Cal Poly Zimbra Calendar Quick Start

This document provides guidance during the transition from the Oracle Calendar to the Zimbra Calendar. The focus of this document is on the Calendar features within the Zimbra Web Client.

To get started:

- Login to the My Cal Poly Portal (http://my.calpoly.edu)
- Click **Go** next to **Zimbra Email/Calendar**.

General Calendar Settings

Setting Calendar Preferences

Calendar preferences are found in **Preferences**, **Calendar**. Preferences include:

- General - Default View, Mini Calendar, Delete Invitees Emails, Reminders
- Creating Appointments - QuickAdd
- Permissions – Free /Busy viewing, Invites

Other Preferences that help the Calendar work more efficiently

- **Address Book** – Auto Complete
- **Mail Filters**

Viewing Calendars

Faculty and Staff Calendars

The calendars of Staff and Faculty members will be **open**. Free & Busy time can be viewed by anyone within the Calendar system. (**Note**: there will be some calendars, such as those of campus administrators that will be closed.)

To view the calendar of a Staff or Faculty user, you will need to **link** to their calendar. After you've linked to their calendar, their calendar will be displayed in your calendar list in the Zimbra web client.

Student Calendars

The calendars of students will be **closed**.

To view the calendar of a student, they must first grant you access rights to Share their calendars, as described in ‘Granting Calendar Roles and Permissions’ below. You must then **link** to their calendar. After you’ve linked to their calendar, their calendar will be displayed in your calendar list in the Zimbra web client.

If the student has exercised their FERPA rights, you must specify their exact email address in the linking dialog explained below. You cannot look them up through the GAL (Global Address List).

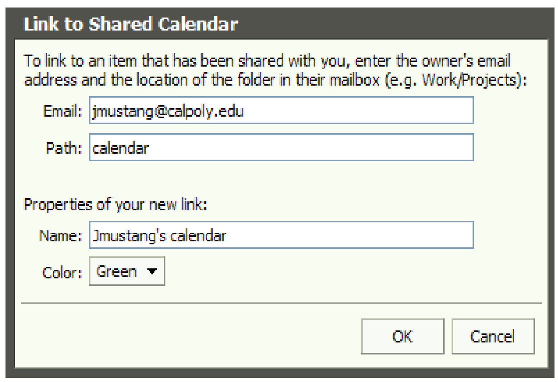
Non-FERPA students can be found though the GAL, but they must also grant you Sharing rights before you can successfully ink to their shared calendars.

See *Appendix A: FERPA and non-FERPA Student Scheduling* for further details of linking to students calendars.

Linking to another person’s Calendar

Right-click on the word ***Calendars*** above your own default calendar and select **Link to Shared Calendar.**

Enter the **Email username**, the Path of **calendar**, and the properties for the new link.



Viewing Group Schedules

The **Schedule View** lets you see multiple calendars selected from your Calendar list.

Check calendars to view in the group and click on the **Schedule** button.

Viewing Resource & Location Calendars

You must first link to a Resource or Location calendar to view it.

Resources and locations now have the characters “rl-“ at the front of their email address to make them easier to locate and distinguishable from other types of email address.

When using their email address to find a resource or location, enter:

rl-

in the email field to display the resources and locations.

The search initially returns an abbreviated list of resources & locations, so further refine their search criteria by putting a character in the search string.

For example,

rl-35 or rl-c

These instructions require that the **Auto-Complete** option is activated. This setting is found in **Preferences, Address Book, Settings: Auto-complete includes Addresses in the Global Address List.**

<table>
<tr>
<td>

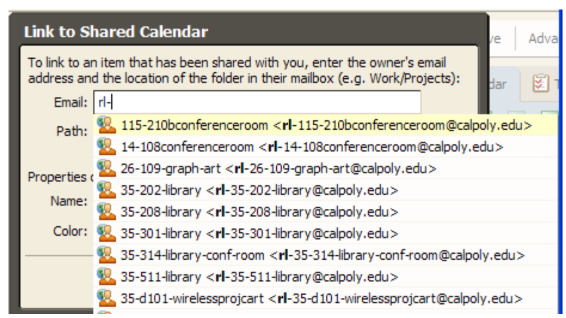
Finding a Resource or Location

Right-click on the word ***Calendars*** above your own default calendar and select **Link to Shared Calendar.**

Enter **rl-** in the email address field.

