



How-To Guide

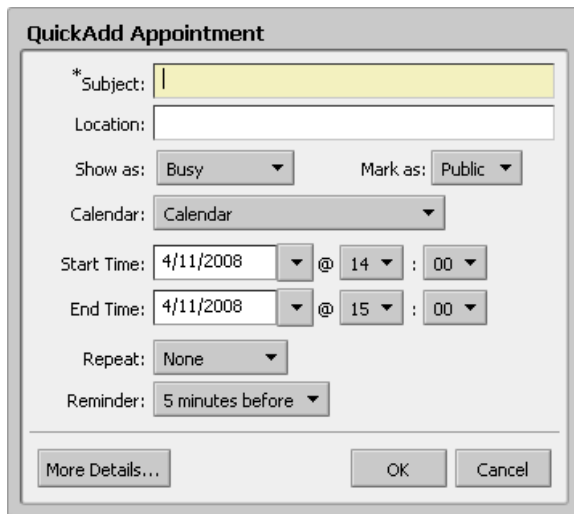
Creating Appointments

Last updated: August 2010

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QuickAdd Appointment Menu



The 'QuickAdd Appointment' dialog box contains the following fields and controls:

- *Subject: [Text input field]
- Location: [Text input field]
- Show as: [Busy] (dropdown)
- Mark as: [Public] (dropdown)
- Calendar: [Calendar] (dropdown)
- Start Time: [4/11/2008] [14] : [00] (time dropdowns)
- End Time: [4/11/2008] [15] : [00] (time dropdowns)
- Repeat: [None] (dropdown)
- Reminder: [5 minutes before] (dropdown)
- Buttons: More Details..., OK, Cancel

The **QuickAdd Appointment** menu is an abbreviated version of the more complete Appointment Details menu.

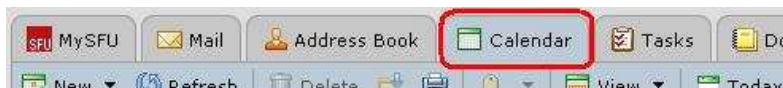
Use the QuickAdd Appointment menu to create appointments when you don't need to add attendees.

To see additional options such as viewing the availability of a person, location or resource, customizing a repeat pattern, adding attendees and adding notes to a meeting, click on the '**More Details...**' button at the bottom left of the QuickAdd Appointment menu.

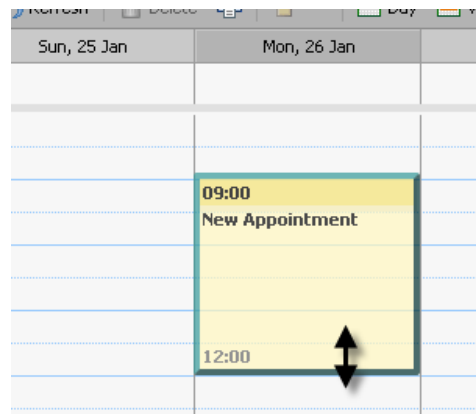
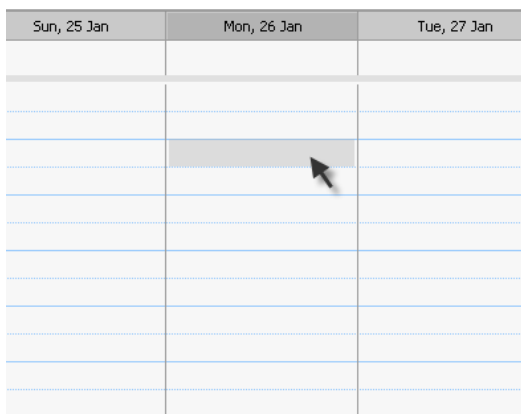
Tip: If you constantly need to add attendees to appointments or need to customize more appointment

details, you can bypass the QuickAdd Appointment Menu by going to the Preferences tab, choosing Calendar, unchecking 'Use the QuickAdd dialogue when creating new appointments' and clicking on the 'Save' button.

