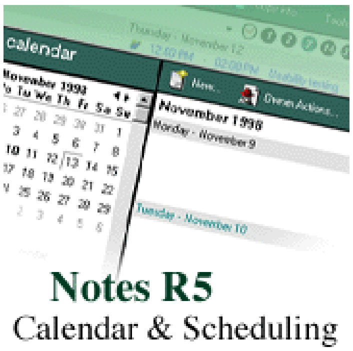

by
Susan
Florio

Level: Beginner
Works with: Notes 5.0
Updated: 05/03/99

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Your life is busy. Busy to the point of being hectic. You want to have it all, but some days having it all overwhelms you. You think you have a normal life -- a job, a family, friends, hobbies you enjoy, but sometimes it feels like you live in the fast lane and you're about to go off the track. What you need is organization. You need a way to schedule your life so that when you are doing one thing, you don't need to worry about making time for other things.

This is where Notes R5 Calendar and Scheduling comes in. Maybe a day in your life starts out like this... You get into work at 8:30 after a harrowing morning getting the kids to school and day care. At work, you have new e-mail messages to read, two meetings today (one where you have to give a presentation, the other that you have to schedule for the afternoon), and your manager stops by and wants to discuss strategy for a 10:30 meeting with customers. While your manager is talking to you, all you can think about is that you need to finish a presentation for the meeting this morning and make sure that there will be video equipment in the room for the presentation. You remember that you are having lunch at a local restaurant with a co-worker, but you also have to remember to pick up the dry-cleaning on your way back to the office. By this time, you have so much going through your mind that you can't even concentrate on the current conversation.

In this article, we'll show you how all of this will be easier. We'll take you through each feature and give you an in-depth look at how Notes R5 can help you organize your life. In Notes R5, the code for your mail and calendar is now in the core product, thus keeping the size of the mail template down. This improves the performance of your calendar while adding an abundance of new features and usability improvements. We'll show you:

- An overview of the new user interface
- How the new workflow capabilities work for you
- How to create calendar entries, including new meeting invitation features
- How to reserve rooms and resources
- What the new Group Calendars are and how to use them
- How to use tasks or to dos
- How to set your calendar preferences
- Other miscellaneous enhancements, such as the new printing capabilities, how to customize and add holidays to your calendar, and how the calendar works with personal information manager (PIM) tools such as Palm Pilot

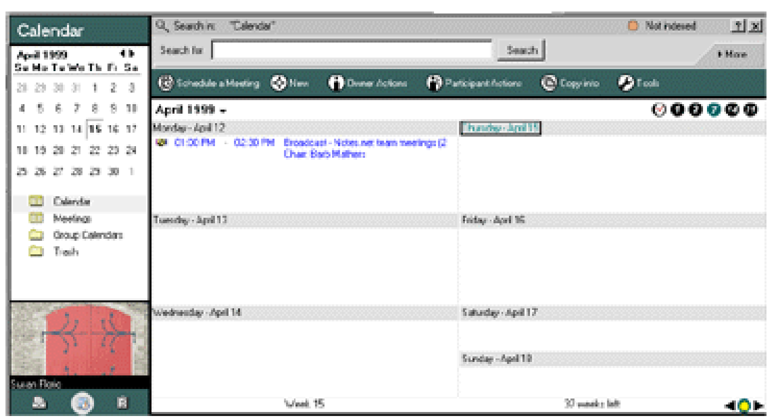
Download the gold version of **Notes R5** and try out some of these new features while you read this article. To learn more about the development of these new calendar and scheduling features, see our **interview with Ryan Jansen**.

Starting with the basics

Notes R5 Calendar and Scheduling refers to the Calendar view and the To Do view. You can access both of these views from the bookmarks that appear, as follows, down the left side of your screen when you install Notes R5.

You'll notice that your mail, calendar, and to dos are tightly integrated in R5. You can create any type of calendar entry or to do from your Inbox, or by choosing the Create bookmark. When you open any of these applications, you can click on the toolbar in the lower left corner to switch among the other applications.