An abbreviated list of resources and locations will be displayed.

</td>
<td>



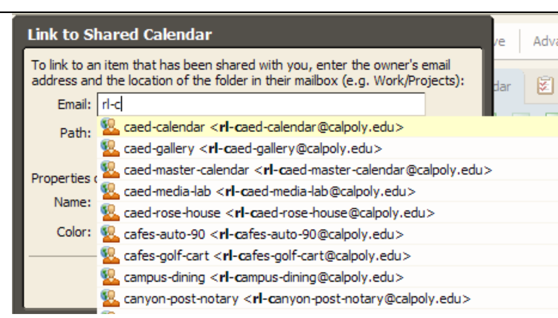
</td>
</tr>
<tr>
<td>

Narrowing Resource or Location Search

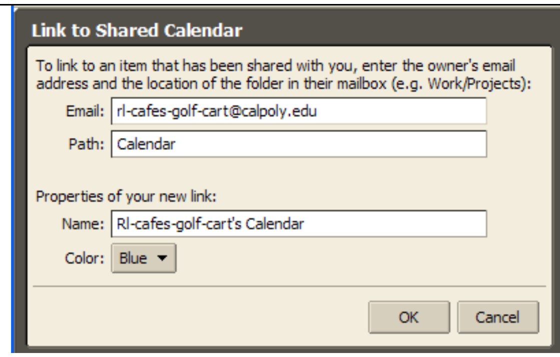
To further narrow the search for a resource or location, enter the first character from the resource or location name.

To the right, **rl-c** was entered.

</td>
<td>



</td>
</tr>
</table>

Selecting the Resource Select the Resource from the list. In the Path field, **e**nter the word **Calendar.** Properties such as the **name** or **color** can be modified for the new resource link.	

Please see *Appendix B: Managing Zimbra Calendar Resources and Locations* for more information about Resources and Locations

Viewing a Calendar in a Separate Browser Window

Sometimes the calendar views on-screen get very busy. You may view a single calendar in its own browser window:

- Right click on the mounted calendar that you want to view.
- Select **Launch in a separate window**.

You will now see a window for that calendar alone and you may select the Day, Work Week, Week, Month or Today view, as you wish.

If your browser preferences are set for tabbed viewing, the calendar will launch in a Tab, not a window. Note that the Tab or Window name will contain the name of the calendar you have selected. The calendar name is also shown at the foot of the screen.

Creating Calendar Entries

Creating Calendar Appointments

Appointments are entries on your Calendar that may or may not include other people or resources. Appointments can also be **repeating**. To create an Appointment,

- Select **New**, **Appointment** from the dropdown menu, or
- Double Click on the timeslot on the Calendar, or
- Right-click on a timeslot on the Calendar, or
- Drag the mouse through a timeslot on Calendar.

QuickAdd Appointment will come up if set in preferences

To activate QuickAdd, just double click on the day and time that you want to setup an appointment. The QuickAdd dialog box will appear.

There is limited detail in this format, you can put this Appointment to any Calendar you have the Permissions for, but no additional attendees can be added here.

The **Subject** is Required. Also has Location, Time and Date Information – More Details will bring you to the Appointment Details tab

Appointment Details tab

The **Subject information** is required. There are fields for Location, Time and Date information. You can put this Appointment on any Calendar you have the Permissions for.

This is where you can add an attachment by clicking the **Add Attachment** icon on the toolbar and providing appointment details in the open text field on the lower portion of the screen.

To select people for the appointment, select the **Schedule** or **Find Attendees** tab and search for the attendee.

To select a **Contact Group** (or distribution list) for the appointment, enter the contact group or list name in the **Attendees:** area of the **Appointment Details**, or

Select the **Schedule** tab and enter a few characters from the Contact Group name on the All Attendees field to locate and select the Contact Group.