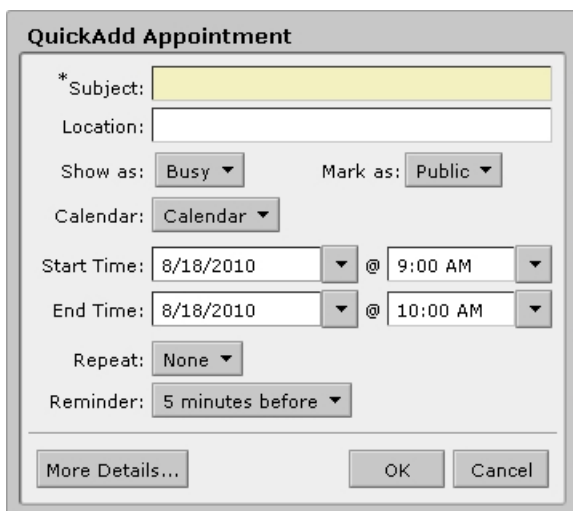
1. Navigate to the Calendar tab in SFU Connect.



2. In your calendar, double click on the date in which you would like to create an appointment. Or, in the Day, Week, Work Week or Schedule views, you may also click and drag to select a time frame.



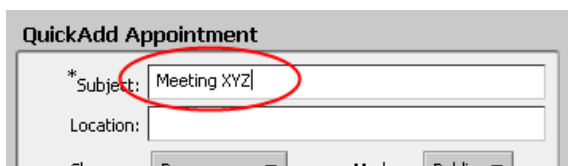
The QuickAdd Appointment Menu should pop up after you release the mouse button.



The screenshot shows the 'QuickAdd Appointment' dialog box. It contains the following fields and controls:

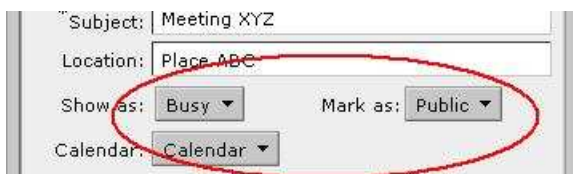
- *Subject: (empty text box)
- Location: (empty text box)
- Show as: Busy (dropdown menu)
- Mark as: Public (dropdown menu)
- Calendar: Calendar (dropdown menu)
- Start Time: 8/18/2010 (calendar picker) @ 9:00 AM (time picker)
- End Time: 8/18/2010 (calendar picker) @ 10:00 AM (time picker)
- Repeat: None (dropdown menu)
- Reminder: 5 minutes before (dropdown menu)
- Buttons: More Details..., OK, Cancel

3. Enter the subject of your choice. If you are specifying a location but do not wish to book one that is in the system (e.g., you are meeting at a local coffee shop), simply type in the location name. Otherwise, to book a location in the system, clicking on 'More Details...' and choosing a location from 'Find Locations' in the Appointment Creation Menu is highly recommended.



This screenshot shows the 'QuickAdd Appointment' dialog box with the 'Subject' field highlighted by a red circle. The text 'Meeting XYZ' is entered in the 'Subject' field.

4. By default, appointments are set to show as 'Busy' and marked as 'Public'. You may also change the destination calendar in which you want to create this appointment, which is automatically set to your main calendar.



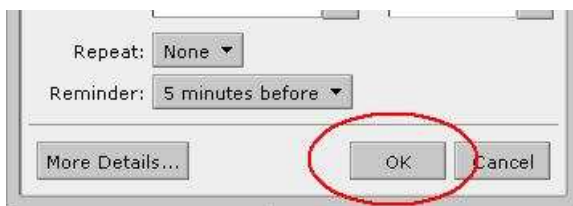
This screenshot shows the 'QuickAdd Appointment' dialog box with the 'Show as', 'Mark as', and 'Calendar' fields highlighted by a red circle. The 'Subject' field contains 'Meeting XYZ' and the 'Location' field contains 'Place ABC'.

5. Select the dates and times for the start and end of the appointment. You can select a repeat pattern and reminder time from the drop down menu.



