Cleveland State University

Information Services and Technology

Campus Deskmail

Calendar Basics

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Key Point:

You can only view calendars, schedules, eMail, etc. of other campus Webmail or Deskmail users on campus. If the other person does NOT use Campus Webmail or Deskmail, you can add them to a Group Calendar or Schedule list, but you will be unable to view their information.

Miscellaneous but important notes

Campus Deskmail actually has a variety of tools that, used together, can make processing your calendar much easier and provide you with control over who sees your calendar, and mail, and what they can see and do while accessing your calendar, if you permit access at all. Here is an overview of some of the tools:

- **Delegation settings** – use these to determine who can/cannot read, create, edit and/or delete mail and/or calendar and To Do items.
- **Confidential** – use this when creating a meeting that you do not want others to be able to view, even if they can see other calendar entries
- **Work Hours setting** – use this to determine which hours you have available for meetings. Set your typical work hours here and list which people can view them (not the details on WHAT you are doing, just if you have meetings scheduled at any given time)
- **Automatically Process Invitations** – use this to handle incoming invitations automatically. The meetings are placed on your calendar and the eMails are removed without any action from you.
- **Address Book** – if you create a group for eMail, use the same group for invitations
- **Schedule** – use this to determine if/when invitees are available while you are scheduling a meeting. You are looking at their Work Hours settings, if they allowed you to, and their calendar. Unless they granted you permission, you cannot view what they are doing, only that they are busy
- **Group Calendar** – use this to view multiple people's free time quickly, if they have allowed you to in Work Hours settings, and what they are doing, if they have granted you access to their calendar.

Address Books

Remember that in Campus Deskmail, you can access names from two different address books:

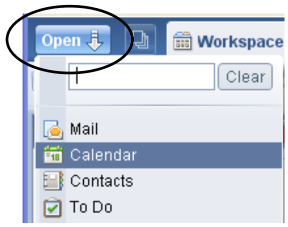
1. CSU E-Mail Directory – this contains all CSU faculty, staff and students who have not requested that their eMail address not be made public.
2. Contacts – this is your personal address book. It contains any information you had added and can be CSU or non-CSU addresses. You cannot view non-CSU people's calendars or eMail boxes.

Note: It is recommended that CSU eMail addresses not be added to your personal address book if they are listed in the public directory. Reason being if an individual's eMail address should change, it will automatically be updated in the public directory, however, the address listed in your personal address book will not be updated.

Calendar Views

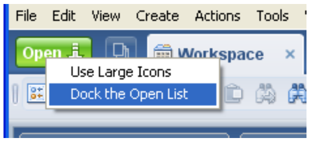
There are three different ways of accessing your calendar from Deskmail. All three will access the same calendar; it is simply what method you are comfortable with using.

1. In the upper left corner you may see a button titled 'Open'. If not, skip to step 2 or 3. Expand 'Open' and select 'Calendar'

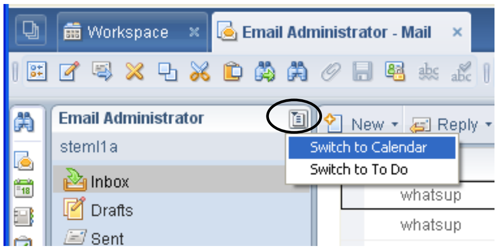


2. Along the left side you will have icons, select the 'Calendar' icon.

If you do not have these icons, but would like them, right click on the 'Open' button and select 'Dock This List'

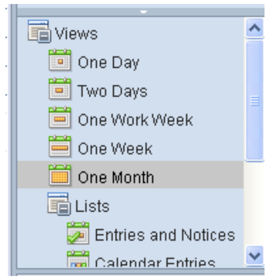


3. Open your mailbox, expand menu options and select 'Switch to Calendar'



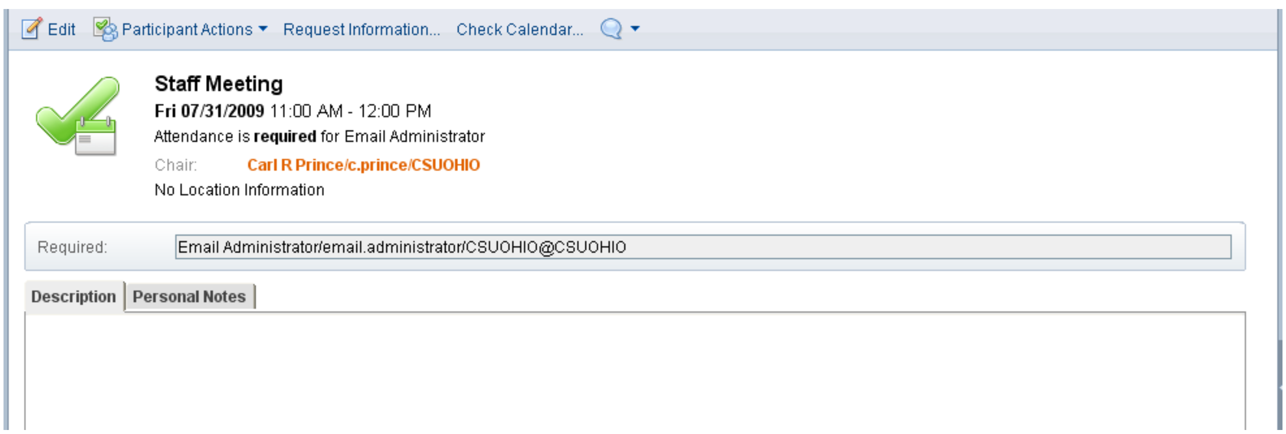
In Campus Deskmail, you have several options for viewing you calendar: One day; two days; one work week; one week; or one month.

You also have the ability to set the default view for when you open your calendar. While the calendar is opened, simply select the view desired and it will automatically become the default for when the calendar is opened in the future.

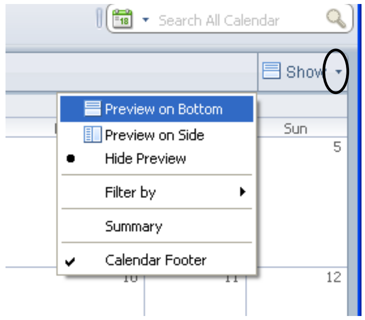


Read details on an entry

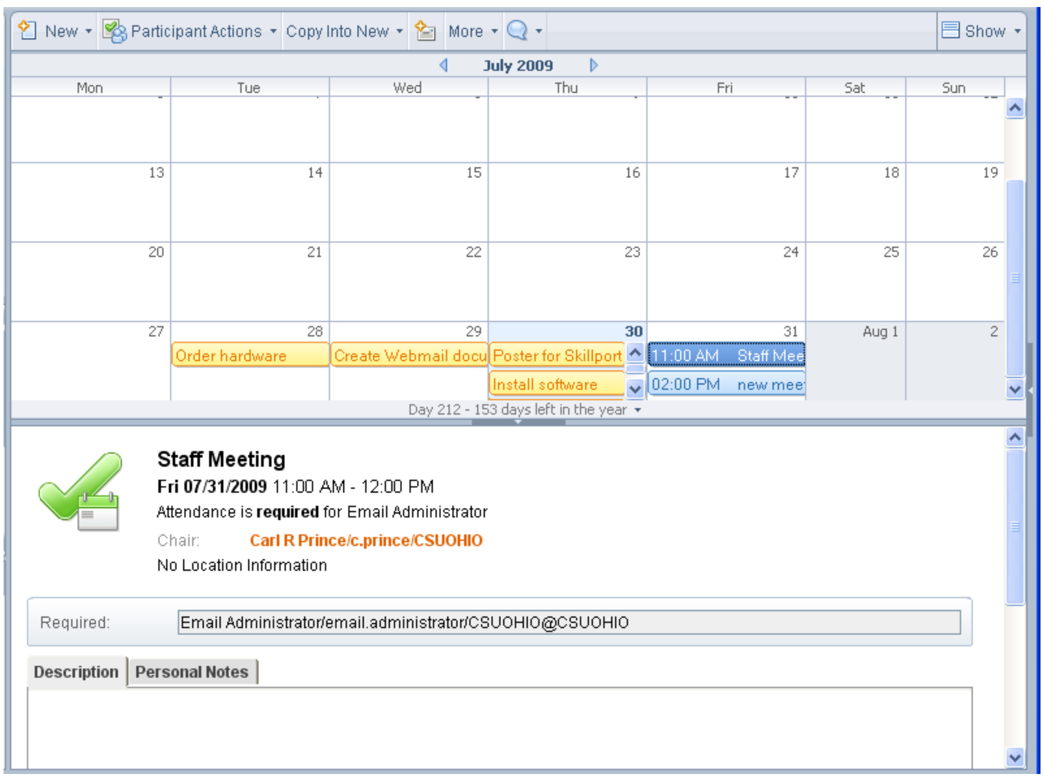
You can click on any entry in the view to open the entry and view the details



Or you can preview the entry, expand 'Show' and select either 'Preview on Bottom' or 'Preview on Side'

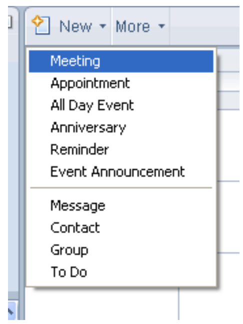


Resulting in (preview on bottom was selected for this example):

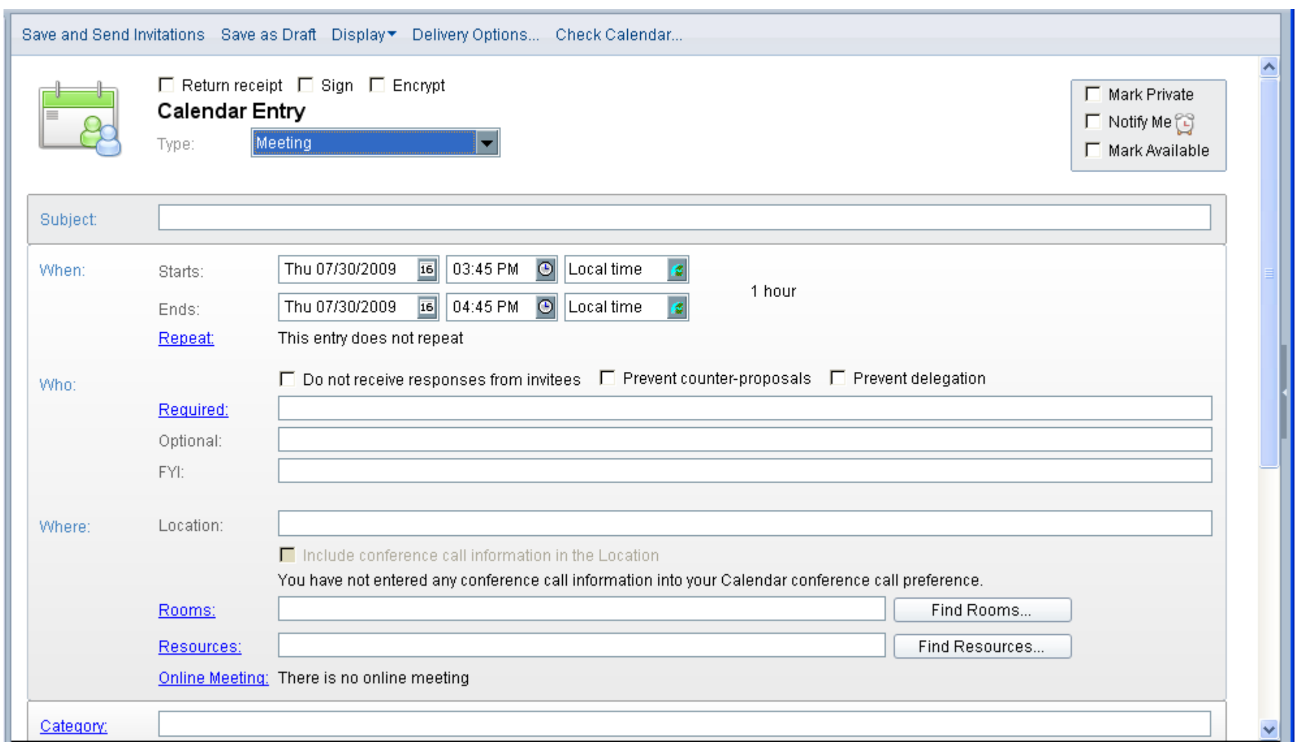


Create Calendar Entries

1. From the calendar expand ‘New’ and select the type of calendar entry to be created (in this example ‘Meeting’ will be used)

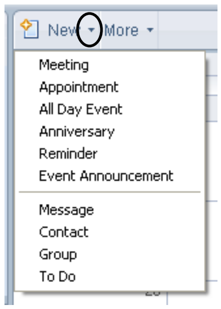


2. Enter the subject and set the date and time for the meeting
3. If desired, enter any special notes or the agenda in the details section (scroll down to view this section)
4. Select ‘Save and Send Invitations’

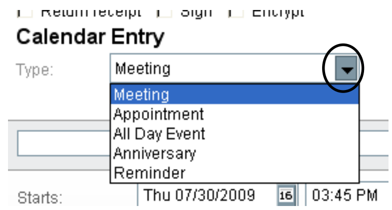


Type of Calendar Entries

Your calendar can contain different types of entries. The most common are meetings. The type of calendar entry to be created can be selected when creating a new entry, from the calendar view expand 'New' and select the calendar entry type, or once in a new entry expanding on the type tab and selecting from the list.

