

# Cleveland State University



Information Services and Technology

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## Campus Webmail

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 Webmail 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*

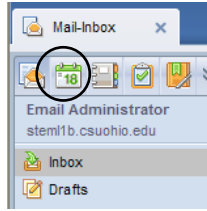
Remember that in Campus Webmail, you can access names from two different address books:

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.

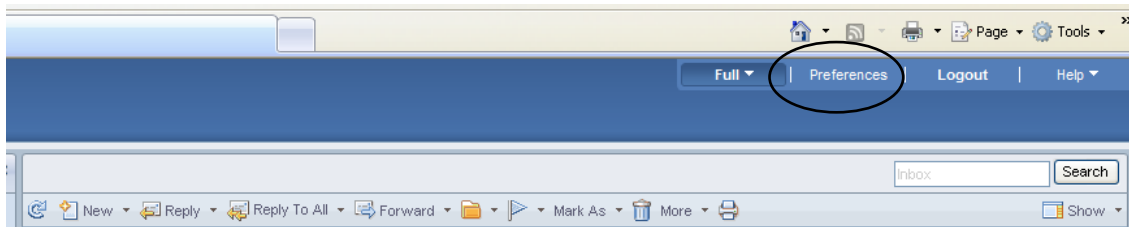
# Calendar Views

To access the calendar from Campus Webmail select the 'Calendar' icon.

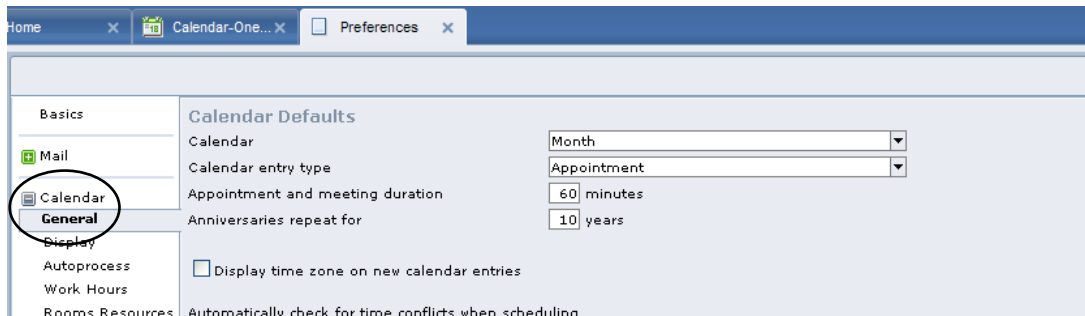


In Campus Webmail, you have several options for viewing you calendar: One day; two days; one work week; one week; two weeks; one month; or one year.

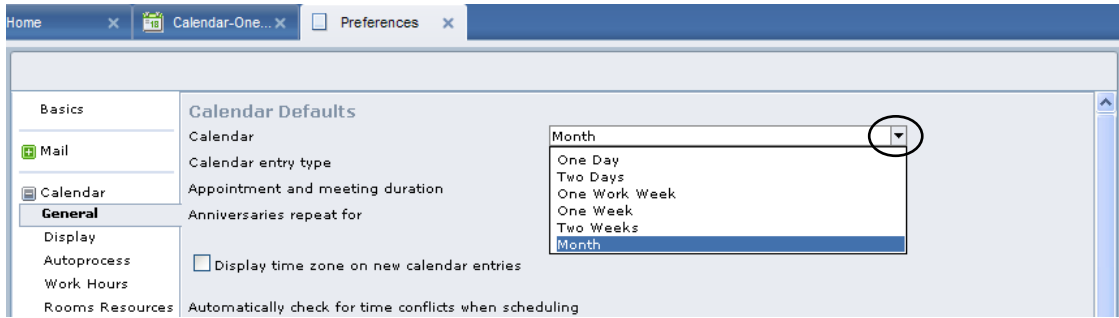
You also have the ability to set the default view for when you open your calendar. To set the default view select 'Preferences'



On the Preferences window, expand 'Calendar' and then select 'General'



Under the section “Calendar Defaults” select the view in the ‘Calendar’ field

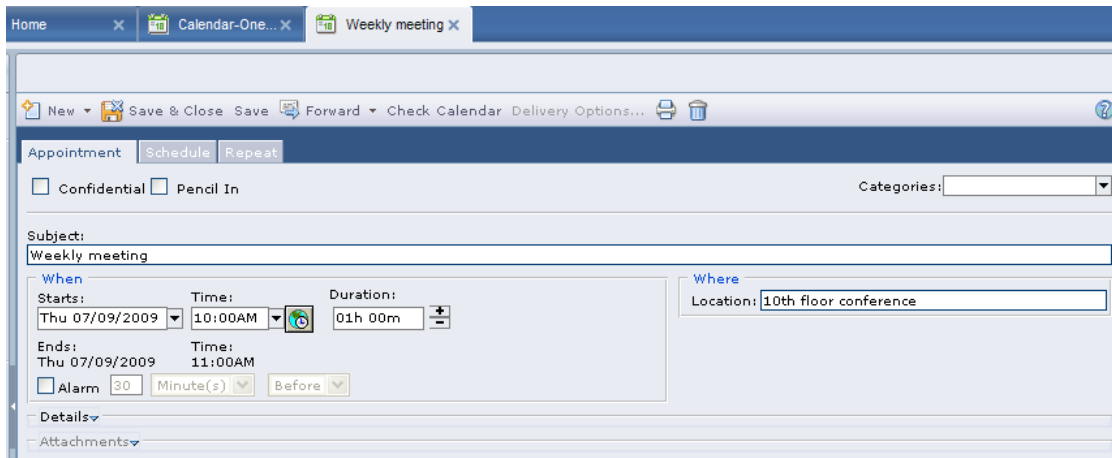


Select ‘OK’ to save

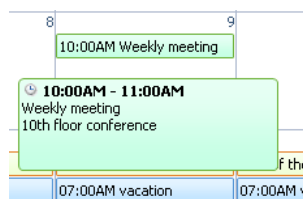


## Read details on an entry

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

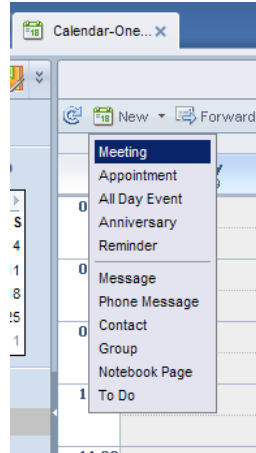


Or you can hold your mouse over the meeting title for an overview of the information for the meeting

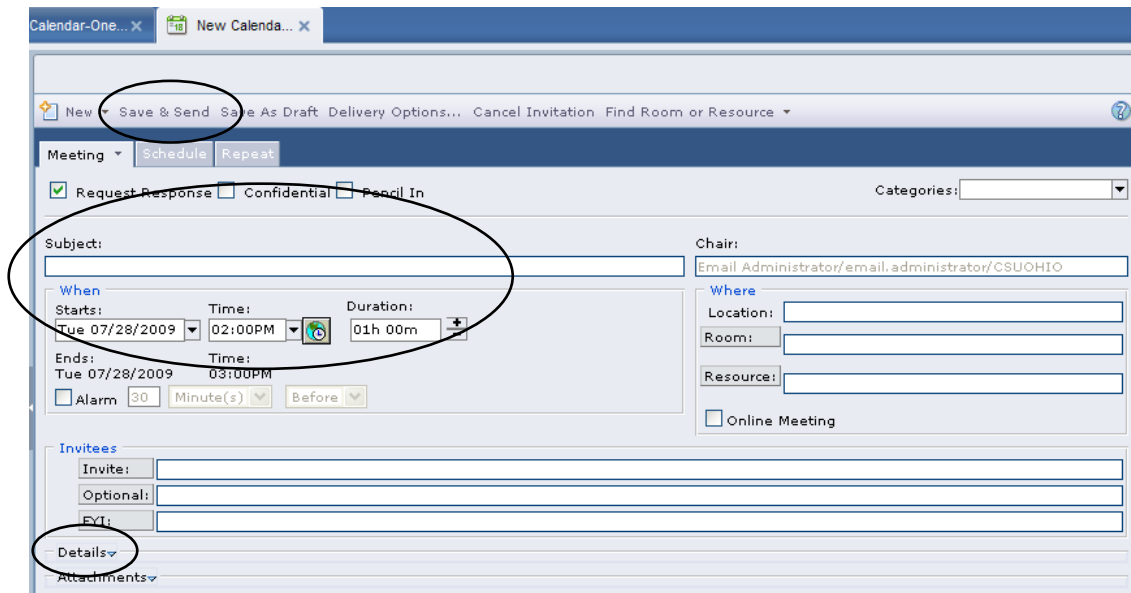


# Create Calendar Entries

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

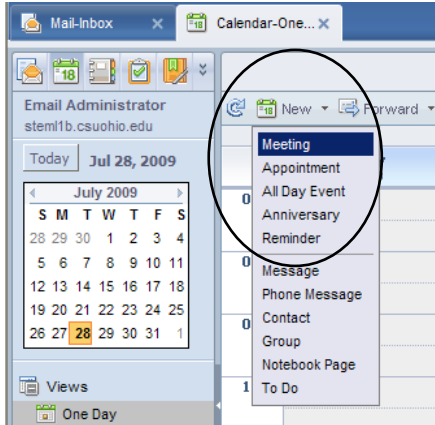


2. Enter the subject and set the date and time for the meeting
3. If desired, enter any special notes or the agenda in the details section
4. Select 'Save & Send'

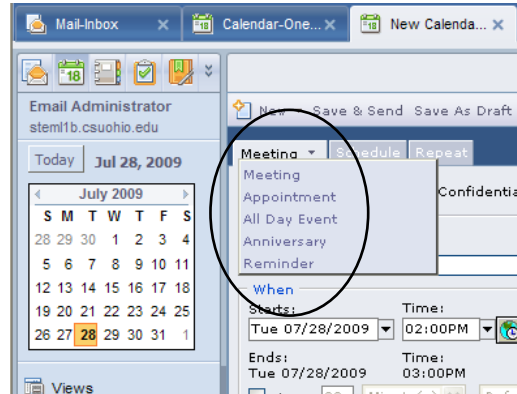


## Type of Calendar Entries

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.

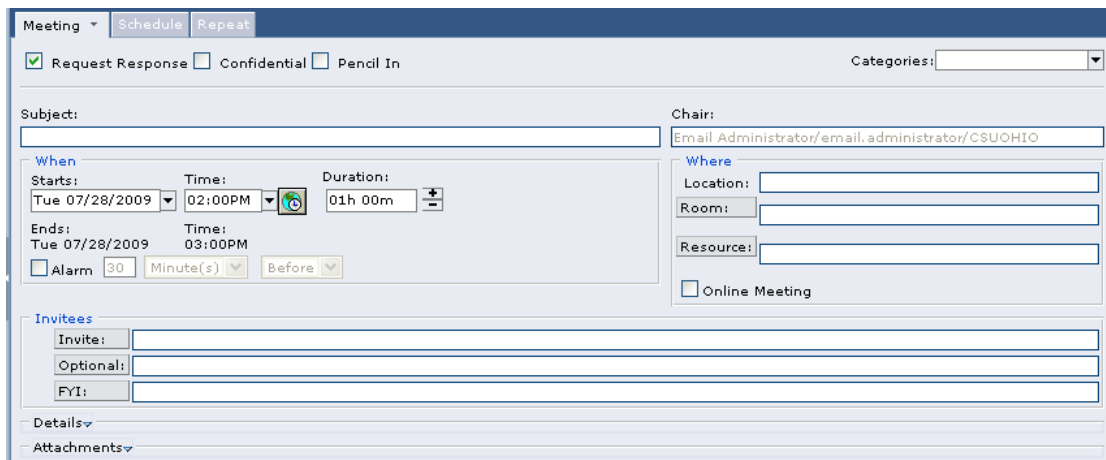


OR



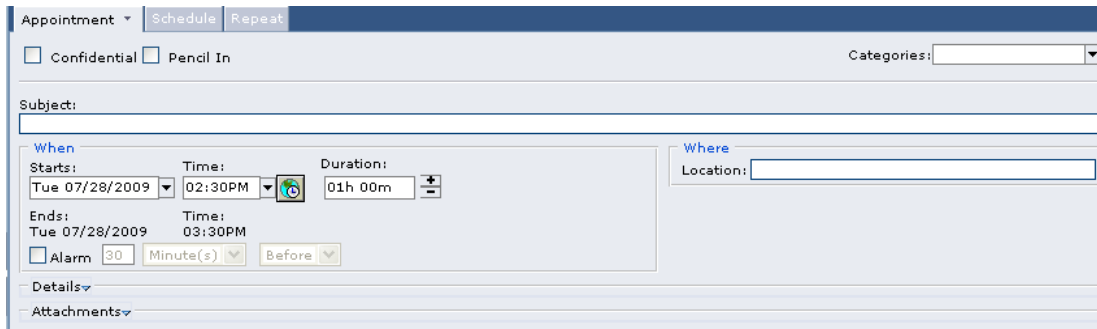
## Meetings

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.