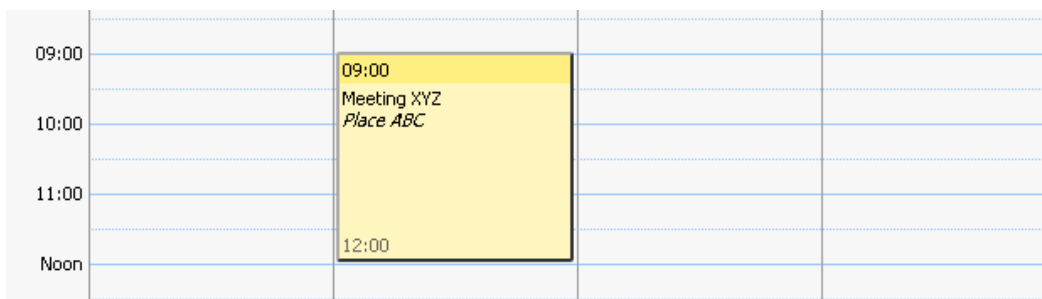
A screenshot of a web form for creating an appointment. The 'Start Time' field is set to '8/18/2010' at '11:00 AM' and the 'End Time' field is set to '8/18/2010' at '12:00 PM'. Both fields have dropdown arrows. A red circle highlights the date and time selection area. Below these fields, a 'Repeat' dropdown menu is visible, currently set to 'None'.

6. To customize the repeat pattern, click on 'More Details...', followed by clicking on the blue 'Customize' link. See the *Creating & Customizing Repeat Patterns* section of this guide. Otherwise, if you have finished, click 'OK' to save the appointment.



A screenshot of the 'Repeat' and 'Reminder' section of the appointment form. The 'Repeat' dropdown is set to 'None' and the 'Reminder' dropdown is set to '5 minutes before'. At the bottom, there are three buttons: 'More Details...', 'OK', and 'Cancel'. A red circle highlights the 'OK' button.

7. The new appointment has now been created and should appear in your calendar.



A screenshot of a calendar grid. The time slots on the left are 09:00, 10:00, 11:00, and Noon. A yellow appointment box is visible, spanning from 09:00 to 12:00. The text inside the box reads: '09:00', 'Meeting XYZ', 'Place ABC', and '12:00'.

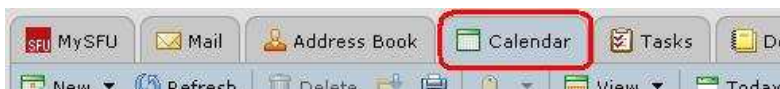
Appointment Creation Menu

The ***Appointment Creation*** menu offers all customization options available for appointments.

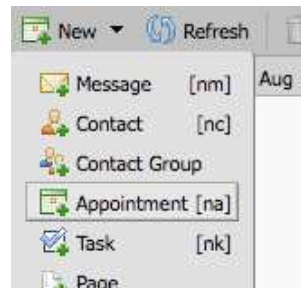
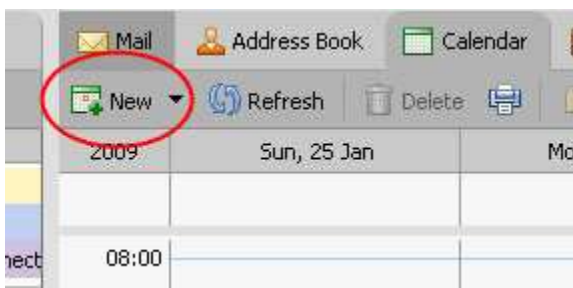
Summary of additional options:

- Search/add attendees
- Search/add locations
- Search/add resources
- Add meeting notes
- Customize a repeat pattern
- Mark as an All Day Event
- Add attachments
- View free/busy times

1. Navigate to the Calendar tab in SFU Connect.



2. Click on the 'New' button near the top left of the screen to create a new appointment. You can also click on the triangle just to right of the 'New' button and choose 'New Appointment'.



3. The Appointment Creation Menu should appear. There are five tabs on the Appointment Details menu: **Appointment Details**, **Schedule**, **Find Attendees**, **Find Locations** and **Find Resources**. Above these tabs, there are also the options to add attachments, check spelling and change the formatting (HTML or text).

The screenshot shows the 'Appointment Details' tab selected. The interface includes a toolbar at the top with buttons for Save, Cancel, Print, Add Attachment, Spell Check, and Format. Below the toolbar are five tabs: Appointment Details, Schedule, Find Attendees, Find Locations, and Find Resources. The 'Appointment Details' tab is active, showing fields for Subject, Location, Show as (Busy), Mark as (Public), and Calendar (Calendar). To the right, the 'Time' section includes an 'All day event' checkbox, Start and End date and time fields (11/8/2010, 13:00 to 13:30), Repeat (None), and Reminder (1 minute before). Below these fields is an 'Attendees' text area and two checked checkboxes: 'Request Responses' and 'Send Invite & Update Attendee Calendars'. At the bottom is a rich text editor toolbar with options for font face (Arial), size (2 (10pt)), bold, italic, underline, and various icons for text color, background color, and alignment.