Select the **Find Attendees** tab and enter a few characters from the Contact Group name to search for the Contact Group.

To select a location for the meeting, select the **Find Locations** tab.

To select resources for the appointment, select the **Find Resources** tab.

Find Attendees tab

Searching for Attendees

When searching for entries in the Find Attendees tab you can choose the Zimbra Global Address List (GAL), Contacts, or Personal and Shared Contacts. The following methods can be used to find an entry:

Searching for an Individual

- **Name search**: First and/or Last name, 100 entries will be returned.
- **Username search**: entries returned will match CalPoly username entered.

Note: If a student has opted to exercise their **FERPA** rights, you will **not** be able to locate a FERPA student's name in the **Global Address List**.

Class and Department email lists cannot be used as attendees within an appointment.

Searching for a Location or Resource

- Select either the **Find Locations tab** or the **Find Resources tab**

Find Locations tab

Enter the name, or part of the name of the location you seek, in the Name field and then click the **Search** button. You may wish to further refine your selection criteria if too many 'hits' are received.

Click on "**Allow Multiple Locations**" if multiples are required for this appointment.

For a single location, select the one you want and then click on the **Select** box.

For multiple locations, use ctrl-click to select the ones you want, and then click on the **Add** or **Add All** box. You may later remove selected locations or add more.

Find Resources tab

Enter the name, or part of the name of the resource you seek, in the Name field and then click the **Search** button. You may wish to further refine your selection criteria if too many 'hits' are received.

For a single resource, select the one you want and then click on the **Add** box.

For multiple resources, use ctrl-click to select the ones you want, and then click on the **Add** or **Add All** box. You may later remove selected resources or add more.

Schedule tab

To check for possible attendee or resource conflicts, select the **Schedule** tab. The calendars must be mounted to see meeting details

Note: There are some differences in the **Free** and **Busy** display of data on the Schedule tab.

- If Person A is scheduling a meeting with Person B ***and*** has linked to the shared calendar of Person B, the Free/Busy data displayed for Person B will include entry details when hovering over public calendar entries.
- If Person A is scheduling a meeting with Person B ***and*** has **NOT** linked to the shared calendar of Person B, the Free/Busy data displayed for Person B will not display any entry details when hovering over public calendar entries.

Changing Calendar Appointments

Appointments can be easily changed if you are the organizer:

- To move the appointment to a different date & time, just drag it on the calendar view to the new date & time.

To change *any* property of the appointment,

- Right click on the appointment in the calendar view,
- Click **Open**
- You may now change the appointment information.
- Remember to **save** it when you're finished.

Creating Notes and All Day Events

An event is a time block that occupies one or more full days. A note is just narrative, such as a reminder, that appears on your calendar, but does not block any time. For example "Dance class after work". You may also create a note such as "Jane Doe – leaving at noon for medical appointment" and add the various people in your department as attendees. They will see a note that you're leaving early, without having to link to your calendar.

Notes and events can have attendees as well as yourself, so they will appear on other people's calendars. They appear at the top of the screen above the normal appointment entries.

The day events and notes cannot be moved, but they can be hidden. Run your cursor over the thick line between the all day events and the regular calendar appointments, until the cursor changes to a hand shape. Click on the line. The day events will be hidden. To make the day events reappear, mouse over bottom of the thick bar at the top of the calendar, just under the date. When the cursor changes to a hand shape, click again. The day notes will reappear.

Scheduling all-day events or daily notes

You can create an all day or multi-day event such as a conference. The event displays at the top of the calendar for the day of the event.

1. In any of the views except from Preferences, click the arrow on 

(the 'new' icon) and select **Appointment**.
2. Enter the **Subject**. The subject becomes the description in the calendar and is required.
3. Enter locations and resources if appropriate. Select the **Start** and **End** date.
4. To create an all-day event,Check **All day event,** on the right of the time.
5. To create a daily note, ensure your '**Show as**' time is **Free**.
6. If you have multiple calendars, from the **Calendar** drop down, select which calendar is setting up the event.
7. Add resources. Use the **Find Resources** tab to find and reserve a resource, such as a projector. This information is listed as a Resource under the Attendees field.