A screenshot of the Outlook meeting creation form. The form is titled 'Meeting' and has tabs for 'Schedule' and 'Repeat'. It includes fields for 'Subject', 'Chair' (Email Administrator/email.administrator/CSUOHIO), 'When' (Starts: Tue 07/28/2009 02:00PM, Ends: Tue 07/28/2009 03:00PM), 'Where' (Location, Room, Resource), 'Invites' (Invite, Optional, FYI), and 'Online Meeting' checkbox. There are also checkboxes for 'Request Response', 'Confidential', and 'Pencil In', and a 'Categories' dropdown menu.

## Appointments

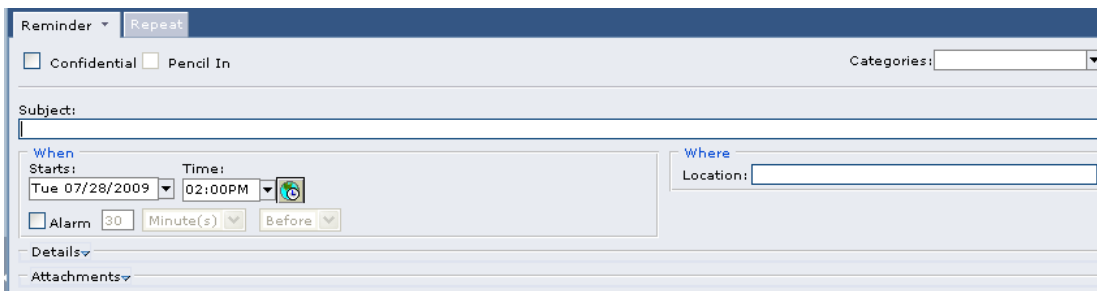
Appointments are for a set period of time, but can be repeated at specified intervals. You cannot invite people to appointments. These are typically for entries such as personal appointments or meetings with non-Campus people.



The screenshot shows the 'Appointment' form. At the top, there are tabs for 'Appointment', 'Schedule', and 'Repeat'. Below the tabs are checkboxes for 'Confidential' and 'Pencil In', and a 'Categories:' dropdown menu. A 'Subject:' text box is present. The 'When' section includes 'Starts:' (Tue 07/28/2009), 'Time:' (02:30PM), and 'Duration:' (01h 00m). The 'Ends:' section shows 'Tue 07/28/2009' and 'Time:' (03:30PM). There is an 'Alarm' section with a checkbox, '30 Minute(s)', and 'Before'. A 'Where' section has a 'Location:' text box. At the bottom, there are expandable sections for 'Details' and 'Attachments'.

## Reminders

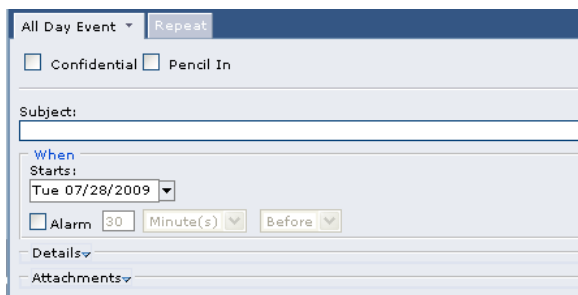
Reminders have a start time, but no end time. They are designed to remind you of a task at a specific time.



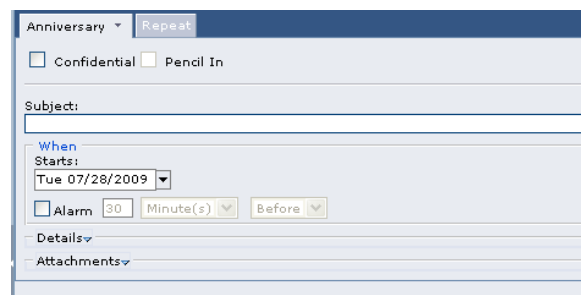
The screenshot shows the 'Reminder' form. At the top, there are tabs for 'Reminder' and 'Repeat'. Below the tabs are checkboxes for 'Confidential' and 'Pencil In', and a 'Categories:' dropdown menu. A 'Subject:' text box is present. The 'When' section includes 'Starts:' (Tue 07/28/2009) and 'Time:' (02:00PM). There is an 'Alarm' section with a checkbox, '30 Minute(s)', and 'Before'. A 'Where' section has a 'Location:' text box. At the bottom, there are expandable sections for 'Details' and 'Attachments'.

## All Day Events and Anniversaries

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



The screenshot shows the 'All Day Event' form. At the top, there are tabs for 'All Day Event' and 'Repeat'. Below the tabs are checkboxes for 'Confidential' and 'Pencil In'. A 'Subject:' text box is present. The 'When' section includes 'Starts:' (Tue 07/28/2009). There is an 'Alarm' section with a checkbox, '30 Minute(s)', and 'Before'. At the bottom, there are expandable sections for 'Details' and 'Attachments'.



The screenshot shows the 'Anniversary' form. At the top, there are tabs for 'Anniversary' and 'Repeat'. Below the tabs are checkboxes for 'Confidential' and 'Pencil In'. A 'Subject:' text box is present. The 'When' section includes 'Starts:' (Tue 07/28/2009). There is an 'Alarm' section with a checkbox, '30 Minute(s)', and 'Before'. At the bottom, there are expandable sections for 'Details' and 'Attachments'.

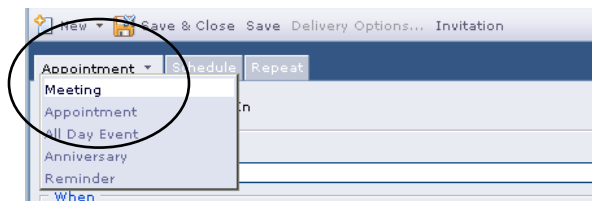
# Invite people to meetings

You can invite one or more people to meetings by creating a calendar entry and entering their names in the 'Invite' field. When you select 'Save & Close', 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 Webmail 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 Webmail 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 Webmail to locate matches

## Type the eMail Address

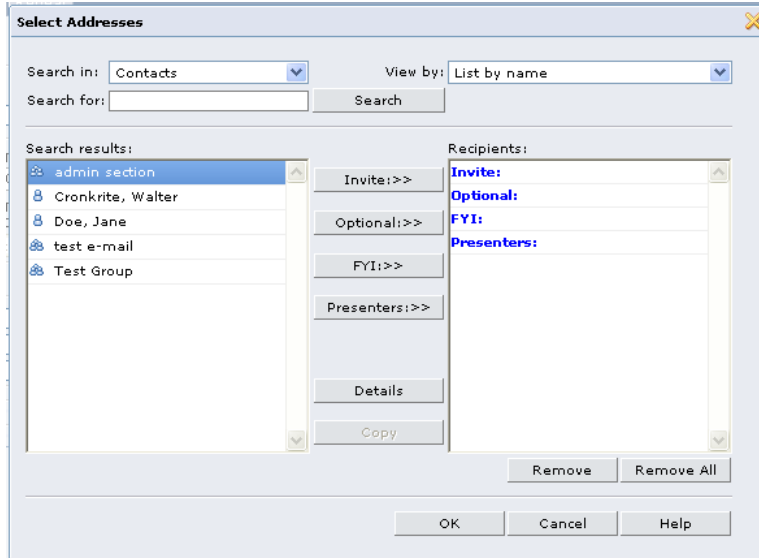
In the 'Invite', 'Optional' and 'FYI' fields you can manually enter complete eMail addresses.

A screenshot of a meeting creation form. The form has tabs for 'Meeting', 'Schedule', and 'Repeat'. It includes checkboxes for 'Request Response', 'Confidential', and 'Pencil In'. The 'Subject' field contains 'New meeting'. The 'Chair' field contains 'Email Administrator/email.administrator/CSUOHIO'. The 'When' section has 'Starts' on 'Wed 07/29/2009' at '02:00PM' for a duration of '01h 00m'. The 'Ends' are 'Wed 07/29/2009' at '03:00PM'. There is an 'Alarm' section with '30 Minute(s) Before'. The 'Where' section has fields for 'Location', 'Room', and 'Resource'. The 'Invites' section has three rows: 'Invite' with 'johndoe@hotmail.com, janedoe@yahoo.com', 'Optional' with 'adamwest@wildwest.com', and 'FYI' which is empty. There are 'Details' and 'Attachments' expandable sections at the bottom.

## Select from your Contacts or the Public Directory

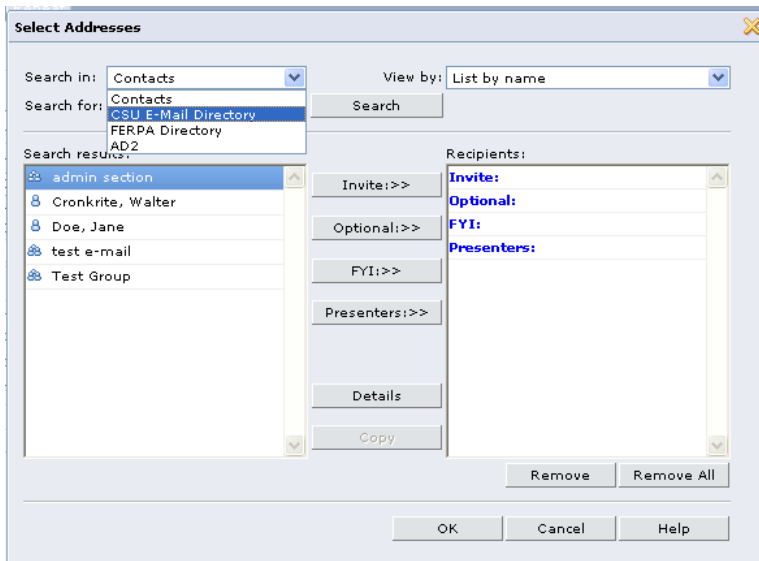
**Invite:** You can use both your Contacts and the CSU eMail Directory, which contains all publicly available faculty, staff and students. To use these, select 'Invite' 'Optional' or 'FYI' field button.

Select from the Contacts list by select the desired name and selecting 'Invite', 'Optional' or 'FYI'. Repeat if additional people are to be selected. Select 'OK' when complete.