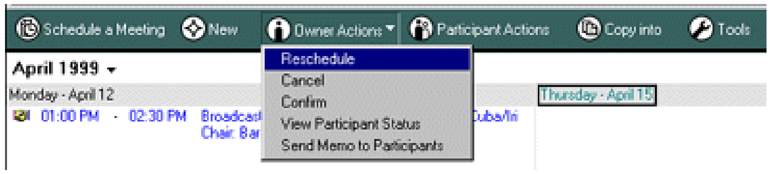
The calendar has a new look-and-feel with a calendar of the current month shown in the left column and the current day highlighted. Under this, you can access the two calendar views -- Meetings and Group Calendars --which we will talk about later in this article. The right side of your screen shows your calendar in more detail. By default, this shows you the current week with all your meetings, appointments, anniversaries, events, or reminders displayed. If you click the sun icon in the lower right corner, Notes highlights the current day of the week by putting a box around the day for you.



You can view just the current day by clicking the 1 button in the upper right corner of the screen. To view today and tomorrow, click the 2 button. To view two weeks or the entire month in detail, click the corresponding 14 or 31 button. Along the bottom of the screen, you can read information about where you are in the current year. For example, Notes displays that it is Week 15 and there are 37 weeks left in the current year, or that it is Day 102 and there are 263 days left.

To see the current week with each hour of the day from 7AM to 7PM displayed, click the clock icon in the upper right corner. This clock view displays your scheduled activities with the hour highlighted, so that you know when you have something scheduled. You can click the clock icon when viewing your calendar by day, two days, a week, two weeks, or a month.

When you click one of the buttons along the top of the calendar (Schedule a Meeting, New, Owner Actions, Participant Actions, Copy into, or Tools), you see the new pop-up action buttons for managing calendar entries. Previously, you managed calendar entries by opening the individual documents and then selecting options.



Workflow capabilities

OK, now that you have the basics, how can all of this help you in that crazy morning you're having? Notes R5 adds workflow capabilities to your calendar. Workflow refers to the ability to take an entire task, break it out into sub-tasks and send it through a channel of people, each completing and checking off a sub-task, until the entire task is complete. In Notes R5, you can do this with your tasks (to dos), as well as with your meetings. This workflow paradigm involves the concepts of owners and participants. Now, you can select an entry in your calendar and click either the new Owner Actions or Participant Actions buttons to choose the action you want to take.

So, when you get into the office and find out that someone invited you to an impromptu lunch meeting when you are already going out to lunch with your co-worker, you can propose a new time for the meeting. To do this, select the entry for the meeting in your calendar, click the Participant Actions button, and choose Propose New Time. You can also add comments when declining or rescheduling the meeting and continue to receive meeting updates if you decline the meeting. The Copy into button also helps to enhance your workflow capabilities. It allows you to copy one calendar entry into another, or into a to do or mail memo.

How do you know if you are a participant? A participant is someone who is not initiating a meeting or to do, but only attends the meeting or helps complete the task. However, if you receive a meeting invitation or a to do as an FYI, you can add it to your calendar, but you cannot use the participant actions. By clicking the Participant Actions button on your calendar, you can:

- Accept a meeting or to do
- Decline a meeting or to do
- Delegate a meeting or to do to another person. Notes then sends a mail message to the owner and the assignee notifying them of the delegation.
- Propose a new time for a meeting or to do. Notes then sends a mail message to the owner notifying them of the delegation

An owner initiates a meeting and appears in the meeting invitation as the "Chair" of the meeting. If you are the owner of a meeting, you can click the Owner Actions button on your calendar to:

- Reschedule a meeting or to do
- Cancel a meeting or to do
- Confirm a meeting or to do
- View if the participants have accepted, declined, or not responded to

your invitation or assignment

- Send a memo to all the participants. For example, you might send an agenda for the meeting in a separate memo or instructions on how to complete a task.

These workflow capabilities give you greater flexibility in scheduling and managing your calendar. Now your manager doesn't need to come into your office in the morning to discuss strategy for that 10:30 meeting with you. She can instead send you a to do or task that outlines the strategies she expects you to work on. If you receive a to do that is not in your area of expertise, you can delegate it. Once you delegate it, your co-worker, as the assignee of the task, can modify, accept, or again delegate the to do. If you delegate a to do, Notes sends a notice to the person who assigned you the to do, saying who the to do was delegated to. Your manager, as the original owner of the to do, can choose to cancel the to do or move the due date, and Notes notifies the assignee of the change.