8. Enter the names of the attendees. You can enter attendee names in any of the following ways:
   - Go to the **Find Attendees** tab. Type a name and select which list to use, either Contacts or Global Address List. Select the names and press **Add**. When complete, click **OK**.
   - In the **Attendees** text field, type the email addresses, separating addresses by a semicolon (;). As you type, names in your Contact list that match are displayed.
   - To see the free/busy schedules for attendees, click the **Schedule** tab. As you enter attendees' names and email addresses, if attendees' schedules are known, availability appears in horizontal bars next to the names. Return to the **Appointment Details** tab when the attendee's list is complete.
   - *Skip this step to schedule an appointment for just yourself on your own calendar, without attendees.*
9. Enter any additional information about the meeting in the text area. To add attachments, click **Add Attachments** on the toolbar above the Calendar tabs. The attachment is included in the email that is sent.
10. Click **Save**. An email invitation is sent to all attendees. The event displays as a banner at the top of the Calendar.

	Notes	**All Day Events**
Where it is **Displayed**	Banner at top of the calendar schedule	Banner at top of the calendar schedule
How to **Create**	Check the **All Day Event** option in the Appointment dialog box, or Right-click on a calendar timeslot and select **New All Day Appointment**.	Check the **All Day Event** option in the Appointment dialog box, or Right-click on a calendar timeslot and select **New All Day Appointment**.
In the Details dialog box, click **Show as…**	**Free**	**Busy**
Resulting **Free/Busy** search	Note has **no impact** on **Free/Busy** availability	All Day Event results in schedule for entire day displayed as **Busy**

Creating a Meeting from a Message or Conversation

To turn a message or conversation into a **Meeting Request**, drag and drop the message *in Zimbra Email* onto a date on the mini-calendar.

Note: The mini-calendar option is activated in **Preferences**, **Calendar**.

- The subject of the message becomes the Subject of the appointment

- The attendees are the email addresses in the **To:** and **Cc:** fields of the message or for conversations, the most recent message in a conversation.

- The text of a message or the text of all messages in a conversation thread becomes the text of the invitation. Message attachments are not included in the appointment request.

Creating a Meeting from a Contact

To create a Meeting Request using a **Contact**, click on a name from your Contact list and drag the name to a date on the mini-calendar. The Appointment page opens.

Note: The mini-calendar option is activated in **Preferences**, **Calendar**.

Responding to Meeting Requests

The Zimbra Inbox or Calendar can be used to accept or reject a meeting invitation. In the Zimbra Calendar, meeting requests will appear in the boldest shade of your calendar's default color until you acknowledge them.

- Accepting the meeting request from the **Inbox:**
    - Open the meeting invitation and click on the **Accept**, **Tentative** or **Decline** button.
- Accepting the meeting request from the **Calendar:**
    - Right-click on the meeting entry and select **Accept**, **Tentative** or **Decline**.

A reply is automatically sent but you can add comments before you send your response. Before you send your response, you can select the calendar that this meeting should be scheduled on. If you do not select another calendar, your meetings are saved to the **default Calendar**.

Depending on your action, the meeting will be shaded:

- **Accepted** appears in solid shade
- **Tentative** appears at 50% transparency
- **Declined** appears at 90% transparency

Viewing Meeting Attendee Status

If you have linked to a calendar and are viewing public meeting requests that the calendar owner has organized, you will be able to view everyone's attendee status by hovering over the meeting request.

If you have linked to a calendar and are viewing public meeting requests that the calendar owner has been invited to, then you will only be able to view the calendar owner's attendee status when hovering over the meeting request.

Creating Multiple Calendars

Zimbra Calendar allows the creation of multiple calendars and setting permissions for each calendar. For example, one could create a "Second" calendar which could be used specifically for activities outside Cal Poly.

To create an additional calendar, select **New**, **New Calendar** from the dropdown menu.

