STANFORD UNIVERSITY

INFORMATION TECHNOLOGY SERVICES

Sundial to Stanford Calendar

Reference Guide

Access to the Stanford Calendar:

With the new Stanford Calendar, you have lots of options:

- Web: go to **webcal.stanford.edu** to jump directly to the Calendar tab.
- Outlook: get the Outlook connector to synchronize mail, contacts, tasks, and calendar.
- iCal: get the iSync connector to synchronize contacts and calendar.
- PDA: synchronization available for iPhone, Windows Mobile, and some Palm/Treo devices.

For more information, go to http://emailcalendar.stanford.edu/

Message-Based Calendaring

Sundial is driven by a central database. Stanford Calendar is a message-based calendar system. All of your calendar data is stored with your email and new items are added to your calendar by email messages with attachments. Creating an appointment, updating an appointment, or setting attendance status all sends an email message to update the organizer or those you have invited. You cannot avoid sending email when you make changes to an appointment. Also, it's important that you do not automatically discard these messages using a filter; the meetings will not appear on your calendar.

Types of Activity

Sundial	Stanford Calendar
Meeting	Appointment
Day Event	See options at right
Daily Note	See options at right
Task	Task

The Stanford Calendar treats Appointments and All Day Appointments much like Sundial's Meetings and Day Events.

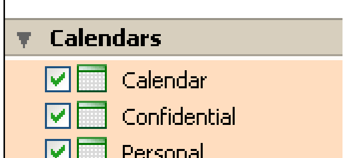
Daily Notes and **Day Events** can be handled in one of two ways:

- You can enter a note as an All Day Appointment and mark it as Free
- You can create a separate calendar and select "exclude this calendar when reporting free/busy times"

We recommend marking an All Day Appointment as free.

Tasks are treated differently and kept on the Tasks tab. Tasks can be tracked by percent completion. Task folders can be shared with other Stanford Email & Calendar users, just like email folders or calendars.

Using Multiple Calendars



In Sundial, you had one calendar, and managed permissions to it by giving groups or individuals the right to see meetings or act as you based on whether a meeting was flagged Normal, Personal, or Confidential.

The Stanford Calendar handles this differently by allowing you to have multiple calendars and set permissions associated with each calendar. You can have as many calendars as you wish. You can create appointments on any calendar and they will all display on your calendar view as long as the checkbox is checked. To hide a calendar, uncheck the checkbox.

Attendance Settings

Sundial	Stanford Calendar
Will Attend	Accept
Will Not Attend	Decline
Will Confirm Later	Tentative

When a meeting is proposed in Sundial, it appears in the Unconfirmed Meetings color. In Stanford Calendar, appointments appear in the boldest variant of your calendar's color until you acknowledge the appointment. Taking action on an appointment causes it to display as:

- Accepted – appears in solid normal calendar shade
- Tentative – appears at 50% transparency
- Declined – appears at 90% transparency

Share a Calendar

In Sundial, visibility and designate rights were managed under the **Tools>Access Rights** menu. Access Rights from Sundial were converted from Sundial on June 24th. To verify or update these rights in Stanford Calendar, access to each calendar is controlled directly by right-clicking (or Ctrl-clicking on a Mac) on the calendar and selecting **Edit Properties**. In the **Sharing for this folder** section, you can review authority granted to others.

To add a share, right-click (or Ctrl+click on a Mac) on the calendar and select **Share Calendar**. Your choices for sharing are:

- **None** – temporarily blocks permission to a calendar without revoking the access right
- **Viewer** – allows access to see items on your calendar unless they are marked Private. This is similar to Viewing access in Sundial.
- **Manager** – allows access to see, edit, add, remove, accept, and decline items on your calendar, unless they are marked Private. This is similar to Designate access in Sundial.
- **Admin** – allows all the access of the Manager role, plus allows the grantee to share that calendar to others.

By default, the permission will not include access to Private appointments on the calendar. To include these, select the **Allow user(s) to see my private appointments** checkbox.

