

# **CorporateTime 5.1**

## **User's Guide**

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**Steltor Inc.**  
**CorporateTime 5.1**  
**June 2001**

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# 1

## Getting Started

This chapter introduces new users to CorporateTime and provides helpful hints for getting started. This chapter discusses:

- “About this User's Guide,” page 6
- “Windows and Macintosh differences,” page 7
- “Learning CorporateTime,” page 7
- “Multiple NT user support,” page 7
- “Setting up CorporateTime,” page 8
- “Signing in to CorporateTime,” page 8
- “Off-line Agenda configuration,” page 9
- “The Connection Manager,” page 11
- “The Connection Editor,” page 11

### About CorporateTime

CorporateTime is the scalable enterprise-wide time management solution, designed to look familiar to anyone who has used a paper planner.

CorporateTime is designed to be as easy to use as possible. To create a Meeting, simply highlight the time of the Meeting, type in a title and press Enter. Make it repeat on a regular basis, write in details, set reminders, invite other users and book company resources. CorporateTime can even suggest dates and times when all invited users and Resources are available.

View an Agenda a day, week, or month at a time. If you want to reschedule an Entry, drag and drop it to a new time or day and all invited users and resources will be notified of the change. If you are invited to a Meeting, double-click it to find out more information, reply or see how other invited users have replied.

More than just a personal calendar, CorporateTime is an enterprise-wide organizer. Open a Group View, displaying the Agendas of several users and resources side-by-side, to see when they are free and invite them to a Meeting. Then notify them of the Meeting by e-mail. All Entries are converted to each user's local time, making it easy to schedule with users in other time zones.

The In-tray folders contain Entries you have received, sent out, accepted and refused. Double-click an Entry to see its information. Quickly drag and drop Entries from one folder to another to reply to them.

The Task Display allows you to keep track of all your assignments. Sort them by priority and keep track of their progress. CorporateTime even lets you note when Tasks were started and when they need to be completed.

Address Books allow you to keep track of all your contacts. Create as many Address Books as you need and share them with other users. Create an Address Book for your business contacts and another for your personal contacts.

Control who can access your Agenda and how much information they can see by assigning Access Rights. Assign full Viewing Rights, allowing users to see details of your Entries. Assign partial Viewing Rights, allowing others to see your busy times. A user with no Access Rights will only see Public Entries, which all users are able to view. Give partial Viewing Rights to allow others to see certain types of Entries.

Designate Rights allow you to authorize individual users to work on your behalf in your Agenda. A Designate can access your Agenda just as you would and create, edit and reply to Entries for you. You still own Entries created by your Designates; edit them just like Entries you created yourself. Give full or partial Designate Rights to as many users as you want. For example, you might give Designate Rights to your secretary to keep track of your appointments.

Print out the information in your Agenda in many ways. CorporateTime comes with a number of popular paper planner formats that you can customize as you see fit. Print your Daily, Weekly, or Monthly Agenda, a Task View, your In-tray and many other combinations.

If you require mobility, export your calendar to a laptop and take it with you. Also, export the Agendas of the users and resources you deal with most often. Schedule Meetings and reply to invitations as you would in your on-line Agenda. When you perform an import, CorporateTime synchronizes your laptop information.



Steltor's CorporateSync allows users to synchronize Agenda and Address Book data with a vast array of hand-held products. CorporateSync is not covered in this manual. For more information on CorporateSync, please contact your Steltor representative.

All these features are explained in detail in their respective sections. Refer to the Table of Contents or the Index to find the information you need.

## About this User's Guide

This User's Guide complements the on-line Help included with all CorporateTime products.

Most dialog boxes contain a **Help** button, which you can click to view the related topic. When opening your on-line Help, you can either view its contents menu or the topic directly related to the screen you are viewing:

- Context-sensitive Help: Press **F1** [**Control+Click**]
- Contents menu: Choose Help menu > Contents [Click the Apple Help Button]

This User's Guide uses the following icons:



Note



Tip



Example



Windows only



Macintosh only



To learn more about a term or icon used in the User's Guide, refer to the reference sections at the end of this book. Key conventions, terminology, menu commands and icons are all explained in greater detail.

## Information and references

If there are several ways of performing a particular operation, all methods are listed in the section dedicated to that function. When reading about that operation in a different chapter, only the most intuitive method of performing it is listed; you will be directed to its main section if you require more detailed information.



There are different ways of creating a Daily Note in a Monthly Agenda. The Monthly Agenda section lists only the most intuitive way of creating a Daily Note. The Daily Notes section, however, lists every method of creating a Daily Note and all other information directly related to them. A "for more information" message in the Monthly Agenda section directs you to the Daily Notes section to learn more.

## Windows and Macintosh differences

This manual provides step-by-step instructions for using both CorporateTime 5.1 for Windows and Macintosh. It assumes you have a working knowledge of your operating system.

Where terminology and/or instructions differ between clients, the Windows version appears first, followed by the Macintosh version in brackets.



Press **Ctrl+D** [**Shift+Command+O**] to open an Agenda as a Designate.



Macintosh users should take note that the Windows term "tab" is used to describe the different pages in a dialog box.

## Learning CorporateTime

Steltor offers different types of documentation designed to help you learn and use CorporateTime effectively, including:


- **On-line Help:** Included with every client. CorporateTime now features an HTML-based Help system.
- **Readme:** Standard with every client. Provides installation instructions, contact information and a link to the most up-to-date Release Notes on the Steltor Web site.
- **Release Notes:** Available on the Steltor Web site and updated regularly. Describes features, system requirements and known limitations. Access the Release Notes from the Readme included in the package.
- **User's Guide:** This document provides in-depth information to complement your on-line Help.

## Multiple NT user support

In earlier versions of CorporateTime, all information was stored in the Windows directory by default. With CorporateTime 4.2 or greater, Windows NT user information is stored in the Windows user profiles, as long as the user has an NT user account.

On computers that have had earlier CorporateTime clients installed, a migration of user files takes place the first time a user signs into CorporateTime 4.2 or greater. This process only needs to be done once per user.

Should file migration fail, an error message appears and the CorporateTime session is terminated. Migration will continue the next time that user signs into CorporateTime.

 This applies only to Windows NT workstations. Computers operating under Windows 95, 98, 2000 and ME are not affected; CorporateTime will still use the Windows directory by default.

## Setting up CorporateTime

This section suggests settings you should use in CorporateTime while you learn the software. Once you are familiar with the software, customize the settings according to your preferences.

1. Choose to view all Entries and their information. This allows you, for example, to view Entries you have refused. Otherwise, if someone invited you to a Meeting and you refused it, the only way to see it would be to view the “Entries you’ve refused” folder in your In-tray. To view all information in your views, select all the checkboxes in the following dialog boxes:
  - Agenda Preferences (Options menu > Agenda)
  - In-tray Preferences (Options menu > In-tray)
  - Task View Preferences (Task View > View menu > Show All Tasks)
2. Color your Meetings by Attendance Status using the Meeting Colors dialog box (View menu > Meeting Colors). This allows you to quickly view which Meetings you plan to attend.


## Signing in to CorporateTime

The method you choose to sign in to your Agenda dictates what you can do. You can:

- Work in your Agenda on-line.
- Work in your Agenda off-line.
- Open another user’s on-line Agenda, if you have the password.
- Open a Resource’s Agenda, if you have the password. You will have limited capabilities.

Each time you sign in, your Agenda restores the windows you had open during your last session. However, Group Views created during the previous session are not saved.

The name and server information used in the last successful sign-in will appear in the Sign-in dialog box.

 If you want to work in another user’s Agenda as a Designate, you must first sign into your own CorporateTime account. For more information, see “Opening another user’s Agenda as a Designate” on page 65.

## Signing in on-line

You must be connected to the server in order to work in your on-line Agenda. Working in your Agenda while on-line lets you schedule Entries and view other users’ Agendas in real time.

1. Start the application.
2. Enter the server name and node number/alias in which your account is stored, if there is more than one node on the server.

3. Enter your password. Passwords are case-sensitive.
4. Enter your user name. If you do not remember your user name, click the Search button to look for it using the Directory Search dialog box.



If your server name is “newton” and your data is stored on node 3, you would enter “newton,3”. If you enter only the server name and the server has multiple nodes, you will be prompted to select your node from a list.

5. Click **Sign-in** to open your Agenda. If any of the information you entered is invalid, you will be unable to sign in.

If you are missing any information needed for the steps above, contact your System Administrator.



Windows NT and Mac OS 9 users can bypass the CorporateTime Sign-in dialog box. For more information, see “Changing your password” on page 82.

## Signing in off-line

To work off-line, you must first create an off-line database. An off-line Agenda is automatically created the first time you open your Agenda.

1. Start the application.
2. Choose Off-line from the pull-down menu.

3. Enter your password. This should be the same password as your on-line Agenda, unless you have modified it. If this is the first time you are using CorporateTime on this computer, either on-line or off-line, leave this field blank.
4. Enter your user name.
5. Click **Sign-in** to open your Agenda. If any of the information you entered is invalid, you will be unable to sign in.

If you sign in off-line without having ever signed in on-line, CorporateTime will create an off-line database. It will then prompt you to enter information in the Off-line Agenda Configuration dialog box.



Set the information you can see in other users' Agendas and the groups available when off-line using the Off-line Preferences dialog box. For more information, see “Off-line Preferences” on page 76.

## Off-line Agenda configuration

When you first attempt to sign into CorporateTime in the off-line mode, you will be prompted to create an off-line Agenda.

1. The About CorporateTime Server dialog box will appear. Click **OK**.
2. Enter your user name in the User edit box.
3. If you would like to have a password for your off-line Agenda, enter it in the appropriate edit box. Your off-line password can be the same or different from your on-line password. If your passwords are different, you can choose to

reconcile them by replacing one with other in the Password Reconciliation dialog box. If you choose to keep your passwords different, the Password Reconciliation dialog box will appear when you sign in and whenever you switch between on-line and off-line modes.

4. Select the time zone you wish to use in your Agenda. Choose the zone by name from the drop-down list box or by region or country in the Regions list box.
5. Enter a location for your off-line Agenda. Click **Browse** to search for a directory.
6. Click **OK**. CorporateTime will create your off-line Agenda.

## Signing in as another user

You can only sign in as another user if you know that user's password and can connect to the server node on which the account is located.

1. Start the application.
2. Enter the server name and the node on which the user's account is stored, if there is more than one node on the server.
3. Enter the other user's name. If you do not remember the user name, click the Search button to look for it using the Directory Search dialog box.
4. Enter the user's password. Passwords are case-sensitive.

5. Click **OK** to open the other user's Agenda. If any of the information you entered is invalid, you will be unable to sign in.

## Signing in as a Resource

You must be connected to your server in order to access a Resource's Agenda.

1. Start the application.
2. Enter the Resource's name. If you do not remember the name, click the Search button to look for it using the Directory Search dialog box.
3. Enter the Resource's password. Passwords are case-sensitive.
4. Enter the server name and node number on which the Resource's account is stored, if there is more than one node on the server.

When you sign in to the system as a Resource, you can only:

- Change the resource's Access Rights, in order to set modification and scheduling rights for other users on the system.
- Change the password for signing in as the Resource.

Because of these limitations, whenever you work in a resource's Agenda you should do so as its Designate. For more information, see "Opening a Resource's Agenda as a Designate" on page 65.



If you are missing any information needed for the steps above, contact your System Administrator.

## The Connection Manager

If you have different servers to which you connect on a regular basis, use the Connection Manager to see all of the connections and manage them. From this dialog box, configure your different server connections. Each set of preferences will be stored under a name you choose and will then appear in the list box. Use the different buttons to edit or delete connections, make a particular connection your default or create a new connection using the Connection Editor dialog box.

### To access the Connection Manager

In the CorporateTime Sign-in dialog box, select Other. The Connection Manager dialog box opens.

- **New:** Clicking this button will open the Connection Editor dialog box, where you can create a new connection.
- **Edit:** Highlighting a connection and clicking Edit will open the Connection Editor dialog box, where you can edit different elements of your connection.
- **Make Default:** When you highlight a particular connection and select Make Default, it will be set as your default. When you next launch CorporateTime, the name of that connection will appear in the "Connect to" pull-down list box.
- **Enable Automatic Sign-in:** Windows NT and Mac OS 9 users can select this box in order to bypass the Sign-In dialog box.

## The Connection Editor

Create or edit connections using the Connection Editor.

1. Enter a name in the Connection name edit box.
2. If you wish, use the Comments edit box to enter any useful information pertaining to the connection.
3. Enter the server name in the Server box. Click Lookup to search for a server and to determine the Authentication, Compression and Encryption (ACE) mechanisms available to you when you are using that particular server.
4. If you are connecting to CorporateTime through an Application Service Provider (ASP), select "Connect using calendar domain" and enter the information in the edit box. If you are having trouble connecting, please contact your ASP.
5. Select an ACE mechanism for your connection. If the option "Server-defined" appears, you do not have the right to configure this preference. If the option "Not available on this server" appears, your System Administrator has not enabled this feature.

### Configuring connections

Decide whether you would like the connection to be automatically configured by the server.

If you decide you do not want the connection to be automatically configured by the server, you will be brought back to the Connection Editor dialog box.

Choose whether you would like to configure the connection at sign-in from a user name or configure for a specific user.

- If you select the “Configure at login from user name” option, the server-defined node and ACE mechanisms are used. You are not able to configure any preferences that are server-defined.
- If you select the “Configure for specific user” option, you must type in either a user ID or a complete user name. This will allow you to find the user’s proper node and ACE mechanisms. Click Configure. The node shown will be server-defined and the ACE mechanisms are those requested by the user’s node. Adjust the ACE mechanisms using the pop-up boxes.

# 2

## Entries

Entries are the basic building-blocks of your Agenda. Use Entries to represent different types of events in your Agenda, from an important assignment at work to dinner with friends. Entries also allow users to share information and resources over a network.

Anything you can enter in your CorporateTime Agenda qualifies as an Entry. Use Meetings to schedule events with a time and place, Day Events and Daily Notes to remind yourself of something on a particular day, and Tasks to keep track of projects.

This chapter discusses:

- “Meetings,” page 14
- “Day Events and Daily Notes,” page 20
- “Tasks,” page 22
- “Holidays,” page 25
- “Working with Entries,” page 25

Create and edit Entries you own. Additionally, view Entries to which you are invited and Entries to which you are not invited based on your assigned Access Rights. For more information, see “Access Rights” on page 69.

There are five types of Entries:

- Meetings
- Day Events

- Daily Notes
- Tasks
- Holidays

Each Entry is identified by an icon. Icons also help display what information is included with the Entry and whether multiple instances exist. For more information, see “Daily, Weekly and Group Views” on page 117.

Entries can be rescheduled, duplicated, printed and deleted. The user in whose name an Entry is created is considered to be the owner of that Entry. An owner is either:

- The user who created the Entry.
- A user whose Designate created an Entry in his name. For more information, see “Designates” on page 63.



If James is working in William's Agenda as his Designate and creates a Meeting, William is considered to be the owner of that Meeting.

## Entry Defaults



Set your Entry Defaults before you start creating Entries (Options menu > Entry Defaults). That way, you will not have to change

Entry Defaults manually each time you create an Entry. For more information, see “Entry Defaults” on page 81.

## Meetings

Meetings are Entries with specific start and end times. Invite other users and Resources to your Meetings, set Reminders and make Meetings recur on a regular basis.

When you enter a Meeting in your Agenda, the time it occupies is highlighted. If other users try to invite you to a Meeting at the same time, they will get a message warning them that you have a conflict, unless you have not given them the Access Rights to view the original Meeting. They can still schedule the Meeting, leaving you to choose what you want to do about the conflict.

### Creating and editing Meetings

Create and edit Meetings using the New Meeting and Edit Meeting dialog boxes. The New Meeting dialog box has six tabs: General, Options, Repeating, Details, Linked Tasks and Reminders. Each tab lets you add certain features to your new Meeting. The Edit Meeting dialog box contains all the tabs and functionality featured in the New Meeting dialog box, as well as a Reply tab.

#### To create a Meeting:

- Click the New Meeting button on the Toolbar.
- Press **F2** [**Command+N**].
- Choose Edit menu > New > Meeting.
- Double-click selected time slots (Daily or Weekly Agenda) or the grid square of any day (Monthly Agenda).
- Right-click [**Control+Click**] an Agenda page and choose New Meeting.

#### To edit a Meeting:

- Select the Meeting and press **F5** [**Command+Return**].
- Select the Meeting and choose Edit menu > Edit Meeting.
- Double-click the Meeting on an Agenda page or in your In-tray.
- Right-click [**Control+Click**] the Meeting and choose Edit Meeting.

### General

Enter basic information about your Meeting.

1. Enter the title and location in their respective boxes.
2. Choose a date for your Meeting. Type it directly into the Date box, use the arrows, or click the Calendar button.
3. Enter the start and end times. Type them directly into the Time box, use the arrows, or click the Clock button. The duration is adjusted accordingly. Adjusting the duration of the Meeting changes the end time.

4. Add the users and Resources you want to invite.
5. Click **Check conflicts** to see if the Meeting conflicts with other Meetings in an attendee's Agenda. Your Agenda only detects conflicts with other users' Meetings that you have the Access Rights to view.
6. Click **Suggest date/time** to find times when all invited users are available. For more information, see "Suggesting another date or time" on page 19.



When you view a Repeating Meeting, a list box displays all scheduled dates. The settings you enter only apply to dates you have selected.

## Options


Set your Meeting's Importance and Access levels. The Access level controls who can see the Meeting, while the Importance level allows others to know what priority should be given to the Meeting. For more information, see "About Access Levels" on page 69.

1. Select the Importance and Access levels from the appropriate drop-down list boxes.
2. Select the checkbox to mark the Meeting as tentative. This indicates the Meeting is still not final and may be rescheduled.

## Repeating

Make a Meeting recur on a regular basis. This is useful for keeping track of important Meetings that occur regularly, such as a weekly staff Meeting.

1. Use the Frequency drop-down list box to choose when you want the Meeting to repeat.
2. Enter a start date for your Meeting. Enter it directly into the Date box, use the arrows or click the Calendar button.
3. Set the end date by selecting either the Until or the For box.
  - If you select Until, enter the date directly into the Date box, use the arrows, or click the Calendar button.
  - If you select For, set the duration using the drop-down list box and type the interval in the left-hand edit box.
4. Select the Include checkboxes if you wish to include Saturdays, Sundays and/or Holidays.
5. Use the Conflicts drop-down list box to decide how your Agenda should handle conflicts when you schedule Repeating Meetings.
  - Display: shows where conflicts exist. Click **List Dates** to display all Meeting instances. Double-click a conflicting Meeting to see the Details of Conflict dialog box.
  - Suggest Time: calls up the **Suggest date/time** dialog box for dates where a conflict occurs. Use it to find times that will avoid conflicts.
  - Ignore: displays the list of dates without indicating whether a conflict exists.

6. Click **List Dates** to display all dates on which your Meeting has been scheduled. If you change your settings and click **List Dates** again, the list will be updated to reflect the changes.
7. Use the “Additional date” edit box to add dates not included in the repetition you have specified. Set the date using the arrows to the right-hand side of the edit box or by clicking the Calendar button. Click the Checkmark button to add the date. Only add dates in this way after you have clicked **List Dates**.
8. Delete dates by selecting them in the list box and clicking **Delete**.
  - Click **Delete all** to cancel the entire list of dates.
  - Use the **Shift** key and your mouse to delete multiple instances at once.
  -  Use the **Ctrl** key and your mouse to delete multiple instances at once.
3. Click **OK**. If the application required to open the file is installed on an attendee's machine, its icon will appear with the attached file on the Details tab of the View Entry dialog box. If not, attendees will be prompted to find an alternate application to open the file when they double-click the icon.