*The option to exclude the calendar from free/busy operations can be selected.

****Private and personal entries that affect your Cal Poly availability should be placed on your principal calendar as Private, so people see that your time is blocked, rather than using "personal" calendars.***

Creating Contact Groups or Distribution Lists

A Contact Group can be used for messaging, group scheduling purposes or to grant access rights.

To create a Group, select **New**, **New Contact Group** from the dropdown menu. Entries for the Contact Group can be chosen from your Contact folder, your Personal or Shared Contact folder, or the Global Address List.

Deleting Calendar Entries or Calendars

Deleting Calendar entries

Only the originator of an appointment can cancel the appointment.

1. Click on the appointment to **delete**.

2. Right-click and select **Delete**. If the appointment is a recurring series, you can delete an instance of the series or the complete series.
3. An email is sent to the attendees and the appointment is deleted from their calendars.

Deleting a Calendar

You can delete any calendar in your Calendars list, ***except*** your default calendar.

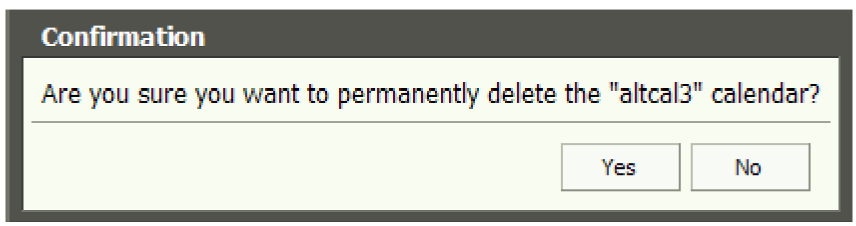
Prior to deleting the calendar, however, individual calendar entries that include other attendees **must** be deleted. If the entries are not deleted *prior* to deleting the alternate calendar, these entries will remain on the attendee's calendars and cannot be deleted.

To delete a calendar:

1. Right-click on the calendar to be deleted.
2. Click **Delete**. The Confirmation dialog appears.
3. Click **Yes**

The calendar is immediately deleted; there is no undo option.

Confirmation notice prior to deletion of an alternate calendar.



Calendar Sharing – Roles and Permissions

Granting Calendar Roles and Permissions

Various **Roles** may be assigned to other users.

- **Viewer:** The Grantee can see the activities posted to your calendar and the status of meeting requests, but cannot make any changes to your calendar.
- **Manager:** The Grantee has full permission to create meetings, accept or decline invitations, and edit and delete activities from your calendar.

The **Manager** role in conjunction with the option to **Allow user(s) to see my private appointments** would allow a designate to modify private calendar entries of the designee.

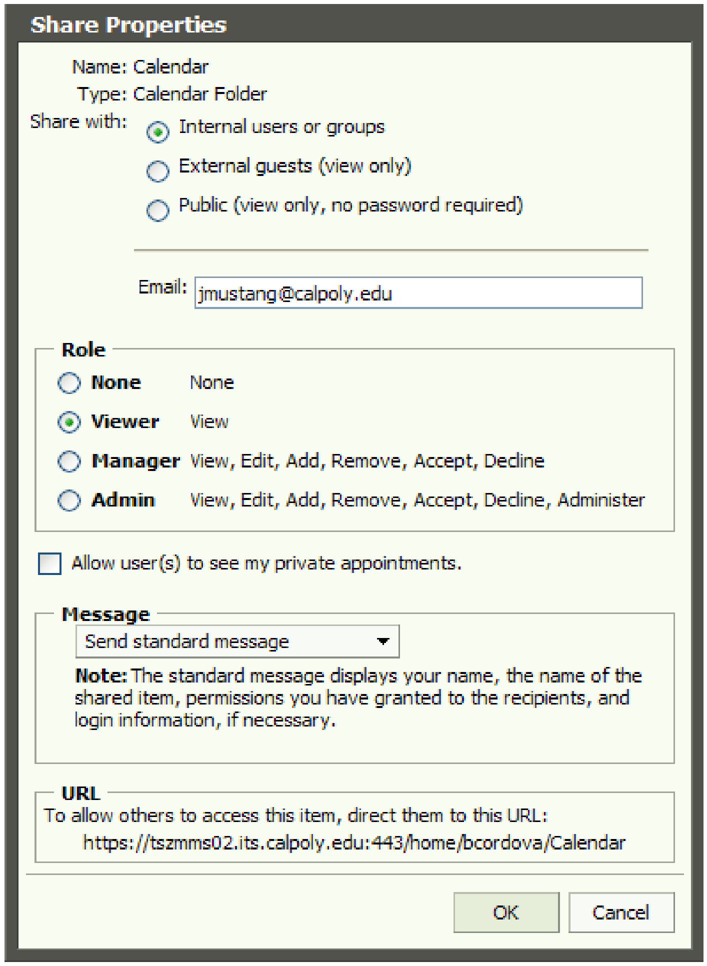
- **Administrator**: The Grantee has permission to create meetings, accept or decline invitations, and edit and delete activities from your calendar, share your calendar with others and revoke calendar shares.