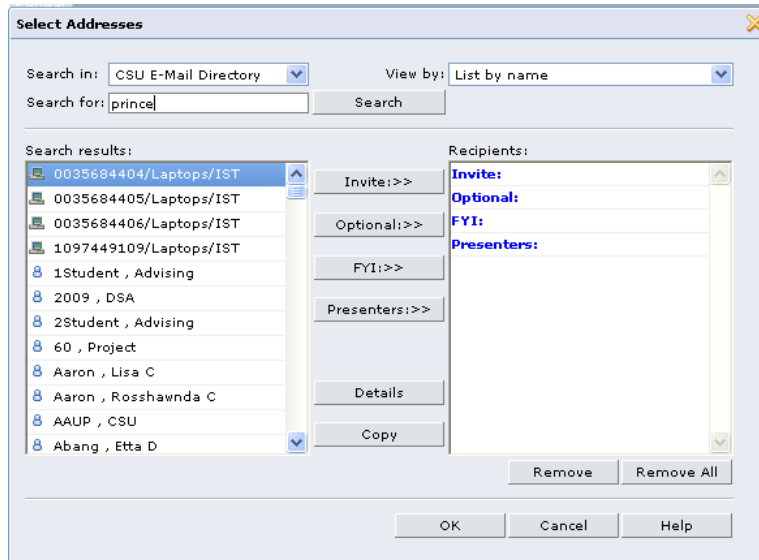


## Select from the CSU eMail Directory

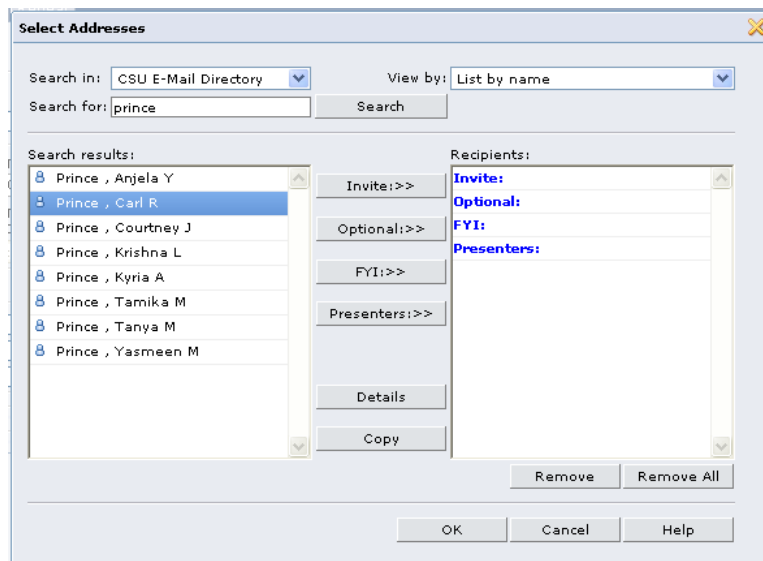
1. Change from the 'Contacts' book to 'CSU E-Mail Directory'



2. Type the name in the 'Search for' field and select 'Search'



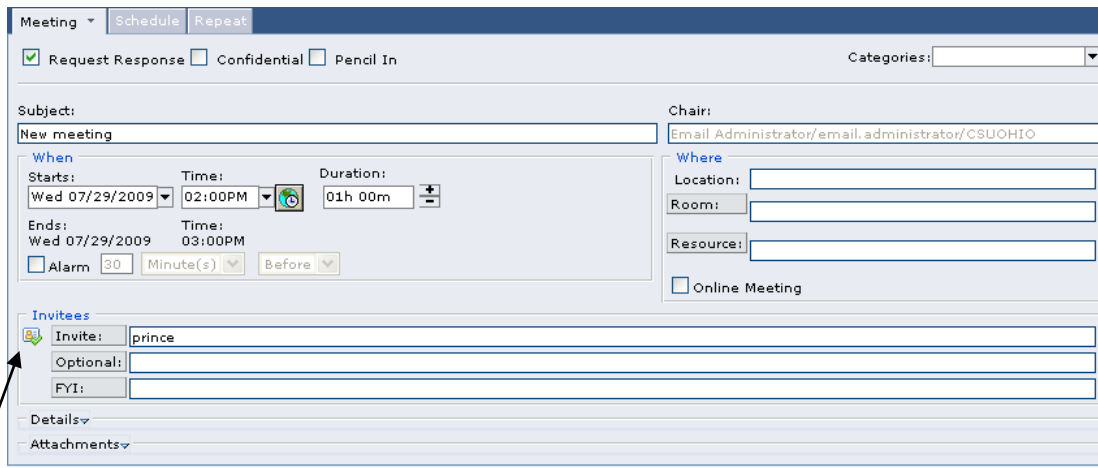
3. Select the desired name then either 'Invite', 'Optional' or 'FYI' button.




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

## Start typing then request Campus Webmail to Locate Matches

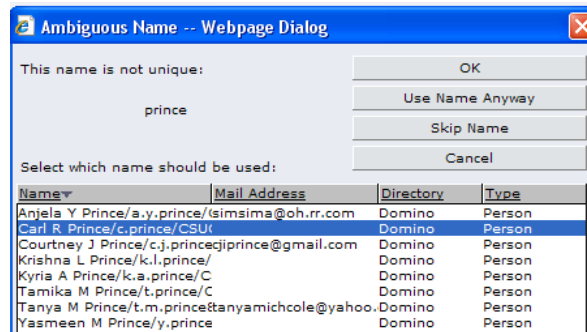
Type in the first part of the name in the 'Invite', 'Optional' or 'FYI' field



 Select the 'Check name(s)' button to the left of the field ...

(Note: this button does not appear until information is entered into one of these fields)

The 'Ambiguous Name' screen will display possible matches. Select the desired name and then select 'OK'

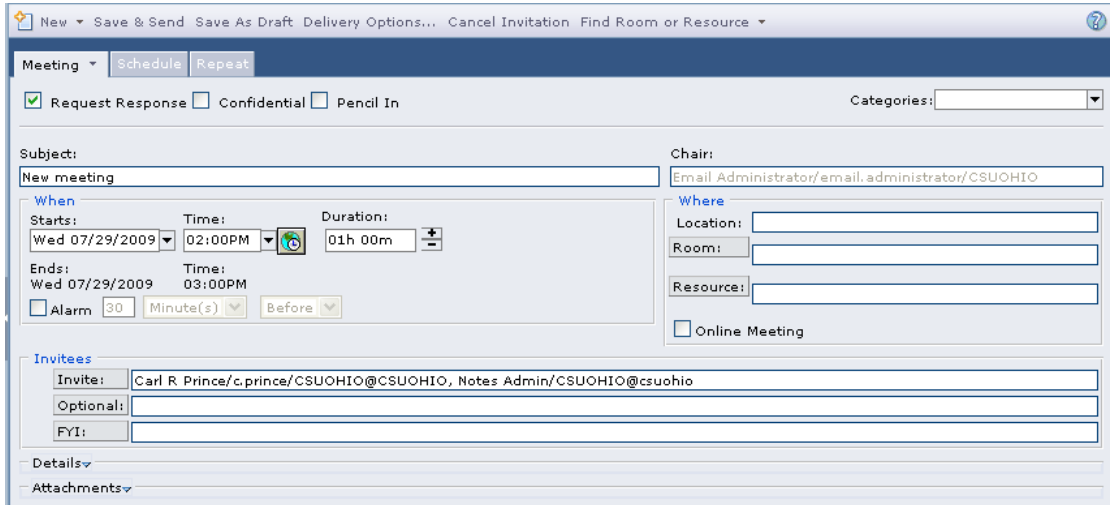


Name	Mail Address	Directory	Type
Anjela Y Prince/a.y.prince/simsima@oh.rr.com		Domino	Person
<b>Carl R Prince/c.prince/CSU</b>		Domino	Person
Courtney J Prince/c.j.princejprince@gmail.com		Domino	Person
Krishna L Prince/k.l.prince/		Domino	Person
Kyria A Prince/k.a.prince/C		Domino	Person
Tamika M Prince/t.prince/C		Domino	Person
Tanya M Prince/t.m.prince@tanyamichcole@yahoo.		Domino	Person
Yasmeen M Prince/y.prince		Domino	Person

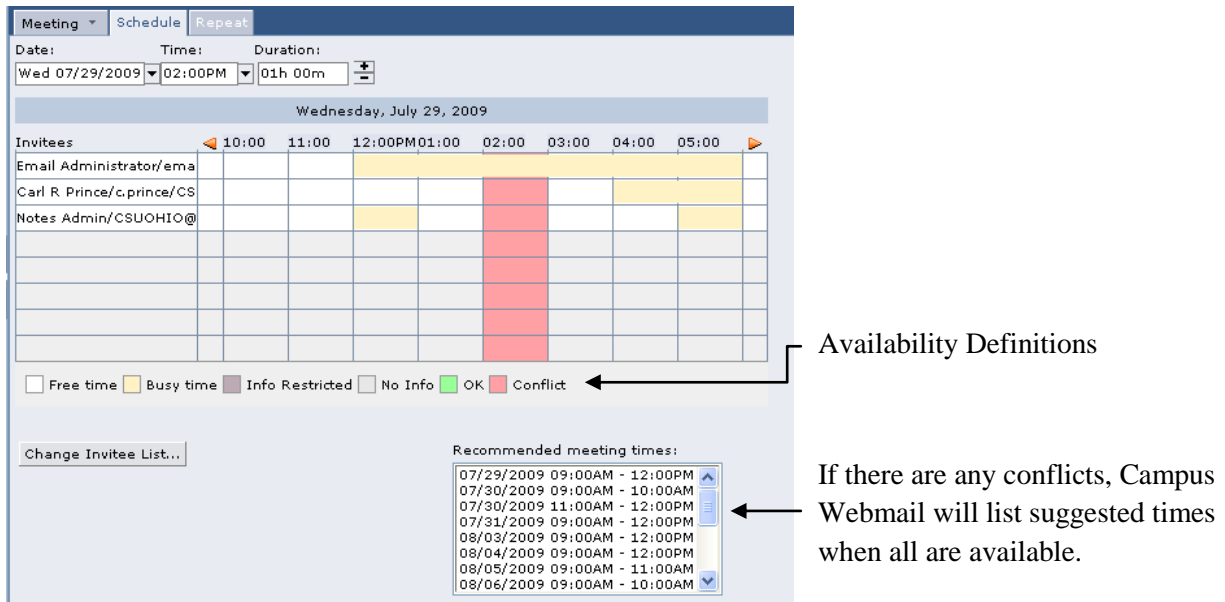
# Check Invitee Availability

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 Webmail, or Deskmail, calendar and if they have not limited the calendar view to specific people, you can use the ‘Schedule’ tab to identify if they are previously engaged.

In this example, 2 people have been invited to a meeting set for 7/29 at 2 p.m.



The ‘Schedule’ tab is selected to confirm availability of all 3 people, self plus the two invitees.



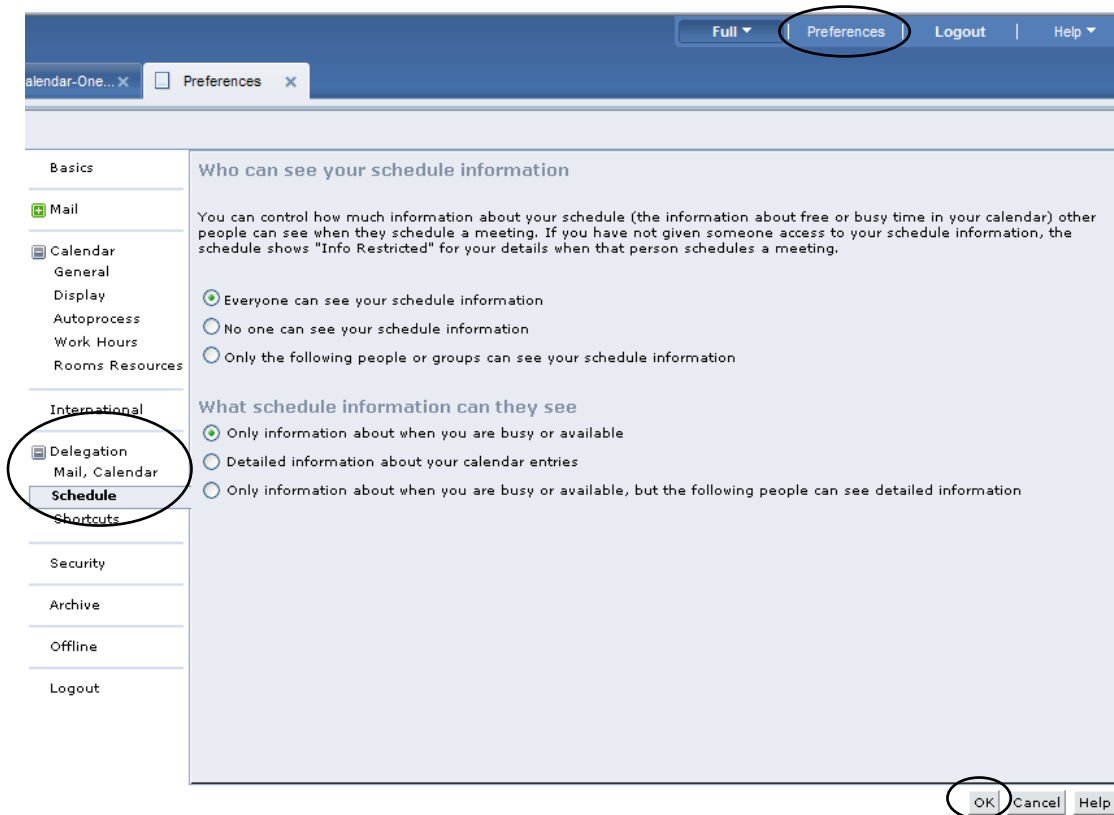
To change the time of the meeting, select the desired time from the list of recommended times.