Your availability without meeting details is available to others on campus via the free/busy lookup function. To block a calendar from being included in your free/busy status, right-click (or Ctrl-click on a Mac) on the calendar and select **Edit Properties** and check the "Exclude this calendar when reporting free/busy times" checkbox. This function should be used with caution since other users will not get a true picture of your free/busy status.

Calendar permissions for all of your calendars can be managed in **Preferences>Calendaring** in the **Permissions** section. From there you can manage access to see your free/busy information and to invite you to meetings. We recommend allowing local users access to both functions.

Access a Shared Calendar

Once shared, an email goes out to the recipient of the share. Using the web client, select the **Accept Share** button to add the calendar to your left-hand column. If you do not use the Mail tab of the web client, you can add a calendar to your left-hand column by right-clicking (or Ctrl-clicking on a Mac) on the calendar and selecting **Link to Shared Calendar**. In the **Email** field, enter the SUNet@stanford.edu address. In the **Path** field, enter **calendar**. You can also adjust the display name and color, then click **OK**.

Public vs. Private Meetings

You can override the permissions affiliated with a calendar by marking an appointment as **Private**. Private meetings appear with a yellow padlock in the upper-right corner and do not display the title to those with View access to your calendar. They also cannot be edited or viewed by those with Manager access to your calendar.

Colors – Calendars and Tags

In Sundial, you had one calendar, and the only color coding available was based on your attendance status. In Stanford Calendar, you have lots of color coding options.

- Select a color for each of your calendars (or calendars you have access to View). There are nine calendar colors available and colors may be used more than once. Suggestions include:
    - If you primarily use only your own calendars, you may make different calendars different colors to identify items.
    - If you manage calendars for multiple people, make all of your calendars one color so that they all appear as yours visually, while making those you manage alternate colors.
    - Make location and resource calendars one color so that they can be easily identified in the left hand column.
- Use Tags to color code meetings. There are seven tag colors available and colors may be used more than once. Tags can be dragged onto an appointment or by right-clicking and selecting **Tag Appointment**.

Create a Meeting

When creating a meeting from the **Calendar** tab, start by:

- Clicking the **New** button.
  *The **Appointment Details** page appears.*

  - OR-

- Click on the desired start time and drag to the proposed duration of the meeting.
  *The **Quick Add Appointment** box appears.*
  *For a personal appointment, complete the fields and click **OK**. To add attendees or other details, click the **More Details…** button.*

Adding Attendees

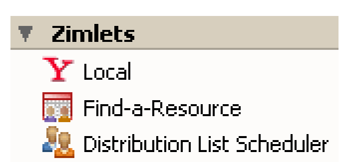
Meeting attendees can be added three ways:

- By adding email addresses, separated by commas, in the **Attendees** field on the Appointment Details tab.
- By entering them on the Schedule tab. Enter the name, and, using your mouse, select the name from the lookup list. A new line appears to add the next attendee.
- By using the Find Attendees tab to search using the Global Address List, your Contacts, or your Shared and Personal contacts. Search for attendees and click **Add** to add them to the appointment.

Using Groups

You can also add attendees by adding a group name. When you type a group name and select it from the list with your mouse, the list of attendees will expand to display the names of everyone in the group. Groups are created in the Address Book tab by selecting **New>New Contact Group**.

Membership-only groups that were centrally managed in Sundial have been converted to Distribution Lists in Stanford Calendar. To invite a Distribution List to a meeting:



1. Right-click (or Ctrl+click on a Mac) the **Distribution List**

Scheduler Zimlet. Select **My Lists** to schedule an appointment for a list where you are a member. (Alternately, you can use **Find Lists** to search for other distribution lists.)

2. Using **My Lists**, select the list and click **Schedule**.

A new appointment window appears.

3. Adjust the time and enter a title for the appointment before clicking **Save**.

NOTE: For lists with more than 50 members, the Schedule tab in the appointment will be disabled. The free/busy schedule view is very slow to load for appointments with many attendees, so this will prevent you from accidentally clicking it and being forced to wait.