Right-click on your calendar to share and select **Share Calendar**.

Enter the **email address** or name of the **Contact Group** (distribution list) and select the assigned role.

Note: *If using Internet Explorer, Contact Groups that are larger than 10 entries cannot be used to grant roles.*

The workaround for this issue would be to use Mozilla Firefox to grant roles to a large Contact Group.



Accepting Calendar Roles and Permissions

You will receive an email that you've been granted access to another person's calendar. You can either **Accept** or **Reject** the share.

If the share is **accepted**, the calendar displays in your calendar list in the Zimbra web client.

Using Zimbra Calendar when you have an off-campus Email Delivery Address (EDA)

If you set your Email Delivery Address (EDA) to an off-campus address (via the Cal Poly Portal) and you want to use the Calendar scheduling component of the Zimbra Collaboration Suite, you will need to perform the following steps in order to use the Zimbra Calendar.

1) In the Cal Poly Portal, reset your Email Delivery Address (EDA) to use your Cal Poly Email Delivery Address.

The EDA update tool is found on the Personal Information Channel on the Personal Info tab. Note that the change from your EDA to your Cal Poly email address may require 10 -15 minutes to take effect.

2) Configure Zimbra to forward email to your off-campus address.

Logon to the Portal and click on the Zimbra Email/Calendar button.

Within Zimbra Collaboration Suite, select **Preferences**, **Mail** tab.

In the **Receiving Message** section of **Mail** preferences, under the action of

When a message arrives:

Forward a copy to: enter off-campus email address.

Leave the checkbox “Don't keep a local copy of messages” unchecked. Zimbra must receive calendar meeting notification emails in your Zimbra Inbox for meetings to be scheduled or modified on your Zimbra Calendar”.

Click **Save** to complete the operation.

The above steps will allow you to forward the email to an off-campus address and to access the Zimbra Calendar.