Creating calendar entries

The pop-up actions on the New button allow you to create the following individual calendar entries:

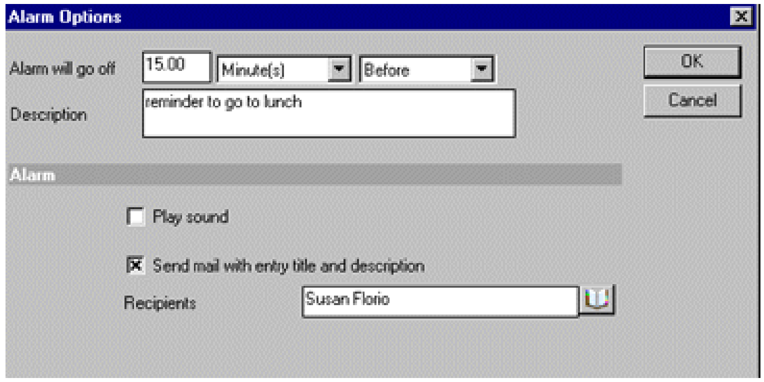
- Appointments
- Anniversaries
- Reminders
- Events

You can create meeting invitations by choosing the Schedule a Meeting button.

Appointments, anniversaries, reminders, and events

Creating appointments, anniversaries, reminders, and events are very similar. When you create an appointment, you specify both a starting and ending date and time. This is the most specific of these calendar entries. An anniversary, because it lasts an entire day, only has a Start date field. Reminders have a start date and time, since they are one-time occurrences with no duration. Events have start and end dates, but no time associated with the date.

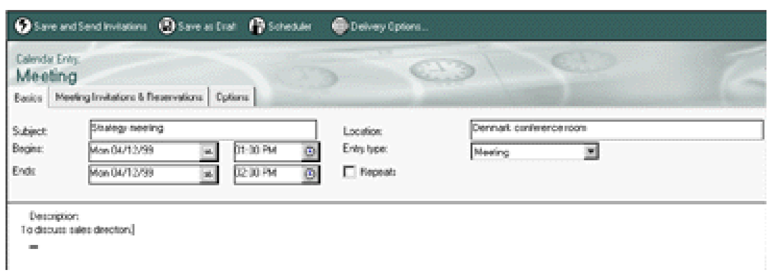
To remind yourself of your lunch date with a co-worker today, you can create a new appointment by clicking the New button and selecting appointment from the pop-up actions. A new appointment document appears. You fill in the title, date, time, and location. You know that after you get back from your 10:30 meeting, you will be preparing for your afternoon meeting and you might forget to leave for lunch at 10 minutes before noon. So, you choose the Options tab, and check the Notify me option. The Alarm options dialog box appears. Since it will take you a few minutes to get your things together and put on your coat, and 10 minutes to get to the restaurant, you specify that an alarm should alert you of the lunch date 15 minutes before noon. You decide to have Notes send you a mail to remind you of the lunch. You could also specify that Notes play a sound or even send an e-mail message to the co-worker you are meeting for lunch.



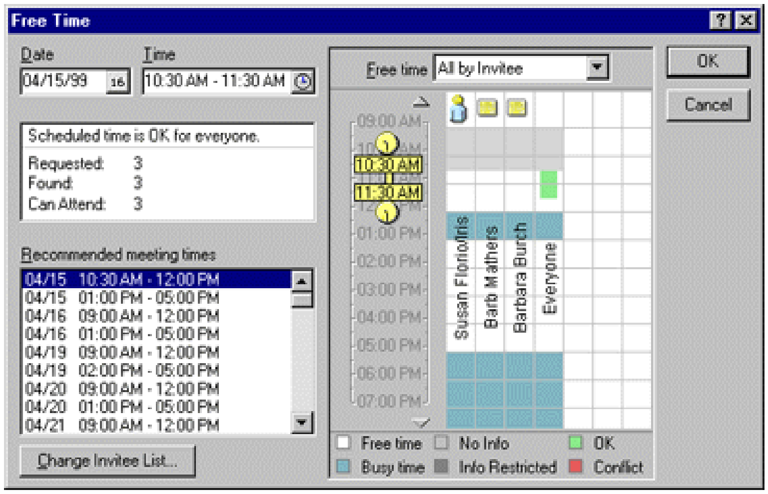
Meeting invitations

Creating meeting invitations is slightly different from creating other calendar entries because you now have more options to choose from. If the invitation is for a repeating meeting, Notes now creates a single document that contains all the meeting dates. Previously, a repeating meeting invitation created a separate document for each date. You can view a list of all your meetings from within your calendar by choosing the Meetings view in the left column.