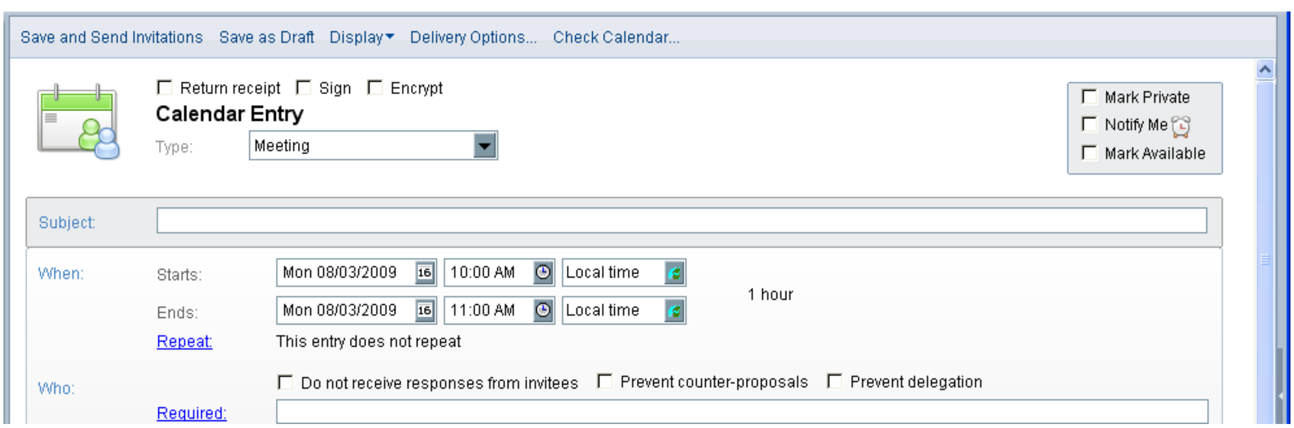


OR



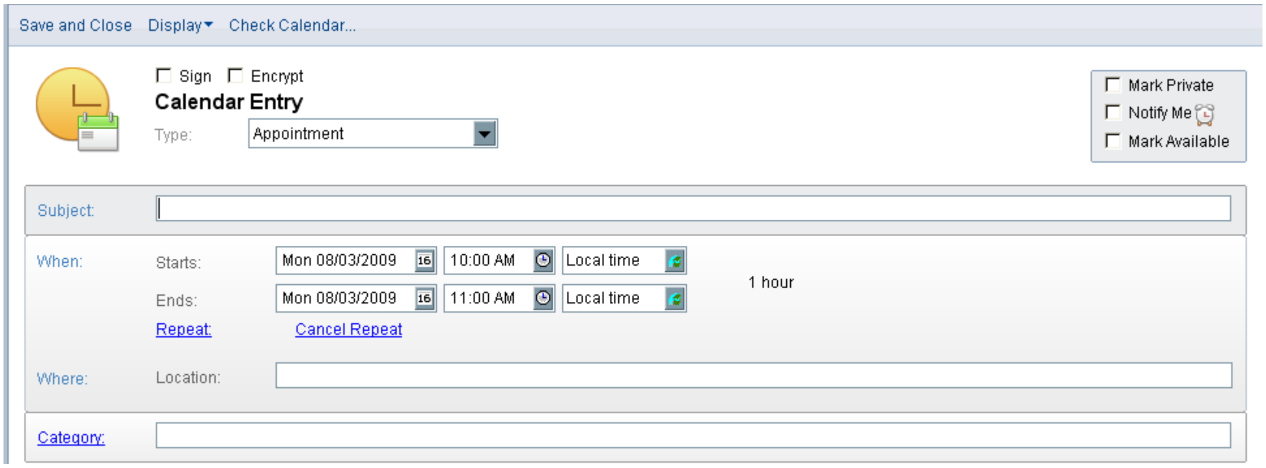
Meetings

Meetings are for a set period of time, but can be repeated at specified intervals, and you can invite others to your meetings (they will receive an eMail with the meeting information). If inviting other's to a meeting, you can also check their meeting schedule against the time of this meeting to avoid any conflicts.



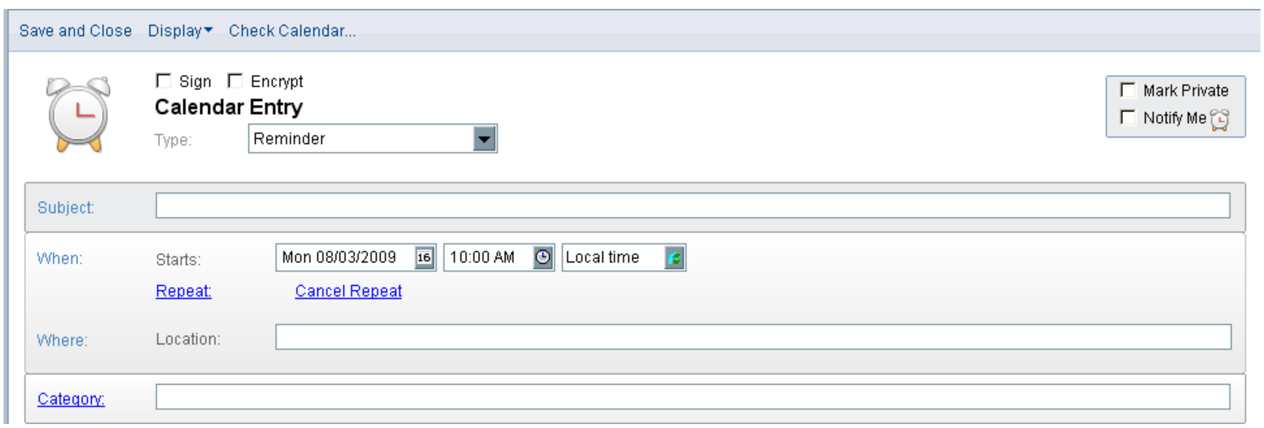
Appointments

Appointments are for a set period of time, but can be repeated at specified intervals. You cannot invite people to appointments. These are typically for entries such as personal appointments or meetings with non-Campus people.



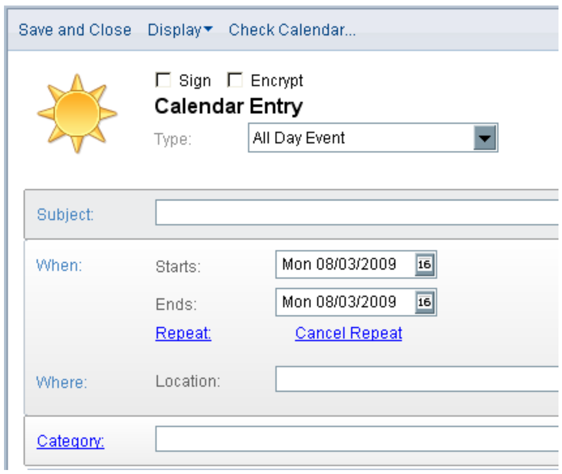
Reminders

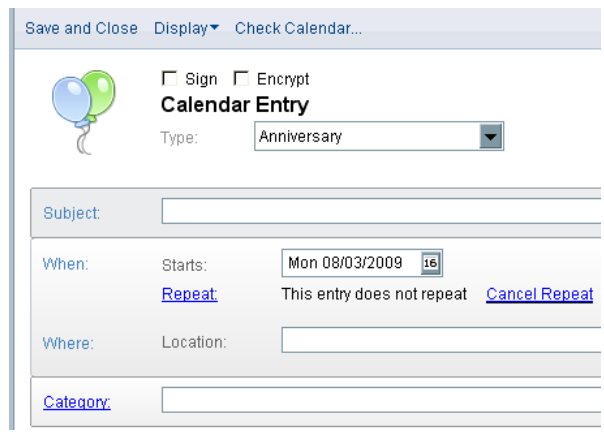
Reminders have a start time, but no end time. They are designed to remind you of a task at a specific time.



All Day Events and Anniversaries

All day events and anniversaries are not time based. They appear on the date specified in the event.





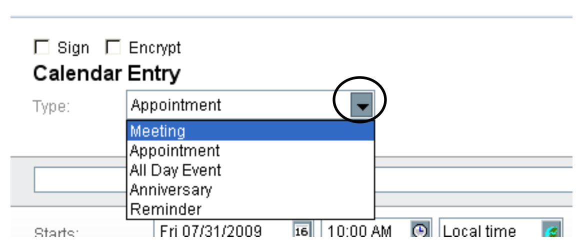
Invite people to meetings

You can invite one or more people to meetings by creating a calendar entry and entering their names in the ‘Required’ field. When you select ‘Save and Send Invitations’, they will receive an eMail invitation. Depending on what eMail system they are using, they may also be able to reply and automatically add the meeting to their own calendar.

Invite field not available?

Campus Deskmail allows various types of calendar entries. You can invite people to meetings, but not appointments or other types of entries. If you do not have an ‘Invite’ field, change the type of entry to ‘Meeting’.

1. Select the drop-down arrow next to the entry type
2. Select ‘Meeting’

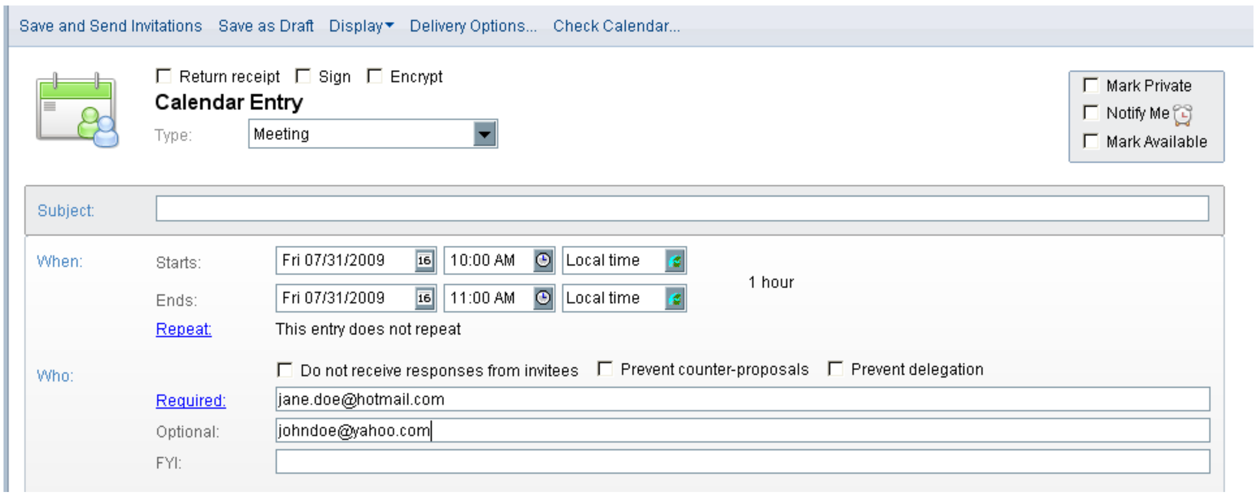


Campus Deskmail provides several methods for inviting people (this will look similar to addressing an eMail)

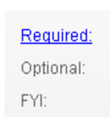
1. Type the eMail address OR
2. Select the address from the directory (address book) OR
3. Start typing then request Campus Deskmail to locate matches

Type the eMail Address

In the 'Invite', 'Optional' and 'FYI' fields you can manually enter complete eMail addresses.