## Set Your Calendar for Viewing

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

1. Select 'Preferences'
2. Expand 'Delegation' and select 'Schedule'
3. Set options as wanted
4. Select 'OK' to save

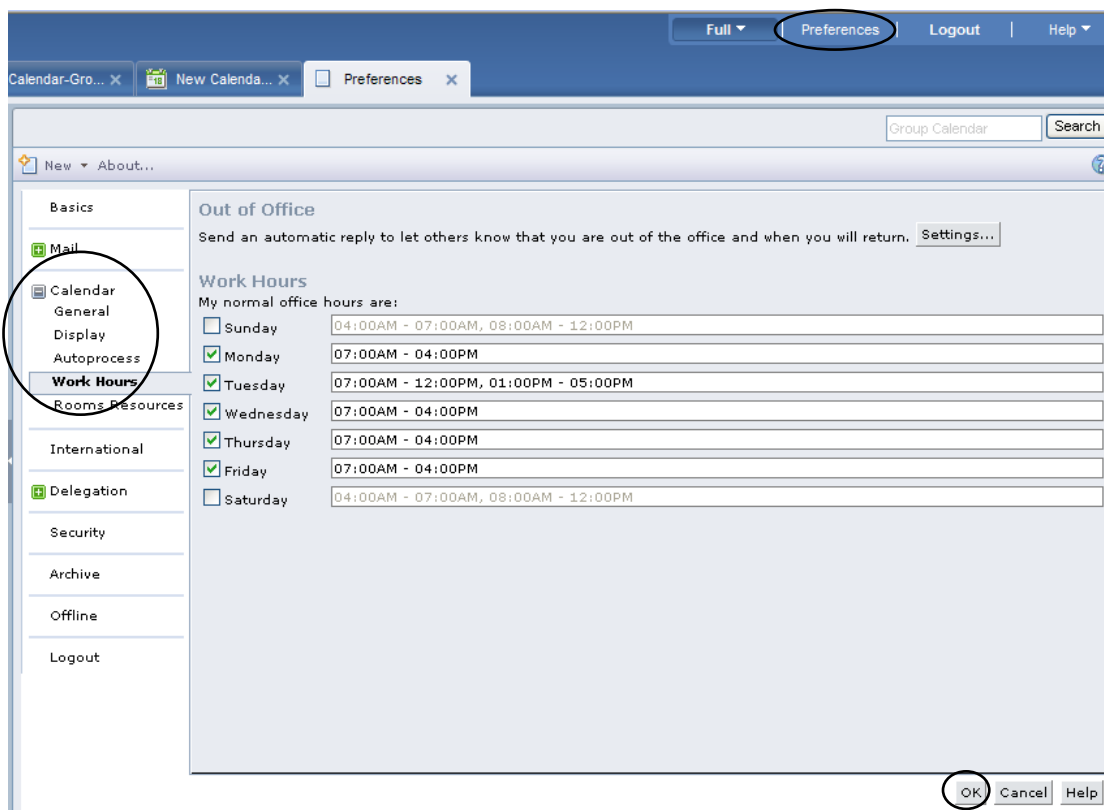
Note: this will allow others to see if you are busy, but will not allow them to see the subject matter, location, or details of your calendar entries.



## 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 'Preferences'
2. Expand 'Calendar' and select 'Work Hours'
3. Select 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.



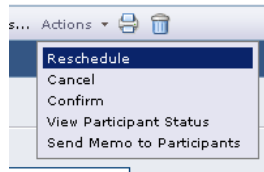
## Update Calendar Entries

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

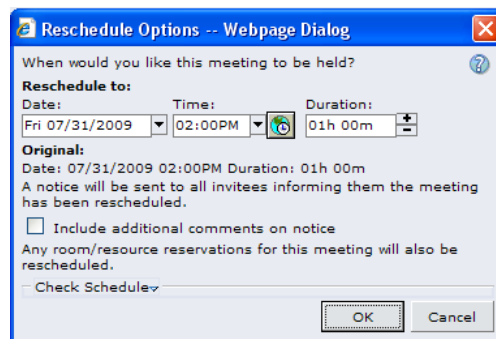
You can drag/drop the meeting to another day and/or time

Or

1. Double click on the meeting to open the entry
2. Expand 'Actions' and then select 'Reschedule'



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

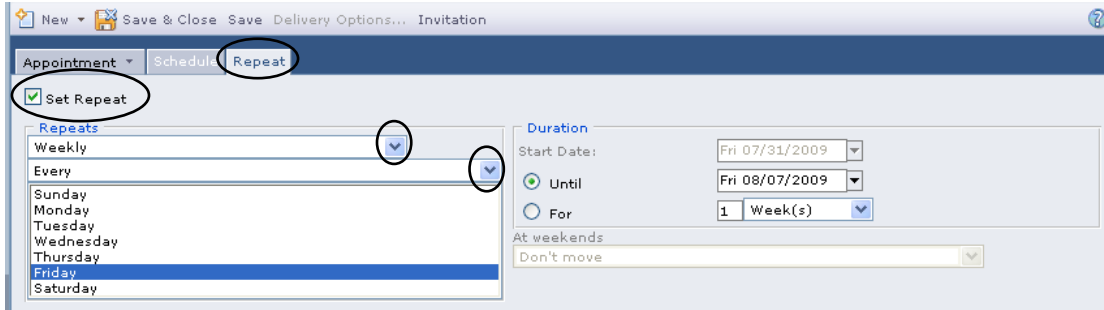


When you change a meeting to which you have invited people, Campus Webmail will automatically send an update eMail to the invitees.

## 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' tab
4. Select on (check mark) 'Set Repeat' checkbox

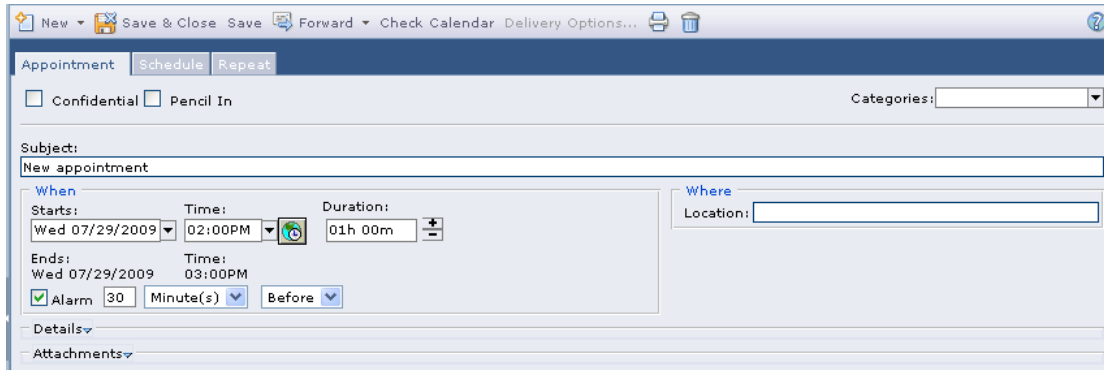


5. Set the repeat pattern to meet your individual needs, when complete select 'Save & Close'

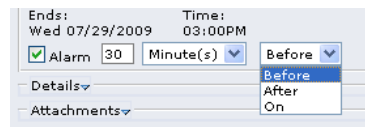
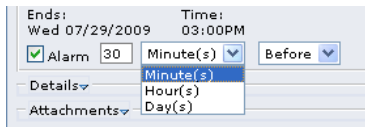
## Set Alarm

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

1. Select the 'Alarm' check box



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

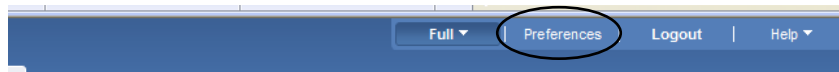


## Change Default Settings

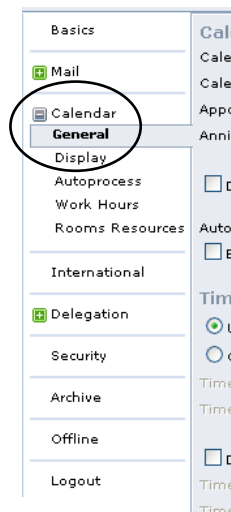
Within Campus Webmail, you can change many of the default calendar settings. For example, you may want to create meeting entries by default, rather than appointment entries. Or, you may want your meetings to last 30 minutes by default.

To change your default settings:

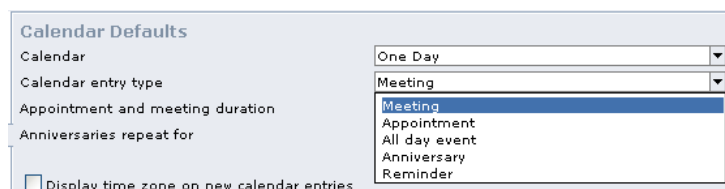
1. Select 'Preferences'



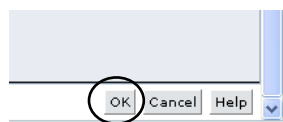
2. Expand 'Calendar' and select 'General'