When you create a meeting invitation, in the Meeting Invitations & Reservations tab, you can specify who you want to invite, cc optional invitees, or bcc invitees who you just want to send an FYI about the meeting. If you choose to fill in the bcc field, Notes notifies that invitee of the meeting and, if you change the time of the meeting or cancel it completely, sends the invitee a message. However, the invitee who receives the message as an FYI need not attend the meeting. The following screen shows the new look of meeting invitations:



From within the meeting invitation you can check the schedules of the invitees to make sure they are available for the meeting. When you click the Scheduler action in a meeting invitation entry, the Free Time dialog box appears:



So, when you decide to sit down and schedule that afternoon team meeting, this dialog box shows you the invitees' schedules for your meeting date and time. It lists the number of invitees' schedules that you wanted to check, and the number of schedules that Notes could successfully access and check. The number that Notes could check depends on whether all the members of your team allow you to access their free time when they set their own calendar preferences. Finally, the dialog box tells you how many members of your team could come if you held the meeting at that time. It also displays recommended meeting times, and a graph of each team member's free time, busy time and conflicts, as long as they gave you access to this information.

When you create a meeting invitation, you can also now specify delivery options by clicking the Delivery Options button in the action bar. You can decide that you want a delivery report, or that you don't want to receive replies from the invitees, or that you want to sign or encrypt the invitation. Or you might want to prevent counter proposals and prevent delegation. By choosing these two latter options, you limit the actions that a participant can take.

Room and Resource Reservations

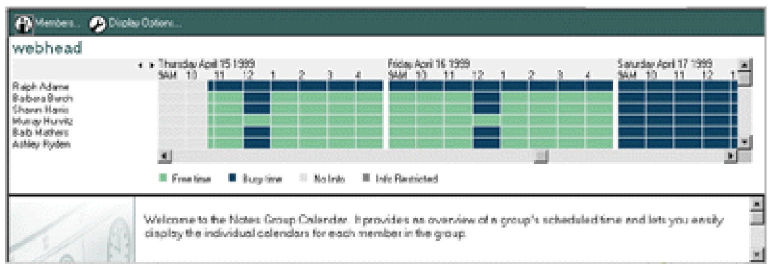
In addition to checking the schedules of invitees and specifying delivery options for meeting invitations, you can schedule a room and resources for the meeting. You schedule a room or a resource for a meeting from within a new meeting invitation. From the action bar, click the Scheduler button and either Find Room(s) or Find Resource(s). In the Scheduler dialog box, you can search for rooms that are available at the time of your meeting, or you can specify the resource that you need for the meeting, such as a computer or video equipment, and see if it is available.

For resource reservations, you can set up a "resource owner" or a person who handles reservations for a particular resource. This could be someone in your Facilities department. To set this up, you can edit the resource document and select one of the owner options on the Owner tab. All requests for a resource are sent directly to the resource owner. The owner has new ways to restrict resource reservations, including who and how the resource is reserved. The owner can specify that all users can reserve resources, only specific users can reserve a resource (all others are denied), or only specific users can reserve a resource and all other requests must go through the resource owner. You can also now reserve resources from other domains, and create repeating reservations. In a meeting invitation, you can choose rooms or resources from cascading address books, as well as type in the full name, including the domain of the room or resource if you know it. You can also directly create repeating reservations inside a R5 reservation database.

Group Calendars

R5 adds a new feature called Group Calendars, which allow you to create a group of calendars that you like to look at often. For example, you may always want to know the schedules of your team members as well as the schedules of some of the people who work in the Sales department so you can coordinate inter-departmental meetings.

There is a new folder in your mail file called Group Calendars. You can also access this folder from within your calendar by choosing the Group Calendars folder in the left column. All of the Group Calendar documents that you create appear in this folder. To create a Group Calendar, click on the New Group Calendar button and a dialog box appears. Put all the members of your team in this new document, and all the members of the Sales department in another new document. When you want to see what members of the Sales department are doing this afternoon, you just click on the document and see their free time for the next week. Lucky for you, several people are available today at the time you scheduled for your team meeting. You send invitations to those who are available for the meeting.



Later in the day, you get a mail message that copies you and the marketing department and tells you about some new product information that you plan to discuss at the team meeting today. You take a list of people from the Send to and Copy to fields and drag-and-drop the list into the Group Calendar folder. Notes creates a new Group Calendar for you that contains the schedules for each person in the list. Now you can check their schedules and invite them to the team meeting.

