Groups (cont.)

- Enter the names of the people or resources you wish to add to the group, clicking the check mark button after each addition. Entering the first few letters of a name will add the name you wish or bring up a short checklist for you to choose from. To add a resource, type r: followed by the resource's name.

Glossary

Agenda
An agenda is the CorporateTime word for personal calendar or schedule.

In-Tray
The In-Tray is where you receive invitations to daily notes, meetings, and day events. It keeps track of proposals that you have accepted, rejected, or sent out. It is somewhat similar to Meeting Maker's message window.

Task
A task is a to-do item. It may be linked to a meeting or other event.

Day Event
A day event is an activity that takes up most or all of a day, but does not block out time on your agenda. You may send day events to other people to let them know that you'll be occupied. Day events appear in the notes section of your agenda.

Daily Note
A daily note appears on your agenda but does not block out time. It is similar to a day event but is usually used for informational rather than schedule-related material. You can send notes to other people.

Getting help

CorporateTime online help
Macintosh: Click on the help icon or select "CorporateTime Guide" under the Help menu.

Windows: Press F1 or select "Contents" under the Help menu.

Your departmental CalAgenda administrator
If you're not sure who your departmental administrator is, see *http://CalAgenda.berkeley.edu/help/admin-list.html* on the CalAgenda web site for a list of department administrators.

The CalAgenda web site: *http://CalAgenda.berkeley.edu/*
See the CalAgenda web site for complete documentation, lists of known quirks and requests for enhancements, and the latest client software.

Icons

The icons below will have slightly different meanings in different contexts. The meanings given below are those appropriate in the context of viewing your agenda or In-tray. Some icons also vary slightly between the Windows and Macintosh versions of the CorporateTime software. Where two icons appear side by side below, the one on the left is the Macintosh icon.

- Open an In-tray
- Open an Agenda
- Open Tasks
- Open Group Agenda
- Open Address Book
- View day
- View week
- View month
- New Meeting
- New Day Event
- New Daily Note
- New Task
- Print
- Launch mail
- Open browser
- Search directory
- Invitee will attend
- Invitee will not attend
- Invitee has not replied
- Meeting
- Meeting on multiple days[M]
- Daily Note
- Daily Note on multiple days[M]
- Day Event
- Day Event on multiple days[M]
- Recurring event[W]
- Event has details
- Holiday
- Event has reminder set
- Working online
- Working offline
- Alert for meeting conflicts
- Select new date
- Check the directory (after entering a complete or partial name)

[M] Symbol appears only on the Macintosh software.
[W] Symbol appears only on the Windows software.

CalAgenda
Online Calendar Service

Quick Reference Guide for Former Meeting Maker Users

CalAgenda is the new electronic scheduling aid and calendaring service for the UC Berkeley campus. Using the commercial application CorporateTime, CalAgenda is a powerful tool that will allow you to schedule meetings with people all over campus. This Quick Reference is intended to help people familiar with Meeting Maker quickly learn how to use the major aspects of CalAgenda.

For complete information on using CalAgenda and the CorporateTime software, visit the CalAgenda web site:

http://CalAgenda.berkeley.edu/

CalAgenda advantages

- Using the CalAgenda service, you will now be able to set up meetings with anyone whose department is also on the service (as long as you have been given the right to schedule meetings with them—see the Set Access Rights section). The CalAgenda service will eventually be able to handle up to 5,000 users.
- CalAgenda offers powerful features for setting access rights. Designate access levels for meetings, then designate the people who can access those levels, either by group or individually. You can also set scheduling rights that allow you to decide who can invite you to events.

What's different about CalAgenda?

The CalAgenda service uses a software product that is new to the UC Berkeley campus but well-known in business circles. CorporateTime, a product of Corporate Software & Technologies (http://www.cst.ca/), has provided electronic calendaring to dozens of businesses and a growing number of universities.

Former Meeting Maker users will notice many similarities in CorporateTime. You can schedule meetings with others electronically, allocate resources, and block out times.

Some things work differently in CalAgenda:

- You must sign in every time. (This is a security feature.)

What's different about CalAgenda? (cont.)

- Activity colors are designated according to three plans:
  - Attendance status (refused, not yet accepted, accepted)
  - Importance level (highest, high, etc.)
  - Entry ownership (owned meetings, meetings invited to, etc.)