3. Under the section titled "Calendar Defaults" change settings as desired

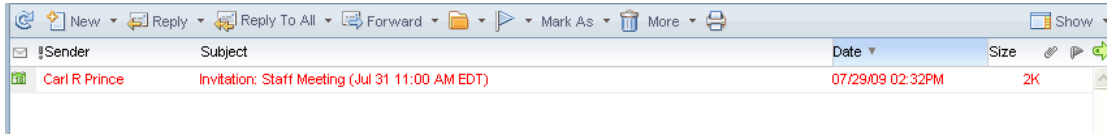


4. Select 'OK' to save settings.

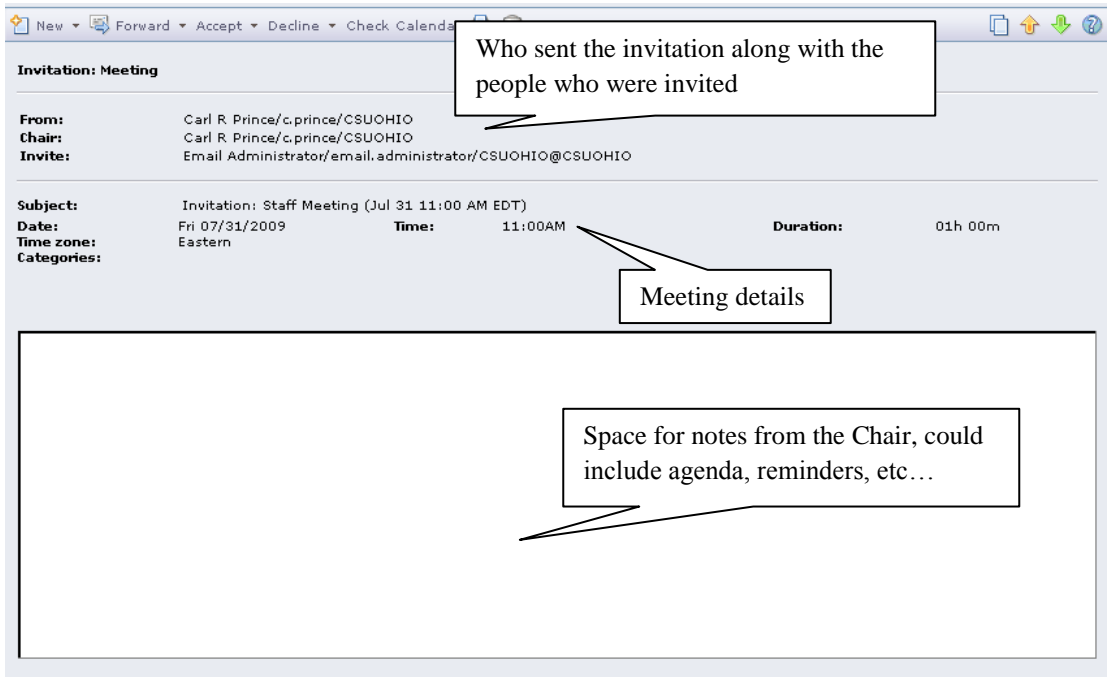


# Manage Received Meeting Invitations

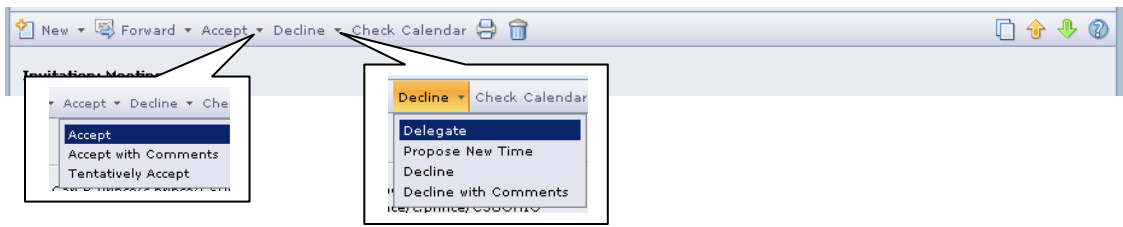
Invitations to meetings appear in your Inbox and look like this:



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:

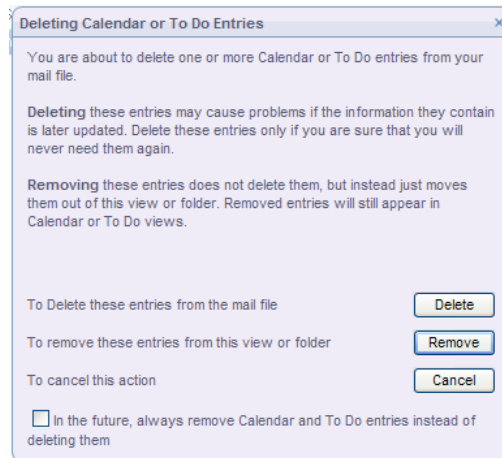


If you accept an invitation, the meeting will be placed on your calendar, complete with details and notes and the Chair will receive an acceptance eMail from you.

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:



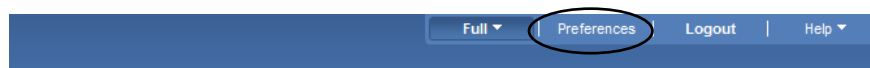
- Select 'Delete' to delete the eMail AND the calendar entry
- Select 'Remove' to delete the eMail but KEEP the calendar entry
- Select 'Cancel' to exit the request and perform no actions

## Change Default Settings for Automatically Managing Invitations

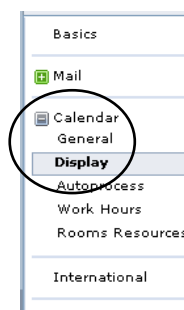
You can also change your default settings so that when you respond to an invitation the eMail will be removed but the calendar entry will remain.

To change the Calendar default setting for invitations:

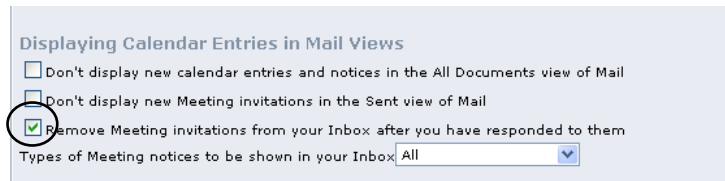
1. Select 'Preferences'



2. Expand 'Calendar' and select 'Display'



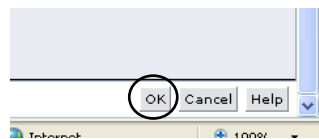
- Under the section titled “Displaying Calendar Entries in Mail Views” select (check mark on) “Remove Meeting Invitations from your Inbox after you have responded to them”



- Another option to assist in managing the calendar is located under the section titled “Displaying Calendar Entries in Calendar Views”. This option will automatically remove cancelled meetings from your calendar, making that time available, or will leave the entry penciled in, but noted as cancelled. To turn on this option select (check) “Process cancelled meetings automatically” and then select one of the two sub options.



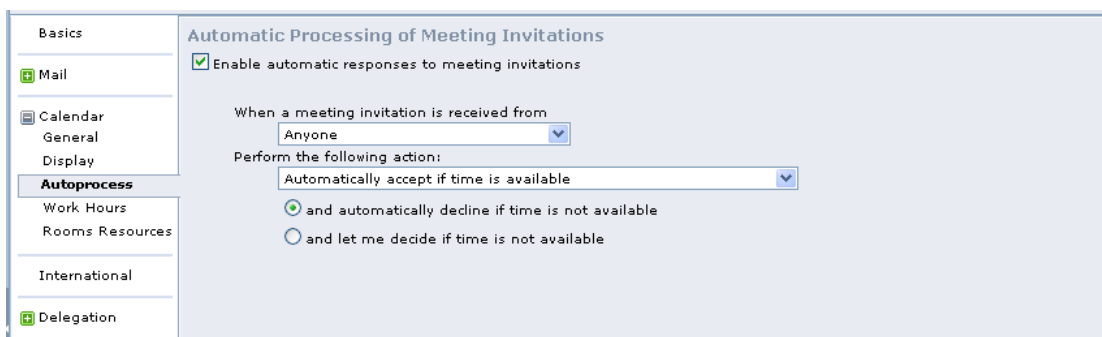
- Select ‘OK’ to save



## ***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, select 'Preferences' expand 'Calendar' and then select 'Autoprocess'. Select (check) "Enable automatic responses to meeting invitations". When this is select other settings associated with this option will appear, and need to be set to meet your individual needs. When complete, select 'OK' at the bottom of the screen.



### **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 Webmail, 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.

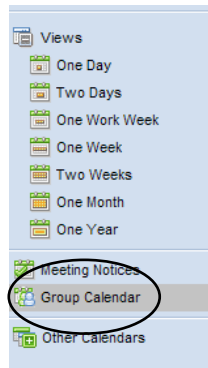
You can use a group calendar to quickly see if people in a selected group are free or busy at a certain time. Additionally, if you have access to people's calendars, you can access their calendars from the group calendar

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.

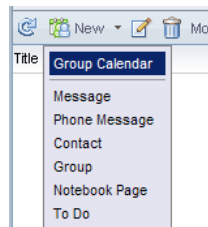
The screenshot shows a webmail group calendar interface. At the top, there are navigation options: 'New', 'Add/Remove', 'Expand/Collapse', 'View', and 'More'. The calendar title is 'Test' and the date is 'Tuesday, August 04, 2009'. The calendar grid shows days from 07 to 04. The 'Email Administrator' and 'Notes Admin' rows show blue shaded cells for August 7th and 8th, indicating busy time. The 'janedoe@yahoo.com' row shows a greyed-out message: 'This member's information does not exist.' Below the calendar grid is a legend with 'Busy Time' (blue square) and 'No Info/Info Restricted' (grey square). Under 'Types of Entries', there are color-coded boxes for Meeting (dark blue), Appointment (purple), All Day Event (light blue), Anniversary (orange), and Reminder (yellow).

## Create a Group Calendar

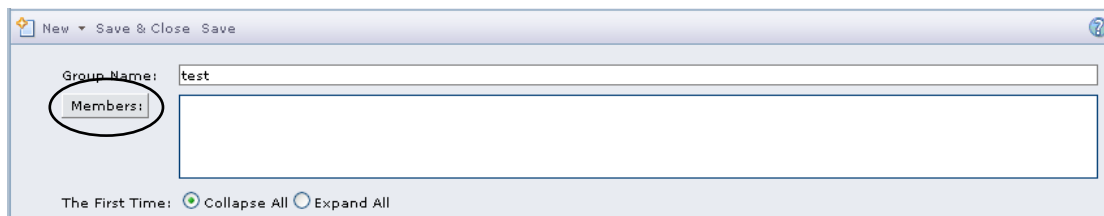
1. Open the Calendar view and select 'Group Calendar' on the left



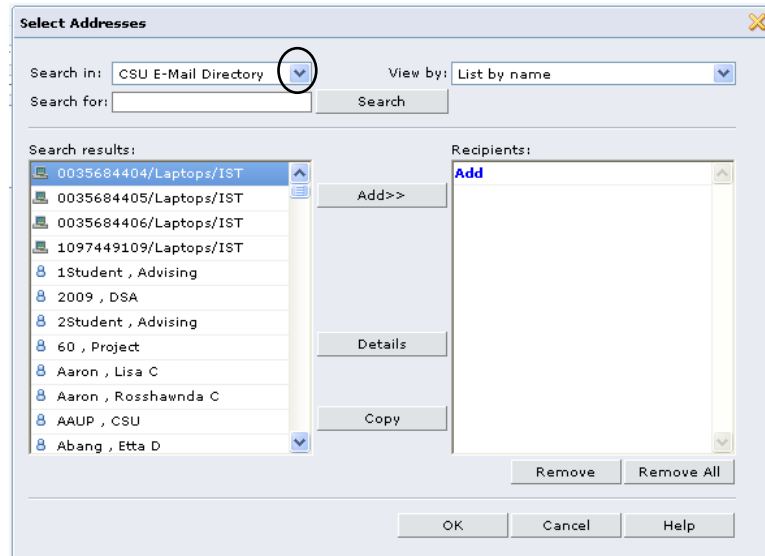
2. Expand 'New' and select 'Group Calendar'



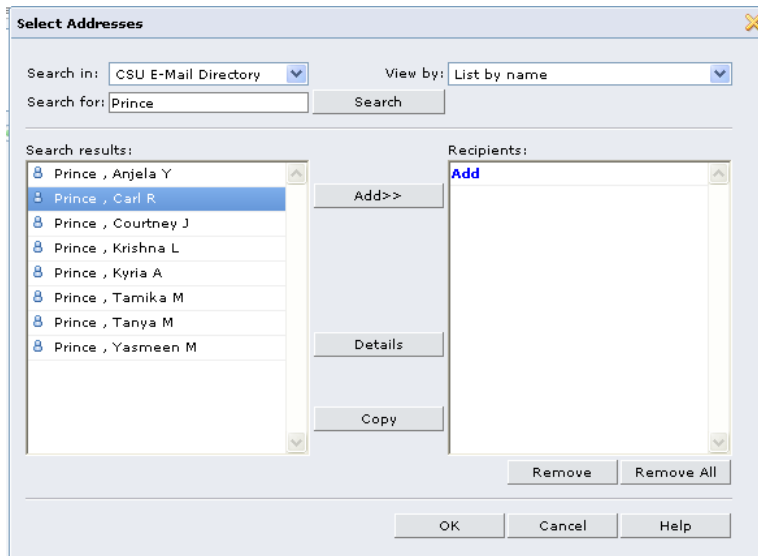
3. Enter the Group Name and then select the 'Members' button

A screenshot of a 'New' dialog box. The 'Group Name' field contains the text 'test'. The 'Members' button is circled in black. At the bottom, there are radio buttons for 'Collapse All' (selected) and 'Expand All'. The dialog box has a title bar with 'New', 'Save & Close', and 'Save' buttons.