## Linked Tasks

Create new Tasks and link them to the current Meeting. This is useful if there are projects or papers you need to complete before the Meeting.

1. Click **New**. The New Task dialog box appears.
2. Enter the relevant information on all three tabs of the dialog box. For more information, see “Creating and editing Tasks” on page 22.

A Task can only be unlinked from the Meeting with which it is associated in the Edit Meeting dialog box. Linked Tasks are displayed with other Tasks in the Task View and in the Task Pane section of a Daily Agenda page.

## Details

Add more information about the Meeting. Type it directly into the edit box or paste text from other applications.

You can also attach files to your Meeting. This is useful if you want to attach a file that other invited users should view before the Meeting.

1. Click **Attach** to attach a file to your Meeting or **Remove** to detach it.
2. Select the document you want to attach.

## Reminders

Set Reminders for the Meeting. Reminders can either be Pop-up Windows or Upcoming Reminders that appear in the Notes View of your Daily and Weekly Agenda pages. They are there to remind the user that the Entry to which it refers is approaching.

1. Select On [Display Reminders].
2. In the first drop-down list box, choose whether you wish to be reminded with a Display Upcoming Reminder or a Pop-up Window.

3. Use the next two boxes to set when you want to be reminded. Depending on your selection, choose to be reminded minutes, hours, days, weeks, months or years in advance.
4. Select **Apply to all** if you want the Reminders to apply to all instances of a repeating Entry.



If you are viewing a Repeating Meeting, a list box displays all scheduled dates. The Reminders you set only apply to dates you have selected.

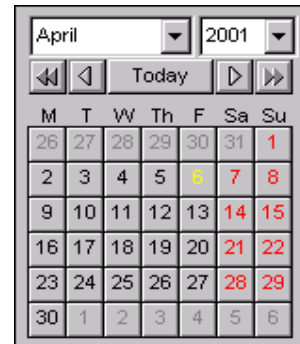
## Reply

Indicate your intention to attend or not attend the Meeting. If it is a Repeating Meeting, your reply applies to all instances selected in the list box. This tab does not appear in the New Meeting dialog box.

1. Select the appropriate checkbox from the list.
  - I will attend
  - I will not attend
  - I will confirm later
2. The message “I would prefer another time” can accompany an accepted or refused reply.
  - Select the message along with “I will attend” to indicate that you will attend but would prefer that the Meeting be scheduled at another time.
  - Select the message along with “I will not attend” to indicate that you would attend the Meeting if it were scheduled at a more convenient time.

3. To send an e-mail message with your reply, click the Mail Message button.
4. Click **OK**.

## The Calendar

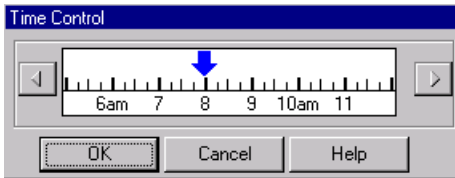


*The Calendar appears when you click the Calendar button on an Agenda page or in an Entry dialog box.*

The Calendar allows you to go directly to a selected date. Use it to change the date range on an Agenda page or to search for a date when you create an Entry.

- Moves calendar dates back one month
- Moves calendar dates forward one month
- Moves calendar dates back one year
- Moves calendar dates forward one year
- Selects current date

## The Time Control



*The Time Control opens when you click the Clock button.*

The Time Control opens when you click the Clock button. Select a time in a corresponding time box. To adjust the Time Control:

- Click the left or right arrows to move the blue arrow in one-hour intervals. The selected time is displayed in the corresponding Time box.
- Click the blue arrow and drag it until it points at the desired time. Move the Time Control in 15-minute intervals.
- Click directly on the desired time if it is visible in the Time Control.

## Scheduling conflicts

The Conflicts Found dialog box alerts you whenever you reschedule a Meeting and cause a conflict in the process. This can happen when you drag and drop a Meeting and create a conflict for an invited user or Resource.

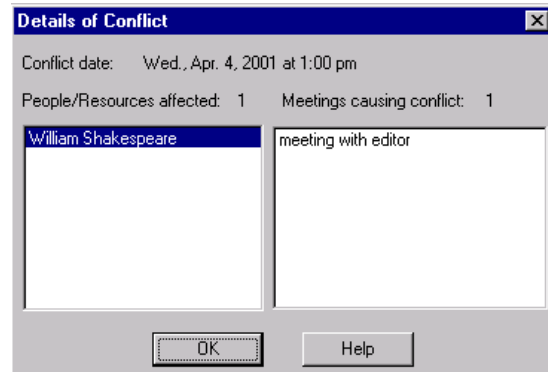
When you edit a Meeting and cause a conflict, you are asked if you want to move the Meeting:

- Click **Yes** to move the Meeting anyway.
- Click **No** to cancel the move.
- Click **View** to view the Details of Conflict dialog box before making your decision.

If you create the Meeting anyway, the conflicting Meetings are shown side-by-side in that user's Agenda. That user must decide how to resolve the conflict.

The Details of Conflict dialog box provides information about conflicts caused by the Meeting you are creating, editing, or rescheduling.

- The left-hand list box shows which attendees have a conflicting Meeting.
- The right-hand list box lets you view the Meetings that conflict for the attendee in the left-hand list box.



*In this example, William's Meeting with his editor conflicts with the proposed Meeting.*

## Suggesting another date or time

CorporateTime can suggest alternative dates or times for a Meeting you are scheduling. It searches the attendees' Agendas within a range of dates and times that you specify. This is done in order to find a time frame long enough to fit the new Meeting.

1. Enter the date range you would like CorporateTime to search, as well as the duration of the Meeting.
2. Enter the time range for CorporateTime's search. Enter the time manually or search within all attendees' Normal or Extended hours. For more information, see "Scheduling Preferences" on page 73.
3. Select the maximum number of suggestions you would like to receive. It is recommended that you choose 15 or less.
4. Click **List Suggestions**. Times are listed in the edit box.
5. Choose a time and customize it in the selected date and time boxes.
6. Click **OK**. The time you chose will appear in the Meeting dialog box.

## Viewing Meetings

Use the View Meeting dialog box to view Meetings you do not own. It has five tabs: General, Details, Linked Tasks, Reminders and Reply. The Linked Tasks, Reminders and Reply tabs all function the same way as in the Create or Edit Meeting dialog boxes.

When viewing another user's Agenda, only the General and Details tabs appear when you view a Meeting to which you are not invited.

### To view a Meeting:

- Select the Meeting and press **F5 [Command+Return]**.
- Select the Meeting and choose Edit menu > View Meeting.
- Double-click the Meeting.
- Right-click [**Control+Click**] the Meeting and choose View Meeting.

## General

View basic information about a Meeting:

- Title
- Location
- Date and times
- Invited people and resources

You cannot edit anything on this tab. You can only view information about the Meeting.

## Details

View additional information added to the Meeting. If the owner included an attachment, it is displayed here. If the application required to open the file is installed on your machine, the application's icon appears with the attached file.

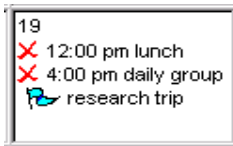
To retrieve an attached file:

- Click **Save As** to save the file in a local directory.

- Double-click the icon to open the file in the associated application. If the application required to open the file is not installed on your machine, you will be prompted to find an application that can open the file.

## Day Events and Daily Notes

A Day Event is an Entry that runs for an entire day but does not block out time in your Agenda. You may want to create a Day Event in your Agenda indicating that someone from another company is visiting your office for the day. You could enter this visit as a Day Event. If you then wanted to reserve part of your day to meet with that person, you would enter that as a Meeting.



*James is on a research trip for the day. He entered a Day Event to indicate his absence, and refused two Meetings that he will be unable to attend because of the trip.*

Daily Notes are memos that serve to remind you of things you need to do or remember on a given day. You may want to create a Daily Note in your Agenda indicating that you need to call a customer at some point that day. If you then wanted to reserve part of your day to meet with that person, you would enter that as a Meeting.

Both Day Events and Daily Notes appear in the Notes View of Daily and Weekly Agenda pages and after Meetings on the Monthly Agenda page.



*The Monthly Agenda shows that James has to pick up his laundry. Since this activity will not take up the whole day, as the research trip did, he entered the information in his Agenda as a Daily Note.*



It is recommended that you set your Day Event and Daily Note defaults by choosing Options menu > Entry Defaults. This allows you to set the default Access level and Reminders used when you create a Day Event or Daily Note. For more information, see “Entry Defaults” on page 81.

## Creating and editing

The New Day Event and New Daily Note dialog boxes have the same tabs: General, Options, Repeating and Reminders. Each tab lets you add features to your Entry.

The Edit Day Event and Edit Daily Note dialog boxes have all the same tabs and functionality featured in the New dialog boxes, as well as an Agenda tab that lets you change your reply status to the Entry.

### General

Enter the following information about your Entry:

- Title
- Date
- Invited people and resources

**To create a Day Event:**

- Click the New Day Event button on the Toolbar.
- Press **F4 [Command+E]**.
- Choose Edit menu > New > Day Event.
- Right-click [Control+Click] an Agenda page and choose New Day Event.

**To create a Daily Note:**

- Click the New Daily Note button on the Toolbar.
- Press **F3 [Command+D]**.
- Choose Edit menu > New > Daily Note.
- Right-click [Control+Click] an Agenda page and choose New Daily Note.
- Double-click the Notes View on a Daily or Weekly Agenda page.

**To edit a Day Event or a Daily Note:**

- Select the Entry and press **F5 [Command+Return]**.
- Select the Entry and choose Edit menu > Edit Day Event/Edit Note.
- Double-click the Entry on an Agenda page or in your In-tray.
- Right-click [Control+Click] the Entry and choose Edit Day Event/Edit Note.

**Options**

Choose an Access level for your Entry. Access Rights determine which users can see Entries you create.

Select the Access level from the drop-down list box. There are four levels: Personal, Confidential, Normal and Public.

For more information, see “About Access Levels” on page 69.

**Repeating**

The Repeating tab functions the same way as in the Create or Edit Meeting dialog boxes. However, you cannot specify a time range because Day Events and Daily Notes have no start or end times.

**Reminders**

The Reminders tab functions the same way as in the Create or Edit Meeting dialog boxes.

**Agenda**

Display or hide the Entry from your Agenda. If it is a Repeating Day Event or Daily Note, your reply will apply to all instances selected in the list box. This tab does not appear when you are creating a Day Event or Daily Note.

The Agenda tab lists the following information about the Entry:

- Title
- Owner
- Date
- Access level
- Invited people and resources

Select the appropriate reply from the list:

- Keep in Agenda
- Remove from Agenda
- Decide later

## Viewing

The View Day Event and View Daily Note dialog boxes let you view Entries you do not own. Both dialog boxes have the same tabs: General, Reminders and Agenda. Only the General tab appears when you view an Entry to which you are not invited.

### To view a Day Event or Daily Note you do not own:

- Select the Entry and press **F5** [**Command+Return**].
- Select the Entry and choose Edit menu > View Event.
- Double-click the Entry.
- Right-click [**Control+Click**] the Entry and choose View Entry.

## General

View basic information about the Entry:

- Title
- Owner
- Date
- Invited people and resources

## Reminders

The Reminders tab of the View Entry dialog box functions the same way as the New Day Event, New Daily Note and Edit Entry Reminders tabs. For more information, see “Reminders” on page 21.

## Agenda

The Agenda tab of the View Entry dialog box functions the same way as the New Day Event, New Daily Note and Edit Entry Reply tabs. For more information, see “Agenda” on page 21.

## Tasks

Tasks allow you to keep track of projects you must complete. Your Task can have a due date, due time, start date and start time. Keep track of all your assignments and responsibilities by adding them to your Task View (File menu > Tasks > Open).



It is recommended that you set your Entry Defaults before you start creating Entries (Options menu > Entry Defaults). That way, you will not always have to change the Entry Defaults manually whenever you create an Entry. For more information, see “Entry Defaults” on page 81.

## Creating and editing Tasks

The New Task and Edit Task dialog boxes have three tabs: General, Reminders and Details.

## General

Enter basic information about your Task. This information may include any of the following:

- Description of your Task
- Due date and time
- Start date and time
- Priority
- Access level

- Percentage Completed or Completion date

## Reminders

Set Reminders for the start and/or due time of the Task you are creating or editing. Reminders can either be Pop-up Windows or Upcoming Reminders that appear in the Notes View of your Daily and Weekly Agenda pages. They are there to remind the user that the Event time is approaching.

1. Select the Set Reminders for Due Time and/or Set Reminders for Start Time.
2. In the first drop-down list box, choose whether you wish to be reminded with a Pop-up Window or a Display Upcoming Reminder.
3. Use the next two boxes to set when you want to be reminded. Depending on your selection, you can choose to be reminded minutes, hours, days, weeks, months, or years in advance.

## Details

Add comments to your Task. Type information directly into the edit box or paste text from other applications.

You can also attach files to your Task using this tab. This is useful if you want to attach a file that you need to accomplish the Task.

1. Click **Attach** to attach a file or **Remove** to detach it.
2. Select the document you want to attach.

3. Click **OK**. If the application required to open the file is installed on your machine, its icon will appear with the attached file on the Details tab of the Edit Task dialog box. If not, you will be prompted to find an alternate application to open the application when you double-click the icon.

### To create a Task:

- Click the New Task button on the Toolbar.
- Press **F7 [Command+T]**.
- Choose Edit menu > New > Task.
- Double-click anywhere in the Task Display.
- Double-click the Task View on your Daily Agenda page.
- Type a title in the Task Display edit box.
- Right-click [**Control+Click**] an Agenda page and choose New Task.

### To edit a Task:

- Select the Task and press **F5 [Control+Return]**.
- Select the Task and choose Edit menu > Edit Task.
- Double-click the Task.
- Right-click [**Control+Click**] the Task and choose Edit Task.

## Viewing Tasks

The Windows View Task dialog box has three tabs: General, Reminders and Details. The Macintosh View Task dialog box has two tabs: General and Details.

## General

View basic information about the Task:

- Description of the Task
- Due date and time
- Start date and time
- Priority
- Access level
- Percentage Completed or Completion date



## Reminders

The Reminders tab of the View Entry dialog box functions the same way as the New Day Event, New Daily Note and Edit Entry Reminders tabs. For more information, see “Reminders” on page 21.

## Details

View any additional information included with the Task. If the owner included an attachment, it is displayed here. If the application required to open the file is installed on your machine, the application's icon will appear with the attached file.

To retrieve an attached file:

- Click **Save As** to save the file in a local directory.
- Double-click the icon to open the file in the associated application. If the application required to open the file is not installed on your machine, you will be prompted to find an application that can open the file.

### To view a Task:

- Select the Task and press **F5**.
- Select the Task and choose Edit menu > View Task.
- Double-click the Task.
- Right-click [Control+Click] the Task and choose View Task.

## Deleting Tasks

To delete a Task you own:

- Select the Task and choose Edit menu > Delete Task.
- Click the Task and press the Delete key.
- Right-click [Control+Click] the Task and choose Delete Task [Clear Task].

## Duplicating Tasks

Duplicating a Task lets you replicate a selected Task. Unlike copying and pasting, duplicating reproduces all Task information. This is useful if you have two similar projects that need to be completed.

To duplicate a Task:

- Select the Task and choose Edit menu > Duplicate Task.
- Select the Task and press **Ctrl+2** [Shift+Command+D].
- Right-click [Control+Click] the Task and choose Duplicate Task.

# Holidays

You can only create Holidays if your System Administrator has given you authorization to do so. The Holidays dialog box (Directory menu > Manage Holidays) allows you to add and delete company Holidays. Holidays are displayed in the Notes View of your Daily and Weekly Agenda pages and appear next to the date on Monthly Agenda pages. Holidays are sent to every user on the server.

## Creating Holidays

New Holidays appear in the New Entries folder of your In-tray. Decide whether or not to keep the Holidays in your Agenda.



You cannot edit Holidays. If you want to make changes to a Holiday, you must delete it and recreate it in the Manage Holidays dialog box.

### To create a Holiday:

If you have the authorization, create a Holiday by choosing Directory menu > Manage Holidays. Enter the Holiday's title and date in the boxes and click the Checkmark button to add it to the list of Holidays.

## Viewing Holidays

The View Holiday dialog box has three tabs: General, Reminders and Agenda. The Reminders and Agenda tabs function the same way as with Daily Notes and Day Events.

Only the General tab appears when you view a Holiday in someone else's Agenda.

### To view a Holiday:

- Select the Holiday and Press **F5** [**Command+Return**].
- Select the Holiday and Choose Edit menu > View Holiday.
- Double-click the Holiday.
- Right-click [**Control+Click**] the Holiday and choose View Holiday.

## General

View basic information about the Holiday:

- Title
- Date

# Working with Entries

## Duplicating an Entry

Copy a selected Entry to another date or time. Unlike copying and pasting an Entry, duplicating an Entry copies all Entry information (dates, attachments, etc.). This is useful if you have a new Entry to schedule that is similar to an existing Entry in your Agenda.

### To duplicate an Entry:

- Click an Entry and press **Ctrl+2** [**Shift+Command+D**].
- Click an Entry and choose Edit menu > Duplicate Entry.

## Rescheduling an Entry

Choose Edit menu > Reschedule Entry to take a selected Entry and move it to another date or time. Unlike cutting and pasting an Entry, rescheduling an Entry copies all Entry information (Access level, attachments, etc.). This is useful if you quickly need to change the date of an existing Entry in your Agenda..

To reschedule an Entry:

- Click an Entry and press **Ctrl+M** [**Shift+Command+R**].
  - Click an Entry and choose Edit menu > Reschedule Entry [Move Entry].
  - Right-click [Control+Click] an Entry and choose Reschedule Entry [Move Entry].
1. Set the new date in the Date edit box. Enter the date by typing it directly into the Date box, using the arrows or clicking the Calendar button.
  2. Meetings only: Set the start and end times by entering them directly in the Time box, using the arrows or clicking the Clock button.
  3. Meetings only: Click **Suggest Another Date** if you would like your Agenda to help you find a new time or date to schedule the Entry.

## Printing Entries

To print an Entry:

- Select an Entry and press **F11** [**Shift+Command+P**].

- Select an Entry and choose File menu > Print Selected Entry.

From the Print dialog box, select printing and layout options before printing the Entry. For more information, see “Layout Options” on page 90.

## Deleting Entries

To delete an Entry you own from your Agenda:

- Select the Entry and press the Delete key.
- Select the Entry and choose Edit menu > Delete Entry [Cut Entry].
- Right-click [Control+Click] the Entry and choose Delete Entry [Cut Meeting].



You cannot delete an Entry you do not own. The only way to make the Entry disappear from your Agenda is to refuse it and to have your preferences set to hide declined Meetings (Options menu > Agenda > Display).

# 3

## Agenda Pages

As a time management solution, CorporateTime offers you a great deal of control over your Agenda. Schedule Meetings with other users, create Tasks for important projects and use Address Books to keep track of business and personal contacts.