  Colors are pre-designated within each of these plans.
- There is currently no audible reminder feature for CalAgenda. You may choose between an on-screen reminder window or a reminder note in the Notes section of the "agenda" window. ("Agenda" = Meeting Maker's Calendar)

Sign in to CalAgenda

1. Start the CorporateTime software.
2. Enter your full name, password, and server name. The first time you use CalAgenda, your password will be "CalAgenda." You should change your password as soon as possible. The server name is "CalAgenda.berkeley.edu".
3. Click on the "OK" button. Your In-Tray and agenda will open up.

Change your password

Click on "Change password" under the Options menu. Enter your old and new passwords. You'll be asked to enter your new one again.

Propose a meeting

Click the New Meeting button in the toolbar. A dialog box will appear. The Windows version will have tabs with the subheadings below. The Macintosh version will have the icons shown next to the subheadings for clicking through the sections.

General

1. Fill in meeting title, location, date, and time.
2. Invite other people individually or as groups in the "People and resources section." Add individuals by typing in the first few letters of their **last** name. A pick list will come up if more than one person's name matches. Add groups by clicking on the group icon. Click the "public" button to see groups set up by departmental administrators.
3. "Invite" resources by typing "r:" and the resource's name or by searching (clicking on the magnifying glass icon.)
4. Check for conflicts in the invited participants' schedules by clicking on the "Check conflicts" button. If conflicts are found, you can ask CorporateTime to suggest a time when all participants are available by clicking on the "Suggest a date/time" button.

Options

Set the importance level and access level (see "Set Access Rights").

Repeating

Set number and frequency of meetings if there is to be more than one.

Details

Add comments or attach a document.

Linked Tasks

Schedule tasks that are linked to the event.

Reminders

Check the radio button to activate the on-screen reminder and choose the desired settings. (Note: CorporateTime currently has no audible reminder option.)

Finalizing the Event

Click on the "Create" or "OK" button. A dialog box will appear asking if you want to send e-mail to invitees notifying them of the event. Click "cancel" if you do not want to send e-mail. The meeting will still be scheduled. Note that only people who have turned on the option "Al low people to send me notification by email for new entries" in the `Options:Agenda` dialog box will receive the e-mail notification.

Schedule Day Events or Daily Notes

Day events are scheduled events that occupy the entire day or a large portion of it. A day event will not block out time slots, but will appear in the notes section of the day view and week view.

Daily notes are similar to day events but are generally hold information pertinent to that day rather than describing events themselves. Like day events, they do not block out time on your agenda.

Create a new note or day event by clicking on the appropriate icon.

Respond to meeting proposals (the In-Tray)

Meeting proposals from others will appear in your In-Tray window (like Meeting Maker's "Messages") in the "New entries" folder. The In-Tray opens when you first open CalAgenda and when new entries have been added. Accept or refuse a meeting, day event, or note by dragging it into the "Entries you've accepted" or "Entries you've refused" folder. For more information about the event, double-click on it.

Set access rights (proxies)

Designate

Viewing

Tasks

Scheduling

CalAgenda offers 4 types of access rights: Designate, Viewing, Viewing Tasks, and Scheduling. You can assign 1 of 4 access levels to any event: Personal, Confidential, Normal, and Public. Others on the CalAgenda service will be able to view, modify, or write events on your agenda that are at the same access level you have granted them. See "Proposing a Meeting" for how to set an event's access level. See the CalAgenda web site (http://CalAgenda.berkeley.edu) for complete information on access rights.

Setting Default Access Rights

Before setting individual access rights, set the default access rights you will grant most people:

- Select "Access Rights…" under the "Options" menu.
- Select "Default: Any unlisted person" in the list box. Click through the tabs, "Viewing," "Viewing Tasks," and "Scheduling," and set the access rights you wish most other users to have. (Note: Macintosh users will see the icons at left.) "Viewing" rights are similar to Meeting Maker's read-only proxy. Change individual access rights as needed. (Note: Designate rights must be set individually.)

Designate Rights (Meeting Maker's Read/Write Proxy)

If someone needs to write to your agenda (secretary for supervisor, supervisor to employee), set the designate rights to "Modify" for the meeting access levels you wish (Normal, Confidential, Personal, Public). You can set other levels as desired, but at least one level must be set to "Modify" for another person to have "Designate" rights to your Agenda.Other designate rights include the ability to reply to meeting invitations on your behalf.

Groups

There are four group types:

- **Public**: available for use by everyone
- **Private**: only available for use by their creator
- **Administrative**: available for use by everyone, but can only be created and administered by the departmental administrator.
- **Members Only**: available for use only by the group's members. These groups can only be edited by their creator.

To create a new group:

- Go to the "Directory" menu and select "Manage Groups…."
- Click the "New…" button to open the New Group dialog box.
- Enter a group name and type.