Locations and Resources and Group Calendars

In Sundial, locations and resources were all treated as resources. In Stanford Calendar, these are treated separately. You can add a Location or Resource on the Schedule tab, or search for them using the Find Location and Find Resources tabs.

Group calendars were treated as an agenda/resource hybrid in Sundial. In Stanford Calendar, these are treated as Resources. To add an event to a group calendar, create the event on your calendar and search for the group calendar on the Find Resource tab. Add the calendar to your appointment.

If you manage a resource calendar, or frequently use the same locations and resources, you may want to add the calendar to your left-hand column. Use the Find-A-Resource zimlet to search for and add these calendars.

1. Click the **Find-a-Resource** Zimlet.

The Find a location or resource calendar dialog appears.

2. Enter a simple search term like part of the building name or room name and click **OK**.

The Select resources to add dialog box appears.

3. Choose the resources you want to add from the list.
4. Resources that are successfully added appear in green and display in the left-hand column on the calendar tab. For resources you do not have permission to add, these display in red; contact info for the resource manager is shown. We recommend contacting that resource manager to request permission to view or manage the resource.

Checking Availability

In Sundial, to check the availability of meeting attendees, you can either use the Check Conflicts button or use a Group Agenda to verify availability. Stanford Calendar handles this differently.

1. From the **Calendar** tab, click the **New** button.
2. Enter basic information like the **Subject** and a proposed **Location**, **Start**, and **End** time.
3. Enter attendees in the **Attendees** field.
4. Click the **Schedule** tab to review the free/busy status for all attendees, locations, and resources.
5. Use the  to move from day to day to find an available day/time.

Alternately, if you are checking availability for calendars you have View or Manager access to, from the Calendar tab, click 

and check each of the calendars you wish to review. The **Schedule** feature will show you side-by-side daily comparison of multiple calendars. The Schedule view is only available for calendars that have been shared to you.

Reminders

Reminders can be set for various times from 5 minutes to 18 hours. By default, the reminder is set for 5 minutes. You can change the reminder time for a meeting on the **Appointment Details** page or change your default preference under **Preferences>Calendar**.

Sundial allows both email and popup reminders. Stanford Calendar only has popup reminders. You will not receive email reminders in the Stanford Calendar even if they were previously set in Sundial.

Adding Vacation to Your Calendar

When going on vacation (or plan to be out of the office for other reasons), it's frequently important to notify coworkers as well. To avoid making their calendars appear busy when you're out, it's best to do this by creating a new All Day Appointment and marking it Free. Invite individuals (or a group calendar) that should be informed of your absence.

1. Right-click (or Ctrl+click on a Mac) on the day you will be out and select **New All Day Appointment**.
2. Enter a **Subject** including your name and status for the day (out of the office, at conference, on vacation, etc.)
3. Add those who should be notified as **Attendees**. (Optionally, if your group has a group leave calendar, search for that calendar using the **Find Resources** tab.)
4. Switch the **Show as:** field to Free.
5. Click **Save**.

Next, create an appointment during your normal business hours showing that you will be busy and unavailable during that time. This appointment should be marked Busy like any other appointment.

1. Right-click (or Ctrl+click on a Mac) on the day you will be out and select **New Appointment**. Schedule the appointment for your normal business hours.
2. Enter a **Subject** indicating your status for the day.
3. Verify that the **Show as:** field is set to Busy and click **Save**.

Searching

In Sundial, you could search your agenda by going to **Tools>Search Agenda**. In Stanford Calendar, you can do a quick search using the search bar at the top of the screen:

Use the drop down box next to the search field to select **Appointments**. Enter a search term and click **Search**. This will display all appointments that match your search criteria for the current view. Use the arrows to scroll through different time periods. Alternately, you may click the Advanced search button to further narrow your search results. (For more information on searching, see the Searching quick reference guide.)

For More Information

See the Email & Calendar service site: http://emailcalendar.stanford.edu/