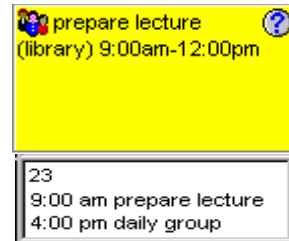
However, the way in which you manage your time depends heavily on how you navigate through your Agenda. This chapter focuses on the different Agenda pages, and how you can use them to manage your schedule effectively.

- "Daily and Weekly Agendas", page 28
- "Monthly Agendas", page 31
- "The Group View", page 33
- "Date Control Bars", page 35

Depending on which Agenda view you are working in, you will see Entry information in more or less detail. Create and edit Entries directly on any Agenda page while you are working in your own name.

There are four types of pages:

- Daily
- Weekly
- Monthly
- Group View



*These two images display the same Meeting. The first image shows how it appears in the Daily Agenda, while the second shows it in the Monthly Agenda.*

Change the date range shown using the Date Control Bar. The Toolbar lets you change what type of Agenda you are in, create new Entries or open another window, such as the Task View or the In-tray.

### Opening an Agenda

Whenever you launch the application, CorporateTime opens your Agenda and In-tray by default. If it is your first time using the product, the Daily Agenda is shown. Otherwise, CorporateTime uses the Agenda view you were in when you last exited the application.

To open an Agenda:

- Click the Open Agenda button on the Toolbar.

- Press **Ctrl+A [Command+O]**.
- Choose File menu > Agenda > Open.

From the Open Agenda dialog box, choose whose Agenda you want to open:

- To open a user's Agenda, including your own, type the user name in the edit box.
- To open the Agenda of a Resource, type r:, re: or res: followed by its name.

## Working in an Agenda

In your Agenda, you are free to create, edit and delete Entries as you wish. However, if you are working in another user's Agenda, you may only view Entries based on the Access Rights that user has given you.

To modify Entries in another user's Agenda, that user must give you Designate Rights. For more information, see "Designates" on page 63.

As a Designate, you can also view Entries based on the rights that user has given you. You will not be able to edit Entries you own until you return to working in your own Agenda.

## Working with Meetings in an Agenda

- To create a Meeting, select time slots to include and double-click the highlighted area.
- To edit a Meeting, double-click a Meeting you own.
- To view a Meeting, double-click a Meeting you do not own.
- To delete a Meeting, select a Meeting you own and press the Delete key.

- To reschedule a Meeting, select a Meeting and press **Ctrl+M [Shift+Command+R]**.
- To duplicate a Meeting, select a Meeting and press **Ctrl+2 [Shift+Command+D]**.
- To print a Meeting, select a Meeting and press **F11 [Shift+Command+P]**.

For more information, see "Meetings" on page 14.

# Daily and Weekly Agendas

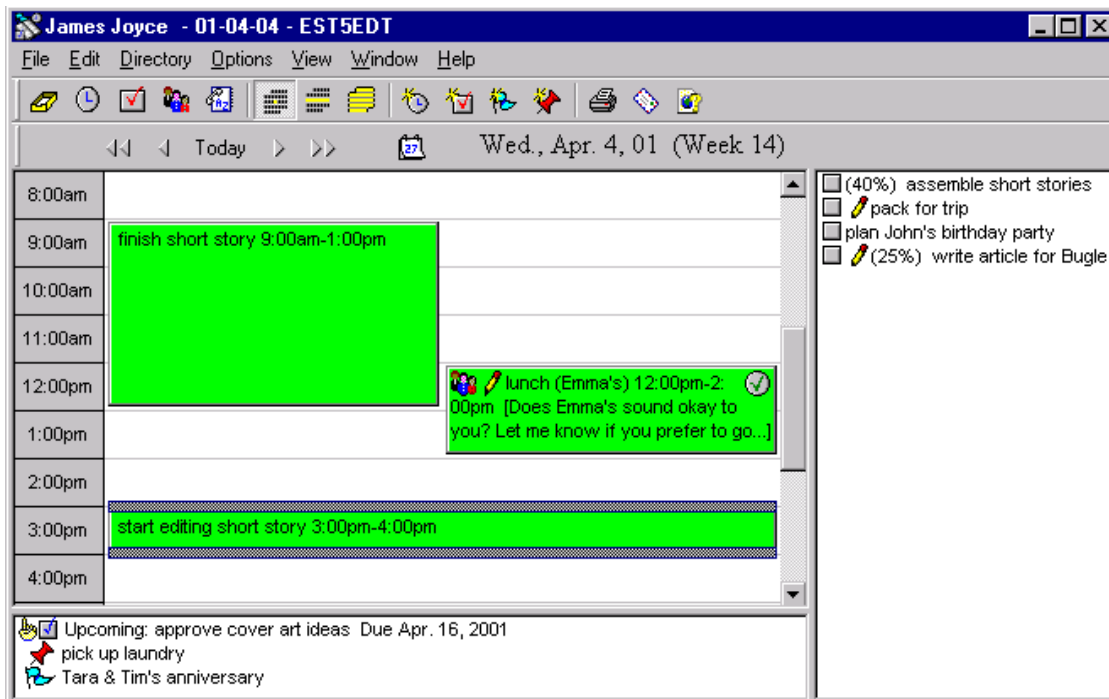
Use the Daily Agenda to view a day's activities. Because it only shows one day of the week, you will probably not want to use the Daily Agenda to manage your long-term schedule. However, it is very useful for viewing a particular day in detail.

The Daily Agenda is divided into four parts:

- The Day View
- The Notes View
- The Task List
- The Date Control Bar. For more information, see "Date Control Bars" on page 35.

The Weekly Agenda gives you less detail than the Daily Agenda, but allows you to efficiently manage a weekly schedule from within a single view. It is divided into three parts:

- The Week View
- The Notes View
- The Date Control Bar. For more information, see "Date Control Bars" on page 35.



*The Daily Agenda is the only Agenda page where you are also able to view Tasks.*

The Daily and Weekly Agendas display some information using icons. This allows you to see that more information exists about an Entry without opening its edit/view dialog box. For more information, see “Daily, Weekly and Group Views” on page 117.

## Day and Week Views

The Day View breaks your day into time slots. The Week View features a week’s worth of Day Views side by side. Meetings are displayed in the Day and Week Views.

Customize what you see in your Day and Week Views:

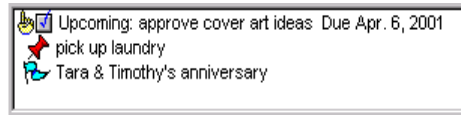
- **Row Height:** Modify the size of the time slots by selecting View menu > Decrease/Increase Row Height. View as many or as few Meeting details as you choose.
  - **Time Slot:** Change the time range each slot represents by choosing View menu > Decrease/Increase Time Slot. Time slots can represent anywhere from 5 to 60 minutes.
  - **Meeting Colors:** Choose View menu > Meeting Colors to color-code your scheduled Meetings according to their importance level, attendance status or ownership.
  - **Display:** Choose Options menu > Agenda > Display and decide what Meeting information (icons, details, location, etc.) is shown. Decide whether Saturdays and Sundays should be shown and what day of the week to list first.
- For more information, see “Display” on page 78.

In any view, clicking **Tab** selects the next Meeting in chronological order. Clicking **Shift+Tab** takes you in reverse chronological order. CorporateTime displays conflicting Meetings side by side.

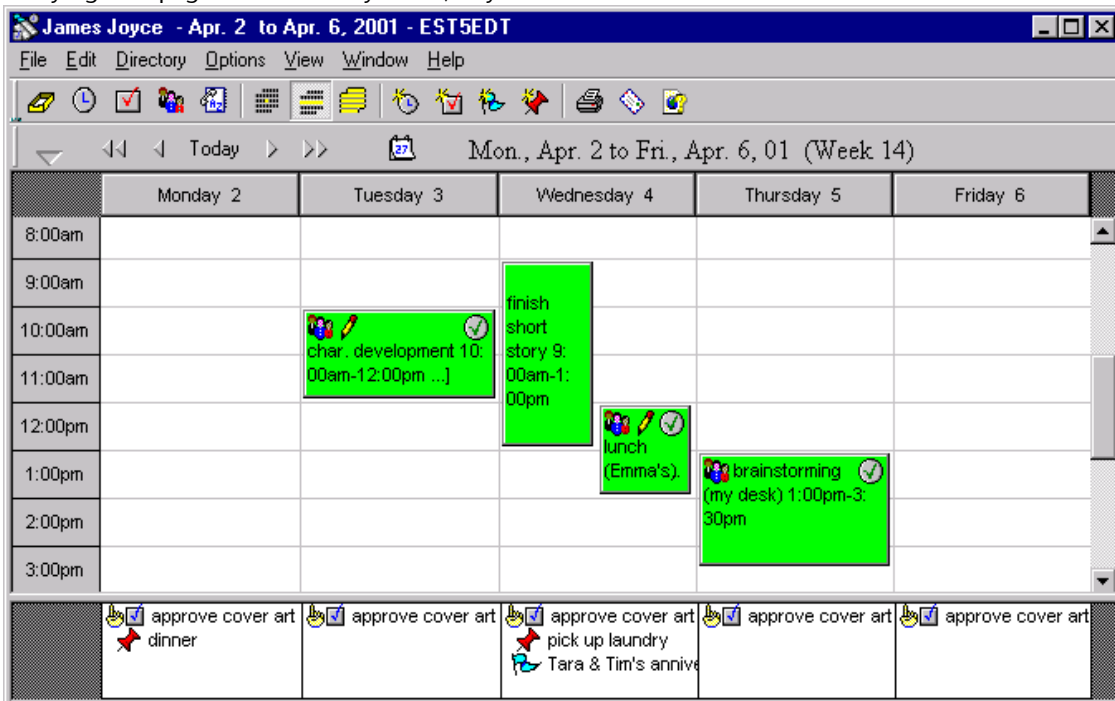
Events, Holidays and Upcoming Reminders for the period being viewed. The Upcoming Reminder icon appears beside the corresponding Entry icon.

## The Notes View (Daily and Weekly Agendas)

The Notes View appears under the Day View on a Daily Agenda page and under the Week View on a Weekly Agenda page. It lists all Daily Notes, Day



*Upcoming Reminders always appear first in the Notes View.*




*Customize your Weekly Agenda's appearance according to your preferences. Decide how many days to display, the icons that are shown, the size of time slots and how Meetings are color-coded.*

### Working with Entries in the Notes View

- To create a Daily Note, double-click under the last listed Entryd
- To create a Day Event, press **F4 [Command+E]**.
- To edit an Entry, double-click an Entry you own.
- To view an Entry, select an Entry you do not own and choose Edit menu > View Entry.

- To delete an Entry you own, select the Entry and choose Edit menu > Delete Entry [Clear Entry].
- To rescheduling an Entry, select the Entry and choose Edit menu > Reschedule Entry [Move Entry].
- To duplicate an Entry, select the Entry and choose Edit menu > Duplicate Entry.
- To print an Entry, select the Entry and choose File menu > Print Selected Entry.

For more information, see “Day Events and Daily Notes” on page 20.

 If you double-click an Upcoming Reminder for an Entry you own, the Edit dialog box of the Entry opens (the View dialog box opens if you do not own the original Entry).

## The Task List (Daily Agendas)

The Daily Agenda allows you to view Tasks on the same page as other Entries. The Task List runs down the right-hand column of the Daily Agenda. Tasks do not appear in Weekly or Monthly Agendas, but you may access them by opening a Task View (File menu > Tasks > Open). For more information, see “Opening a Task View” on page 41.

The Task List displays three types of Tasks:

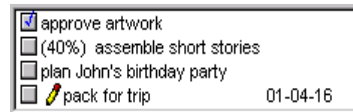
- Active Tasks (Tasks whose start dates have passed)
- Tasks with a due date in the future (for Tasks without a start date)
- Tasks that are overdue on the date you are viewing

A small box appears next to each Task, indicating its completion status. Tasks are sorted by due date, beginning with those without a due date. Icons may appear next to your it. For more information, see “Task View and Task Display” on page 119.

## Working in the Task List

- To create a Task, double-click under the last listed Task.
- To edit a Task, double-click a Task you own.
- To view a Task, double-click a Task you do not own.
- To delete a Task, select the Task and press the Delete key.
- To complete a Task, click the checkbox.
- To duplicate a Task, select the Task and press **Ctrl+2** [**Shift+Command+D**].
- To print a Task, select the Task and press **F11** [**Shift+Command+P**].

For more information, see “Tasks” on page 22.



*The checkmark indicates the task has been completed.*

## Monthly Agendas

Use the Monthly Agenda to view a month's activities at a glance and plan your long-term schedule. The Monthly Agenda offers a broader view of your Agenda but does not provide as much detail as the Daily or Weekly Agendas. It is divided into two parts:

- The Month View
- The Date Control Bar. For more information, see “Date Control Bars” on page 35.

	Monday	Tuesday	Wednesday	Thursday	Friday
13	26 4:00 pm daily group	27 4:00 pm daily group	28 4:00 pm daily group	29 4:00 pm daily group	30 4:00 pm daily group
14	2 4:00 pm daily group dinner	3 10:00 am char. developn 4:00 pm daily group	4 9:00 am finish short stor 12:00 pm lunch	5 1:00 pm brainstorming 4:00 pm daily group	6 4:00 pm daily group 7:00 pm writing circle
15	9 4:00 pm daily group	10 4:00 pm daily group	11 4:00 pm daily group assemble notes for	12 4:00 pm daily group assemble notes for	13 4:00 pm daily group out with the boys i
16	16 4:00 pm daily group pick up laundry	17 12:00 pm annual lamb 4:00 pm daily group	18 4:00 pm daily group research trip	19 12:00 pm lunch 4:00 pm daily group	20 9:00 am organize notes 4:00 pm daily group
17	23 9:00 am prepare lecture 4:00 pm daily group	24 4:00 pm daily group	25 4:00 pm daily group pick up laundry	26 11:30 am lunch? 4:00 pm daily group	27 4:00 pm daily group last day of museu
18	30 4:00 pm daily group	1 4:00 pm daily group	2 11:30 am lunch?	3 pick up laundry	4 7:00 pm writing circle

Any grid squares not used for the current month display show some of the dates of the previous or following month in gray. The current date is displayed in red, with its grid square in shaded yellow.

## Month Views

The Month View displays Meetings, Daily Notes, Day Events and Holidays, listed daily in that order. Holidays appear in red next to the date along the upper edge of the grid square. Scroll through Entries in a grid square using the cursor keys on your keyboard.

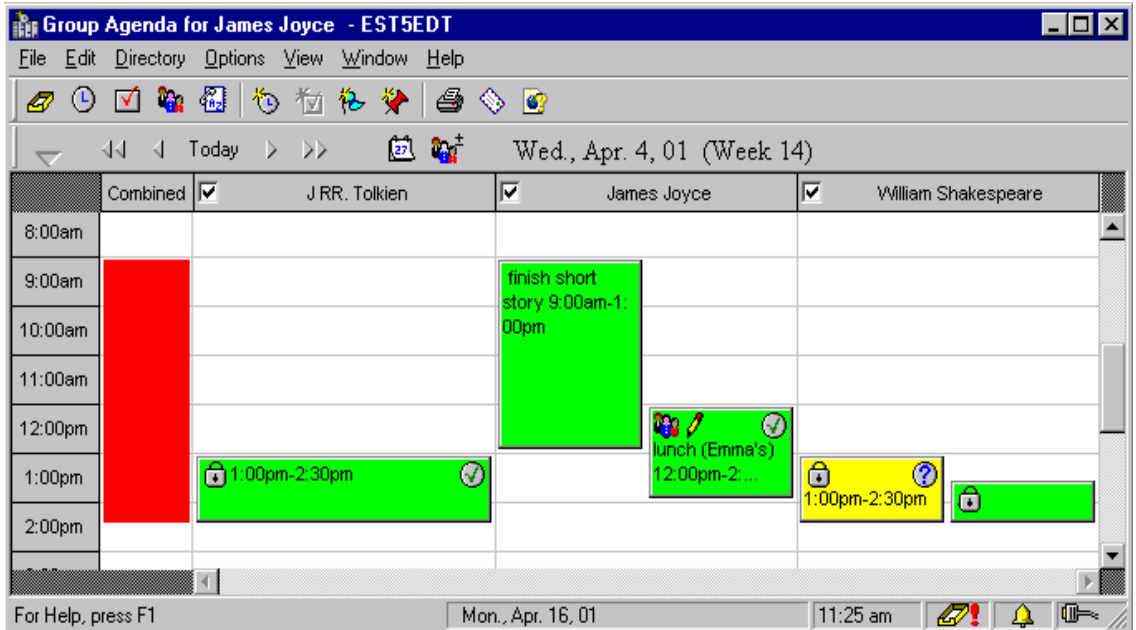
When a grid square has more Entries than displayed, the More icon indicates that there are additional Entries listed below the visible ones. Click the top of a day grid to view that day's Daily Agenda or a week number on the left hand side of the page to view that week's Weekly Agenda.

The Month View breaks the days of a month into grid squares. Customize it by choosing Options menu > Agenda > Display:

- Weekends: Decide whether Saturdays and Sundays should be shown.
- Start day: Decide which day of the week to list first.

## The Group View

The Group View is a convenient, visual way of scheduling an Entry with other users and Resources.



*Time slots blocked off in the Combined View show when Group Agenda members have Meetings scheduled.*

The Group Agenda allows you to open several user and Resource Day Views side by side, letting you view their Meetings and schedule Entries at a time that is convenient for everyone. It is divided into two parts:

- The Group View
- The Date Control Bar. For more information, see “Date Control Bars” on page 35.

- Click the Group button on the Toolbar.
- Press **Ctrl+G** [**Command+G**].
- Choose File menu > Agenda > Open Group View.

This opens the Open Group View dialog box, where you can select which users and Resources to include in your Group Agenda.

### Opening a Group View

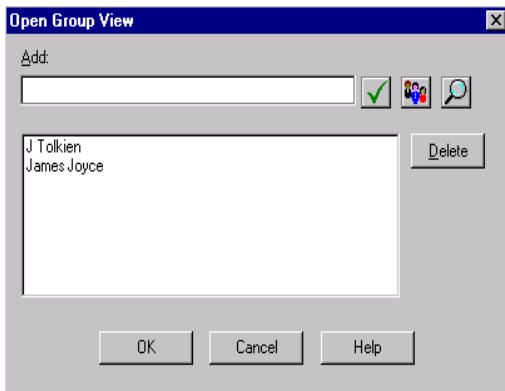
To open a Group Agenda:

## Open Group View

The Open Group View dialog box lets you add members to the Group Agenda you are creating or editing. You can even view the daily schedules of people or Resources for whom you do not have booking rights.

- To add a user, type the user's name or initials in the edit box.
- To delete one or more names from the list box, select the names and click **Delete**.
- To add a group, type g:, gr: or grp: followed by the group's name or click the Group button. Alternatively, type its name by itself, or enough characters to distinguish it from all user names.
- Click the Search button if you are unsure of the name of a user or Resource you wish to add.

To add or remove people from your Group Agenda, open the Modify Members dialog box by clicking its button on the Date Control Bar.



*The Open Group View dialog box lets you add users and Resources to a Group Agenda.*

## Creating Meetings in the Group View

The Combined column is on the far left of the Group Agenda. It displays the availability of all the users and Resources you have included in a Group View. Unavailable times are marked in red.