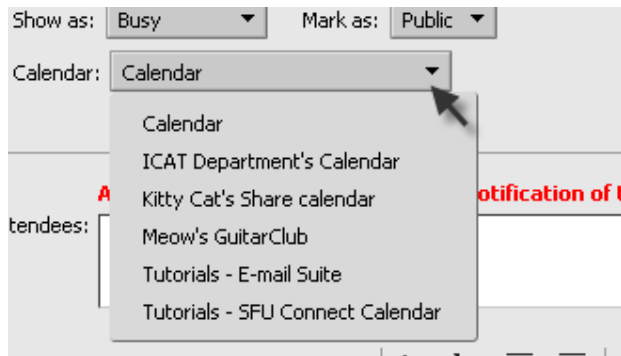
Setting Free/Busy Status & Access Levels

4. In the **Appointment Details** tab, you can enter the main details of the appointment. By default, appointments are set to show as 'Busy' and marked as 'Public'.

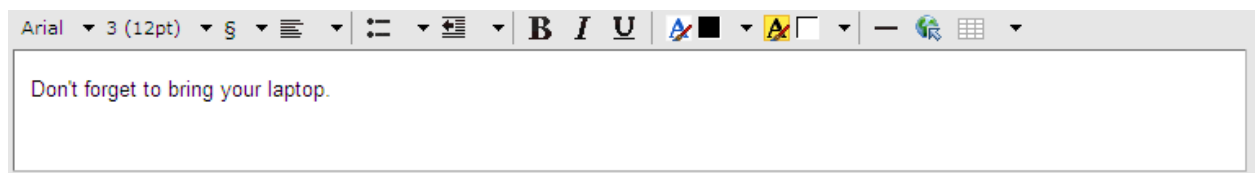
The first screenshot shows the 'Show as' dropdown menu open, with options: Free, Tentative, Busy, and Out of Office. An arrow points to the 'Busy' option. The second screenshot shows the 'Mark as' dropdown menu open, with options: Public and Private. An arrow points to the 'Public' option. Both screenshots show the 'Appointment Details' tab with the 'Subject' field highlighted in yellow.

Note: By default, any SFU Connect user can only see whether you are free or busy for a meeting; they cannot see the details of your meeting unless you share your calendar with them. Marking a meeting as 'Private' will hide the meeting details from those with whom you have shared your calendar. To view more details on sharing, see the 'Sharing Calendars' How-To Guide.

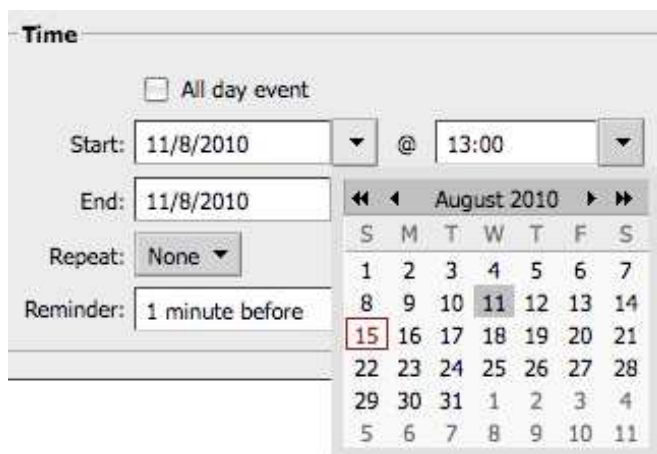
You may also change the destination calendar in which you want to create this appointment, which is automatically set to your main (default) calendar.



5. Additional notes regarding the meeting can be entered in the large field at the bottom of the page. Using the toolbar, you can customize the HTML formatting of the message. These notes will be included in the email notification to all attendees.



6. Select or type in the dates and times for the start and end of the appointment. You can select the 'All day event' check box, which makes the appointment an all day event. **All day events will block off your entire day as 'busy'**, and will be displayed on the top of most calendar views.