Select from the Public Directory

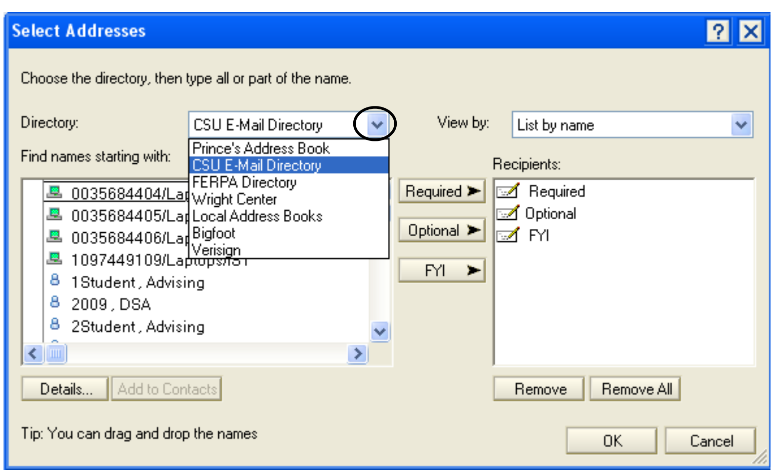


You can use both your Contacts and the CSU eMail Directory, which contains all publicly available faculty, staff and students. To use these, select 'Required'.

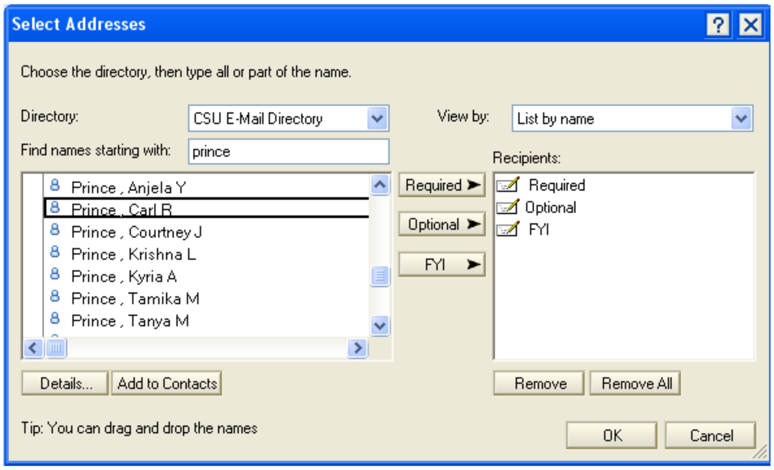
To select an address from your personal address book, follow the steps listed below, except in step 1, select your personal address book.

Select from the CSU eMail Directory

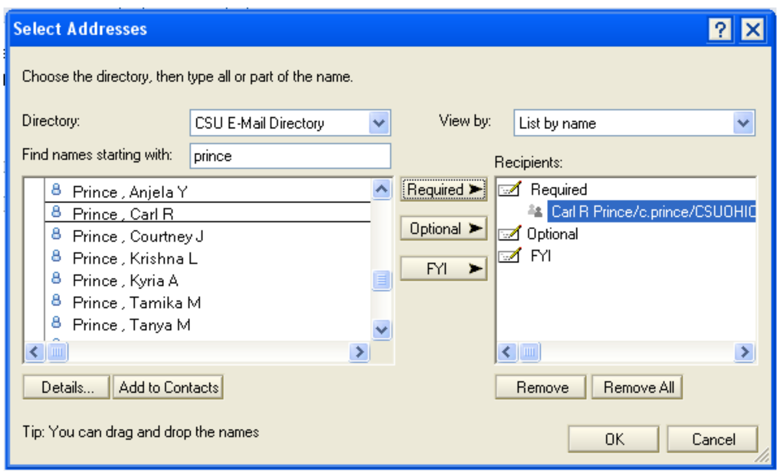
1. Verify the Directory is pointing to "CSU E-Mail Directory". If not expand this field and select 'CSU E-Mail Directory'



2. Type the name in the 'Find names starting with' field. The search will occur automatically as the name is entered



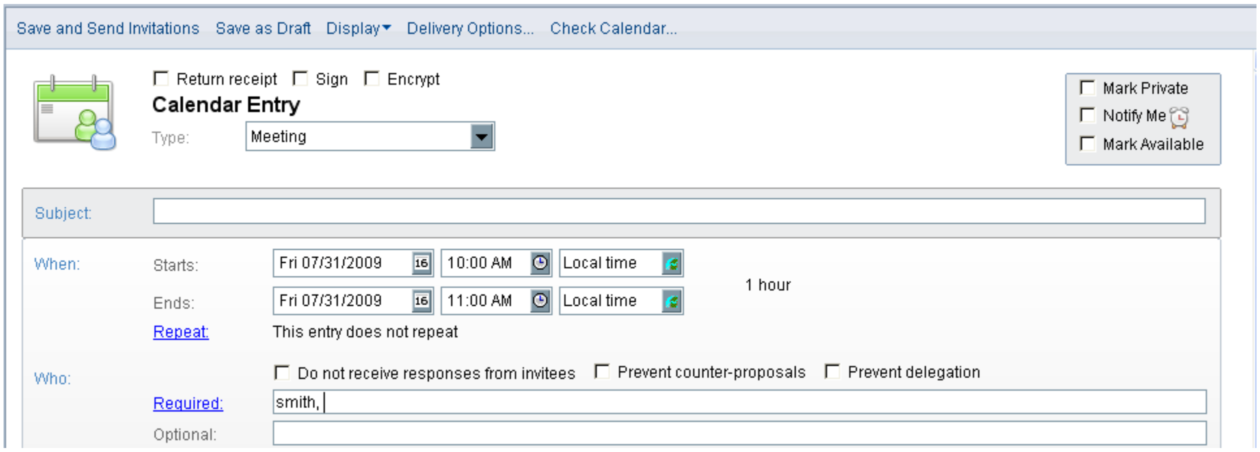
3. Select the desired name then either 'Required', 'Optional' or 'FYI' button.



4. Repeat above steps if additional addresses are to be selected. Select 'OK' when complete.

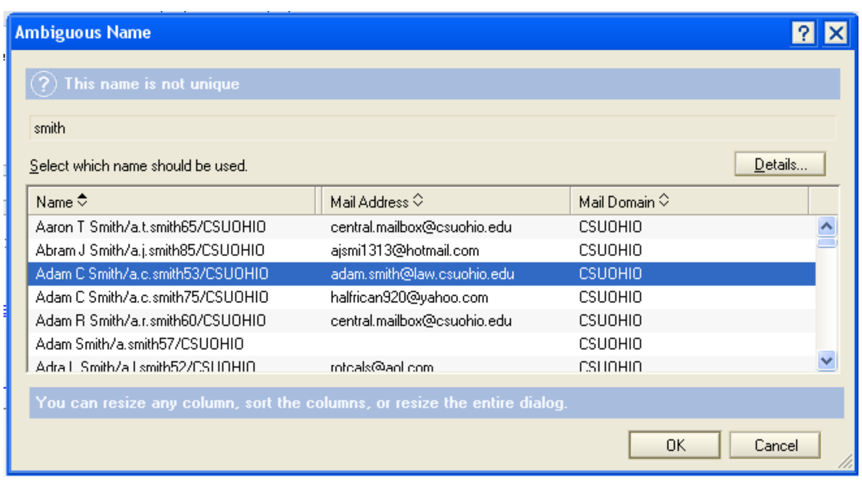
Start typing then request Campus Deskmail to Locate Matches

Type in a name, or a part of a name, in the 'Required', 'Optional' or 'FYI' field, followed by a comma



Once the comma is entered, a search will automatically be performed on the personal address book and the public directory. If only one match is located, that name will be displayed in the field in which the search was performed.

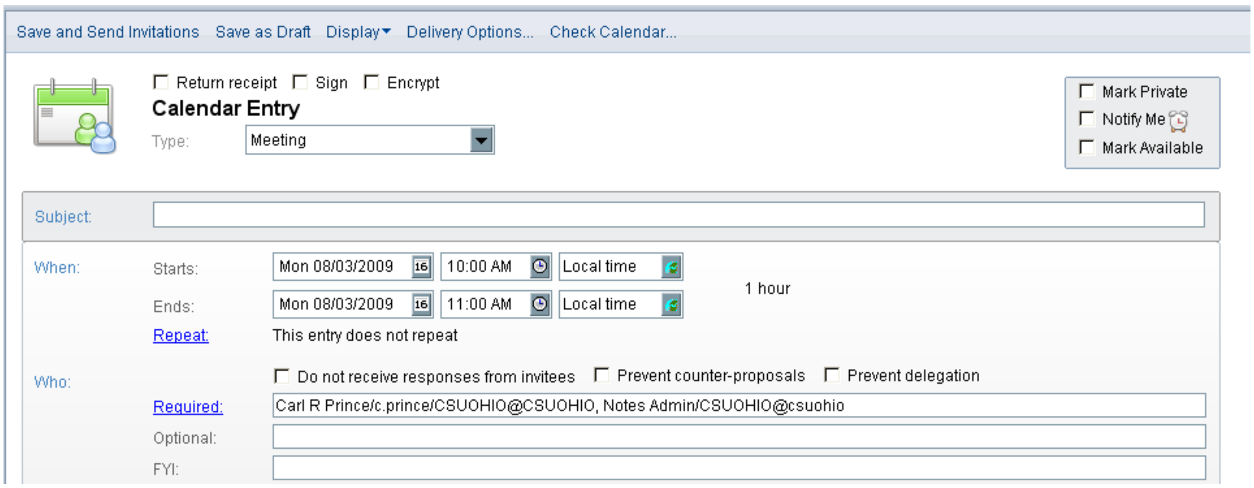
If more than one match was located, the 'Ambiguous Name' screen will display possible matches. Select the desired name and then select 'OK'



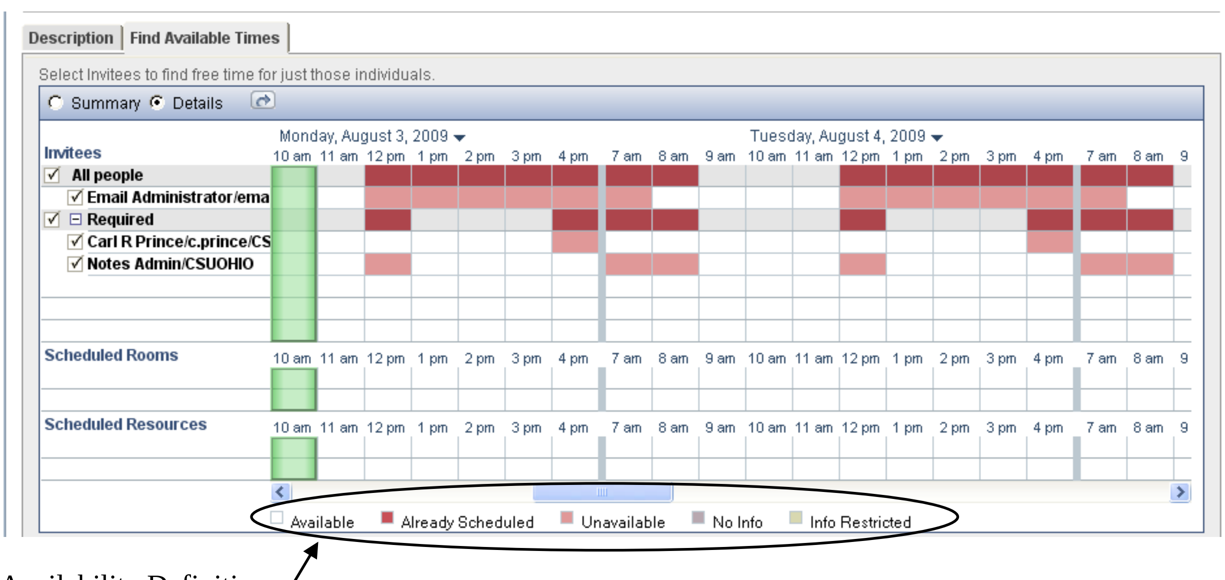
Check Invitee Availability

Although you may not have access to another person's calendar, you can often check if they are available for a meeting. If the invitees use the Campus Deskmail, or Webmail, calendar, and if they have not limited the calendar view to specific people, you can use the 'Check Available Times' tab to identify if they are previously engaged.

In this example, 2 people have been invited to a meeting set for 8/03 at 10 a.m.