1. To invite all of the Group View's users and Resources to a Meeting, use the Combined column. Select the desired time slots and double-click the highlighted area. The New Meeting dialog box will open. If you prefer to schedule a Meeting with only one of the users or Resources included in a Group View, double-click the desired time slot in his column.
2. Add and delete users and Resources from the invited list as you would when creating any other Entry. Edit the Meeting later by selecting it in your Agenda and choosing Edit menu > Edit Meeting.

You can remove a user or Resource from the Combined column or reinstate him by clicking on the checkbox beside his name. There are three possible statuses for each person or Resource in the Group View:

- **Included:** Users or Resources that you have decided to keep in the Combined column. The checkbox will be selected.
- **Excluded:** Users or Resources that you have decided to keep out of the Combined column. The user's checkbox will not be selected and their column will be shown on a gray background.
- **Read-only:** Items that you can view but cannot book for an Entry. All read-only items are excluded and so are shown on a gray background.

## Date Control Bars

Change an included or excluded item's status by clicking on its checkbox. You cannot change the status of a read-only item, since you do not have booking rights for that user or Resource.

## Resizing Agenda Views

Resize your Agenda Views to suit your needs. The cursor changes when you point at the splitters that separate the views.

To resize the views, click the splitters and drag them to the new location.



*The Up and Down arrows indicate that there are Meetings not visible on-screen because they are earlier and later in the day.*

The Date Control Bar runs along the upper edge of your Agenda pages, to the left of the date range you are viewing. It lets you change pages in the current Agenda with a click of a button. At the far left of the Date Control Bar, you may see arrows pointing upwards or downwards. They indicate that there are Meetings earlier and/or later in the day that are not visible on-screen.

The following table shows you what each button does in each type of Agenda:

	Daily Agendas	Weekly Agendas	Monthly Agendas	Group Views
	Moves you back one day	Moves you back one week	Moves you back one month	Moves you back one day
	Moves you forward one day	Moves you forward one week	Moves you forward one month	Moves you forward one day
	Moves you back one week	Moves you back four weeks	Moves you back six months	Moves you back one week
	Moves you forward one week	Moves you forward four weeks	Moves you forward six months	Moves you forward one week
	Opens the current day's Agenda	Opens the current week's Agenda	Opens the current month's Agenda	Opens the current day's Agenda
	Lets you select a specific date	Lets you select a specific date	Lets you select a specific date	Lets you select a specific date
	n/a	n/a	Restores the default grid	n/a
	n/a	n/a	n/a	Lets you edit the users and Resources in the Group Agenda

## Dragging and dropping Entries in an Agenda

Manually drag and drop Entries on your Agenda pages without opening an Entry Edit dialog box.

1. Click and hold the Entry with your mouse.
  - If the cursor changes, you have the right to move the Entry.
  - If the cursor does not change, you do not own the Entry and so cannot move it.
2. Drag the Entry to your desired location. If you drag it somewhere it cannot be placed, the Cannot Drop It Here cursor appears.



You can only drag and drop Entries you own in CorporateTime. Drag and drop an Entry out of CorporateTime in vCalendar format by holding down the [Ctrl] key. For more information, see “Exporting vCalendar Entries” on page 102.



When you drag a Meeting, it snaps to the time slot interval you are using in your Agenda. For example, if each of your time slots is a 15-minute duration, your Meeting snaps to the nearest quarter-hour division. To move an Entry by a smaller amount of time, select the Entry and hold down the **Ctrl** [Control] key while dragging.

## Changing a Meeting's duration

1. Click the Meeting to select it. The frame of the selected Meeting becomes highlighted. When you point at the handles, the cursor changes.
2. Click the handle you want to move and drag it to lengthen or shorten the Meeting.

## Moving a Meeting

1. Click and hold a Meeting. The drag cursor appears.
2. Drag the Meeting to its new location.

# 4

## The In-tray

A key aspect to managing your schedule through CorporateTime is the In-tray. Its intuitive drag-and-drop mechanism allows you to respond quickly to new Entries and keep track of those you have sent out.

This chapter describes the In-tray and how to use it:

- “In-tray Folders,” page 37
- “Replying to Entries in the In-tray,” page 38
- “Working in the In-tray,” page 39

The New Entries alert icon appears on the status bar when your Agenda contains Entries to which you have not yet responded.

To open your In-tray:

- Click the Open In-tray button on the Toolbar.
- Press **Ctrl+I** [**Command+I**].
- Choose File menu > Open In-tray.



You cannot open another user's In-tray. The only time you can view someone else's In-tray is when you are working as that user's Designate. The user's Entries then appear in a labeled folder in your In-tray.

### In-tray Folders

When you open your In-tray, a folder labeled with your name appears. If you are currently working in another user's Agenda as a Designate, a folder with that user's name is also displayed.

Click a folder icon to open or close it. Your folder contains four subfolders:

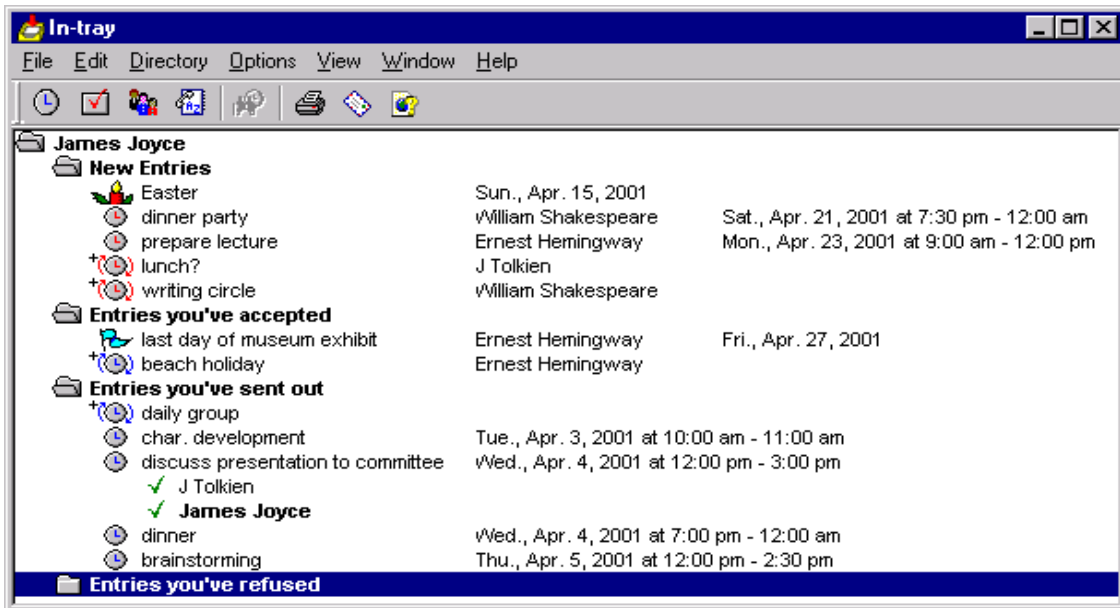
- New Entries
- Entries you've accepted
- Entries you've sent out
- Entries you've refused

Opening a subfolder displays its contents. Each Entry is preceded by an icon identifying it as a Meeting, Daily Note, Day Event or Holiday.

The Entries that appear in the In-tray depend on your In-tray Preferences (Options menu > In-tray). View all your Entries, or those scheduled within a specific time period. For more information, see “In-tray Preferences” on page 80.

### New Entries

The New Entries folder contains Entries to which you have not yet replied. Check this folder regularly to keep track of Entries you have received.



*Click an Entry's icon to view attendees and their reply status.*



Using the Notification tab of the Agenda Preferences dialog box (Options menu > Agenda), you can display pop-up notification whenever you receive a new Entry. The New Entries icon appears on the status bar when a new Entry is added to your Agenda. For more information, see "Notification" on page 79.

## Entries you've accepted

The "Entries you've accepted" folder contains Entries you are planning to attend or keep in your Agenda. Double-click an Entry title to change your reply in the View Entry dialog box.

## Entries you've sent out

This folder contains Entries you have created and sent to other users. Double-click an Entry title to change your reply in the Edit Entry dialog box.

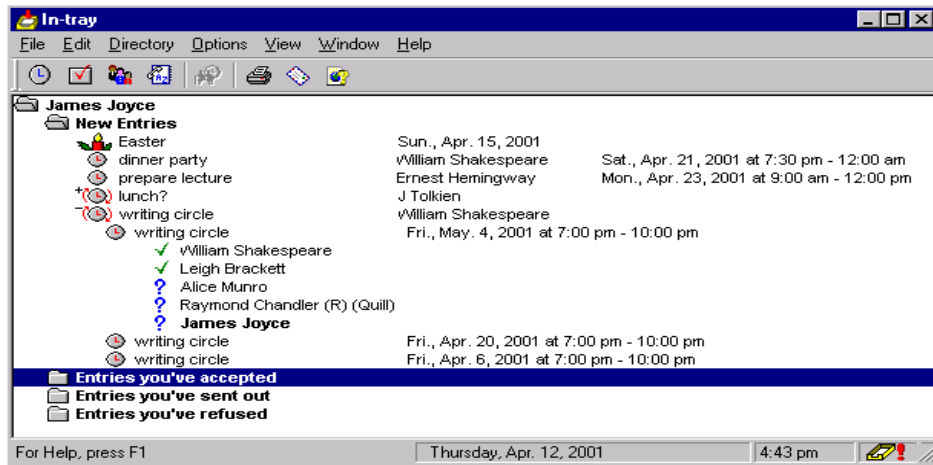
## Entries you've refused

This folder contains Entries you have decided not to attend or keep in your Agenda. Double-click an Entry title to change your reply in the View Entry dialog box.

## Replying to Entries in the In-tray

To reply to an Entry in the In-tray:

- Select the Entry and press F5 [Command+Return].



Click a Repeating Entry icon to view the Entry's instances and how attendees have replied to each instance.

- Select the Entry and choose Edit menu > View Entry/Edit Entry.
  - Drag and drop the Entry to the desired folder.
  - Double-click the Entry.
  - Right-click [Control+Click] the Entry and choose your reply from the menu.
3. In the list box at the bottom of the dialog box, choose the instances to which you want your reply to apply. Hold down the **Ctrl [Control]** key to select multiple instances or click **Apply to all** to select all instances.
  4. Select your reply from the list.

## Replying to Repeating Entries in the In-tray

To reply to all instances of a Repeating Entry at once, drag the Entry into the appropriate folder.

To reply to multiple instances of a Repeating Entry at once, do the following:

1. Click the Repeating Entry icon to view all instances of the Entry.
2. Double-click an instance to open the Agenda tab (Reply tab for Meetings) of the Edit Entry or View Entry dialog box.

## Working in the In-tray

- To reply to an Entry, select the Entry and drag it into the desired folder.
- To edit an Entry, double-click an Entry you own.
- To view an Entry, double-click an Entry you do not own.
- To delete an Entry you own, select the Entry and press the Delete key.
- To find an Entry in your Agenda from your In-tray, select an Entry and press **Ctrl+F [Command+F]**.
- To reschedule an Entry, select the Entry and press **Ctrl+M [Shift+Command+R]**.

- To duplicate an Entry, select the Entry and press **Ctrl+2 [Shift+Command+D]**.
- To print an Entry, select the Entry and press **F11 [Shift+Command+P]**.

# 5

## The Task View

Tasks are a convenient way to keep track of any projects you need to complete. Create Tasks, check their completion levels and even link Tasks to Meetings.

The Task View (File menu > Tasks > Open) lets you manage your Tasks from a single window. Create and edit your Tasks on one page and keep track of them with CorporateTime's easy, intuitive interface.




Next to each Task is a small box indicating its current status. When the box has a black outline, the Task's due date has not yet passed. When the box has a red outline, the Task is overdue. When the box is checked, the Task is complete.

This chapter describes the Task View and how to use it:

- "Opening a Task View," page 41
- "Viewing Tasks," page 42
- "Sorting Tasks," page 42
- "Working in the Task View," page 42

Task Views allow a user to see the Tasks owned by the current Task View's owner.

Some Tasks may also be shown with the following icons:

-  The Task has a reminder.
-  The Task has details.
-  The Task has an attachment.

### Opening a Task View

To open a Task View:

- Click the Open Task button on the Toolbar.
- Press **Ctrl+T** [**Command+K**].
- Choose File menu > Tasks > Open.

To open another user's Task View as a Designate, choose File menu > Tasks > Open As Designate. You are only able to view those Tasks that the user has granted you the Viewing Rights to see.

What you can do in a Task View depends on whose display you have open, what Access Rights you have in that display, and how you opened it:

	Your own Task View	Another user's Task View	Another user's Task View as a Designate
Create/edit Tasks	Yes	No	According to Access Rights
View Tasks	Yes	According to Access Rights	According to Access Rights

## Viewing Tasks

Decide what Tasks you want displayed and how you want them sorted by using the options from the View menu:

- Show All Tasks
- Show Incomplete Tasks
- Show Completed Tasks
- Show Active Tasks

- To edit a Task, double-click a Task you own.
- To view a Task, double-click a Task you do not own.
- To delete a Task, select the Task and press the Delete key.
- To complete a Task, click the Task's checkbox.
- To duplicate a Task, select the Task and press **Ctrl+2 [Shift+Command+D]**.
- To print a Task, select the Task and press **F11 [Shift+Command+P]**.
- To print all Tasks, press **Ctrl+P [Command+P]**.

## Sorting Tasks

Sort your Tasks in the Task View by:

- Description
- Due date
- Start date
- Priority
- Completion level

Alternatively, sort Tasks by clicking the heading by which you want to sort them.

For more information, see "Tasks" on page 22.

## Working in the Task View

- To create a Task, double-click under the last listed Task.

# 6

## Address Books

This chapter describes Address Books and Address Book Entries:

- “Personal Address Books,” page 43
- “Address Book View,” page 44
- “Address Book Entries,” page 44
- “Address Book Entry Bookmarks,” page 47
- “Published Address Books,” page 49
- “Backing up an Address Book,” page 49
- “Importing and Exporting Address Book Entries,” page 50

Address Books allow you to keep track of your business, personal and professional contacts. Create as many Address Books as you need. There are three kinds of Address Books:

- **Personal:** These Address Books are only for a user's personal use.
- **Published:** Published Address Books can be shared with users on your server. Only the user who publishes an Address Book can modify or delete it.
- **Backed-up:** Backed-up Address Books are stored on the server for you to restore when needed.

### Personal Address Books

Personal Address Books are not shared with other users. They are stored locally on your computer.

### Creating Personal Address Books

1. To create an Address Book:

- Choose File menu > Address Book > New.
- Click the Address Book button on the Toolbar.
- Press **Ctrl+ B [Shift + Command + A]**.

For the second and third options, the Address Book Selection dialog box will open. Click **New** if you already have an Address Book. If you do not have an Address Book, a message will ask you if you want to create one. Click **Yes**.

2. The New Address Book dialog box will open. It has two tabs:

- **Name:** Enter the name of the Address Book you are creating.
- **User-defined fields:** Personalize your Address Book information. Each Address Book Entry has a Notes tab with four customizable fields.

The Address Book now exists on your machine.



The first two fields can be used in the Address Book Display's List View (page 44) as column headings. For example, enter a Children field to help you remember the names of each contact's children.

## Opening Personal Address Books

- To open an Address Book:
  - Choose File menu > Address Book > Open.
  - Click the Address Book button on the Toolbar.
  - Press **Ctrl+B** [**Shift+Command+A**].

For the second and third options, if there are no existing Address Books, a message will ask you if you want to create one. Click **Yes**.

- Select the Address Book you wish to open.

## Deleting Personal Address Books

- To delete a personal Address Book, choose File menu > Address Book > Delete.
- Select an Address Book from the list.
- Click **OK**. A message will prompt you to confirm the deletion. Click **Yes** to delete or **No** [Cancel] to cancel.

# Address Book View

Once you have created and opened an Address Book (File menu > Address Book > New), you will find yourself in the Address Book View. Similar to the Task View, the Address Book View lets you create, sort and print Address Book Entries according to your needs.

The name of the current Address Book is the title of the View. The View is divided into two sections:

- List View: Displays your Address Book folders and Entries.
- Entry View: Displays a list of your Address Book Entries on one side and lets you view or edit a selected Entry on the other.

Switch between the two views using the Toolbar button.

# Address Book Entries

## Creating and editing Address Book Entries

The New and Edit Address Book Entry dialog boxes have four tabs: General, Business, Personal and Notes. Each tab lets you add and modify Address Book Entry information.

### General

Enter the contact's name, phone number, e-mail and address information, as well as your relationship.

**To create an Address Book Entry:**

- Click the New Address Book Entry button on the toolbar.
- Press **F6** [**Command+N**].
- Choose Edit menu > New Address Book Entry.
- Double-click below the last Entry or folder.

**To edit an Address Book Entry:**

- Select the Address Book Entry and press **F5**.
- Select the Address Book Entry and choose Edit menu > Edit Entry.
- Double click the Address Book Entry.
- Right-click [**Control+Click**] the Address Book Entry and choose Edit Entry.

## Deleting Address Book Entries

To delete an Address Book Entry:

- Select the Address Book Entry and press Delete.
- Select the Address Book Entry and choose Edit menu > Delete Entry [Cut Entry].
- Right-click [**Control+Click**] Address Book Entry and select Delete Entry [Cut Entry].



If you select a folder, all Entries in that folder will be deleted.

### Business

Enter your contact's company information, including her position, department, industry type and account number.

### Personal

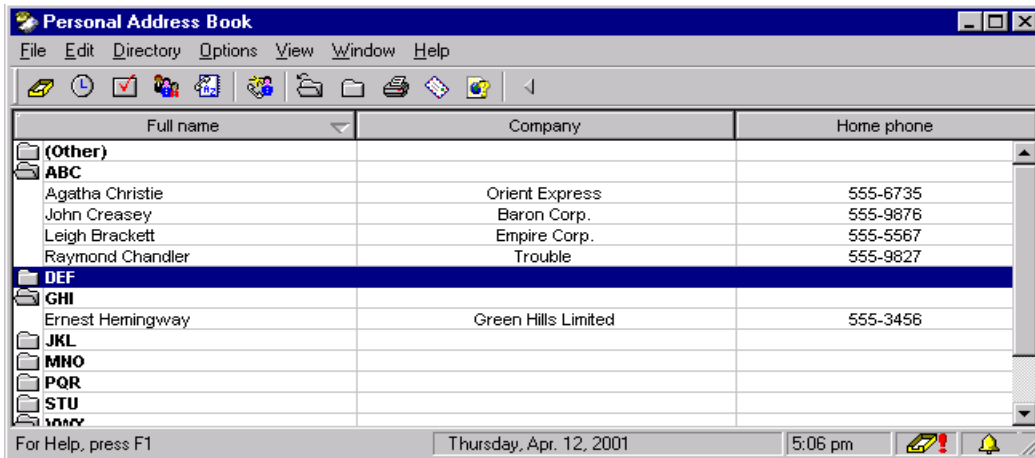
Enter personal information about the contact, including spouse's name, important dates and any other notes you need to remember.

### Notes

Enter additional information about the contact. The fields listed here are the ones you customized when you created the Address Book. Modify them using the User-defined fields tab of the Properties dialog box (File menu > Address Book > Properties).

## Customizing the List View

Customize your List View in the Address Book Settings dialog box (View menu > Settings) by using the Columns, Sorting and Folders tabs.