A repeat pattern and reminder time can be selected from the drop down menu. To customize the repeat pattern, choose 'Custom', or click on the blue 'Customize' link, which will bring up a more options. See the *Creating & Customizing Repeat Patterns* section of this guide for more information.

Adding Locations & Resources

7. **Note:** Before adding locations and/or resources to your appointment, please ensure that you have permission to book them. Locations/resources that have booking restrictions will have '[R]' at the end of the name. If you do *not* have permission to reserve a particular location or resource, you will receive an email message indicating that the booking has been declined. Contact the department's location/resource manager (seen in the Contact column of the search results) to find out more about their booking policies.

There are two methods of adding locations to an appointment:

- a. Go to the **Find Locations** tab and perform a search. Double click on the location to add it.

- b. Or, begin typing a location name in the field if you already know it. The system will attempt to find a list of matches based on your entry.

- c. Or, if you do not wish to request a bookable location, simply type in the name.

To add resources to the meeting, go to the Find Resources tab and perform a search. Double click on the resource to add it.

The screenshot shows the 'Find Resources' tab selected in a software interface. The tab bar includes 'Appointment Details', 'Schedule', 'Find Attendees', 'Find Locations', and 'Find Resources' (which is circled in red). Below the tabs, the 'Find Resources' section contains several input fields: 'Name:', 'Site:', 'Description:', 'Building:', 'Contact:', and 'Floor:'. A 'Search' button is located to the right of these fields.

Adding Attendees

8. There are two methods of adding attendees to an appointment:

- Begin typing an attendee's name in the field. The Global Address List (GAL) will attempt to find a match based on your entry.

The screenshot shows the 'Attendees' field in a meeting software interface. The field contains the text 'kitty'. Below the field, a dropdown list shows search results, including 'Kitty Cat <icat_meow@sfu.ca>'. A red banner at the top of the dropdown list states: 'All attendees will receive an email notification of this event.'

- Or, go to the **Find Attendees** tab and search for your attendees. Double click to add the attendee.

The screenshot shows the 'Find Attendees' tab selected in a software interface. The tab bar includes 'Appointment Details', 'Schedule', 'Find Attendees', 'Find Locations', and 'Find Resources'. Below the tabs, the 'Find Attendees' section contains a search bar with 'kitty' entered, a 'Source' dropdown set to 'Global Address List', and a 'Search' button. Below the search bar, a table displays search results.

Folder	Name	Email	Work Phone	Home Phone	Status
Global Address List	Academic Computing Services	icat_meow@sfu.c			Free
Global Address List	K				Free

'Request Responses' and 'Send Invite & Update Attendee Calendars'

9. You will notice there are two checkboxes under the Attendees field: **Request Responses** and **Send Invite & Update Attendee Calendars**. These two checkboxes are activated by default.



Request Responses

When *checked*, you will receive attendees' email responses (Yes, I will attend; no, I will not attend, etc.) and you will be able to see their responses on the Schedule tab of the appointment as well.

When *unchecked*, you will not receive attendees' email responses, nor will you be able to see their responses on the Schedule tab of the appointment.

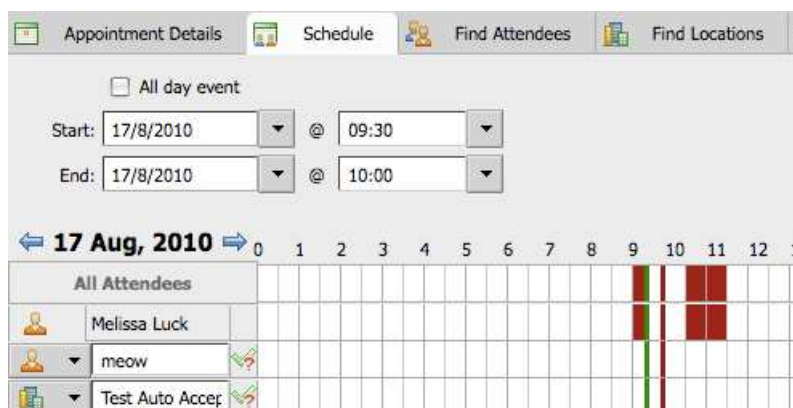
Send Invite & Update Attendee Calendars

When *checked*, an email notification will be sent to attendees and their calendars will be updated with your changes.