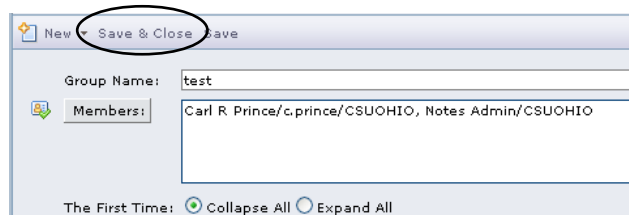
- The “Select Addresses” screen will appear. Verify that the ‘Search in’ field is pointing to “CSU E-Mail Directory”



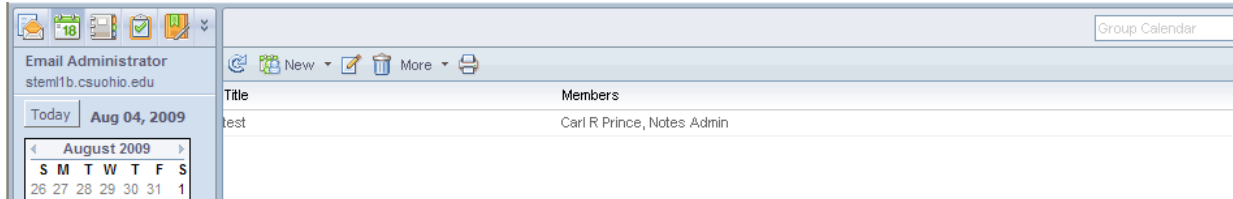
- In the ‘Search for’ field enter the last name of the individual to add to the group, select the ‘Search’ button. Locate the individual in the ‘Search Results’ field, select the name and then select the ‘Add>>’ button. Repeat this process until all names are added. Select ‘OK’ when complete.



6. Select 'Save & Close' to save the group



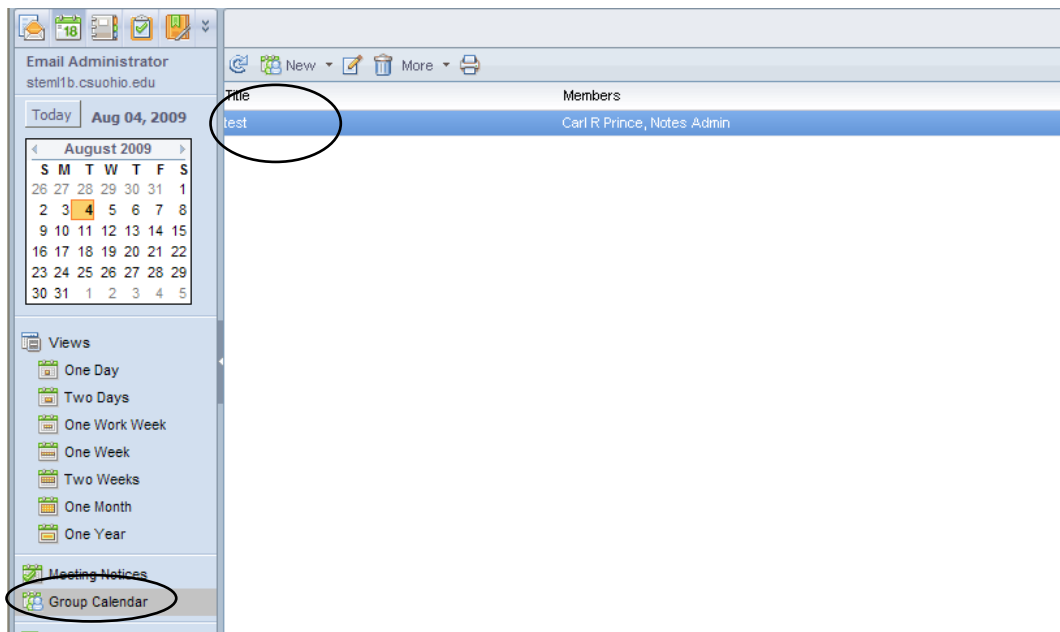
7. The group will appear in the list along with the name of the members.



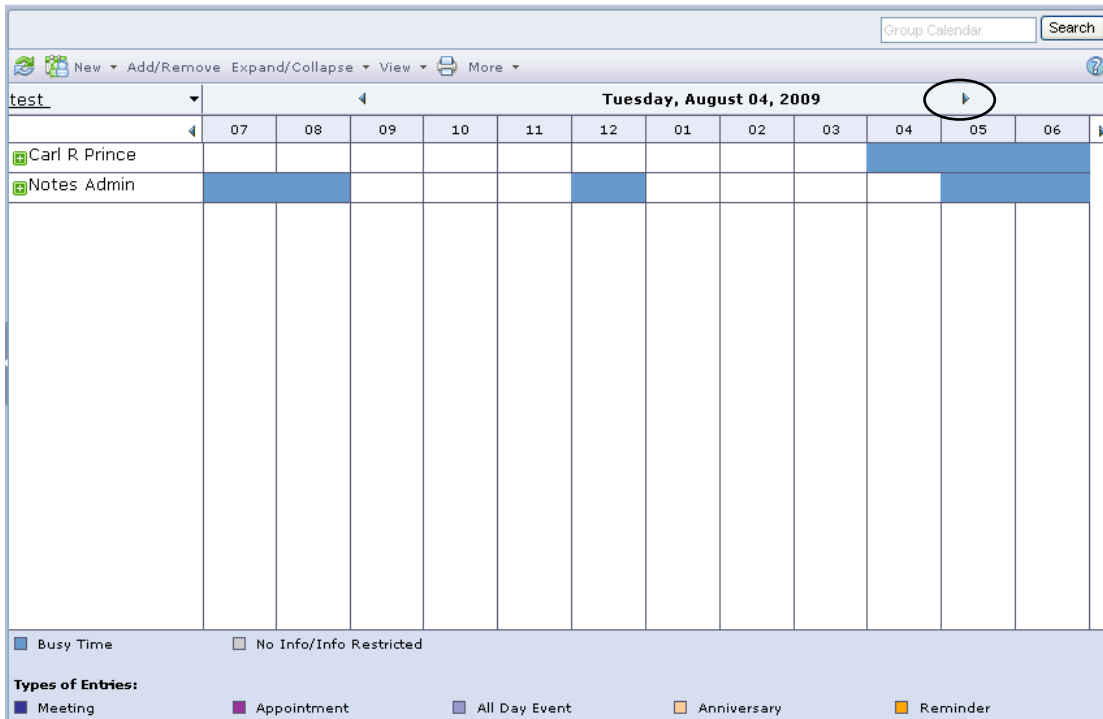
### ***View a Group***

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

1. Open the Calendar view
2. Select 'Group Calendar'
3. Double-click on the group to view

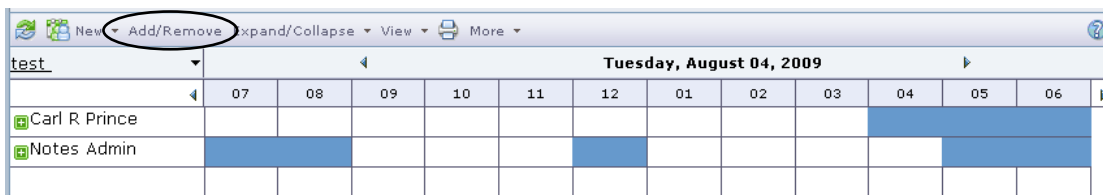


Once opened, you will be able to view each member's availability for the current date. To select a new date, select the arrow next to the date listed.



### *Change the Members in a Group Calendar*

1. Open a group following the directions listed under “View a Group” above. Select the ‘Add/Remove’ button

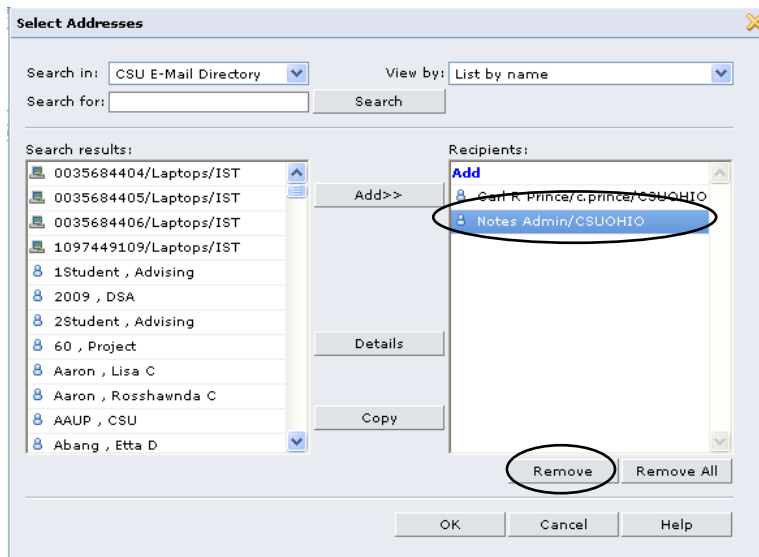


2. Select the ‘Members’ button

Group Name:

Members:

- To remove a member, in the 'Recipient' 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.



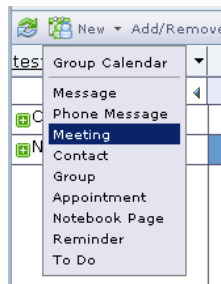
- Select 'Save & Close' to save the changes.



### ***Create a Meeting using a Group***

To create a meeting for a particular group:

- Open the Calendar view and view a group
- Expand 'New' and select 'Meeting'

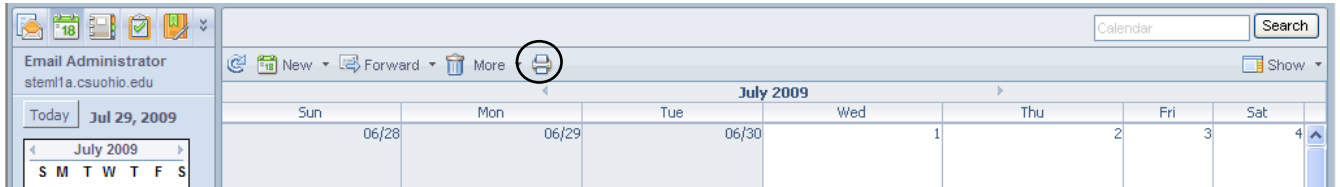


- Schedule a meeting as you normally would
- Once the meeting has been scheduled, close the group

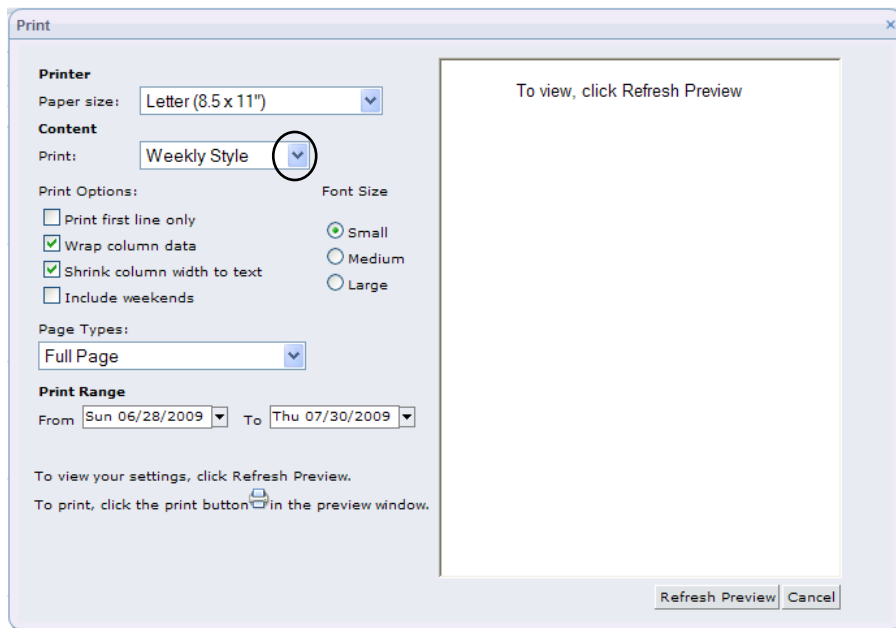
# Printing Calendars

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.