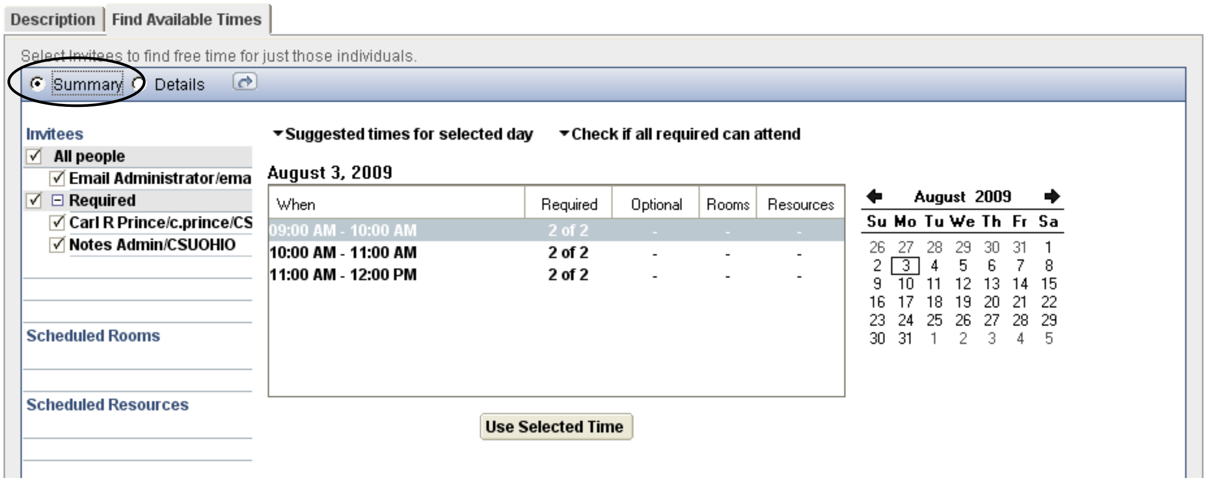


The 'Find Available Time' tab is selected to confirm availability of all 3 people, self plus the two invitees. Note: scroll down to view this section.



Availability Definitions

If there are any conflicts, Campus Deskmail will list suggested times when all are available. Select 'Summary' to view any suggested times.

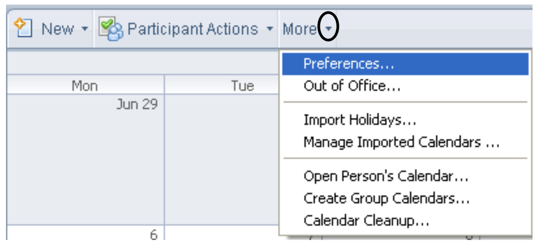


To change the time of the meeting, select the desired time from the list of recommended times, and select the 'Use Selected Time' button.

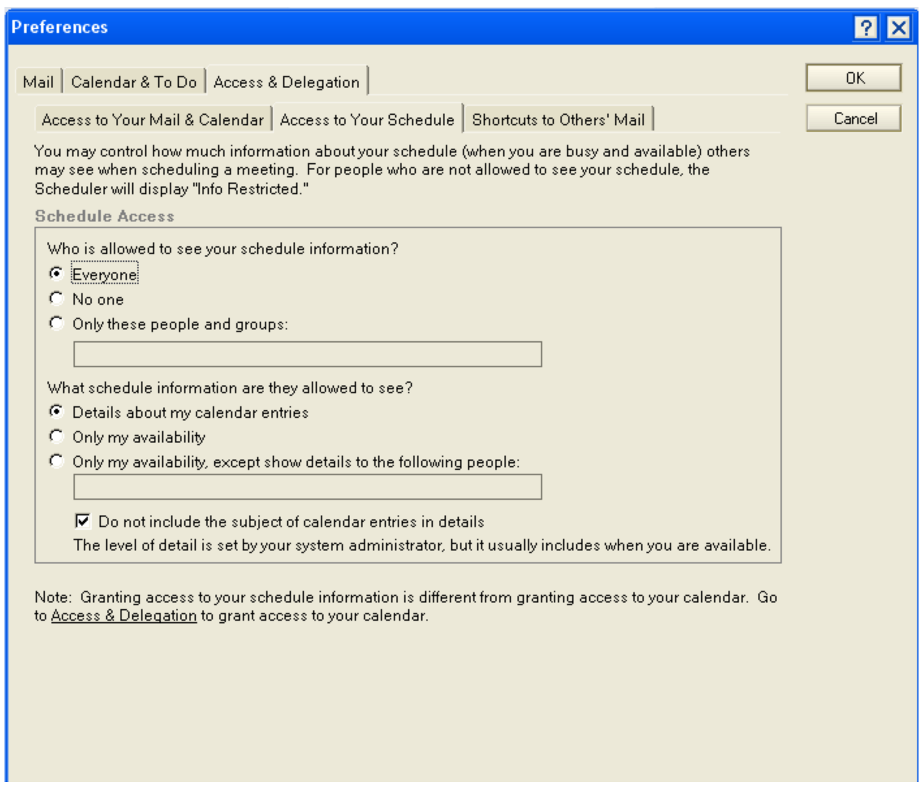
Set Your Calendar for Viewing

If you would like others to be able to see your schedule availability, set your defaults:

1. Select 'More' and then 'Preferences'



2. Select the 'Access & Delegation' tab and then the 'Access to Your Schedule' tab



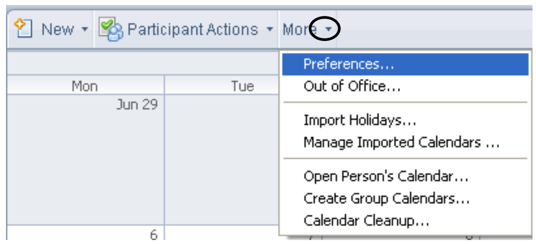
3. Set options as wanted
4. Select 'OK' to save

Note: this will allow others to see if you are busy, but will not allow them to see the subject matter, location, or details of your calendar entries.

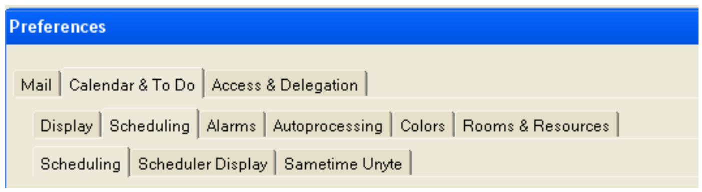
Set Your Work Hours of Availability

You can define your work hours so that when others view your availability, only those times listed as your work hours will be seen as available for possible scheduling.

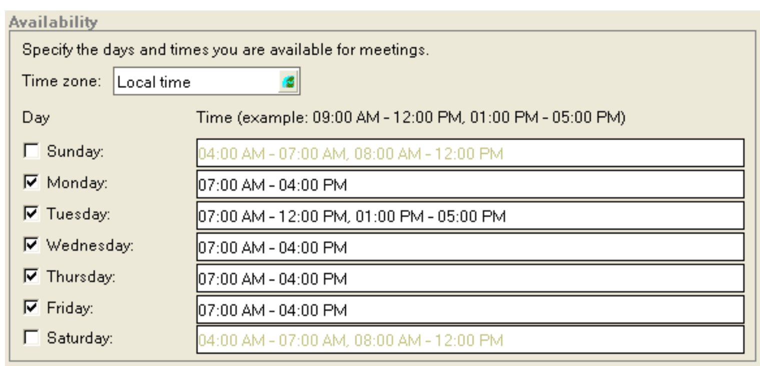
1. Select ‘More’ and then ‘Preferences’



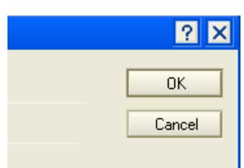
2. Select the ‘Calendar & To Do’ tab, the ‘Scheduling’ tab, and then the ‘Scheduling’ tab



3. Select the days on which you are scheduled to work, and define the work hours. To define a lunch break, or any other break that will occur at the same time on a given day, separate the times before and after the break with a comma. Refer to “Tuesday” in the graphic below for an example



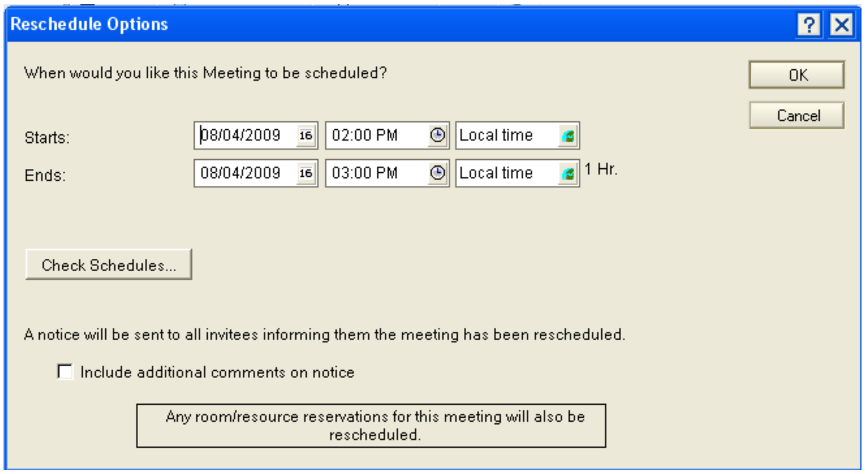
4. Select ‘OK’ when complete



Update Calendar Entries

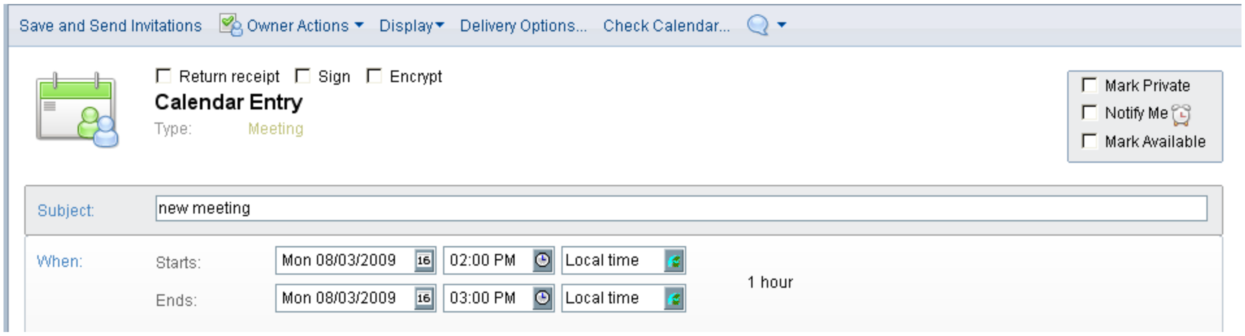
If a meeting changes, you can easily move it on your calendar…

You can drag/drop the meeting to another day and/or time. The system will request that you confirm the new date/time. You also have the ability to check all schedules before confirming the new time. Once confirmed an eMail will automatically be sent notifying everyone of the new time.

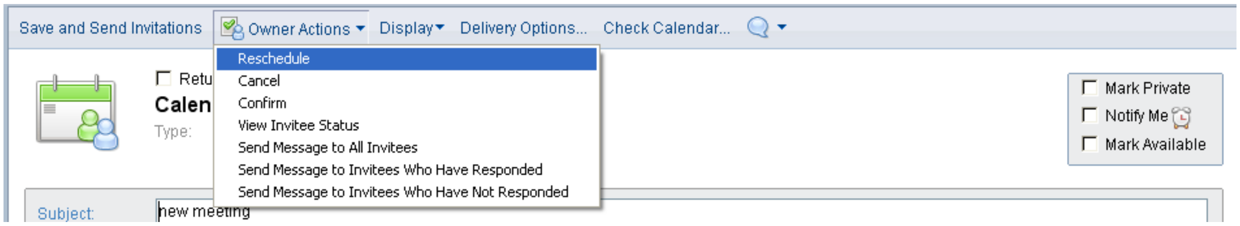


Or

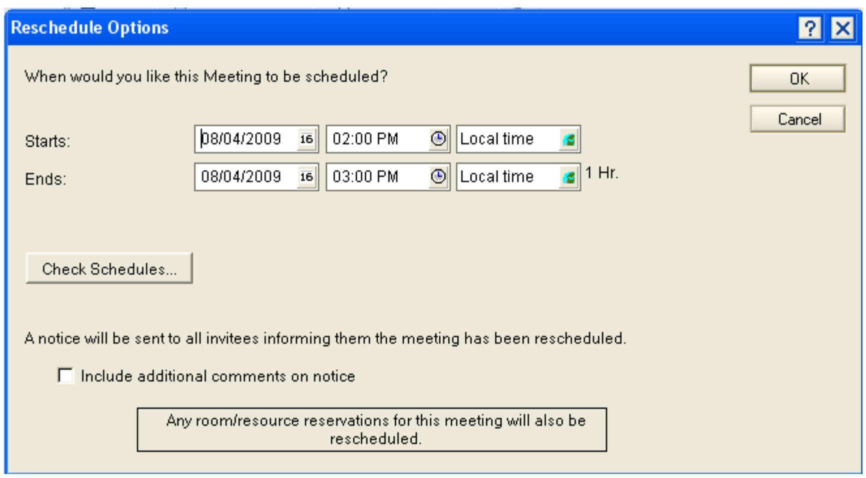
1. Double click on the meeting to open the entry
2. Set a new date/time and select 'Save and Send Invitations'.



a. Or expand 'Owner Actions' and then select 'Reschedule'



b. Change the information as needed and then select 'OK'

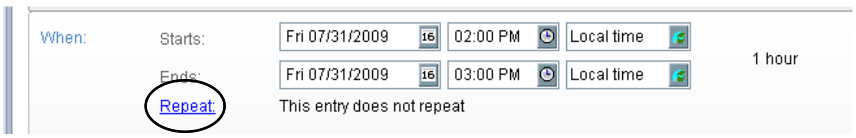


When you change a meeting to which you have invited people, Campus Deskmail will automatically send an update eMail to the invitees.