When *unchecked*, no email notification will be sent to attendees. **Note that the SFU Connect calendar is email-driven;** email notifications must be sent by the organizer and received by attendees in order for attendees' calendars to reflect any changes you make to the appointment.

Checking Availability

10. To check the availability and/or time conflicts of the attendees, location or resource, click on the **Schedule** tab. The organizer will appear at the top of the list of All Attendees. The green line indicates the proposed start time, and the red line indicates the proposed end time.



The availability of time slots is marked as follows:

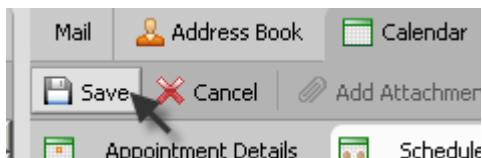
White = Free

Orange = Tentative

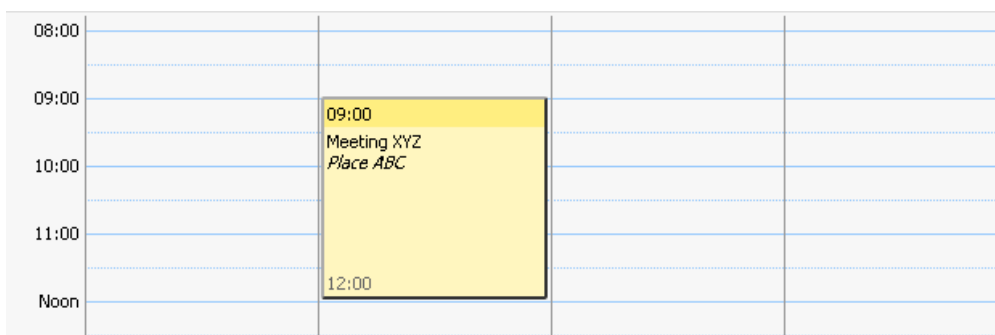
Dark red = Busy

Yellow = Out of Office

11. Once you have finished entering the appointment information, click 'Save'.

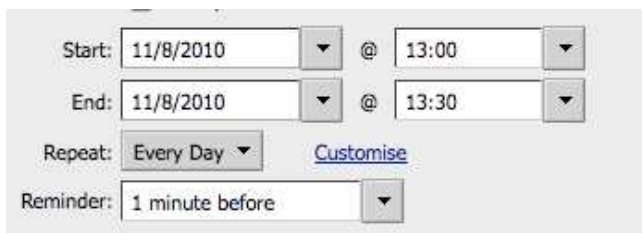


12. The new appointment has now been created and should appear in your calendar. An email will automatically be sent to all attendees to notify them of the new meeting.

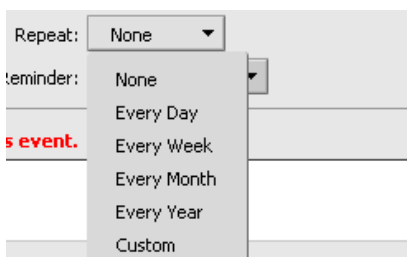


Creating & Customizing Repeat Patterns

1. When creating a repeat pattern, begin by entering the start time/date and end time/date for **the first instance** (not for the entire range of the meeting pattern).



2. Then, either select a predefined repeat pattern from the drop down menu, or select 'Custom' to bring up more options.



3. In the 'Custom Repeat' window, there is a wider range of settings available. You may also choose how the repeat pattern ends: Either after a number of occurrences, or at a specific date.

Custom Repeat

Repeat

Daily ▾

☒ Every day.

☐ Every weekday.

☐ Every 2 days.

End

☐ No end date.

☐ End after 1 occurrence(s).

☒ End by 30/1/2009 ▾

OK Cancel

4. Click 'OK' to save the repeat pattern. The repeating meeting should show up in your calendar once you click 'Save' in the main Appointment Details menu.

09:00 Repeating meeting	09:00 Repeating meeting	09:00 Repeating meeting	09:00 Repeating meeting	09:00 Repeating meeting

Note: Modifying Instances and the Series of a Repeat Pattern

You can modify one or more *instances* of a meeting pattern. Modifications can also be made to an entire *series*. However, note that if you add an attendee to the *series*, this will cause all the meetings in the pattern to show up in the attendee's calendar, including all customized instances. This will not be apparent to the organizer of the meeting.