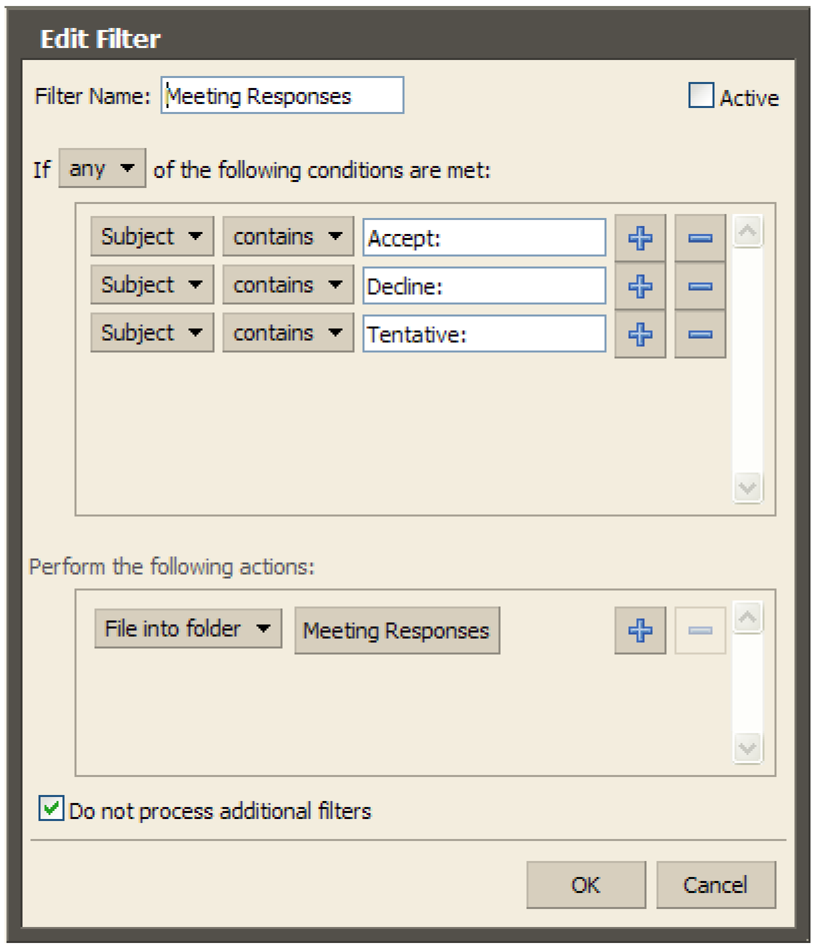
However, you will need to clean out the Zimbra Inbox on a regular basis since email will be accumulating in it.

Meeting Responses Folder

This folder and the filters shown below will be pre-established in your Zimbra account when the calendar is migrated.

Meeting Responses Filter:

When a user responds to a Calendar Appointment by changing their attendee status to Accept, Decline or Tentative, an email notification is sent to the meeting organizer.

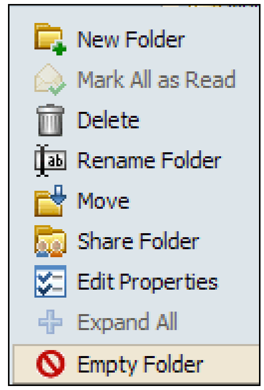


In order to limit the number of calendar notifications delivered to the organizer's Inbox, a mail filter called **Meeting Responses** has been created in each user's account. Meeting responses that meet the criteria will be filed in a folder called Meeting Responses.

The rule is initially **Inactive**.

To activate the rule, select **Preferences**, **Mail Filters**, and click the **Active** check mark.

Deleting the Contents of the Meeting Responses folder



Email notifications will accumulate in the Meeting Responses folder. On an occasional basis, the folder should be emptied.

To empty the folder, right-click on the **Meeting Responses** folder and select **Empty Folder**.

Printing a Calendar

You may print individual calendars in any of the views in different ways:

- In the list of mounted calendars, right-click beside the name of the calendar you wish to print.
- Select “Launch in a separate window”
- In the new window, select the Day, Work Week, Week, Month or Today view that you wish.
- Use File - Print from your web browser to print that calendar. The printout will show the calendar name.
- The meetings are displayed per day. If you print a view that includes more than one calendar, all the schedules are combined, but the printed calendar does not specify the individual calendar names for the activities.

or

- To print a calendar, select the calendar and display the calendar view you wish to print.
- Click the printer icon  on the toolbar. A printer dialog appears and the Calendar view is printed.
- The printout shows your email address. It does not show the name of the calendar owner, or the calendar name. This method is suitable for printing your own calendar, but not recommended if you are printing someone else’s calendar as it does not identify them.

Tagging Calendar Entries

Tagging Appointments

You may mark an appointment entry with a colored **Tag** to categorize it as you wish:

- Right Click on the particular appointment in your calendar view
- Select Tag Appointment, and then select the colored tag you wish, or add new tag. You can also remove a tag previously applied to an appointment.
- You will now see a colored tag in the top right corner of that appointment

Viewing Tagged Appointments

Click on the colored tag you wish to see under the Tags files on the left side of the screen.