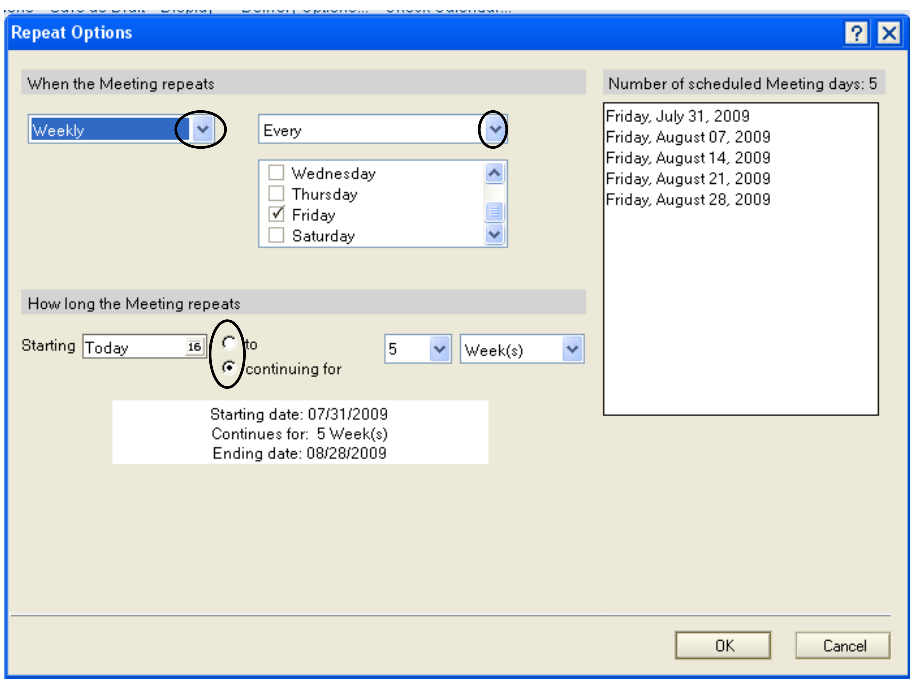
Create Repeating Entries

Some entries reoccur on a scheduled basis. Instead of entering each meeting individually, you can schedule an entry to reoccur as needed.

1. Create a new calendar entry
2. Select the type of entry (meeting, appointment, etc)
3. Select the 'Repeat'



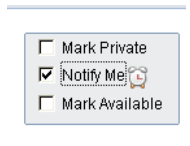
4. Set the repeat pattern to meet your individual needs, when complete select 'OK'



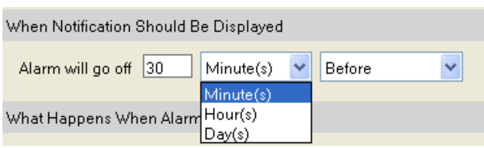
Set Alarm

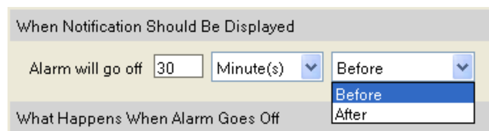
You can set an alarm for each entry to ring just before (or after) an entry's start time.

1. Select the 'Notify Me' check box



2. Set the alarm notice time and when it should occur



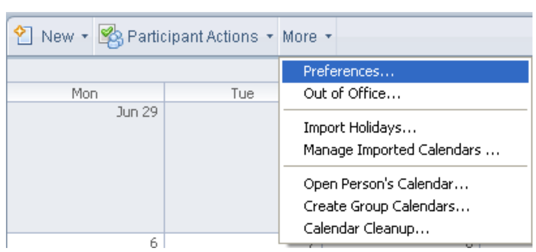


Change Default Settings

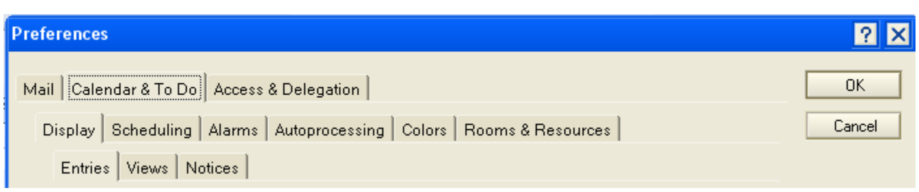
Within Campus Deskmail, you can change many of the default calendar settings. For example, you may want to create entries by default, rather than appointment entries. Or, you may want your meetings to last 30 minutes by default.

To change your default settings:

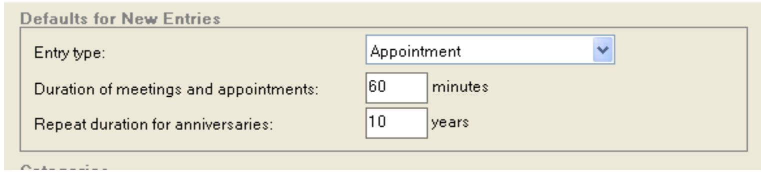
1. Select 'More' and then 'Preferences'



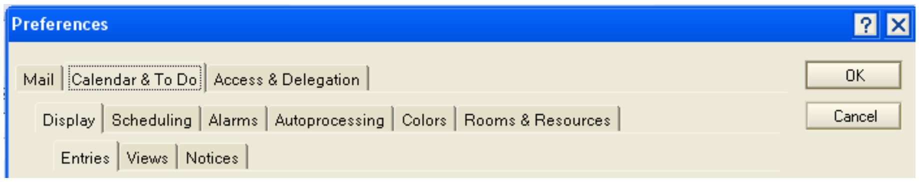
2. Select the 'Calendar & To Do' tab, select the 'Display' tab and then select the 'Entries' tab



3. Under the section titled “Defaults for New Entries” change settings as desired

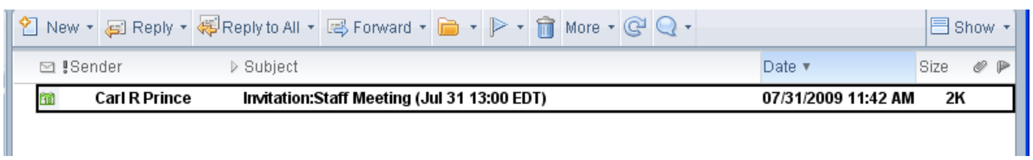


4. Select ‘OK’ to save settings.

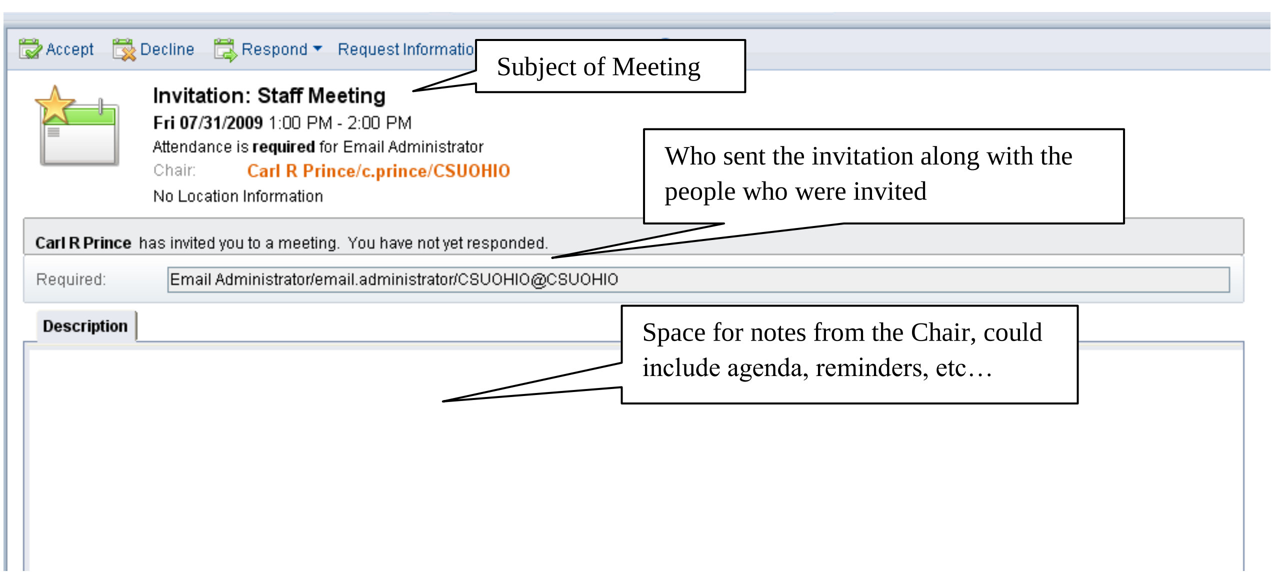


Manage Received Meeting Invitations

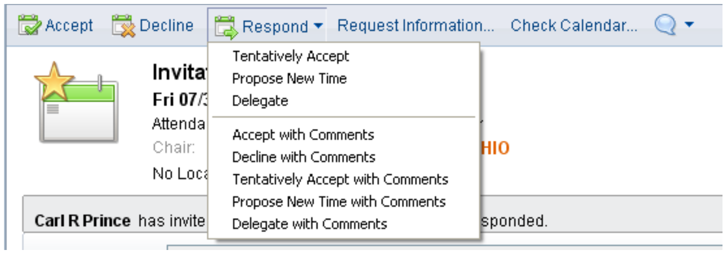
Invitations to meetings appear in your Inbox and look like this:



When the invitation is opened, the details will be displayed as:



And the actions available to you are listed at the top of the invitation:

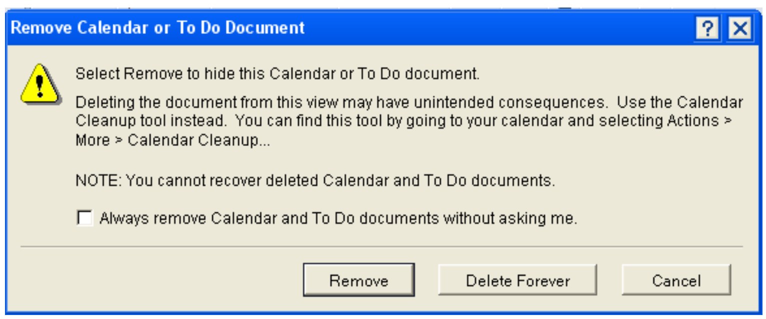


If you accept an invitation, the meeting will be placed on your calendar, complete with details and notes and the Chair will receive an acceptance eMail from you.

If you decline an invitation, the Chair will receive a decline eMail from you.

Deleting the Invitation

If you try to delete the invitation from your eMail, you will receive the following warning:



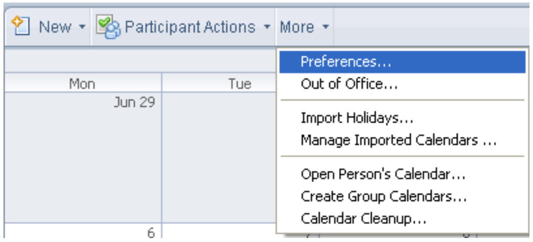
- Select 'Delete Forever' to delete the eMail AND the calendar entry
- Select 'Remove' to delete the eMail but KEEP the calendar entry
- Select 'Cancel' to exit the request and perform no actions

Change Default Settings for Automatically Managing Invitations

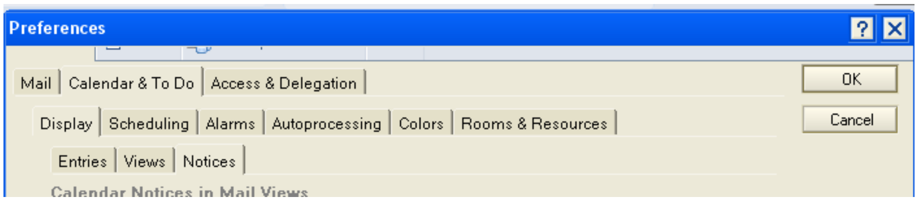
You can also change your default settings so that when you respond to an invitation the eMail will be removed but the calendar entry will remain.