*Double-click an Entry in the List View to edit it.*



Customizing fields allows you to see the most relevant information for each contact.

### Columns

Select the data fields that appear in the List View. Since the settings only apply to the current Address Book, you can create a List View specific to the Address Book you are viewing.

Select your columns from the options listed in the drop-down list boxes.



The first two user-defined fields you created for the current Address Book can be used as columns in the List View.

### Sorting

Specify the order in which Address Book Entries appear. Entries are sorted according to the criteria selected in the first pull-down menu, followed by the options you choose from the other pull-down menus.

Select from the available headings in the drop-down list boxes. The options available are the three selected on the Columns tab.



If an Entry does not have a specified option, it will be sorted by the next option. If that option is not specified either, the third sorting option is used.

## Folders

Specify how folders are grouped in the List View.

1. Select a letter-grouping option from the list.
2. Select the field by which it will be grouped from the “Group by” drop-down list box.

## Working in the List View

- To change views, click the icon at the far right of the Toolbar.
- To view all Entries, click the Open All Folders button on the Toolbar.
- To hide all Entries, click the Close All Folders button on the Toolbar.
- To open or close a folder, click a folder icon or double-click anywhere on the line.
- To create an Entry, press **F6 [Command+N]**.
- To view or edit an Entry, double-click the Address Book Entry.
- To delete an Entry, select the Address Book Entry and press Delete.
- To duplicate an Entry, click the Address Book Entry and press **Ctrl+2 [Shift+Command+D]**.
- To print an Entry, select the Address Book Entry and press **F11 [Shift+Command+P]**.

## Editing an Entry in the Entry View

1. If the Entry View is not open, click the icon at the far right of the Toolbar.
2. Select an Entry on the left. Its information is displayed on the right.
3. Edit your Entry as you would in the Address Book Entry dialog box.

4. When you are finished editing the Entry, you can:
  - Select another Entry to edit its information.
  - Click the icon at the far right of the Toolbar to return to the List View.
  - Close the Address Book.

These options preserve any changes you made to your Entries. For more information, see “Creating and editing Address Book Entries” on page 44.

## Address Book Entry Bookmarks

Bookmarks allow you to keep track of important Address Book Entries. When printing Address Book Entries, you have the option of printing only those that are bookmarked. For more information, see “Printing Address Books” on page 88.

### Adding Bookmarks

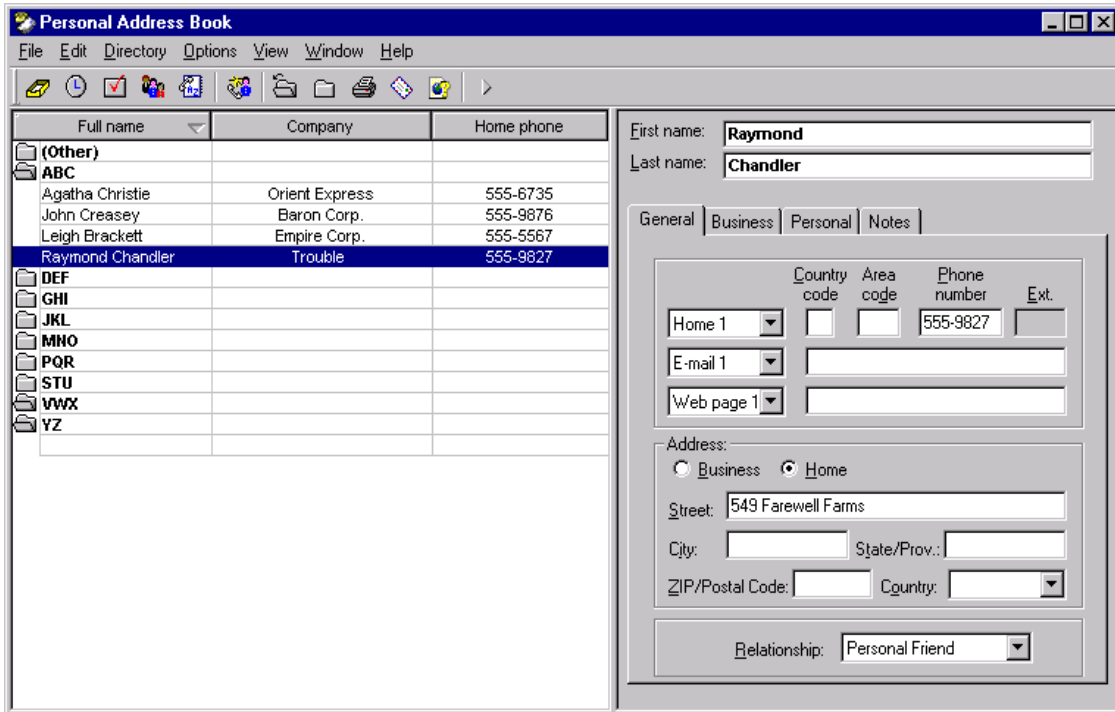
To bookmark an Address Book Entry:

- Select the Address Book Entry and press **Ctrl+J [Command+B]**.
- Select the Address Book Entry and choose Edit menu > Add Bookmark.
- Right-click [Control+Click] the Address Book Entry and choose Add Bookmark.

### Removing Bookmarks

To remove a Bookmark from an Address Book Entry:

- Select the Address Book Entry and press **Ctrl+K [Shift+Command+B]**.



*The Entry View allows you to edit a selected Entry directly in the Address Book Display. To move to the next Entry, simply select it from the list. Make your changes on the right.*

- Select the Address Book Entry and choose Edit menu > Remove Bookmark.
- Right-click [Control+Click] the Address Book Entry and choose Remove Bookmark.

## Scrolling through Bookmarks

To scroll through Bookmarked Address Book Entries:

- Press **Ctrl+N** [**Command+**].
- Choose Edit menu > Next Bookmark.

## Address Book Filters

Filters allow you to view only Address Book Entries that fit certain criteria. You can only have one filter per Address Book.

1. To set a filter:

- Press **Ctrl+E** [**Shift+Command+F**].
- Choose View menu > Set Filter.

2. Select your filter from the available options in the pull-down box.

3. Choose whether you want to limit the results to Entries that either begin with or are exactly the same as the value you will enter in the edit field.
4. Enter the value in the edit field. This field is not case-sensitive.
5. Click **OK** to view Entries that fit the criteria. The filter will remain until you remove it by choosing View menu > Remove Filter.



Use the Print dialog box to print only those Entries that fit a filter's specifications. For more information, see "Printing Address Books" on page 88.

## Published Address Books

Publish an Address Book so that other users can access and use it. They can rename and edit their own local copies of a retrieved Address Book.



A Published Address Book can only be modified or deleted by its publisher.

## Publishing and Modifying Address Books

1. To publish an Address Book, choose File menu > Address Book > Publish. To edit an Address Book you have already published, choose File menu > Address Book > Modify Published.
2. Select an Address Book from the list provided.
3. Create a list of users who will be able to access the Address Book. Click **Remove** to delete users from the list.

4. Enter any comments you wish to include with the Address Book.

## Deleting Published Address Books

To delete an Address Book you have published:

1. Choose File menu > Address Book > Delete Published.
2. Select an Address Book from the list provided.
3. Click **OK**. A message will prompt you to confirm the deletion. Click **Yes** to delete or **No [Cancel]** to cancel.

## Retrieving Published Address Books

Retrieve a Published Address Book sent to you by another user. Only users specified by the publisher can retrieve the Address Book.

1. Choose File menu > Address Book > Retrieve Published.
2. Select an Address Book from the list provided.

Edit retrieved copies of an Address Book as if you were its owner. The original published Address Book remains on the server.

## Backing up an Address Book

The Backup Address Book dialog box (File menu > Address Book > Backup) allows users to make a backup copy of an Address Book on the server.

The user who backed up an Address Book can later restore it.

1. Select an Address Book from the list provided.
2. Enter any comments you wish to include with the Address Book.

## Restoring a Backed-up Address Book

The Restore Backup Address Book dialog box (File menu > Address Book > Restore Backup) allows users to restore a backup copy of an Address Book on the server.

Only the user who backed up an Address Book can restore it.

1. Select an Address Book from the list provided.
2. Comments included with the Address Book are at the bottom of the dialog box and cannot be edited.

## Deleting a Backed-up Address Book

The Delete Backup Address Book dialog box (File menu > Address Book > Delete Backup) allows users to delete an Address Book backed up on the server.

Only the user who backed up an Address Book can delete it.

1. Select an Address Book from the list provided.
2. Comments included with the Address Book are listed at the bottom of the dialog box and cannot be edited.

## Importing and Exporting Address Book Entries

CorporateTime allows users to import and export Address Book Entries from other applications. CorporateTime supports the following types of Address Books:

- Comma-delimited text files.
- Tab-delimited text files.
- vCard files.

To export an Address Book from another application, look for either an Export or Save As command in the File menu. Consult that application's documentation for detailed information.

For more information, see "Importing data into an Address Book" on page 100.

# 7

## Searching

Minimizing the time you spend chasing after people to attend Meetings is important, especially in a large corporate environment where not everyone works in the same area or even in the same building.

CorporateTime's search tools let you quickly create lists of attendees for Meetings, find out what another user is doing at a given time and view times when users are available to attend Meetings.

This chapter describes the different search tools available in CorporateTime:

- "Directory Search," page 51
- "Search Parameters," page 52
- "Locating a person," page 55
- "Opening an Agenda," page 56
- "Searching your Agenda," page 56

Your search choices depend on where you are doing the search and what you are looking for:

- **Directory Search dialog box:** Add attendees in an Entry dialog box or Group View or find out information the System Administrator has entered about a user or Resource. For more information, see "Directory Search" on page 51.

- **Locate Person dialog box:** See what other users, Resources or group members are doing at a given time. You will only see information each user has given you Access Rights to view. For more information, see "Locating a person" on page 55.
- **Opening an Agenda:** Open an Agenda or a Group View for multiple users and Resources, to see what a user has planned for a day, week or month. You will only see information that each user has given you Access Rights to view. For more information, see "Opening an Agenda" on page 56.
- **Searching your Agenda:** Using criteria that you specify, search for a word, a string of words, an attendee or over a date range. For more information, see "Searching your Agenda" on page 56.

## Directory Search

The Directory Search dialog box lets you search for users, groups and Resources. Depending on how the dialog box is opened, you can add attendees to a list. In any Search Directory dialog box, click Information to see what information the System Administrator has entered about a user or Resource.

To open the Directory Search dialog box:

- From another dialog box: Click the Search button to add attendees to the list you are working on.
- From inside a view: Press **F12 [Command+S]** or choose Directory menu > Search Directory to find out more information about a user or Resource.
- When signing in: Click the Search button to select a user or Resource for signing in.



If CorporateTime finds more than 100 matches for your search, it only lists 100 names at a time. Use the double arrow buttons next to the Search button to toggle back and forth between lists.

## Selecting a single user or Resource

This version of the Directory Search dialog box opens when you search from the Sign-in or Open Agenda dialog boxes. It has two tabs: People and Resources.

1. Select the appropriate tab.
2. Enter your search parameters. For more information, see “Search Parameters” on page 52.
3. Click **Search** to find the name you are looking for.
4. Matching names appear in the Found list box at the bottom of the dialog box. Select the name you want and click OK to add it to the edit box.

## Selecting multiple users and Resources

This version of the Directory Search dialog box opens when you click the Search button in a dialog box where you can add multiple users and Resources to a list (e.g. when you create an Entry). It has three tabs: People, Resources and Groups.

1. Select the appropriate tab.
2. Enter your search parameters. For more information, see “Search Parameters” on page 52.
3. Using the People or Resource tab, click **Search** to find the names you are looking for. Alternatively, using the Groups tab, select the name of the group to which the users or Resources belong.
4. Matching names appear in the Found list box or, if you are using the Groups tab, the Members list box. Select the names you want and click **Add** to add them to the list.
5. If you want to add more users, Resources and/or group members, go to the next tab and repeat steps 2-4.
6. If you accessed this dialog box by choosing Directory menu > Search Directory, you may perform a search, but you cannot create a list of attendees.

## Search Parameters

Search parameters are useful when you do not know the name of the user or Resource you want to invite to an Entry. The characters you enter must

match the beginning of the name or string you are searching for. Use Search Parameters either in an edit box or the Directory Search dialog box.

## Using Search Parameters in an edit box



*The Add edit box lets you enter names and search parameters for including new user and Resource names.*

The following are samples of search parameters in an edit box and what they do:

Search Parameter	Result
	If your server allows empty searches, this will list all users
h	Users whose surnames begin with the letter H
j h	Users with the initials J H
j *	Users whose given names begin with the letter J
j h/CORP	Users whose initials are J H and whose first organization unit is CORP
t//ADMIN	Users whose surnames begin with the letter T and whose second organization unit is ADMIN
John Hancock	Users whose given names begin with "John" and whose surnames begin with "Hancock"
res:*	All Resources
res:conf	All Resources whose names begin with "conf"
res:projector/P-100	The Resource named "projector" whose resource number is "P-100"
res:/R-200	The Resource whose Resource number is "R-200"
gr:*	All groups
gr:Admin	All groups whose names begin with "Admin"

## Searching for Users

The first few letters are normally enough to search by name.

- If a message indicates that the search string is too short, you must add more letters. The minimum value is entered by the System Administrator.
- Additionally, search using a user's organization units. For more information, see "Selecting users by organization units" on page 54.
- If a person's name has a blank character in it, you must type in a ^ character (**Shift+6**) in place of a blank space when you enter that person's name. Otherwise your Agenda assumes the second name is the person's surname.



Write Mary^Jane Johnson instead of Mary Jane Johnson and Peter Wilson^Smith instead of Peter Wilson Smith.

For more information, see "Search Parameters" on page 52.

### Selecting users by organization units

Organization units allow users to be classified in the departments and subdivisions of their organization. Depending on your company's system, a person may have as many as four organization units.

To search for a user by organization units:

- If you enter a person's organization units, with or without the user's name, the organization units must be separated from the name and

from each other by slashes (for example: Alice Munro/CORP/MKTG/EXT or Alice Munro/OU1=CORP/OU2=MKTG/OU3=EXT).

- If you do not include the "OU#=", then the organization units must be entered in their correct sequence. If you enter Alice Munro/EXT, your Agenda will assume EXT is the first organization unit. However, if you enter Alice Munro///EXT, your Agenda will understand that EXT is the third organization unit.
- If you wish to search only by organization units, make sure to precede the first organization unit by a slash, so that the Agenda recognizes it as an organization unit and not as a name (for example: /OU2=MKTG; or /CORP).

If your Agenda cannot find one unique name with the search parameters you entered, it will display all matches and prompt you to select a name from the list.

## Searching for Resources

A few letters are normally enough to search by name. They must appear at the start of the name.

- Additionally, enter the Resource number, with or without the Resource's name. The number must be separated from the Resource name by a slash (for example: Meeting Room/R3535-1). If you enter only the Resource number, without the Resource name, the number must be preceded by a slash. For example: r:/R3535-1
- If a message indicates that the search string is too short, you must add more letters. The System Administrator sets the minimum value.
- The Agenda accepts a search request for a Resource without any search parameters. This lists all Resources.

- Select a Resource and click **Information** to view the Resource Information dialog box.

For more information, see “Search Parameters” on page 52.

*The Resource Information dialog box contains the information available on the selected Resource.*

## Searching for Groups

Choose what types of groups you want to display.

- Select the “Private” checkbox to display only groups you created for yourself.
- Select the “Others” checkbox to display all other groups you are permitted to see, including any Members-Only groups to which you belong.

The upper list box displays available groups. Click a group to select it and show its members in the lower list box. Below the Groups displayed box, you will be able to see which group you selected and who owns it.

- Select a Resource and click **Information** to open the Resource Information dialog box.

- Select a user and click **Information** to open the User Information dialog box.



Remote users or Resources are identified with an (R). They are on a different node or server. Remote users can be added to private or members-only groups, but they cannot edit or view such groups.

## Locating a person

The Locate Person dialog box (Directory menu > Locate a Person) allows you to see what others are doing at a given time.

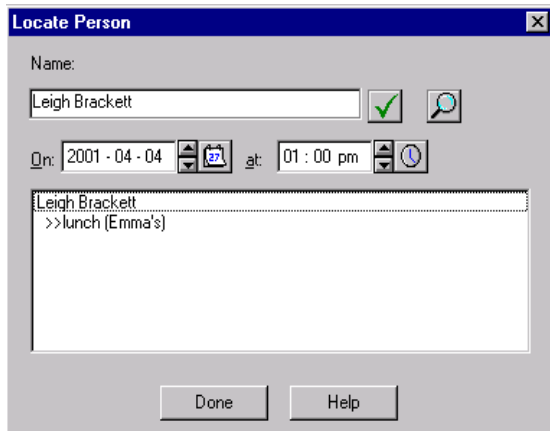
To locate a user, Resource, or group:

1. Type the name in the edit box.
  - To enter a Resource's name, precede the name with “r:”, “re:” or “res:”
  - To enter a group's name, precede the name with “g:”, “gr:” or “grp:”
  - Click the Search button to look in the Directory.
2. Enter the date and time.
3. Click the green checkmark to locate the user, group or Resource.
4. Your result depends on the viewing rights the user has granted you for relevant Entries in her Agenda. For more information, see “About Access Levels” on page 69.

- If you have the right to view all information about the Entry scheduled at that time, both its title and location are displayed.
- If you only have the right to see their busy times, “Busy” appears after the name.
- If you have no viewing rights for the Entry, you will not see it at all.



You will only view those Entries for which at least one invited user has granted you Viewing Rights.



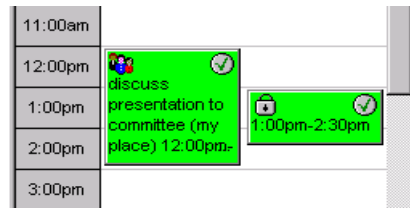
“Busy” appears when you only have Access Rights to view the busy times for the Entry that is occupying a user. “No available information” appears when the user has nothing specified for that time or you have no viewing rights for his Agenda.

## Opening an Agenda

The Entries you will see in another user or Resource’s Agenda depends on whose Agenda you opened and how you opened it:

- Viewing an Agenda (File menu > Agenda > Open): View what a user or Resource has scheduled during a given day, week or month.
- Working as a Designate (File menu > Agenda > Open as Designate): View what a user or Resource has scheduled during a given day, week or month. The user or Resource must have granted you Designate Access Rights. Opening an Agenda as a Designate lets you view more information than if you opened that same Agenda using the Agenda > Open command.
- In a Group View (File menu > Agenda > Open Group View): Include users and Resources to view Entries multiple users and Resources have scheduled during a given day, week or month.

Opening an Agenda to look for information lets you see what a user or Resource has scheduled a day, week or month at a time and in greater detail than you will find using any other method. For more information, see “Opening an Agenda” on page 27.



The Padlock icon appears when you do not have Access Rights to view an Entry.

## Searching your Agenda

The Search dialog box (Edit menu > Search Agenda) allows users to search their Agendas according to criteria that they specify. You can search any user’s Agenda for a word, string of words or attendee within a date range you specify.



The Search dialog has three tabs: Search Criteria, Search Options and Search Data Source.