The Calendar view will now show just the appointments that have been tagged with that particular color.

To return to the full calendar view, click the **Refresh** icon in the toolbar.

Sharing Contacts

You may share your contacts with someone else:

- Click on the Address Book icon in the toolbar.
- Right click on the mounted contacts that you wish to share
- Click on Share Address Book.
- A Share Properties window will now let you share your contacts, as described in *Calendar Sharing – Roles and Permissions* above

Note that your entire contact list will be shared. We suggest creating a separate smaller address book if you want to share just a specific group of contacts, perhaps for a club, a department or a project team. That way, you won’t be sharing all your contacts

Appendix A: FERPA and non-FERPA Student Scheduling

Student calendars are **closed**. You cannot view or link to any student calendar unless they have specifically granted you permission.

Zimbra Calendar functionality differs depending on whether a student has exercised their FERPA rights. The table below illustrates the differences.

	FERPA Student	**Non-FERPA Student**
FERPA rights includes the protection of "directory information" such as name, phone number and e-mail address.	Student has **opted** to exercise their FERPA rights.	Student has **not opted** to exercise the FERPA rights.
Viewing student calendars	Student calendars are **closed**. Student must grant a user access to their calendar.	Student calendars are **closed**. Student must grant a user access to their calendar.
Error displayed when attempting to open a student's calendar and they have not granted you access to their calendar	Permission denied.	Permission denied.
Listed in Global Address List **(GAL) ?**	No	Yes
Can Student be scheduled ?	Student cannot be selected from GAL. However, if student email address is known and entered, they can be scheduled.	Yes
Can student's Free/Busy times be viewed?	No	Yes (times only.)

Appendix B: Managing Zimbra Calendar Resources and Locations

Renaming of some Oracle Calendar Resources during the Zimbra Migration

Existing Oracle Calendar resources and calendars will be migrated. *Some* of the Oracle Calendar resources will be renamed during the migration to Zimbra:

- Any special characters in the resource name will be removed.
- Telephone numbers and capacity in the resource name will be removed. This information has been moved to the relevant field in Zimbra.
- Example:
  - Oracle resource name: 01-409 x6-6000 Cap 20 Admin
  - Zimbra resource name: 01-409 Admin

Zimbra Resources and Locations

Zimbra resources include both **resources and locations**. The resources within the Oracle calendar are now assigned to a Zimbra resource or location category.

When scheduling a meeting in Zimbra, a user will click on the resource or location button to select the room or equipment. To view all resources or all locations, click on the **Search** button within the Find Resources or Find Locations window.

Resource Access Rights

Full administrative access rights to the resource or location calendar will be granted to the owner or primary contact. In addition, the resource or location calendar will be automatically mounted within the owner's account.

Comparison of Oracle and Zimbra Resource Designate Rights

OCS Designate Rights	Zimbra Access Rights
Full Viewing Rights to all entries	**Full Viewing rights** to Public and Private entries
Ability to create, modify or decline **Normal, Confidential, Personal** and **Public** entries	Ability to create, modify or decline **Public** and **Private** entries
Resource owner: Ability to grant access to other users	**Admin** role: Ability to grant access to other users

Others individuals who had specific access rights – such as viewing rights -- to the resource calendar in Oracle will have similar access rights configured in Zimbra. The user will have to link to the calendar of the resource or location to display the calendar within their account.

Managing Resource or Location Migrated Data

The attendance status of the migrated Zimbra resource or location entries will be similar to the attendance status of the Oracle Resource entries.

OCS Entry Status	Zimbra Entry Status
Unconfirmed	New
Accepted	Accepted
--	Tentative
Refused	Declined

The owner of the resource or location can change the status of the Zimbra migrated resource or location entry by right-clicking on the calendar entry and selecting **Accept**, **Tentative** or **Decline**.

Managing Resource or Location Data after Migration

Resource or location calendar entries created *after* migration will have a status of **New.** The resource or location owner should then right-click on the calendar entry and select **Accept**, **Tentative** or **Decline**.