To change the Calendar default setting for invitations:

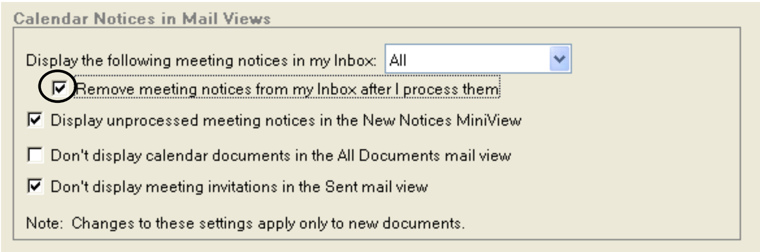
1. Select ‘More’ and then ‘Preferences’



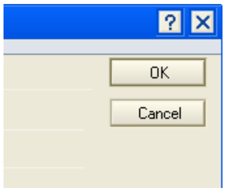
2. Select the ‘Calendar & To Do’ tab, then the ’Display’ tab and then the ‘Notices’ tab



3. Under the section titled “Calendar Notices in Mail Views” select (check mark on) “Remove meeting notices from my Inbox after I process them”



4. Select ‘OK’ to save

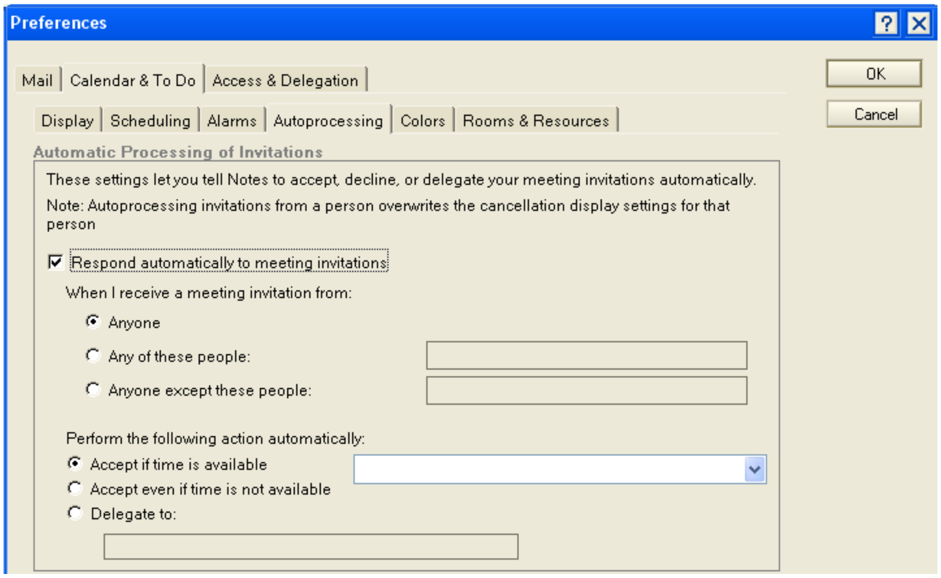


Automatically Process Invitations

By enabling automatic responses, this allows you to specify an action to be performed on your meeting invitations automatically. Possible actions include: automatically accepting the invitation if time is available; and delegating the invitation to someone else. You can also choose to automatically decline if time is not available. You can specify to limit this option to a specific person, group of people or to allow it to process regardless of who sends you a meeting invitation.

To set this option,

1. Expand 'More' and then select 'Preferences'
2. Select the 'Calendar & To Do' tab and then the 'Autoprocessing' tab
3. Select (check) "Respond automatically to meeting invitations". When this is selected other settings associated with this option will appear, and need to be set to meet your individual needs
4. Select 'OK' when complete



Calendar Invitation Options:

When a meeting invitation is received from:

- Anyone (default)
- Any of the following people (a field will appear to enter the addresses of the people)
- Anyone except the following people (a field will appear to enter the addresses of the people)

Perform the following action:

- Automatically accept if time is available (default)
- Delegate invitation to the follow person to attend instead of me (a field will appear to enter the address of the person)
- Automatically accept even if time not available

Automatically decline if time is not available (default) or let me decide if time is not available.

When this process runs, an acceptance or decline notice will automatically be sent to those sending the meeting invitation, depending on the settings selected.

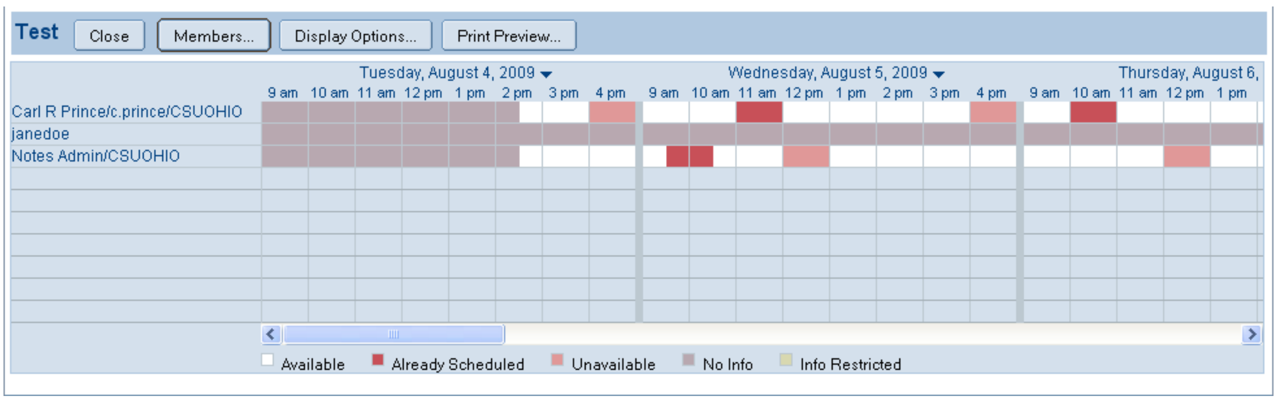
Group Calendar

Why use a Group Calendar?

With Deskmail, you can create a group of people whose calendars you frequently check. This allows you to view all their schedules simultaneously without having to re-select them each time. A group calendar is a collection of schedule of people you select.

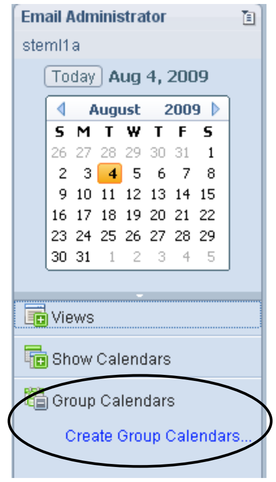
You can use a group calendar to quickly see if people in a selected group are free or busy at a certain time. Additionally, if you have access to people's calendars, you can access their calendars from the group calendar

The example below will display 3 people's 2 of which their availability is displayed since they are using Campus Webmail/Deskmail. The third individual will not display since they are not part of our system.

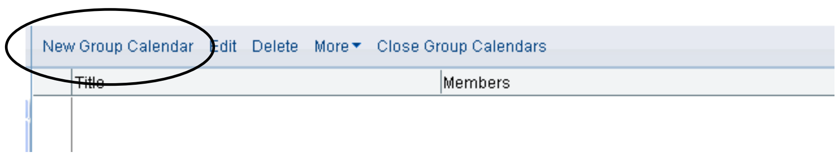


Create a Group Calendar

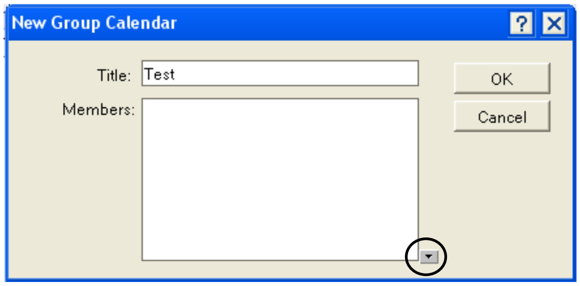
1. Open the Calendar view and expand 'Group Calendars' on the left and select 'Create Group Calendars…'



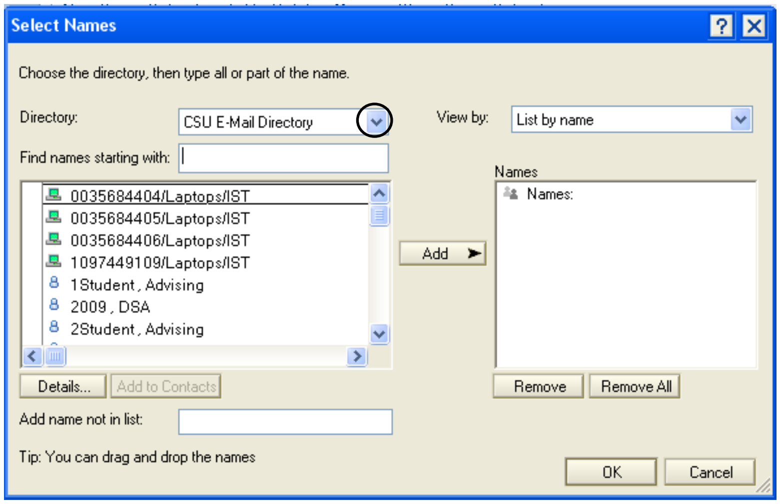
2. Select 'New Group Calendar'



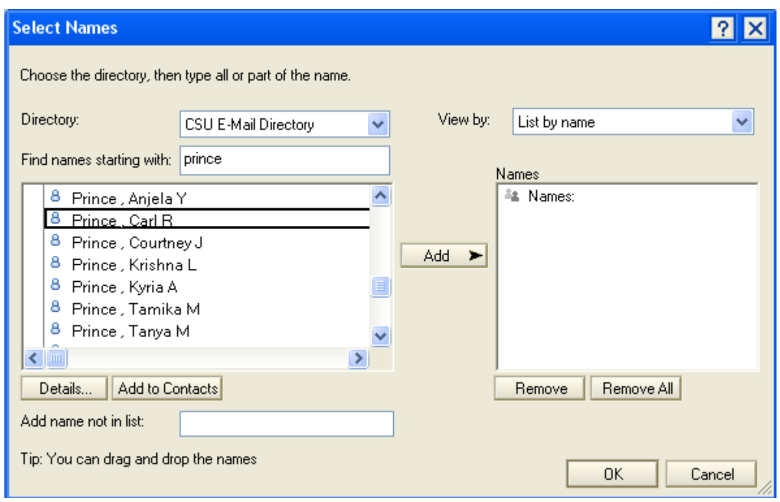
3. Enter the Group Title and then select the down arrow button



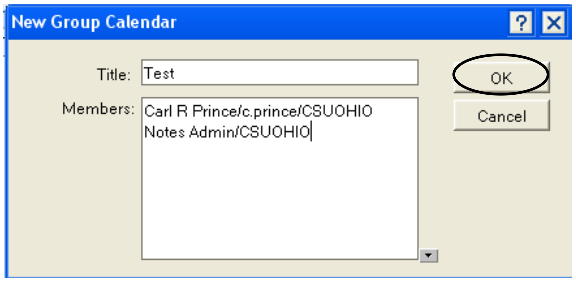
4. The "Select Names" screen will appear. Verify that the 'Directory' field is pointing to "CSU E-Mail Directory"



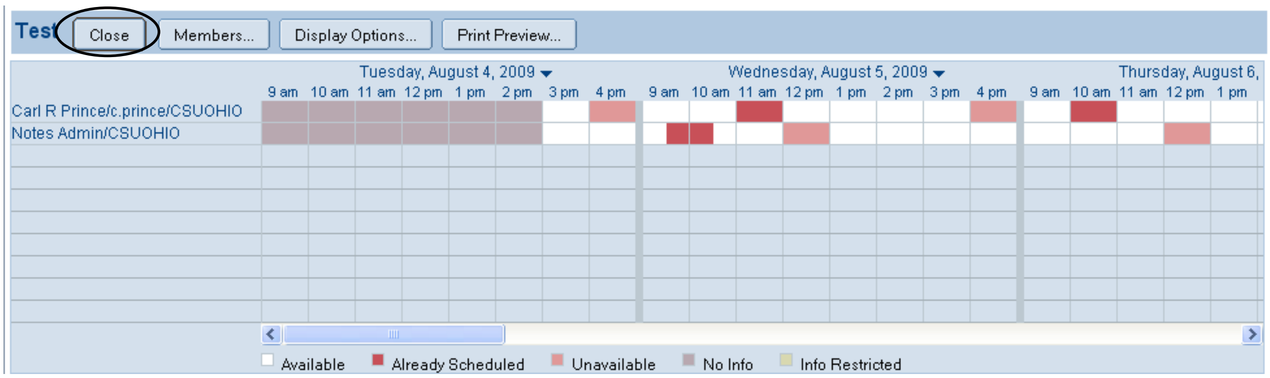
5. In the 'Find names starting with' field enter the last name of the individual to add to the group, as the name is being entered, the search will occur automatically. Locate the individual in the results, select the name and then select the 'Add' button. Repeat this process until all names are added. Select 'OK' when complete.