## Search Criteria

1. Enter the element for which you wish to search in the **Search for** field. Use this field if you are searching for a single word or a string of words. If you are searching according to an Entry's attendees, leave this field blank.
2. If you wish to search for an Entry according to the people who have been invited to attend, type in the person's name, or part of his name, in the Add Attendee to search for edit box. If you wish to add members of a group to your Search Attendees list, click the Group button. The results of your search will be those Entries to which any attendees listed in the Search Attendees list box are invited.
3. Select a time period for your search. Type in the date, click the arrows to the right of the date boxes or click the Calendar button.

## Search Options

1. In the **Search through** area, decide the types of Entries for which you would like your Agenda to search.
2. In the **Search in** area, decide whether you would like to search the Title, Location and/or Detail of a particular Entry. With Day Events, Daily Notes and Holidays, you can only search the Title. For Meetings, you can search through the Title, Location or Detail of an Entry.

3. In the **Search options** area, select the appropriate boxes for a full-word or case-sensitive search.

## Search Data Source

1. This section displays the name of the person whose Agenda you would like to search. To change the name in the box, type the person or Resource's name, or part of his name, in the Agenda of edit box.
2. Click the Search button to find a particular person or resource.



1. Enter the element for which you wish to search in the **Search for** field. Use this field if you are searching for a single word or a string of words. If you are searching according to an Entry's attendees, leave this field blank.

2. If you wish to search for the people who have been invited to attend an Entry, type in the person's name, or part of his name, in the **Attendee** field. If you wish to add members of a group to your list, click the Group button. The results of your search will be those Entries to which any attendees listed in the Attendees list box are invited.
3. The **Agenda of** area displays the name of the person whose Agenda you would like to search. To change the name in the box, type the person, Resource or group name in the edit box. Click the Search button to find a particular person, Resource or group.

4. In the **Period** area, select a time period for your search. Type in the date, click the arrows to the right of the date boxes or click the Calendar button.
5. In the **Through** area, choose the types of Entries for which you would like your Agenda to search.
6. In the **In field** area, decide whether you would like to search the Title, Location and/or Detail of a particular Entry. With Day Events, Daily Notes and Holidays, you can only search the Title. For Meetings, you can search through the Title, Location or Detail of an Entry.
7. In the **Option** area, select the appropriate boxes for a full-word or case-sensitive search.

Once you have entered all of the relevant information, click Search. Entries that conform to your specifications will be displayed in the Search Results [Found] box.

View the details of a particular Entry by highlighting it and clicking the Show button, or by double-clicking it. If the results of your search are too numerous to be shown all at once, use the forward and backward arrows to browse through all of them.

Each request will be stopped when the server-side limits are reached; contact your System Administrator for more information about server-side limits. The Found list box displays as many Entries as possible. If the arrows are enabled, you can view additional results.

# 8

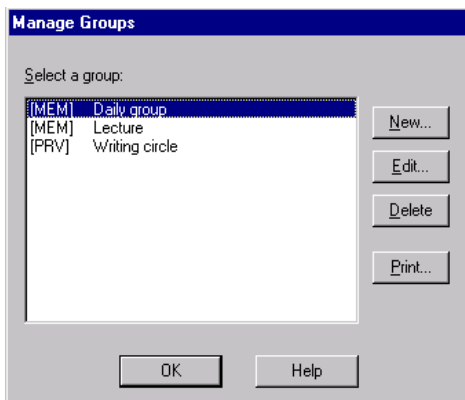
## Groups

This chapter describes the Group options available in CorporateTime:

- “Manage Groups,” page 59
- “Using Groups off-line,” page 61
- “Adding Group members to lists,” page 61
- “Selecting a Group,” page 61

Your Agenda allows you to create, edit and view groups of users and Resources. These groups can save you time when you need to invite the same set of people and/or Resources on a regular basis.

Create different group types and decide who can use the group. Users and Resources can belong to an unlimited number of groups.




*The current user owns three different groups. The type of group appears in brackets beside its name.*

There are four types of groups:

- **Public [PUB]:** Any user on your system can use the group.
- **Private [PRV]:** The group's creator can use or edit the group.
- **Members-only [MEM]:** The group's members can use or edit the group. Remote (R) users can be included in Members-only groups but they cannot view or edit them.

Any user can create private or members-only groups. You can only create an Administrative group if the System Administrator has granted you authorization to do so.

 Groups also allow you to search for users and Resources when you do not know their names. For more information, see “Searching for Groups” on page 55.

## Manage Groups

The Manage Groups dialog box (Directory menu > Manage Groups) allows you to create new groups, and modify and delete groups you created.

- Click **New** to create a new group.
- Click **Edit** to modify the selected group.

- Click **Delete** to erase the selected group.

## Creating Groups

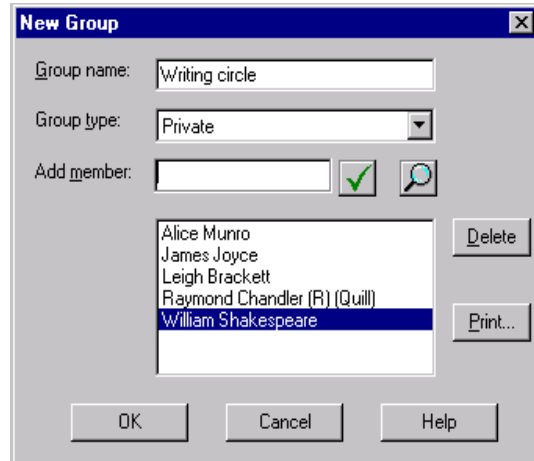
Create groups in your Agenda using the Manage Groups and Group Properties dialog boxes (Directory menu > Manage Groups).

1. In the Manage Groups dialog box, click **New**.
2. Type the new group's name in the Group name edit field.
3. Select a group type from the drop-down menu. This controls who can access your group in order to add members to Entries and Group Agendas.
4. Add users and Resources in the Members edit field. Select a name and click **Delete** to remove it.
5. Click **OK**. The group now appears in the list of groups available in the Manage Groups dialog box, preceded by an abbreviation indicating the group type.

## Editing Groups

Edit the list of users and Resources in existing groups. You can only edit groups that you created.

1. In the Manage Groups dialog box, select the group you want to modify and click **Edit**.
2. Modify the group's name in the Group name edit field.



*This is a private group. It can only be used or edited by its creator.*

3. Select the group type from the drop-down menu. This controls who can access your group in order to add members to Entries and Group Agendas.
4. Add users and Resources in the Add member edit field. Select a name and click **Delete** to remove it.
5. Click **OK** to accept the changes. The group appears in the list in the Manage Groups dialog box, preceded by an abbreviation indicating its type.

## Deleting Groups

1. Choose Directory menu > Manage Groups.
2. Select the group you wish to delete.
3. Click **Delete**. A message box prompts you to confirm the deletion.


## Printing Groups

1. Choose Directory menu > Manage Groups.
2. Click **Print** to print a list of groups, their types, owners and members.
3. To print a list of a group's members, select it and click **Edit**. Click **Print** in the Edit Group dialog box.

## Using Groups off-line

The Groups tab of the Off-line Preferences dialog box (Options menu > Off-line) allows you to choose which groups to include in your off-line Agenda. You can then use the Groups button and the Group tab of the Directory Search dialog box to add group members to Entries.

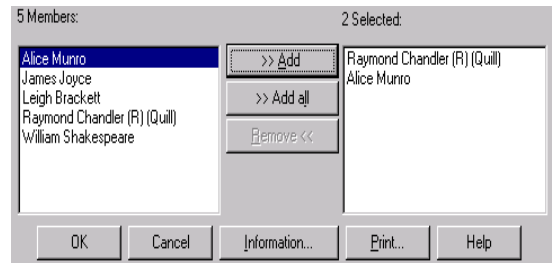
- If you do not want to include any groups, select "No groups".
- If you wish to download all groups with your Agenda, select "All groups".
- If you wish to download only certain groups, pick "Select groups". Choose group types for download: Private, Public or both. The listbox shows a list of available groups. To delete a group from the list, select it and click **Delete**.

 When you download a group, only a list of the group members' names are downloaded, not their Agendas. If you wish to download other users' Agendas, you must use the People/Resources tab of the Off-line Preferences dialog box. For more information, see "Off-line Preferences" on page 76.

## Adding Group members to lists

The Groups tab of the Directory Search dialog box allows you to add members of a group to an Entry. This is useful when you do not know the names of users who should be added to an Entry, but know that they are in a certain group.

1. Click the Search button beside the Add edit box.
2. On the Groups tab, select the name of the group from which you want to add members.
3. Select the group members you want to add in the Members list box. Select multiple users using the **Ctrl** and **Shift** keys.
4. Click **Add**. Click **Add All** to add all members of the selected group. Click **Remove** to remove a user from your list. Optionally, click **Information** to find out more about the user.



*The bottom half of the Groups tab allows you to choose which members to add. Raymond and Alice have already been added to the current list.*

## Selecting a Group

The Select a Group dialog box is displayed when you click the Group button next to an Add edit box (e.g. you invite users and Resources to an Entry or

open a Group Agenda). Choose a group whose members you want to include in a list of people and resources.

1. Select the group types you want displayed.
2. Select a group from the **Groups available** list box. The group members' names appear in the Group members list box.
3. To print out a list of groups, click **Print groups**. The print-out will contain a list of all groups, with a list of each group's members, up to a maximum of 50 members.
4. To print out a list of the members of a specific group, select the group and choose **Print members**. The print-out will contain a list of all the group's members.

# 9

## Designates

In CorporateTime, the primary way you interact with other users is by scheduling them for Meetings and responding to Entries they have sent you. Occasionally, you may want to open another user's Agenda to find out her schedule. With built-in scheduling features such as conflict-checking and suggesting a date or time for Meetings, you can typically accomplish everything you need to do without opening another user's Agenda.

However, in a corporate environment, busy users may find it convenient to have other users manage their Agendas. You can assign a user to act as your Designate, letting her work in your Agenda according to the access rights you have given her.

Designates can reply to Entries and create and edit information in your name when you are not available to do so. Give your assistant Designate Rights and let him reply to Entry invitations in your name. Or give Designate Rights to a co-worker when you are out of the office so he can keep your Agenda current. Designates can also keep track of Tasks and invite other users to Entries scheduled in your name.

Since you can decide which Designates should have which rights, you do not have to worry about Designates knowing more about your schedule than you want them to. Different Designates can have different rights.

This chapter discusses four different aspects of Designates and Designate Rights:

- “Designate Rights,” page 63
- “Granting Designate Rights for Entries,” page 64
- “Granting Designate Rights for Tasks,” page 64
- “Working as a Designate,” page 64



Assign one user the right to view and reply to your normal Entries and another the right to your personal Entries to keep your work and home lives separate. Remote users cannot act as Designates.

### Designate Rights

The Designate tab of the Access Rights dialog box (Options menu > Access Rights) lets you assign Designate Rights to other users when they work in your Agenda. Decide which types of Entries each user can create, edit and view.

Grant Designate Rights to as many users as you wish.

To grant Designate Rights to a user:


1. If it is not already listed, use the Add edit box to enter the name of the user whose Designate Rights you want to set.
2. Choose the name in the list box to set the user's Designate Rights.
3. Select which Designate Rights the user will have for your Meetings, Day Events and Daily Notes.
4. Select the checkboxes to set the Designate Rights this user will have for your Tasks.
5. If you want the user to have full Designate Rights to both your Entries and Tasks, select the Full Designate Rights checkbox. If you want the user to have no rights, select No Designate Rights. Choose this option if you do not want to give the person Designate Rights, but still want to set her rights on another tab.

Meetings, Day Events, Notes				Tasks
	Modify	View/Reply	View times only	Modify
Normal Entries	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Normal Tasks
Confidential Entries	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Confidential Tasks
Personal Entries	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Personal Tasks
Public Entries	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Public Tasks

Same as default  
  Full designate rights  
  No designate rights

*Give Designates different rights for Entries of each Access level.*

To delete a user from the list of Designates, select the name in the list box and click **Delete**. Any deleted user deleted will revert to having default rights. This applies to settings on all four tabs of the Access Rights dialog box.

 For security reasons, it is not recommended that you give Designate Rights to every user on the system. The names of users who do give such rights to all users are not displayed in the list box on the Designate tab of the Access Rights dialog box.

## Granting Designate Rights for Entries

For Meetings, Daily Notes and Day Events, assign any of the following rights:

- **Modify:** The Designate is able to modify Entries you created, as well as view and reply to Entries to which you are invited.
- **View/Reply:** The Designate sees Entries in their entirety and can reply in your name.
- **View times only:** The Designate can only view the times of your Meetings. If you choose this option, the Designate does not see Daily Notes or Day Events with this Access level in your Agenda.

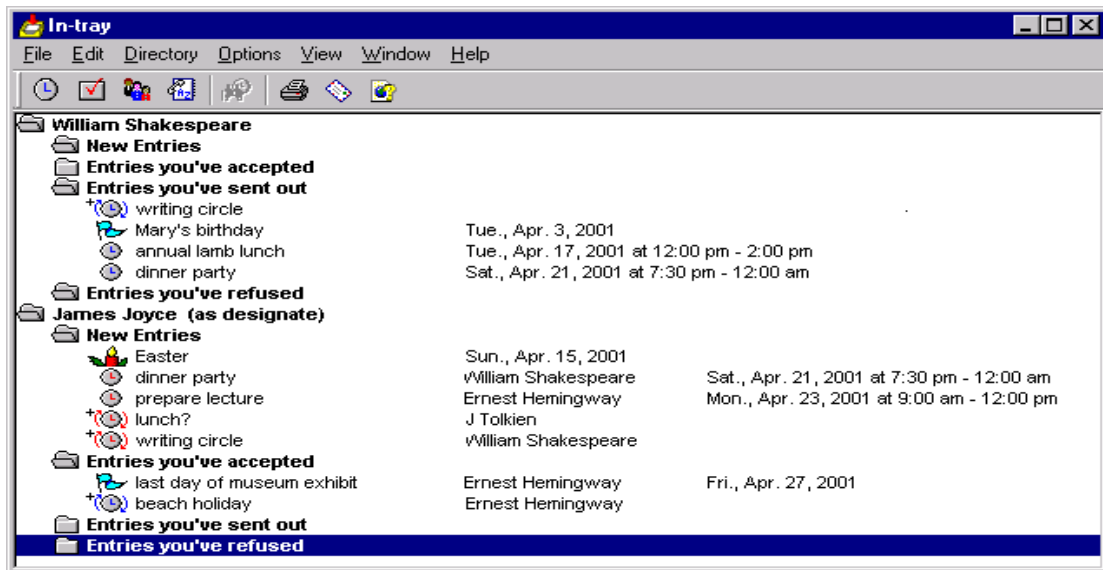
## Granting Designate Rights for Tasks

Select the appropriate checkboxes (Normal, Confidential, Personal and Public) to assign rights for each Access level. Alternatively, choose "No Designate Rights" to prevent the user from modifying Tasks in your Agenda.

## Working as a Designate

When you work in someone else's Agenda as a Designate, view, edit and create Entries owned by that user according to the rights you have been granted. For example, you may or may not also have access to that user's Tasks.

If you view the In-tray, you will see both your own folders and those of the person for whom you are working as a Designate.



*William has opened James's Agenda as his Designate. James's name and Entries appear in folders below Will's.*

## Opening another user's Agenda as a Designate

1. Choose File menu > Agenda > Open as Designate.
2. The Act as Designate [Open Agenda as Designate] dialog box displays users who have granted you Designate Rights. Select the user for whom you wish to work as a Designate and click **OK**.
3. In the Open Agenda as Designate dialog box, select the first option. Click **OK** to open the selected user's Agenda.

## Opening a Resource's Agenda as a Designate

On a large network, you may wish to keep certain Resources off-limits to all but a few users. For example, if your department owns a laptop and it exists as a Resource in CorporateTime, you may only want members of your department to be able to book it for Entries.

To set Access Rights for a Resource, it is recommended that you first sign in as the Resource, give yourself Designate rights, and then access the resource's Agenda as a Designate. Working as a resource Designate allows you to do more in its Agenda than if you sign in as the Resource.



If you do not know the password of the Resource, please contact your System Administrator.

To work in a Resource's Agenda as a Designate:

1. Close your current CorporateTime session (File menu > Exit).
2. Sign in as that Resource. You will only be able to:
  - change its assigned Access Rights (set modification and scheduling rights for other users on the system).
  - change the password for signing in as the Resource.
3. Choose Options menu > Access Rights.
4. Grant yourself the desired Designate Rights.
5. Exit CorporateTime .
6. Sign into CorporateTime as yourself.
7. Choose File menu > Agenda > Open as Designate.
8. Users and Resources who have granted you Designate Rights are displayed. Select the Resource name and click **OK**.
9. In the Open Agenda as Designate dialog box, select the Open the Agenda option and click **OK**. The Resource's Agenda opens.

## Opening a Group View as a Designate

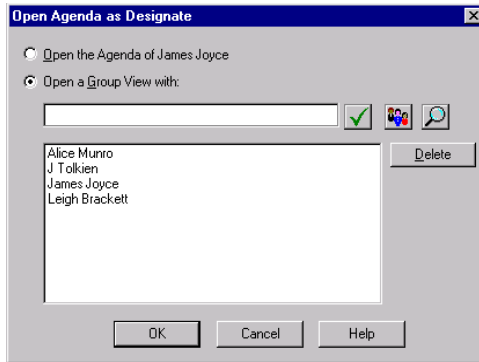
Opening a Group View as a Designate lets you create Entries using the Group View while working as a Designate for someone else. This is useful when you want to work in another user's name and invite multiple users and Resources to an event.

Working in a Group View as a Designate is the same as working in your own Group View, except that the Entries you create are owned by the person for whom you are working as a Designate. For more information, see "The Group View" on page 33.

To open a Group View as a Designate:

1. Choose File menu > Agenda > Open as Designate.
2. In the Act as Designate [Open Agenda as Designate] dialog box, users who have given you Designate Rights are displayed.
3. Select the user or Resource for whom you wish to work as a Designate.
4. In the Open Agenda as Designate dialog box, select the "Open a Group View with:" option.
5. Add users to your Group View using the Add edit box. The user names appear in the list box below.

For more information, see "The Group View" on page 33.



*When you open a Group View as a Designate, you can easily create Meetings inviting multiple users in another user's name.*

## Opening a Task View as a Designate

When you work on someone else's Tasks as a Designate, view, edit or create Tasks owned by that user, according to the rights given to you. Your rights as a Designate are defined by the owner of the Tasks. For example, you may or may not have access to that user's personal Tasks.

To open a Task View as a Designate:

1. Choose File menu > Tasks > Open As Designate.
2. In the Act as Designate [Open Tasks as Designate] dialog box, users who have granted you Designate Rights are displayed. Select the user for whom you wish to work as a Designate.



# 10

## Access Rights

One of the most important components of any time management system is security. As a corporate user, you may not want every Entry you create to be visible to every user on the system.

CorporateTime gives you complete control over the security of your Entries by letting you set Access Rights for different Entries (Options menu > Access Rights).

This chapter discusses six key topics on setting Access Rights:

- “About Access Levels,” page 69
- “Viewing,” page 70
- “Viewing Tasks [Tasks],” page 70
- “Designate,” page 71
- “Scheduling,” page 71
- “Setting Default Access Rights,” page 72

The Access Rights dialog box has four tabs:

- Designate
- Viewing
- Viewing Tasks
- Scheduling

Each tab allows you to assign different privileges to other users in your Agenda. Enter a user's name in the user edit field, or select a name from the list box, to set the user's rights. Users whose rights are not specified are assigned default rights.

