attachments** on the toolbar. This is included in the email that is sent.
9. Click **Save**. An email invitation is sent to all attendees. The event displays as a banner at the top of the Calendar.

Skip step 7 to schedule an appointment for yourself on your calendar, without attendees.

Creating recurring appointments

Recurring appointments are appointments that repeat on some sort of schedule. You can schedule recurring meetings to repeat daily, weekly, monthly, or yearly. In addition, you can customize recurring appointment schedules.

1. In any view except the Preferences view, click the arrow on  and select **Appointment**.
2. Enter the **Subject**. The subject becomes the description in the calendar and is required.
3. Enter a location. You can enter any location. Locations that have been created as resource accounts by your system administrator can be reserved. If you know the name of the location enter it in the Location field. If you do not, go to the **Find Location** tab to search for the location. When you select it, the location appears in this field.
4. Select the date and time. Enter the date or click the down arrow to display a calendar and pick a date. Select the End date.

Note: If the time zone is displayed, it reflects the time zone that you are in. You usually do not need to change this. When you schedule meetings with attendees in different time zones, the invitation is sent reflecting the meeting time in their time zone. For example, if you create a meeting with attendees in California and New York, the invitation displays Pacific time for attendees in California and Eastern time (three hours later) for attendees in New York.

5. Click Repeat to view the recurrence patterns: daily, weekly, monthly, yearly, or custom. The meeting will be scheduled in the recurring pattern from the specified start date and time. Custom repeat lets you schedule more specific patterns.
6. If your recurring meeting has an end date, click the link next to the Repeat field.
7. Select a recurrence pattern and, if necessary, to customize the pattern further, click the link that appears next to it.
 - **Every Day.** Customize daily repeats to choose whether it is every day or some other sequence such as every two days or four days.
 - **Every Week.** Customize weekly repeats to select whether it is a weekly recurring appointment or some other weekly pattern such as every two weeks. You can select which day of the week you want the meeting.
 - **Every Month.** Customize monthly repeats to select whether it is a monthly recurring appointment or some other monthly pattern such as every two months. A calendar displays and you can select which day or days you want the meeting scheduled.
 - **Every Year.** Customize yearly repeats to select the month and date.
8. Add resources. If you know the name of the resource, enter it in the Resource field, If you do not, go to the **Find Resources** tab to search for available resources.
9. Enter the names of the attendees. You can enter attendee names in any of the following ways:
 - Go to the Find Attendees tab. Type a name and select which list to use, either Contacts or Global Address List. Select the names and press Add. When complete, click OK.

Creating recurring appointments (Continued)

- In the **Attendees** text field next, type the email addresses, separating addresses by a semicolon (;). As you type, names in your Contact list that match are displayed.
 - To see the free/busy schedules for attendees, click the **Schedule Attendees** tab. As you enter attendees' names and email addresses, if attendees' schedules are known, availability appears in horizontal bars next to the names. Return to the **Appointment** tab when the attendee's list is complete.
10. Use the **Text** field to add additional information to include in the email. To add attachments, click **Add Attachments** on the tool bar.
 11. Click **Save**. An email invitation is sent to all attendees and the appointment is displayed in their calendars.

Responding to a meeting invitation

When you receive an email notification for a meeting, the meeting is added to your calendar and marked **New**. You can quickly respond to the invitation either from the email Inbox or from the **Calendar List** pane.

1. Open the message that contains the meeting request, in either the Inbox or right-click the appointment in the **Calendar List**.
2. To respond to the meeting invitation, click the appropriate action. If the meeting is a recurring meeting, you have the option to select **Instance** or **Series** to respond to.
3. Click **Accept, Tentative, or Decline**. A reply is automatically sent. You can add comments before you send your response.

To add comments when in Calendar View, right-click and select **Edit Reply**.

After you make your choice, the email message is moved to the Trash, and **New** is removed from the calendar notice. **Declined appointments display on your calendar in a faded view, as a reminder of the meeting you declined.** You can delete a declined message any time.

To read the message or to see any attachments that may have been sent, click the meeting notice

Deleting an appointment

Only the originator of an appointment can cancel the appointment.

1. Click on the appointment to delete.
2. Right-click and select **Delete**. If the appointment is a recurring series, you can delete an instance of the series or the complete series.
3. An email is sent to the attendees and the appointment is deleted from their calendars.

Changing recurring appointments

If you created the recurring meetings, you can change and delete one occurrence or the series of meetings. An email is sent to attendees after the change occurs.

To change a meeting

1. Double-click on the meeting to change, or right-click and select **Delete**.
2. Select whether to open only the selected date or to open the series. The **Appointment** page opens.
3. Make your changes. You can change the schedule, the attendees, add an explanation in the **Text** field and add an attachment.
4. Click **OK**. An email is sent to the attendees.

To delete a recurring meeting

1. Click on the appointment.
2. Right-click and select **Delete**, or drag the item to  .
3. Select whether to delete the instance or to delete the series.
4. An email is sent to the attendees and the appointment is deleted from their calendars.