6. Select ‘OK’ to save the group



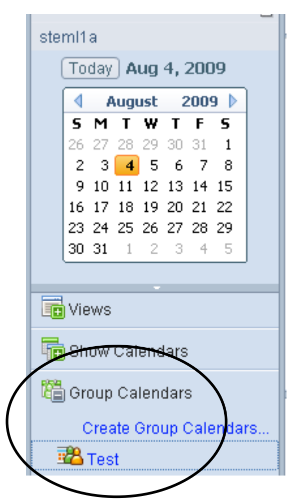
7. The group will display, select ‘Close’ after reviewing



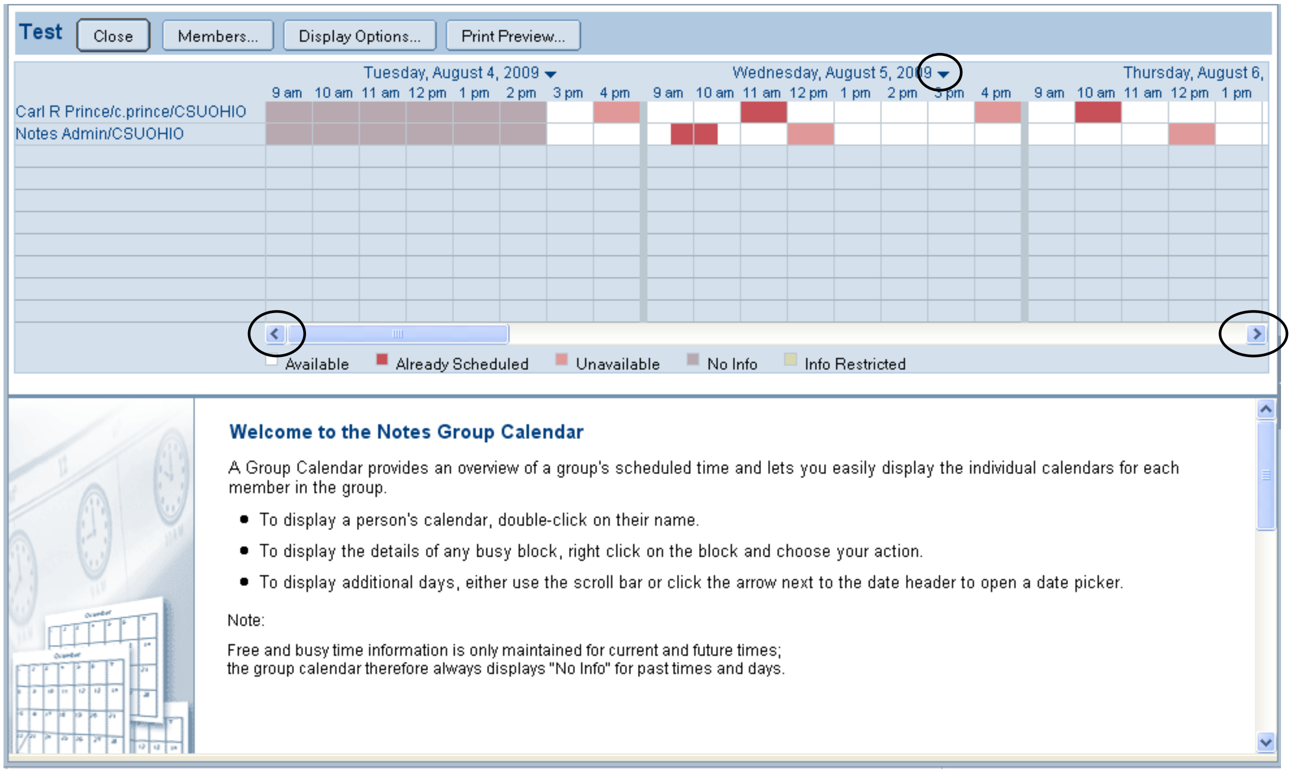
View a Group

To view the members of a group, and their availability:

1. Open the Calendar view
2. Expand ‘Group Calendars’
3. Select the group to view

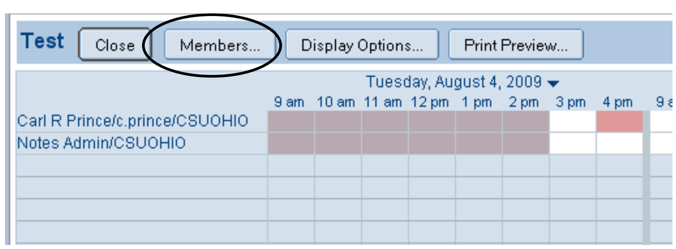


Once opened, you will be able to view each member's availability for the current date. To select a new date, select the arrow next to the date listed or use the scroll bar at the bottom of the calendar.

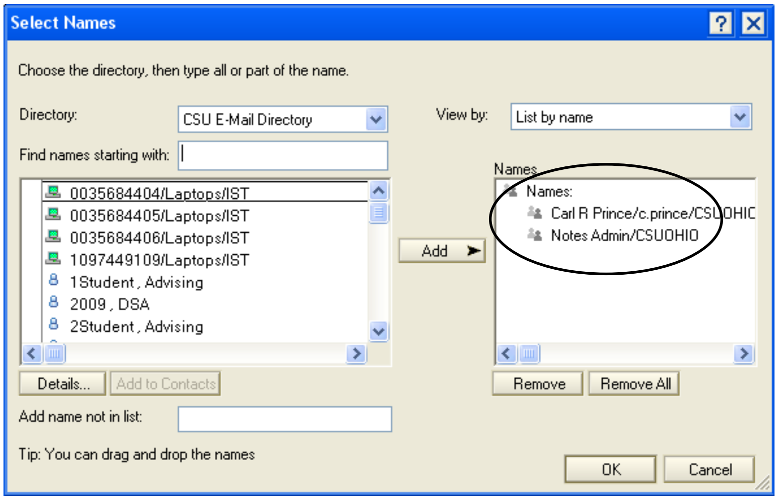


Change the Members in a Group Calendar

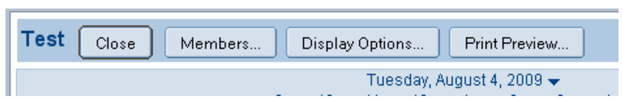
1. Open a group following the directions listed under "View a Group" above. Select the 'Members' button



2. To remove a member, in the 'Names' field, select the name to remove and select the 'Remove' button. To add a member, follow the directions in steps 4 & 5 in the sections titled "Create a Calendar Group". Select 'OK' when complete.



3. Select 'Close' to save the changes.



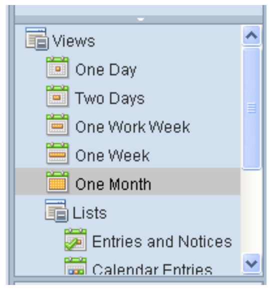
Create a Meeting using a Group

To create a meeting for a particular group, schedule the meeting as you normally would, entering the names on the individuals within the meeting invitation.

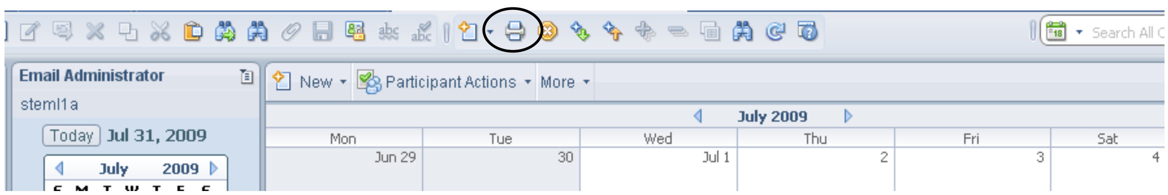
Printing Calendars

You have numerous options, and combinations, available when it comes to printing the calendar. Following are basic directions, it is advised that you use the various options available to you to develop a format that best meets your needs.

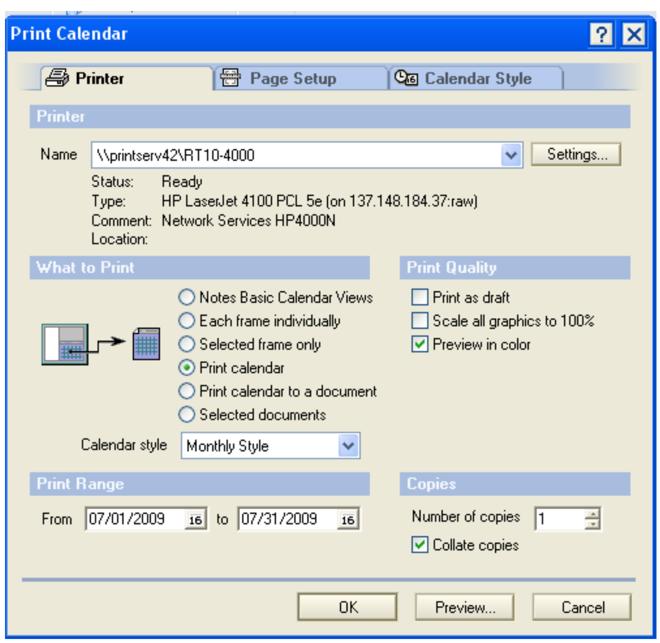
1. Open the calendar view and select the print format you want. The view that is selected is the format of the print.



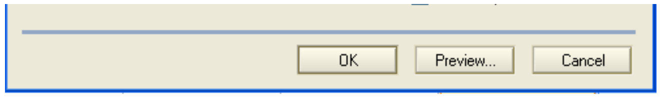
2. Open the calendar view and select the print in the calendar view



3. Select the various options to meet your specific needs. You can select what to print, including just individual documents, change the date range, or change the style to name a few options.



4. When the options have been set, select ‘OK’

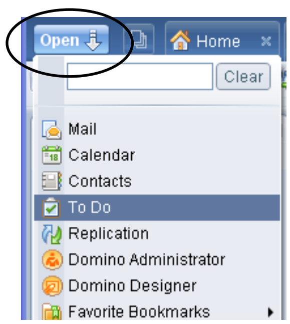


To Do Items

Campus Deskmail also provides a To Do list for tracking tasks. To Do items can be viewed by selecting the ‘To Do’ icon to open the ‘To Do’ view.

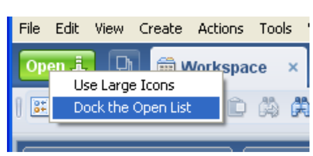
There are three different ways of accessing your To Do from Deskmail. All three will access the same list; it is simply what method you are comfortable with using.

1. In the upper left corner you may see a button titled ‘Open’. If not, skip to step 2 or 3. Expand ‘Open’ and select ‘To Do’

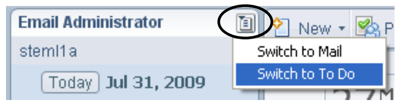


2. Along the left side you will have icons, select the ‘To Do’ icon.

If you do not have these icons, but would like them, right click on the ‘Open’ button and select ‘Dock This List’



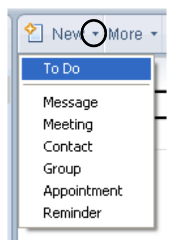
3. Open your mailbox, expand menu options and select ‘Switch to To Do’



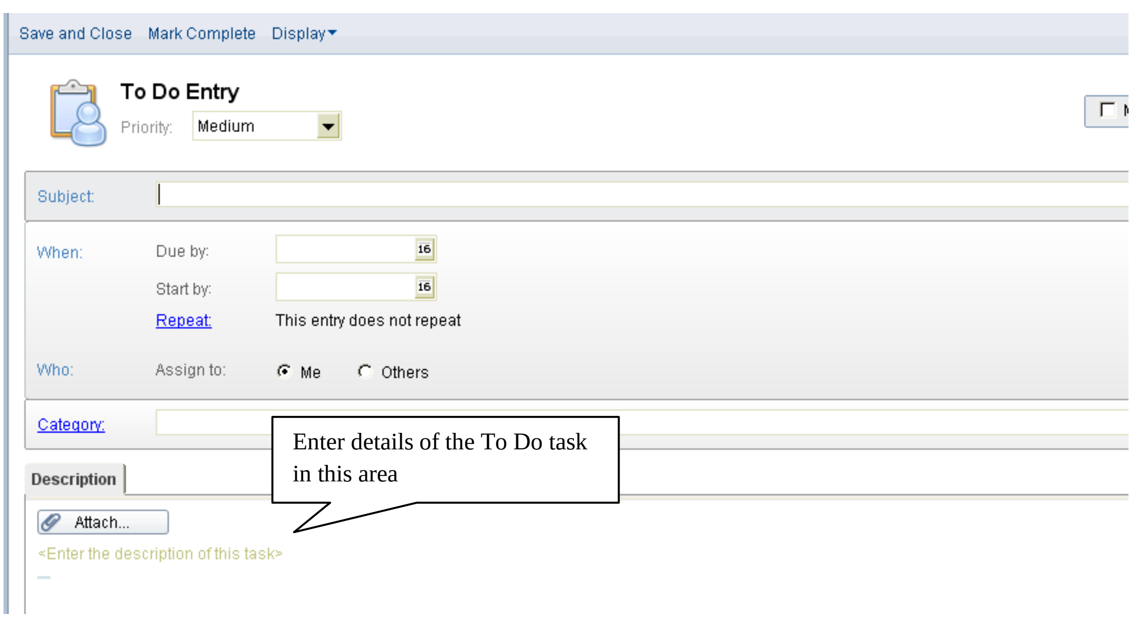
Or, if the setting in your preference allows it, the To Do entries can also be displayed in your calendar.