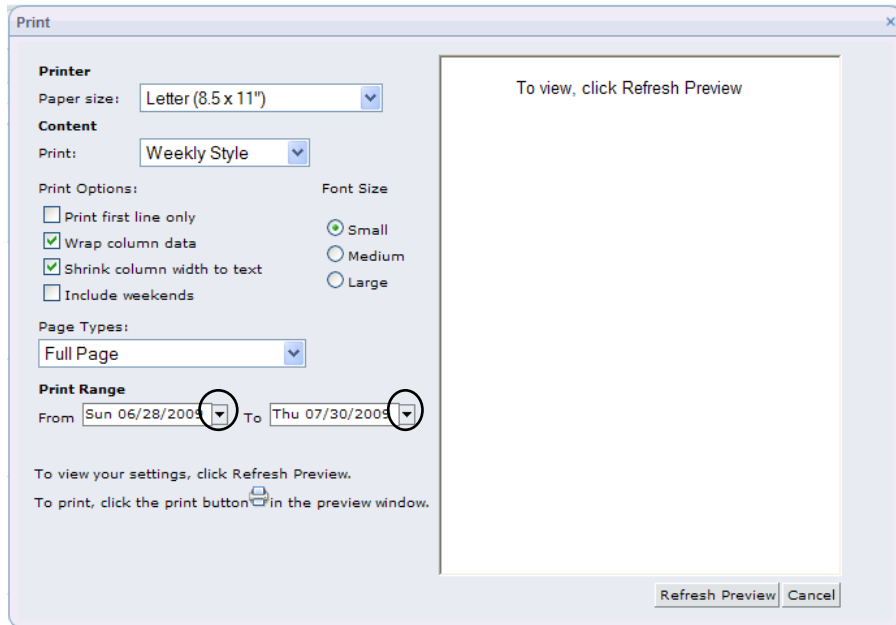
1. Open the calendar view and select the print in the calendar view



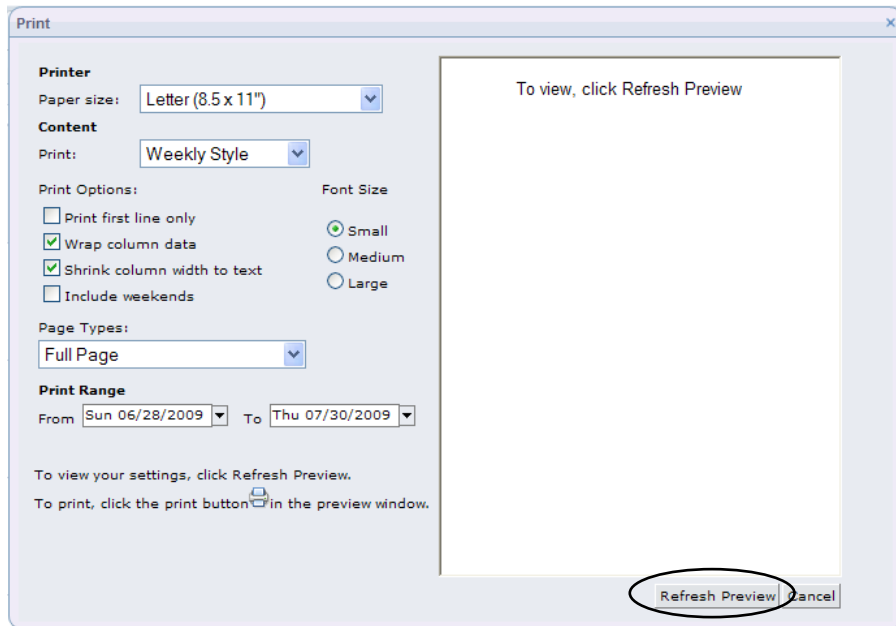
2. Set the content print style to the format you want



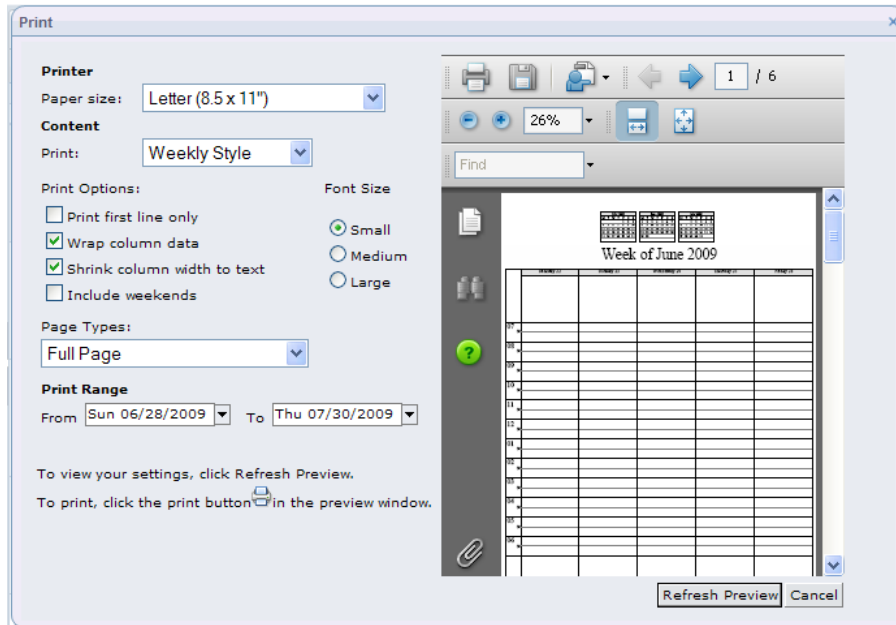
3. Change the dates to indicate the range desired



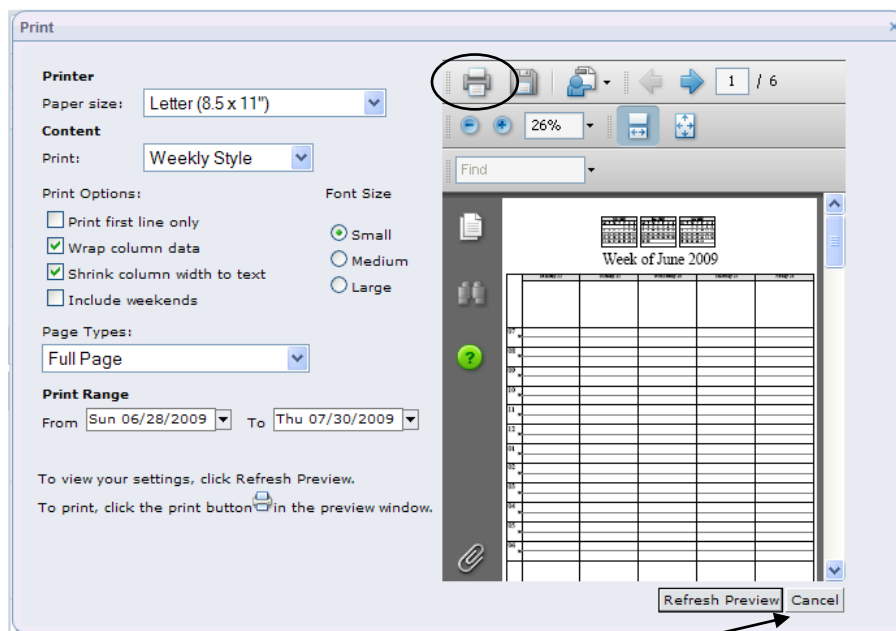
4. Select the 'Refresh Preview' button



The right side will display the print preview ....



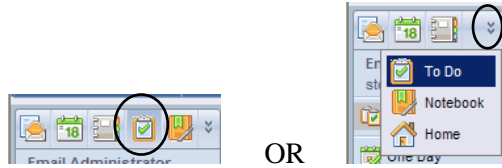
5. Once the preview has been viewed and it is ready to print, select the print button within the preview



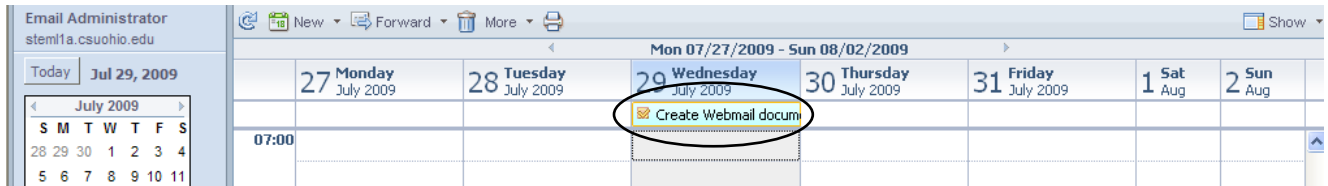
When the calendar has finished printing, select 'Cancel'

# To Do Items

Campus Webmail also provides a To Do list for tracking tasks. To Do items can be viewed by selecting the 'To Do' icon and open the 'To Do' view:

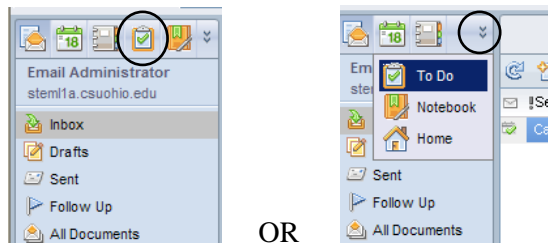


Or, if the setting in your preference allows it, the To Do entries can also be displayed in your calendar.

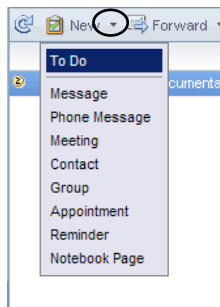


## Create To Do Items

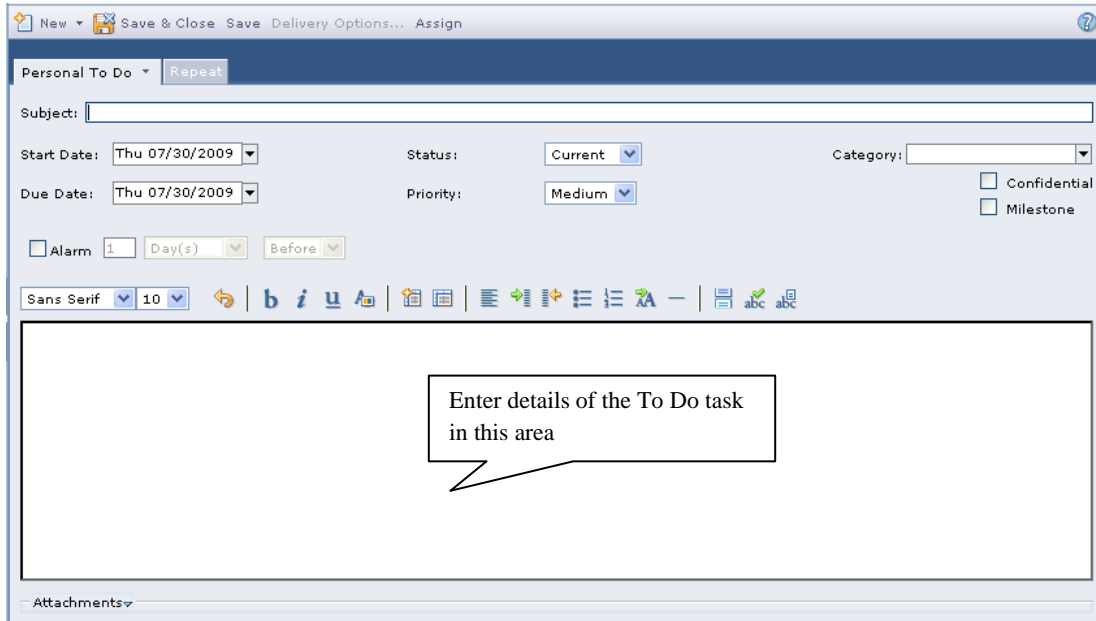
1. Open the To Do view by selecting the To Do icon



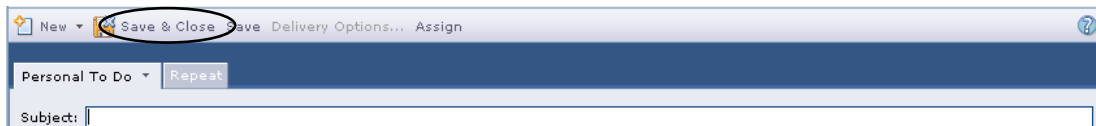
2. Expand 'New' then select 'To Do'



- 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.