To Dos

If you are familiar with tasks in Notes R4.6, you'll notice that in R5, they are called "to do's" and that they are now similar to other calendar entries. To see your to dos, select the To Do bookmark or, if you are already in your calendar, choose the To Do (checkbox) icon in the lower left toolbar. You can create Personal or Group To Dos in the Basics tab. A Group To Do, like a meeting invitation, allows you to specify who you want to assign a task to in the Assign to field, and allows you to cc and bcc other participants. If you enter someone in the bcc field, Notes notifies the participant of the to do, but the participant is not the person required to complete the task.

By default, any to dos you create appear in your calendar. When you create a to do, as with any calendar entry, you can choose the Notify me option to select a time for an alarm to remind you of your to do. You can play a sound, or send a mail notice when you want to be reminded of a to-do.

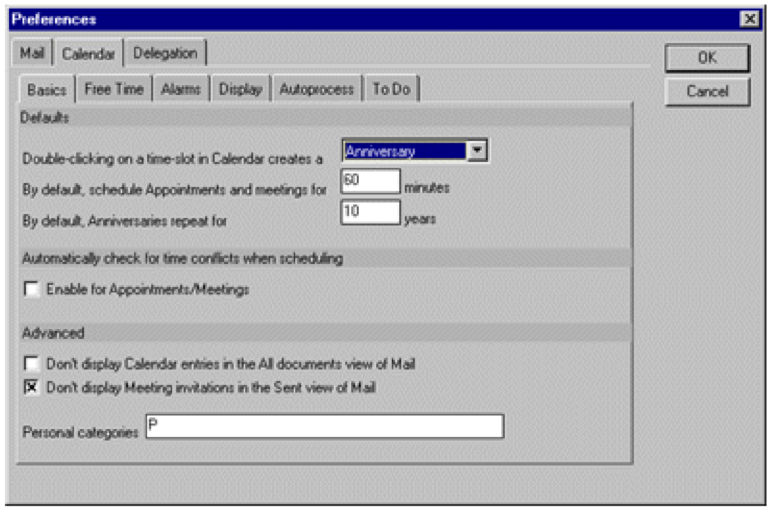
Within your calendar preferences, you can specify that incomplete to do's should follow you from day-to-day. In R4.6, you could only manually move these entries. Also, to dos have workflow capabilities that allow owners of to dos to take all the actions that owners and participants can take with other calendar entries.

Calendar preferences

An example of the close integration between your mail and your calendar is the fact that your calendar preferences are now combined with your mail preferences in one dialog box. These preferences allow you to specify your calendar entry defaults, free time, alarm defaults, calendar view defaults, auto-processing defaults, and where you to dos display. To view this dialog box:

1. Open your mail, calendar, or to dos.
2. Choose Actions - Tools - Preferences.
3. Choose the Calendar tab to view your calendar preferences.

The following screen shows the Calendar preferences tab with the Basics tab open:



In this tab, you can the defaults for your calendar entries. First, you specify the Calendar Entry type that you want to appear by default. If you set this, for example, to Anniversary, when you choose Create - Calendar Entry, a New Anniversary document appears for you to fill out. You can also specify the default duration time for meetings in your calendar, such as 60 minutes, and the Anniversary yearly repeat, which is the default number of years that appear when you specify that you want an anniversary to repeat. You could set anniversaries to repeat every year by entering one. This saves you the step of creating an anniversary and clicking the repeat button. Entering zero turns this feature off. There are options for displaying calendar entries in your All Documents view and meeting invitations in the Sent view in your mail file.

You can specify that Notes check for possible conflicting appointments and meetings. If Notes finds a conflict, it prompts you that a calendar entry already conflicts with whatever you want to schedule. You can either continue and schedule it, or cancel the entry.

In the Free Time tab, you can modify the days of the week and the times of day that you are available for meetings. When your co-worker set up the 10:30 meeting for this morning, he checked your free time and saw that this was good time for you and all the other people who needed to attend. Your co-worker saw the times you entered in this dialog box. This is useful because say you are never in the office on Tuesdays, you can just not include Tuesdays as part of your free time and your co-workers know that you are not available for meetings on that day.

In the Alarms tab, you can select Enable alarm notifications and the Default Alarms section appears. Within this section, you can choose the sound of the alarm. You can also choose when the alarm should sound. For example, if you select Appointments/Meetings, you can set the alarm to sound 15 minutes before every meeting. Then, within individual documents, you could change this and specify that for one particular meeting, you want the alarm to sound 10 minutes before the meeting.