Create To Do Items

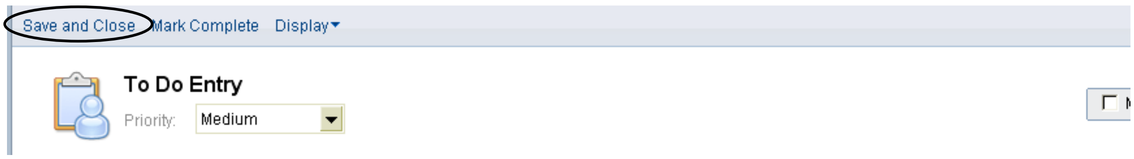
1. Open the To Do view
2. Expand ‘New’ then select ‘To Do’



3. Fill in the ‘Subject’ field with the name of the To Do task, enter any details and change the date(s) as needed. Note: if you have the system set up to display the To Do items on your calendar, they will appear based upon the “Start Date” of the To Do task.



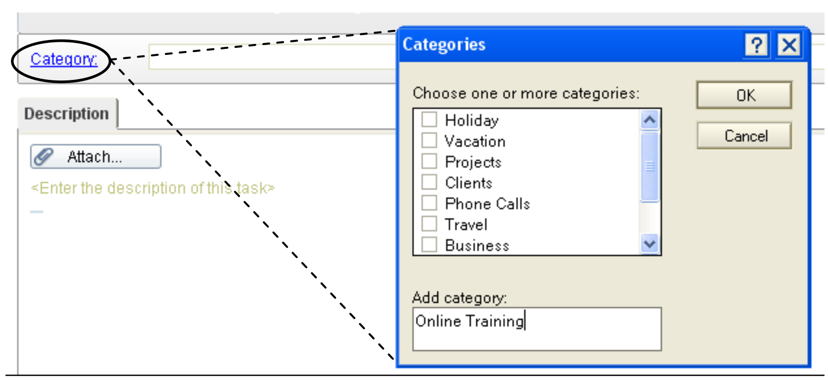
4. Select 'Save & Close' to save



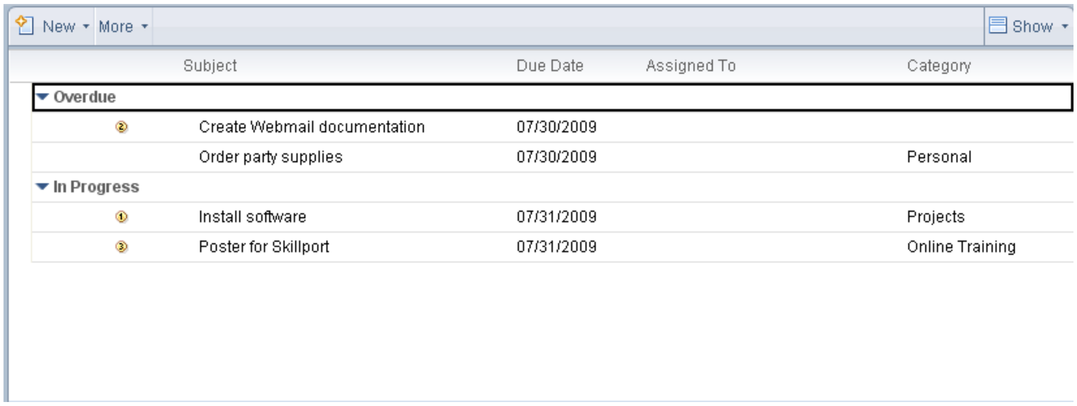
Change To Do Priority & Category

The priority for To Do items can be listed as High, Medium, Low or None. You can change the priority of a task during creation or afterwards…

To further differentiate your tasks, you can add a category. Select 'Category', a screen where you can select, or add your own, category will appear. In this instance, instead of selecting a predefined category, I typed a new one, "Online Training". Select 'OK' when completed.



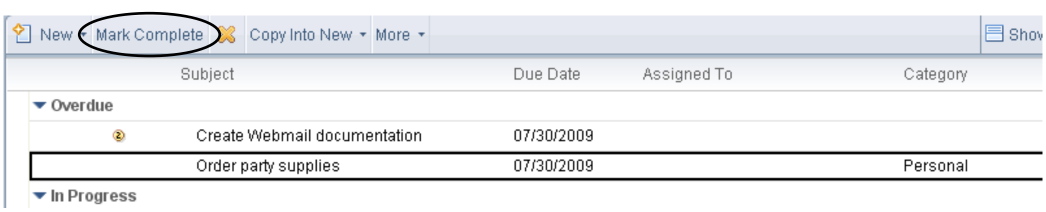
Here is a sample of a To Do list with various categories & priorities:



Mark To Do Complete

There are two ways of marking a task complete. The first way, a task must be opened to change its status. You can mark a task as completed by selecting the 'Mark Complete' button

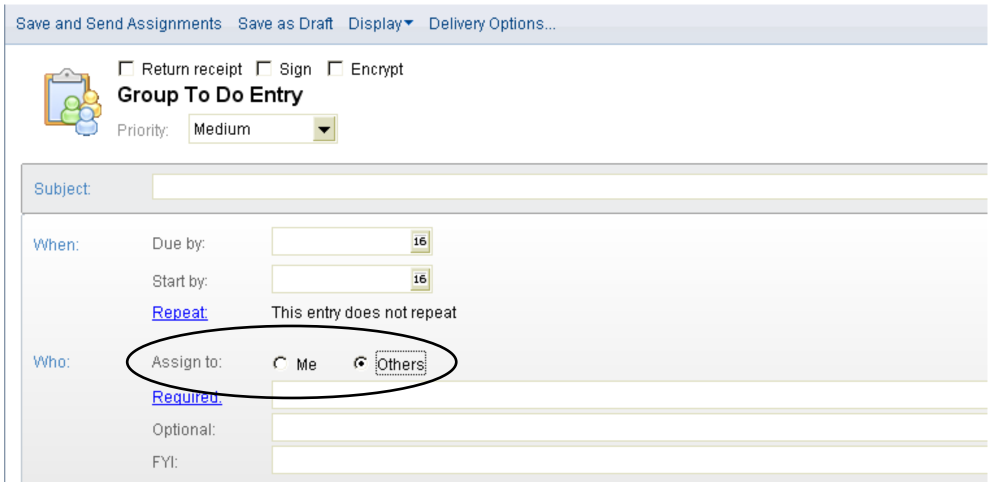
The second way of marking a task complete is from the view. Select the task to be marked as complete and then select the 'Mark Complete' button.



Assign To Do to Someone Else

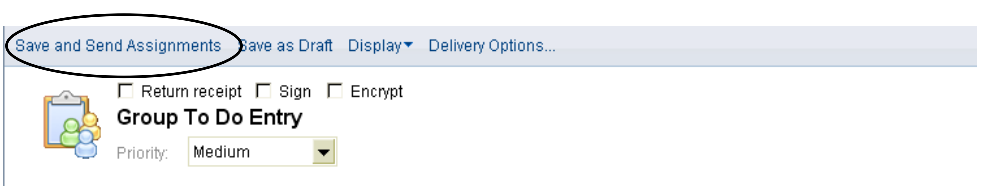
You can assign To Do tasks to other people, who would then receive the assignment via eMail when the To Do task is saved. This is especially useful when you need to assign and manage various projects of other individuals.

1. Open a new To Do task, when opened select the option of 'Others' for "Assign to"



2. Add the eMail address of the person(s) this task will be assigned to. You can enter the eMail address manually, or select it from the directory by selecting 'Required', which will then open the directory from which you can select the individual(s).

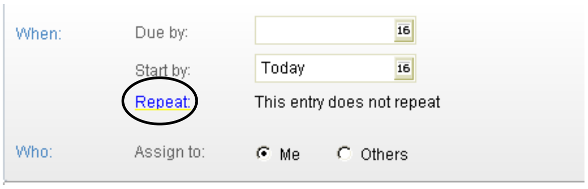
3. Fill in the task as you normally would, select 'Save and Send Assignments' when completed. Once saved, an eMail notice will automatically be sent to the individual(s) listed.



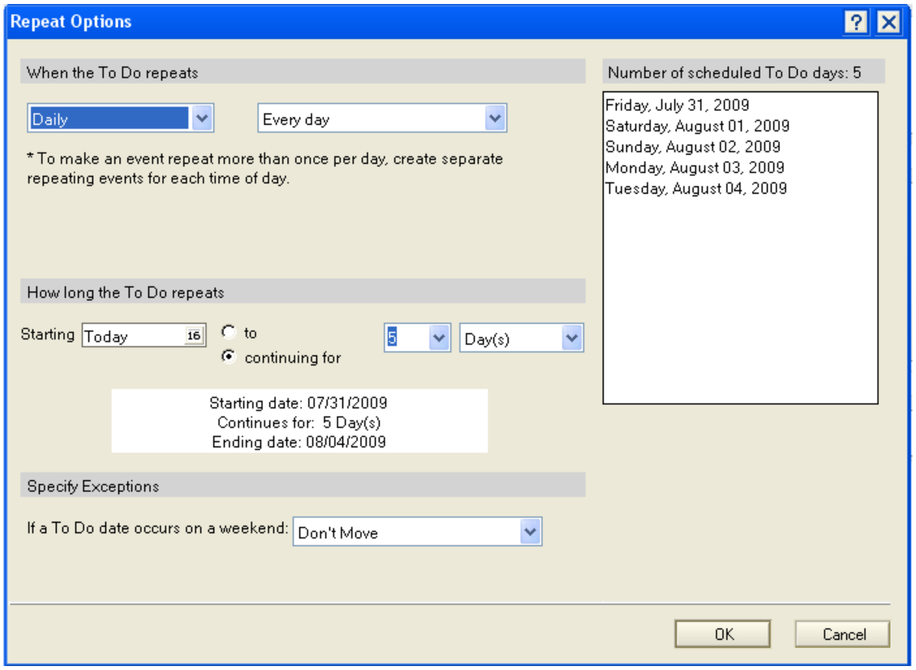
Make a Repeating To Do Item

At times, you may want a task to repeat automatically, such as creating departmental reports on a monthly basis.

1. Create a new task
2. Enter the task information
3. Select the 'Repeat'



4. Set the repeat pattern to meet your individual needs
5. Select 'OK' to save repeat settings

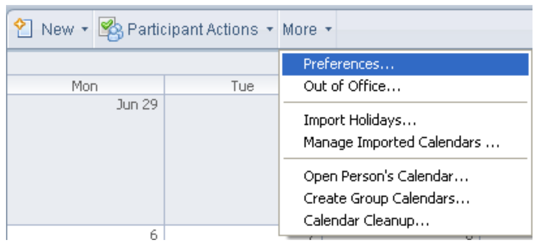


Hide Your To Do Items on Your Calendar

If others are viewing your calendar, or if your calendar view becomes too crowded, you can hide the To Do items so they do not display on the calendar view.

To remove the To Do items from the calendar view:

1. Select ‘More’ and then ‘Preferences’



2. Select the ‘Calendar & To Do’ tab, then the ‘Display’ tab and then the ‘Views’ tab
3. De-select (uncheck) ‘Display To Do Entries’
4. Select ‘OK’ to save