### About Access Levels

Access levels allow you to limit what Entries users can see in your Agenda. The Entry's owner assigns an Access level when she creates the Entry. There are four different Access levels:

- Normal
- Confidential
- Personal
- Public



You may want to make a classified business Meeting Confidential. Only users with Access Rights to view your Confidential Entries will be able to see this Meeting in your Agenda.



All users can view Public Entries.

	View Entries	View times only
Normal Entries	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Confidential Entries	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Personal Entries	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Full viewing rights     No viewing rights

The Viewing tab allows you to customize what Entry information others can see in your Agenda.

## Viewing

Control which of your Meetings, Day Events and Daily Notes are visible to other users.

To grant viewing rights to another user:

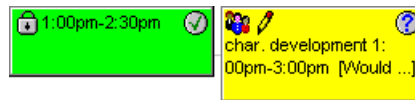
1. Enter or select the user's name.
2. Use the checkboxes to choose the viewing rights you want to give the user for Meetings, Day Events and Daily Notes. Set the rights separately for Normal, Confidential and Personal Access levels. You cannot stop another user from viewing Public Entries.



If you only give the right to see busy times, the user will not be able to view Day Events or Notes with that Access level in your Agenda.

3. Instead of setting individual rights for each type of Entry, you can choose to grant the user:

- Same as Default [Use Defaults]: The user's rights are the same as the Default. Choose this if you do not want to give the person any special Access Rights on this tab, but still want to set his or her rights on another one.
- Full viewing rights: The user can view all your Entries.
- No viewing rights: The user can only view your Public Entries.



The current user can only see that time has been blocked off in the Agenda on the left. In the second example, the user has full viewing rights for the Meeting.

## Viewing Tasks [Tasks]

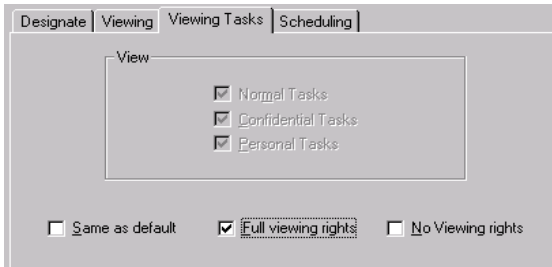
Control which Tasks in your Agenda are visible to other users.

To grant Task viewing rights to another user:

1. Enter or select the user's name.
2. Use the checkboxes to choose viewing rights for the user. Set these values separately for Normal, Confidential and Personal Tasks.
3. Instead of setting the individual rights for each type of Task, you can choose to grant the user:

- Same as Default [Use Defaults]: The user's rights are the same as the Default. Choose this if you do not want to give the person any special Access Rights on this tab, but still want to set her rights on another tab.

- Full viewing rights [Full Rights]: The user can view all your Tasks.
- No viewing rights [No Rights]: The user can only view your Public Tasks.



*The selected user has complete Task viewing access.*

## Designate

The Designate tab allows you to set other users' rights to use your Agenda.

To grant Designate Rights to another user:

1. Enter or select the user's name.
2. Use the checkboxes on the left to choose Designate Rights for your Entries.
3. Use the checkboxes on the right to assign Designate Rights for your Tasks. Designates can have full Designate Rights (i.e. view and modify) to your Entries or no rights at all.
4. Instead of setting the rights for each type of Entry individually, you can choose to grant the user:

- Same as Default: The user's rights are the same as the Default. Choose this if you do not want to give the person any special Access Rights on this tab, but still want to set her rights on another tab.
- Full Designate Rights: The user can view and modify all your Entries.
- No Designate Rights: The user has no Designate Rights in your Agenda.

It is not recommended that you give Designate Rights to every user on the system. For more information, see "Designate Rights" on page 63.

## Scheduling

The Scheduling tab lets you control which users can invite you to Meetings, Day Events and Daily Notes. All users have control over who can invite them to Entries.

To modify a user's scheduling rights:

1. Enter or select the user's name.
2. Select the user's scheduling rights:
  - Can invite me to events: This gives the user the right to invite you to Entries.
  - Same as Default [Use Defaults]: The user's scheduling rights are the same as the Default. Select this if you do not want to give the person any special rights on this tab, but still want to set her rights on another tab.

Users without scheduling rights will be notified that they cannot invite you to an Entry.

## Setting Default Access Rights

To change the Default settings on any tab of the Access Rights dialog box (except the Designate tab):

1. Select “Default: Any unlisted person” in the list box.
2. Choose settings in the same way you would for an individual user, as described previously in this chapter.

# 11

## Preferences

After you have mastered the basics of managing your Agenda by creating and editing Entries, maintaining Address Books and sorting Tasks, you will want to customize your preferences for various CorporateTime features.

Changes you make to your preferences will be applied the next time you open an affected window.

This chapter describes different preference settings in CorporateTime:

- “Scheduling Preferences,” page 73
- “General Preferences,” page 74
- “Off-line Preferences,” page 76
- “Agenda Preferences,” page 78
- “In-tray Preferences,” page 80
- “Entry Defaults,” page 81
- “Meeting Colors,” page 82

### Scheduling Preferences

The Scheduling Preferences dialog box (Options menu > Scheduling) contains a tab for each day of the week. These tabs allow you to enter your normal and extended hours. These are the hours the Suggest date/time feature uses when looking for convenient times to schedule your Meetings.

- Normal hours are those during which you usually work and schedule Meetings. If you usually work from 9 a.m. to 5 p.m., enter these as your Normal hours.
- Extended hours are the outside limits for scheduling Entries in your Agenda. These are hours when you are not normally in the office, but when you could show up if there is an important Meeting or deadline. If you are willing to attend a Meeting that starts as early as 8 a.m. or ends as late as 6 p.m., enter these as your Extended hours.

To enter your scheduling preferences:

1. Select the day for which you want to set scheduling preferences.
2. Set your normal hours by entering the start and end times in the appropriate boxes.
3. Set your extended hours by entering the start and end times in the appropriate boxes.
4. Repeat steps 1 to 3 to modify each day's settings individually, or click **Apply to all** to apply the current tab's settings to every day of the week.

## General Preferences

The General Preferences dialog box (Options menu > General) has four tabs: Names, Date and Time, External Applications and Time zones.

### Names

Choose how much information is included with user and Resource names in your Agenda.

1. User and Resource information is displayed differently.
  - Users: Select the appropriate checkboxes to view the user's name in whatever format you wish, along with organization units, e-mail addresses, country, and/or other company information.
  - Choose how you want these different items divided: If you select Use Separator, items are separated from the name and each other by slashes, without codes for what the items indicate. If you select Display org. field, items include codes for what they indicate (i.e. OU1= for Organization unit 1, C= for Country, etc.).
  - Resources: Choose to view only the Resource name, or both the Resource name and number, in whichever order you prefer.

### Date and Time

Choose how hours and days appear in your Agenda.

1. Set the Short date format. This is how dates will appear in date boxes and in the title of different Agenda views. An example of the selected format is shown in the dialog box.
  - Select the order in which the month, day and year appear.
  - In the Separator box, enter the character you want to separate the month, date and year. Any character can be used.
  - To display the four-digit year, select the "Century" checkbox.
2. Set the Long date format. This is how dates will appear in Entry dialog boxes and on the Status bar.
  - Select the order in which the month, day and year will appear. An example of the selected format is shown in the dialog box.
  - Select the formats for the day, date, month and year from the drop-down list boxes.
3. Set the Time format by selecting either the 12-hour or 24-hour display.

## Time zones

The Time zones tab lets you change your Agenda's time zones. This is useful if you travel or schedule Meetings with users who are in a different time zone.

- To choose a time zone:
  - Select the name of the time zone using the drop-down list box.
  - Select your time zone by selecting the name of the region or country whose time zone you wish to use. Click **Load regions** to choose from a list of countries and regions in the list box.

To return to your system's default time zone (i.e. the local time zone in which your system has been installed) without logging out, click **Revert to host's time zone**.

- If the System Administrator has given users the right to do so, you can choose to save the changed time zone for future sessions. This could be useful if you frequently travel between two time zones.
  - If you do not have this option, "Save time zone change for future sessions" is inactive and you will not be able to select it.
  - If you do not wish to save the changed time zone, select "Make time zone change for this session only."
  - If you want to change time zones permanently, select "Save time zone change for future sessions." If you wish to use the host's time zone again, you must open this dialog box and click **Revert to**

**host's time zone.** To return to your saved time zone without logging out, click **Restore saved time zone**.



If you save your time zone change, the alternative time zone will be your default time zone.

## External Applications

Open an e-mail client and Web browser from your Agenda.

Choosing a mail client is an optional feature designed for your convenience. It does not affect your Agenda's e-mail notification features, which are entirely independent of the mail client settings you enter here.

The Web browser you choose will open when you click the Product Information button on the Toolbar or select Help Menu > Product Information. The file location that command opens is configured by your System Administrator. The location may vary depending on whether you are working on-line or off-line. The default location is the Steltor web site.

Windows and Macintosh are treated differently here. Please refer to the section that applies to you.



### External Applications — Windows

- Type the path and name of your mail client's executable file in the edit box.
- Select "Minimize on startup" if you do not want the Mail program's full start-up screen to appear when your Agenda starts up the Mail program.

3. Type the path and name of your Internet browser's executable file in the Browser Application command line, or click **Browse** to search for the file.



### External Applications — Macintosh

1. In the Mail application section, click **Browse** to select a mail program or “Use Internet setup” to use your system's default mail client. If you do not know your system default, click **View Settings** to bring up the Internet Control Panel. Click **Remove** to erase your mail client choice.
2. Select the “Start in background” checkbox if you do not want the mail program to appear when you start up the mail program.
3. In the Web browser section, click **Browse** to select an application or “Use Internet setup” to use your system's default web browser. If you do not know your system default, click **View Settings** to bring up the Internet Control Panel. Click **Remove** to erase your web browser choice.

Click **OK** when you are finished with all the tabs in the dialog box.

## Off-line Preferences

The Off-line Preferences dialog box (Options menu > Off-line) lets you choose preferences for your off-line Agenda. The dialog box has five tabs: Location, Download, People/Resources, Groups and Reconciliation.

### Location

Choose where you want to store your off-line Agenda.

1. Choose the directory in which you wish to store your off-line Agenda. Click **Browse** to look for directories and files.
2. Select “Create directory [folder] if none exists” if you want to create a new directory for your off-line Agenda.

### Download

Select the range of Entries downloaded to your off-line Agenda.

1. Choose the time period for Entries you want to download:
  - Select “Download all Entries” to include all Entries.
  - Select “Download Entries from” to customize a time period. Enter how far into the past and future your off-line Agenda will search when downloading Entries. Type the desired number in the edit boxes and select intervals from the drop-down list boxes.
2. Choose an option for downloading your Agenda when you quit CorporateTime or work off-line:
  - Automatically download: Your Agenda will automatically be downloaded when you quit your on-line Agenda.

- **Prompt before downloading:** When you quit your on-line Agenda, you will be asked if you want to download to your off-line Agenda.
- **Do not download:** Your Agenda will only be downloaded when you choose to do so manually (by choosing File menu > Download to Local File).

## People/Resources

The People/Resources tab lets you download other Agendas so that you can view them while off-line. These Agendas will always be downloaded when you download your Agenda.

Add names in the “Download the Agenda(s) of” edit box.



You will only see Entries you have Access Rights to view.

## Groups

Download groups from the server to your off-line Agenda to include group members in Entries you create while off-line.

Select the groups you would like to download:

- “No groups”: Do not include any groups.
- “All groups”: Download all groups.
- “Select groups”: Download only certain groups.

If you select this option, decide what group types you wish to choose from. You can download Private, Members-only or Public groups. Your

Agenda will display a list of available groups. To delete a group from the list, select it and click **Delete**.



When you download a group, only group member user names are downloaded, not their Agendas. If you wish to download other users' Agendas, you must use the People/Resources tab. However, group members included in the attendee list for any Entry in your Agenda are automatically downloaded.

## Reconciliation

Control how your on-line and off-line Agendas are synchronized. Make decisions on a case-by-case basis, or let your Agenda automatically handle certain situations.

1. When an Entry has been deleted in your off-line Agenda, the Agenda can do one of two things:
  - **Show reconciliation dialog box:** Review the deletion and decide whether to also delete it from your on-line Agenda.
  - **Delete on-line Entry:** Automatically remove the Entry from your on-line Agenda.
2. When an Entry has been modified in both your off-line and on-line Agenda, the Agenda can do one of two things:
  - **Show reconciliation dialog box:** Review and confirm the change before it is made in your on-line Agenda.
  - **Update on-line Entry:** Automatically update the Entry in your on-line Agenda.

3. If Meetings are created or modified in both your on-line and off-line Agendas, scheduling conflicts can arise when you upload. The Agenda can do one of two things:
    - Check for conflicts on upload: The Agenda displays information about any conflicts and lets you deal with it in the Conflicts Detected dialog box.
    - Ignore conflicts on upload: The Agenda will not prompt you about any conflicts when uploading.
  4. Select the "Update off-line Agenda after upload" checkbox if you want the reconciled on-line Agenda to be automatically downloaded after each upload. This option ensures that your off-line and on-line Agendas are identical.
- Click **OK** when you are finished with all the tabs in the dialog box.
2. Select the desired time interval using the drop-down list box. This is the amount of time represented by each slot in your Agenda.
  3. Choose your preferred time format:
    - Select "am/pm" to display times in that format.
    - Select "24-Hour" to display times in the 24-hour format (00:00 to 23:59).
  4. Use the drop-down list box to select the day on which you would like to start your week. The first day is displayed in your Weekly and Monthly Agenda pages.
  5. Select the "Show Saturday" and/or "Show Sunday" checkboxes to display those days in your Weekly and Monthly Agenda pages.

## Agenda Preferences

The Agenda Preferences dialog box (Options menu > Agenda) lets you customize your Agenda's look, feel and functionality. It has three tabs: Display, Notification and Wireless Settings.

### Display

Decide what is displayed in your Agenda.

1. Set the start and end times to be displayed in the first and last time slots of your Day and Week Views. When a Meeting is scheduled at a time earlier than your selected start time, the Agenda page will begin at the time when the earliest Meeting starts.
2. Select the desired display options. These options affect which Entries are displayed and how they appear in your Agenda:
  - Refused Meetings: Refused Meetings will be displayed in your Agenda.
  - Unconfirmed Meetings: Meetings to which you have not yet replied will be displayed.
  - Start and end times: Meeting Start and End times will be displayed.
  - Title: Meeting titles will be displayed.

- Location: When specified, meeting locations will be displayed.
- Details: Entry Details will be included.
- Icons: If you choose to display Meeting icons, select whether to view all icons or only the Information icon. The Information icon indicates that there is information included with the Meeting.
- When you create Entries: Every time you invite other users to an Entry you have created, you will be asked if you want to send an e-mail message.
- When you edit Entries: Every time you modify an Entry to which you have invited other users, you will be asked if you want to send an e-mail message.
- When you delete Entries: Every time you delete an Entry to which you have invited other users, you will be asked if you want to send an e-mail message.

## Notification

Decide how your Agenda notifies you of new, edited and deleted Entries. You can even choose to have your Agenda check for new Entries at regular intervals.

1. Select “Allow other to notify you of new Entries by e-mail” to receive an e-mail notifying you of a new Entry to which you have been invited. You will only receive this kind of e-mail notification if the Entry’s owner sends one.
2. To receive a pop-up window notifying you of new Entries, select “Show pop-up window when you have new Entries”.
3. To check your Agenda for new Entries at a regular interval, select “Check for new Entries every” and type the time interval in the edit box. The New Entries icon appears in the Status bar when there are new Entries in your Agenda.
4. Select when you would like your Agenda to ask if you want to send an e-mail message to invited users.



Names of users who do not want to receive e-mail notification will not appear in the distribution list. For more information, see “Mail Notification” on page 85.

## Wireless Settings

Decide if you want your Agenda to notify you of new, edited or deleted Entries on your wireless device.

Device:

1. Enter your mobile device’s phone number in the Mobile device number box.
2. Select your mobile device type from the drop-down list box.
3. In the Mobile notification type drop-down list box, select the kind of notification that you would like to receive. The notification type that you can select depends on your mobile device type:
  - Generic device: Your notifications appear as text messages.

- Nokia 6100 Series: Your notifications appear as text messages, vCalendar data (calendar notes) or as both.
  - Nokia 9000 Series: Your notifications appear as text messages or vCalendar data (calendar notes).
4. Choose if you would like to enable your mobile device's alarms.
  5. For easy reference, enter the phone number of your preferred service center.

#### Services:

1. Enable wireless services: Receive SMS messages from the calendar server or make information requests from your wireless device. You cannot use any of the following options unless this box is selected.
2. Hold reminders and notifications: Do not receive reminders and notifications. They will be held until you uncheck the box. Reminders and notifications for upcoming events will be sent to you. Reminders and notifications for events that have already passed will be erased.
3. Deliver reminders and notifications: Specify a daily time range during which to receive your reminders and notifications. They will only be sent to you during this time period. If you do not specify a time range, you will receive reminders and notifications 24 hours a day.
4. Hold reminders and notifications outside this period: Reminders and notifications generated outside of your chosen delivery period will be held for you. You will receive them during your next daily delivery period. If you do not select

this box, reminders and notifications generated outside of your chosen delivery period will be erased.

5. Automatically notify when Entries are created, edited or deleted: Receive notification by SMS message whenever an event to which you are invited is created, modified or deleted.

You can still make information requests from your mobile device while the Hold reminders and notifications, Deliver reminders and notifications and/or Hold reminders and notifications outside this period boxes are selected.

## In-tray Preferences

The In-tray Preferences dialog box (Options menu > In-tray) controls how the In-tray treats your Entries. The dialog box has four tabs: Accepted, Sent, Refused and On startup.

### Accepted

Set your viewing preferences for Entries you accept.

- Select "Show Entries dated from today: to the next" to limit the number of Entries displayed, type the desired number in the edit box and choose an interval from the drop-down list box.
- Select "Show Entries dated from today onwards" to view every accepted Entry.

### Sent

Control the viewing preferences for Entries you send.

- Select “Show Entries dated from” to limit the number of Entries displayed, type the desired numbers in the edit boxes and choose intervals from the drop-down list boxes.
- Select “Show Entries dated from today onwards” to view every sent Entry.

## Refused

Control the viewing preferences for Entries you refuse.

- Select “Show Entries dated from today to the next” to limit the number of Entries displayed, type the desired number in the edit box and choose an interval from the drop-down list box.
- Select “Show Entries dated from today onwards” to view every refused Entry.

## On Startup

The On Startup tab allows you to decide if and when you would like your In-tray to be shown. Open your In-tray at any time by clicking the Open In-tray button.

- Select “Open In-tray” to have the In-tray appear every time you open your Agenda.
- Select “Do not open In-tray” to keep the In-tray closed when you open your Agenda.
- Select “Open In-tray if it was left open on exit” if you want the In-tray to appear or remain closed according to its status the last time that you quit CorporateTime.

The In-tray must be open in order to receive new Entries and for the New Entries icon to appear. However, you can edit existing Entries without the In-tray being open.

Click **OK** when you are finished with all the tabs in the dialog box.