Within the Display tab, you can set the Calendar view display so that Notes automatically displays only a specified period of time in the Calendar view. For example, you can specify that default time slots for your calendar would be half hour intervals between 8:30 and 5:30.

The Autoprocess tab allows you to set how Notes processes meeting requests that come into your mail file. You can specify a certain user or several users whose meeting requests you want Notes to automatically process and add to your calendar, you can turn off autoprocessing completely, or allow autoprocessing for all users. For example, you might want any meeting requests from your manager to automatically appear in your calendar. You can also specify that all meeting requests forward to a specific person, for example, the administrator that handles all your scheduling. This tab also allows you to turn on an option that would remove a meeting invitation from your Inbox after you reply to it. If you accept the invitation, it moves to your calendar, and as always, meeting invitations appear in the Meetings view. In addition, you can prevent event replies from appearing in your Inbox. If you are the chair of a meeting, when invitees reply to your invitation, the replies appear by default in your Inbox. Selecting this option prevents the replies from appearing there.

The To Do tab of the Calendar Preferences dialog box allows you to specify that To Dos always display on the current day's calendar.

Miscellaneous enhancements

Along with the major features illustrated in the previous sections of this article, there are many minor enhancements in R5 Calendar and Scheduling. These also go a long way towards making your day easier. Among these improvements are support for holidays, an easy way to use you calendar with a Palm Pilot, and new printing options.

Your system administrators can now make holidays available within your calendar. You just choose Actions - Calendar Tools - Import Holidays to import the holidays into the calendar. Your administrators can also customize the default set of holidays provided, or create holidays unique to your corporation. They can do this by creating or modifying documents in the Public Address Book. Administrators can manage the holidays centrally, but also customize them to fit the needs of the corporation. As with meetings or to dos, holidays can repeat and the repeating holidays stay within only a few documents.

Before you head out to lunch with your co-worker, you download your calendar to your Palm Pilot using **EasySync** for Notes. Notes R5 Calendar and Scheduling is compatible with your Palm Pilot. This allows you to take your calendar, and all the organization that it gives you, on the road. After lunch, you are about to head back to the office, but you quickly check your calendar on your Palm Pilot and realize you have to pick up the dry cleaning on your way back to the office. You make a quick stop and head back to the office -- clean clothes in hand.

If you don't have a Palm Pilot or other PIM tool, you can take you calendar with you by printing it. You can print your calendar in daily, weekly, monthly, and Calendar List formats. You can customize the layout of the format you choose. You can select different paper types, fonts, time ranges and sizes for printing your calendar. R5 also includes a print preview, so you can check your printout before you print it.

Rewinding your day

Now let's rewind the crazy day you were having at the beginning of this article. You arrive at the office and see 20 new e-mail messages, the light on your phone is blinking, and your manager stops by and wants to discuss strategy for that 10:30 meeting with customers. Let's see how you would proceed with Notes R5...

You sit down at your computer and open Notes R5 to your calendar. The meeting invitation that your manager sent you for the 10:30 meeting automatically moved into your calendar, because you specified in your calendar preferences for your manager's meeting invitations to do this. A to do from your manager outlines the strategy for the meeting and contains information for your presentation this morning, as well as several issues that you know very little about. You delegate these issues to a co-worker who specializes in that area, and use the remaining information to begin preparing your presentation. You use your Group Calendar to check to make sure that everyone is available for the afternoon team meeting you need to schedule and then send out invitations to the meetings. An alarm goes off five minutes before 10:30, and you check the invitation for the reserved room number. You calmly leave for the meeting confident that the video equipment you need will be there. Your presentation goes well -- thanks to all the time you had in the morning to add extra information and read it over.

After your meeting, you go back to your office, sit down and begin preparing for the afternoon team meeting. You easily invite members of the Sales and Marketing departments, who are free at that time, by creating meeting invitations to the team meeting. An alarm notifies you that it's time to go to lunch. You download your calendar from Notes to your Palm Pilot and head out. After lunch, you check your Palm Pilot and remember to pick up your dry cleaning on your way back to work.

You feel in control. Your life is organized and you are ready for whatever the afternoon brings. Notes R5 clears up the stress and mess in your life and lets you concentrate on getting your job done.

What do you think about this article?