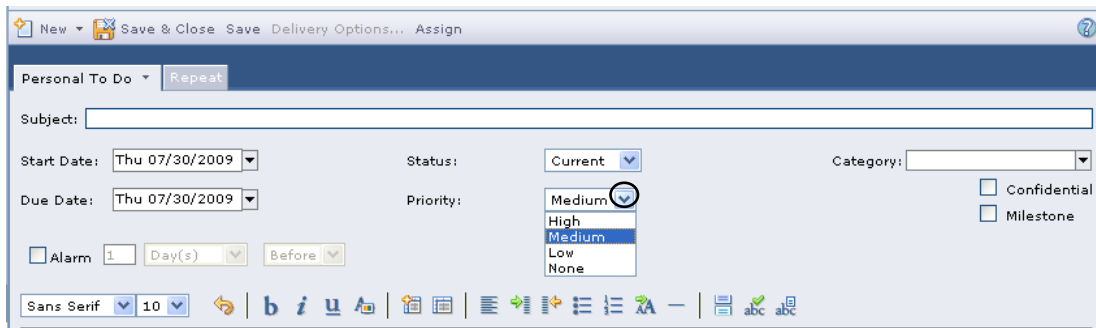


- Select 'Save & Close' to save

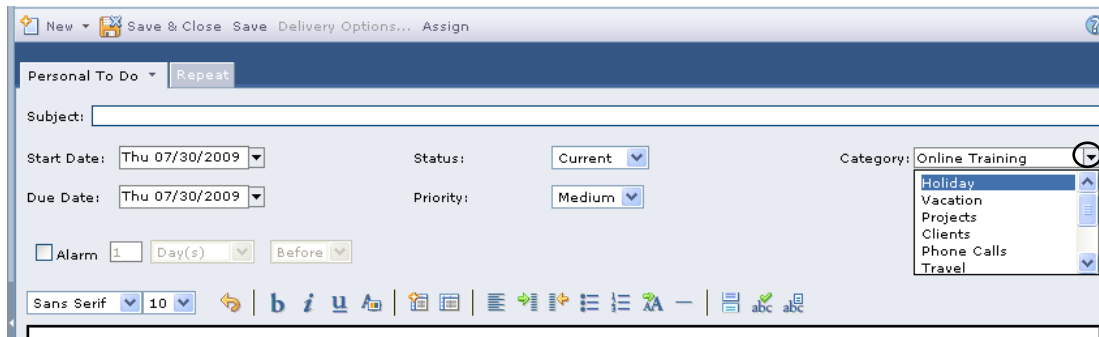


### ***Change To Do Priority & Category***

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. In this instance, instead of selecting a predefined category, I typed a new one “Online Training”

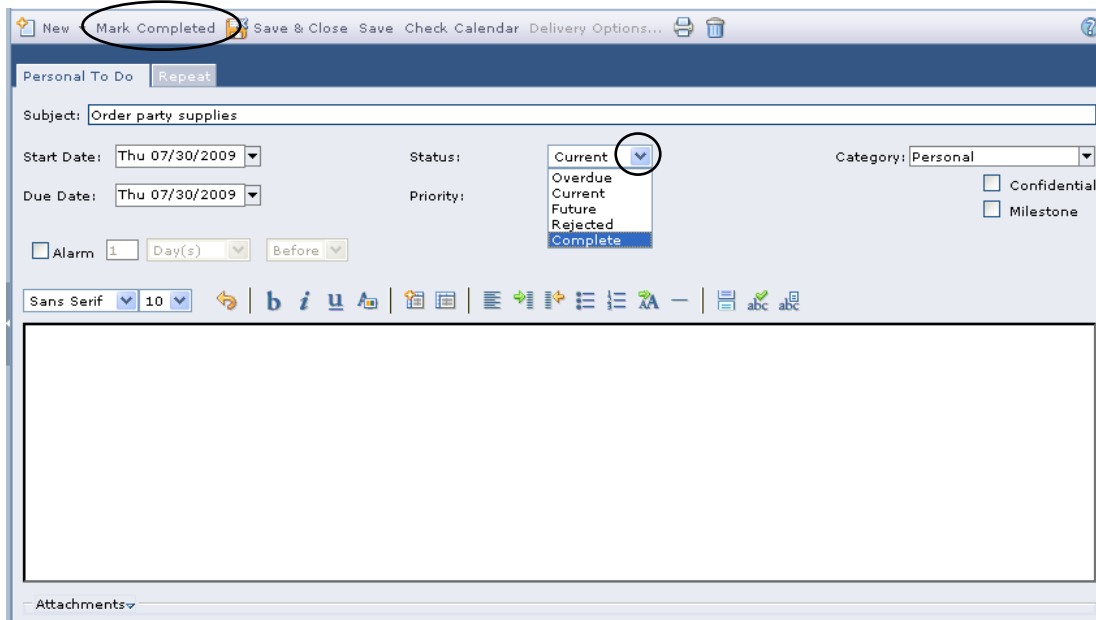


Here is a sample of a To Do list with various categories & priorities:

To Do	Due Date	Status	Category
Install software	07/31/09	In Progress	Projects
Create Webmail documentation	07/30/09	In Progress	
Poster for Skillport	07/31/09	In Progress	Online Training
Order hardware	07/29/09	Completed on 07/30/2009	
Order party supplies	07/30/09	In Progress	Personal

### Mark To Do Complete

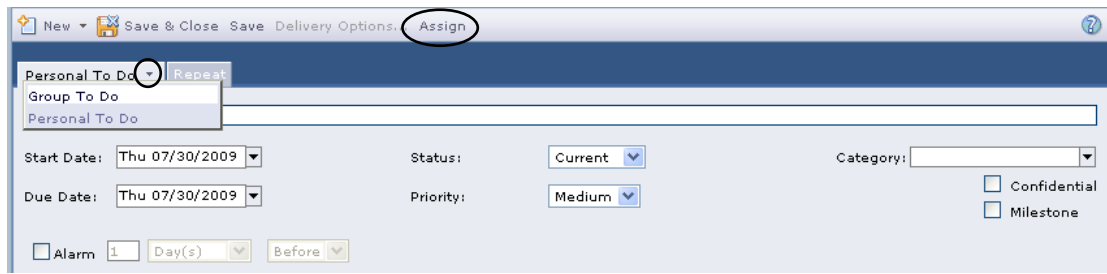
A task must be opened to change its status. You can mark a task as completed by either changing the status or by selecting the ‘Mark Completed’ button



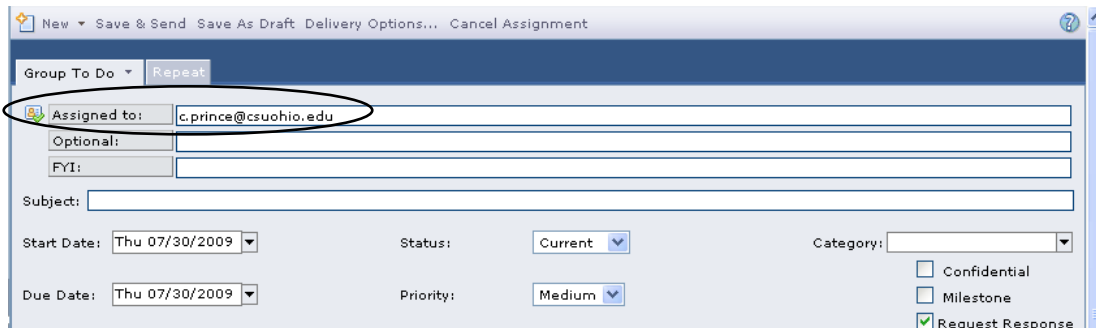
## Assign To Do to Someone Else

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.

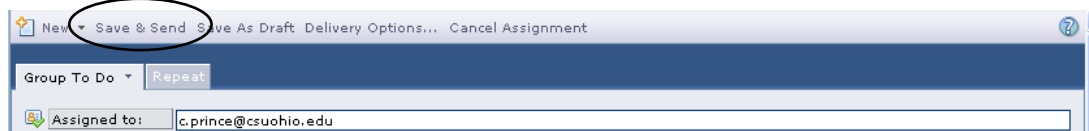
1. Open a new To Do task, when opened select the 'Assign' button or expand the 'Personal To Do' tab and select 'Group To Do'



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 "Assign to", which will then open the directory from which you can select the individual(s).



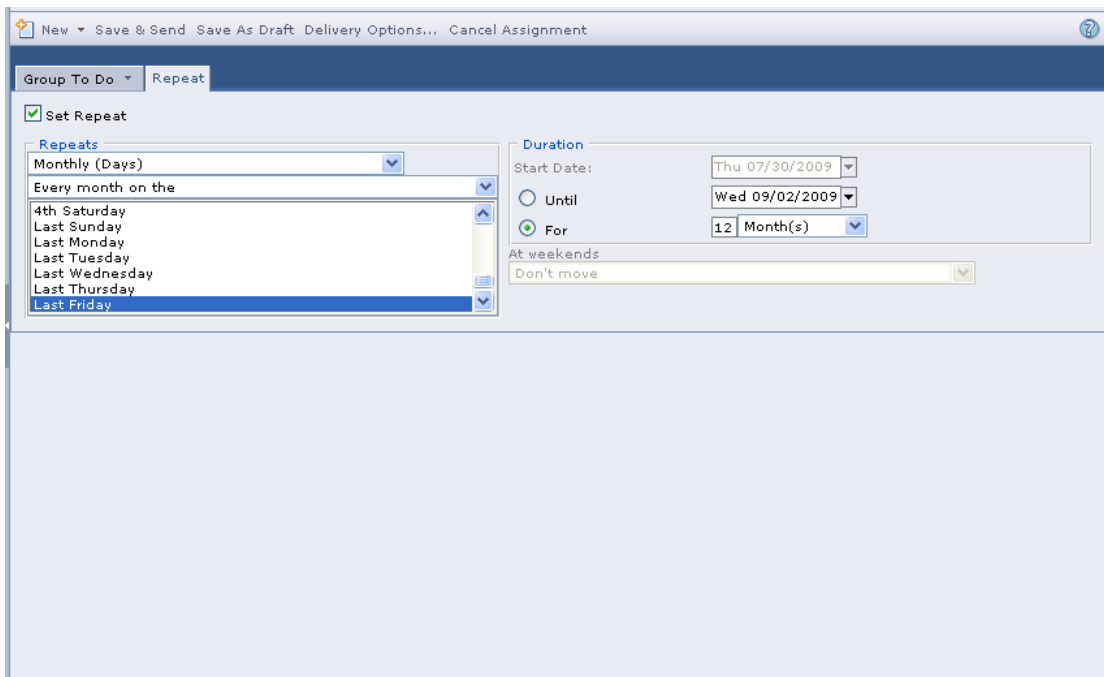
3. Fill in the task as you normally would, select 'Save & Send' when completed. Once saved, an eMail notice will automatically be sent to the individual(s) listed.



## ***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' tab
4. Select (check) 'Set Repeat'
5. Set the repeat pattern to meet your individual needs
6. Select 'Save & Close'



The screenshot shows the 'Repeat' tab of a task management application. The window title is 'New Save & Send Save As Draft Delivery Options... Cancel Assignment'. The 'Repeat' tab is active, and the 'Set Repeat' checkbox is checked. The 'Repeats' section is expanded, showing a list of options: 'Monthly (Days)', 'Every month on the', '4th Saturday', 'Last Sunday', 'Last Monday', 'Last Tuesday', 'Last Wednesday', 'Last Thursday', and 'Last Friday'. The 'Duration' section is also visible, with 'Start Date' set to 'Thu 07/30/2009', 'End Date' set to 'Wed 09/02/2009', and 'For' selected with a value of '12 Month(s)'. The 'At weekends' dropdown is set to 'Don't move'.

## 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 'Preferences'
2. Expand 'Calendar' and select 'Display'
3. Under the section titled "Displaying Calendar Entries in Calendar Views", de-select (uncheck) 'Display To Do Entries'
4. Select 'OK' to save