## Entry Defaults

The Entry Defaults dialog box (Options menu > Entry Defaults) allows you to set default values for all Entries you create. It has four tabs: Meetings, Tasks, Day Events and Daily Notes.

### Meetings

Enter the settings you want used when you create a Meeting. You can always modify these settings when you create a Meeting (Edit menu > New > Meeting) or edit a Meeting (by selecting the Meeting and choosing Edit menu > Edit Meeting).

1. Choose the default Importance and Access levels from the pull-down menus.
2. Choose whether you want a Reminder to be set by default. If you choose to set default Reminders, select a type from the drop-down list box.
3. Type the desired number in the edit box and choose an interval from the drop-down list box.

## Tasks

Enter the settings you want used whenever you create a Task. You can always modify these settings when you create a Task (Edit menu > New > Task) or edit a Task (by selecting the Task and choosing Edit menu > Edit Task).

1. Choose the default Priority and Access levels from the pull-down menus.
2. Choose whether you want due and start time Reminders to be set by default. If you choose a Reminder, select a type from the drop-down list box.
3. For each Reminder, type the desired number in the edit box and choose an interval from the drop-down list box.

## Day Events and Daily Notes

Enter the settings you want used whenever you create a Day Event or Daily Note. You can always modify these settings when you create a Day Event or Daily Note (Edit menu > New > Entry) or edit one (by selecting the Entry and choosing Edit menu > Edit Entry).

1. Choose the default Access level from the pull-down menu.
2. Choose whether you want a Reminder to be set by default. If a Reminder is chosen, choose a type from the drop-down list box.
3. Type the desired number in the edit box and choose an interval from the drop-down list box.

Click **OK** when you are finished with all the tabs in the dialog box.

## Meeting Colors

In the Daily and Weekly Agenda, all Meetings appear in colored boxes. Set the colors using the Meeting Colors dialog box (View menu > Meeting Colors).

Choose how you want your Meetings to be colored:

- Importance Level
- Attendance Status
- Ownership

## Changing your password

The Change Password dialog box (Options menu > Change Password) lets you modify your password.

To change your current password:

1. Enter your current CorporateTime on-line password in the Old password edit box.
2. Enter your new password in the New password edit box.
3. Click **OK**. The Verify Password dialog box will open, prompting you to re-enter your new password.

Users of Windows NT or Mac OS 9 and greater can choose to bypass the CorporateTime password verification. Select Options menu > Manage Connections and click Enable Automatic Sign-In.



When changing your password, asterisks will appear for each character you enter, rather than displaying the text. The edit boxes are case sensitive.



# 12

## Internet Components

This chapter describes the Internet components that can be used in conjunction with CorporateTime:

- “Mail Client,” page 85
- “Mail Notification,” page 85
- “Mail Message,” page 86
- “Web Access Settings,” page 86

CorporateTime allows you to open both an e-mail application and a Web browser from your Agenda, as well as send and receive e-mail notification of new, edited and deleted Entries.

### Mail Client

Your Agenda allows you to start up your e-mail application from within CorporateTime. Enter the program on the External Applications tab of the General Preferences dialog box (Options menu > General). There are two ways of doing this:

- Click the Launch Mail button on the Toolbar.
- Choose File menu > Launch Mail Application.



This is an optional feature meant for your convenience. It does not affect your Agenda's e-mail notification features, which are entirely independent of the mail client settings you enter here. For more information, see “External Applications” on page 75.

### Mail Notification

CorporateTime lets users send e-mail notification of new, edited and deleted Entries. It is an added feature to make sure users learn about Entries as soon as possible. For more information, see “Notification” on page 79.

### Who can notify you

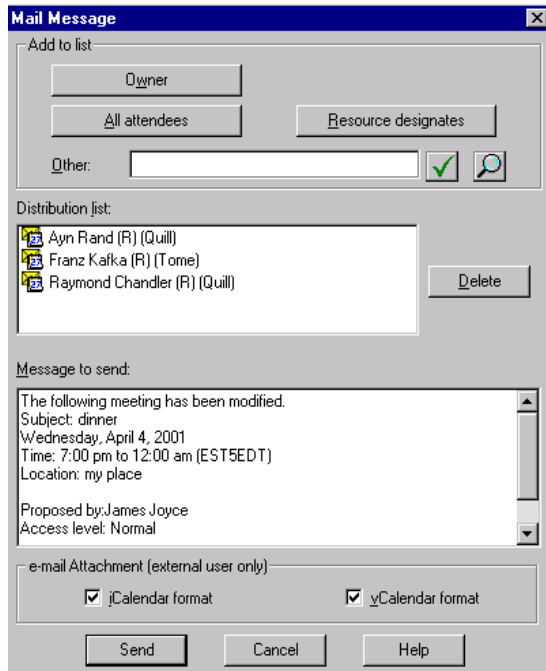
Choose if you would like other users to be able to notify you by e-mail. Do this by using the Notification tab of the Agenda Preferences dialog box (Options menu > Agenda).

In the “Entries you receive” section, select “Allow others to notify you of new Entries by e-mail” to give users notification rights. If the checkbox is selected, your name will appear by default on other users' distribution lists when you are invited to an Entry they created, edited or deleted.

### Notifying others

After creating, editing or deleting an Entry to which you have invited other users, CorporateTime may ask you if you wish to send them a notification e-mail.

- Click **Yes [OK]** to send a message and open the Mail Message dialog box.
- Click **No [Cancel]** if you do not want to send a message.



*The default distribution list includes all attendees who have enabled e-mail notification in the notification checkboxes.*

## Mail Message

The Mail Message dialog box opens when you send an e-mail message concerning an Entry you have created, edited or deleted. The dialog box also appears when you click the Mail button on the Reply tab of the View Meeting dialog box. The Mail Message dialog box lets you create a list of recipients, write your message and send it.

Whenever you send a mail message, the default distribution list includes all invited users. If your message concerns a new Entry, only users who have set their notification preferences to receive e-mail notification for new Entries are included in the list. You can also include non-CorporateTime users in the Distribution list.

## Writing a notification message

1. Modify your attendee list in the “Add to” list section. If you wish to include a non-CorporateTime user in the Distribution list, type his e-mail address into the Other edit box.
2. Compose your message in the Message to send edit box. Basic information about the corresponding Entry already appears in the edit box. Add to the message or import text from other applications using the standard copy, cut and paste commands.
3. If you have included an external user in the Distribution list, decide if you will send the message in iCalendar or vCalendar format.

## Web Access Settings

The External Applications tab of the General Preferences dialog box (Options menu > General) lets you enter a Web browser that you can open from within your Agenda. For more information, see “External Applications” on page 75.

# 13


## Printing


This chapter describes how to print in CorporateTime:

- “Printing Agenda Pages,” page 87
- “Printing an In-tray or Task View,” page 88
- “Printing Address Books,” page 88
- “Printing Selected Entries,” page 89
- “Print Preview,” page 89
- “Layout Options,” page 90

Print information from your Agenda in a variety of formats. You can print out an Agenda page, In-tray, Task Display, Address Book, or selected Entries. CorporateTime includes several popular customizable layout formats, such as Franklin Day Planner and Avery.

Open the Print dialog box to print your Agenda, In-tray, Address Book or Task Display. Open the window you want printed and select one of the following methods to open the Print dialog box:

- Click the Print button on the Toolbar.
- Choose File menu > Print.
- Press **Ctrl+P** [**Command+P**].
-  Choose File menu > Print Preview and click **Print**.

 Due to the differences in printing for Windows and Macintosh, the two platforms are treated separately in this chapter.



From the Print dialog box, click **Setup** to change your printer setup using the Print Setup dialog box.

## Printing Agenda Pages



### Windows

1. Choose File menu > Print.
2. Select a layout from the drop-down list box. Click **Options** to customize the layout you have chosen. You can also create your own layout. For more information, see “Layout Options” on page 90.
3. Choose the date range for your print-out. Weekly print-outs are always one week in duration, running five to seven days, depending on your Agenda Preferences. These Agenda Preferences also control your Monthly print-outs.
4. Select the types of Agenda pages you wish to print using the corresponding checkboxes. You can print more than one type at a time.

5. See what your print-out will look like by clicking **Preview**. The active Agenda page will be printed, even if you have multiple Agendas open.



## Macintosh

1. Choose File menu > Page Setup and select the CorporateTime pull-down option.
2. Select a layout for printing. Click **OK**.
3. Choose File menu > Print and select the CorporateTime option from the pull-down menu.
4. Change the Start and End dates for your print-outs by entering the dates in the edit boxes. Use the arrows to the right of each box to adjust the date.
5. Select the types of Agenda pages you wish to print by selecting the corresponding checkboxes. You can print more than one type at a time.
6. Click **Print**. For more information, see “Print Preview” on page 89.

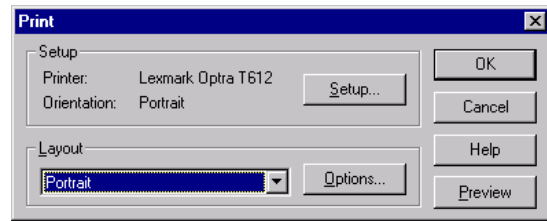
## Printing an In-tray or Task View



### Windows

1. Choose File menu > Print.
2. If you are printing a Task View, click **Options** to customize the layout using the Task list tab of the Layout Options dialog box. For more information, see “Layout Options” on page 90.

3. See what your print-out will look like by clicking **Preview**.



The same version of the Print dialog box opens when you are printing your In-tray, Task View, or a selected Entry.



## Macintosh

1. Choose File menu > Page Setup and select the CorporateTime pull-down option.
2. Select a layout for printing. Click **OK**.
3. Choose Options menu > Print Layout and customize the printing options for your Task List. If you are printing your In-tray, skip this step and select File menu > Print. For more information, see “Layout Options” on page 90.
4. Click **Print**. For more information, see “Print Preview” on page 89.

## Printing Address Books



### Windows

1. Choose File menu > Print.
2. Select a layout from the drop-down list box. Click **Options** to customize the layout you have chosen. For more information, see “Layout Options” on page 90.

3. Select the Entries you want printed.
  - All Entries: All Address Book Entries will be printed.
  - Marked Entries: Only marked Entries will be printed.
4. Select the fields you want printed.
  - All fields: All Address Book fields will be printed.
  - Column fields: Only the column fields, according to your customized List View, will be printed. Choose the number of columns to be printed using the drop-down list box.
5. See what your print-out will look like by clicking **Preview**.



## Macintosh

1. Choose File menu > Page Setup and select the CorporateTime pull-down option.
2. Select a layout for printing. For more information, see “Layout Options” on page 90. Click **OK**.
3. Choose File menu > Print and select the CorporateTime pull-down option.
4. Select the Entries you want printed.
  - All Entries: All Address Book Entries will be printed.
  - Marked Entries: Only marked Entries will be printed.
5. Select the fields you want printed.

- All fields: All Address Book fields will be printed.
- Column fields: Only the column fields, according to your customized List View, will be printed. If you select this option, choose the number of columns to be printed using the pull-down menu.

## Printing Selected Entries



### Windows

1. Select the Entry you want to print and choose File menu > Print Selected Entry.
2. Select a layout from the drop-down list box. Click **Options** to customize the layout you have chosen. For more information, see “Layout Options” on page 90.
3. See what your print-out will look like by clicking **Preview**.



### Macintosh

1. Choose File menu > Page Setup and select the CorporateTime pull-down option.
2. Select a layout for printing.
3. Select the Entry you want to print and choose File menu > Print Entry.

## Print Preview

Print Preview allows you to evaluate your print-outs on-screen before you decide to print.



## Windows

1. Click **Preview** in the Print dialog box.
  - To scroll through a multiple-page print-out, use the **Next Page** and **Prev. Page** buttons.
  - If you prefer to view two pages at a time, click the **Two Pages** button. Click the **One Page** button to return to the one-page-per-screen view.
  - Zoom in on documents by clicking the area you wish to magnify with the magnifying cursor or by clicking the **Zoom In** button on the Toolbar. The view will expand to let you see the print-out in more detail. If you have reached maximum magnification, the cursor will revert to the normal pointer.
  - Zoom out by clicking the **Zoom Out** button on the Toolbar.
2. Click **Close** to return to the Print dialog box.



## Macintosh

1. Choose File menu > Print Preview. To scroll through a multiple-page print-out, use the two scroll buttons in the top left-hand corner of the dialog. The page you are currently viewing is indicated below. Zoom in or out using the magnification buttons.
2. Click **Options** to bring up the Layout Options dialog box. Customize a layout for each type of Agenda print-out (Weekly, Monthly, etc.). If you selected a layout in the CorporateTime section of the Page Setup dialog box (File menu > Page Setup), it appears at the top of the page. Otherwise, the default layout appears.



You can customize options for different kinds of print-outs in this dialog box, but you cannot select a print layout from here.

3. Click **OK** to return to the Print Preview dialog box.
4. Select **Apply** to implement your changes.



Use the Print Preview dialog box to view different layouts before you actually print. You can change printing options by choosing the CorporateTime pull-down option in the Print menu, but you will not be able to preview them.

## Layout Options

The Layout Options dialog box allows you to customize the content and structure of your printed document. Layout settings are the same on the Windows and Macintosh platforms. The dialog box has eight tabs: Daily, Weekly, Monthly, Multi-week, Day List, Task list, Fonts and Margins. Open the Layout Options dialog box by choosing File menu > Print > Options [Options menu > Print Layout]. If you make changes to any of the tabs and then decide that you do not want to keep them, click **Reset**.

Configure options for as many different print layouts as you intend to use. For example, if you plan on only using the Multi-week print layout, configure the Multi-week printing options and leave the other section settings at their defaults.

## Daily

Select the information to be included in your Daily Agenda print-outs.

1. Choose the following:
  - Start time: Prints the times at which Meetings are scheduled to begin.
  - End time: Prints the times at which Meetings are scheduled to end.
  - Description: Prints any Descriptions included with Meetings.
  - Location: Prints the scheduled locations of Meetings.
  - Gray shading [Color]: Shades all Meetings gray to make your free time more visible.
  - Overflow pages: Prints an additional page for items that do not fit on the Daily Agenda page.
2. Select column items from the drop-down list boxes. This allows you to modify the layout of the printed Daily Agenda. Choose where each section is located and what is included in the print-out.
3. Set the time range you want printed. You may want only your working hours included or you may want to print out your entire day.

## Weekly

Select the information to be included in your Weekly Agenda print-outs.

1. Choose the content for the print-out. The information that can be selected includes all the information listed in the Daily tab topic, as well as the following:
  - Work days only: Prints Monday to Friday only.
  - Day Events and Daily Notes: Prints your Day Events and Daily Notes at the bottom of each day.
2. Set the time range you want printed.

## Monthly

Select the information you want included in your Monthly Agenda print-outs.

Choose from the following:

- Overflow pages: Prints an additional page for items that do not fit on the Monthly Agenda page.
- Work days only: Prints Monday to Friday only.
- Start time: Prints the times at which Meetings are scheduled to begin.
- End time: Prints the times at which Meetings are scheduled to end.
- Day Events and Daily Notes: Prints your Day Events and Daily Notes at the bottom of each day.

## Multi-week

Print up to five weeks' worth of information per page.

1. Decide how many weeks' worth of information you would like to print per page and enter the number in the edit box.
2. Choose from the following:
  - Overflow pages: Prints an additional page for items that do not fit on the Multiweek page.
  - Work days only: Prints Monday to Friday only.
  - Start time: Prints the times at which Meetings are scheduled to begin.
  - End Time: Prints the times at which Meetings are scheduled to end.

## Day list

The Day list tab lets you select the information you want included in your Day list.

Choose from the following:

- Maximum number of attendees: Prints the names of attendees for an Entry. The maximum value allows you to limit the number of attendees printed out. If there are more attendees than this limit, your print-out will only indicate the set number of attendees.
- Maximum length of descriptions and comments: Prints Meeting Descriptions and Task Comments. The maximum value allows you to limit the length of Descriptions or Comments that your

Agenda will print. If the length is exceeded, your print-out will only indicate the length in characters.

- Day Events, Daily Notes, Holidays and Upcoming Reminders: Prints all Entries in the Notes View of your Daily Agenda on your Day List.
- Entry owner: Prints the name of the person who owns the Meeting.
- Tasks: Prints all Tasks for the selected days.
- Importance level: Prints Meeting Importance levels and Task Priorities.
- End Time: Prints the times at which your Meetings are scheduled to end.
- Boxes: Places all Meeting information inside a frame.
- Title on a separate line: Prints each title on a separate line from the other Meeting information.
- Keep formatting of details: Keeps the original line breaks of the Details you assigned a Meeting or Task.
- Empty days: Days without Entries are included on your Day List.

## Task list

The Task list tab allows you to select a layout to be used for printing your Tasks, as well as listing some of the details.

Choose from the following:

- Maximum length of descriptions and comments: Prints any comments you have included in your Tasks. The maximum value allows you to limit the length. If the length is exceeded, your print-out will only indicate the length in characters.

- **Start date:** Prints the dates on which your Tasks are scheduled to start.
- **Due date:** Prints the dates on which your Tasks are due.
- **Completion date:** Prints the dates on which Tasks were completed.

## Fonts

Select the fonts to be used when you print your Agenda or Address Book.

1. Choose heading and text fonts from their respective drop-down list boxes. When you choose the default font, CorporateTime will select the typeface that most closely matches either Helvetica or Times.
2. Select header and text font sizes from their respective drop-down list boxes. Select either normal, small or large. Your Agenda will use the appropriate size of the selected font for the layout you are using.

## Margins

Set the margins that will be used when printing. Unless you have already modified them, the values that appear are the default settings.

1. Select the unit of measurement using the "Units" drop-down list box.
2. Set the number of rows and columns by typing the number in the corresponding boxes.
3. Set the margins and internal margins by typing the values in the corresponding boxes.

## Saving new layouts

When you have customized a particular layout format, you may want to save your setup. This way you can use the same settings the next time you print.

To save the layout you have created or modified:

1. Click **Save as**.
2. Type a name for the layout you created. This name now appears in the list of layouts offered in the Print dialog box.



Click **Preview** in the Print dialog box to test a new layout and customize your ideal layout.



# 14

## Off-line

This chapter describes the off-line capabilities that CorporateTime offers:

- “Off-line Agenda Configuration,” page 95
- “Different Local Storage,” page 95
- “Reconciling your Agendas,” page 96
- “Host reconciliation,” page 96
- “Web access information,” page 97
- “Password reconciliation,” page 97

Use your Agenda even when not connected to the server. Your off-line Agenda lets you create, edit and view your Entries and upload them to your on-line Agenda. CorporateTime helps you to reconcile any differences between the two quickly and easily. For more information, see “Signing in off-line” on page 9.

The Off-line Preferences dialog box lets you set up your off-line Agenda (Options menu > Off-line). For more information, see “Off-line Preferences” on page 76.

### Off-line Agenda Configuration

The Off-line Agenda Configuration dialog box opens when you try to sign into your off-line Agenda without having configured it on-line.

1. Enter your user name in the edit boxes.
2. If you would like to have a password for your off-line Agenda, enter it in the appropriate edit box.
3. Select the time zone you wish to use in your Agenda. Choose from the pull-down list box or by selecting a region or country in the Regions list box.
4. Enter a location for your off-line Agenda. Click **Browse** to search for a directory.
5. Click **OK** to open your off-line Agenda for the first time.

### Different Local Storage

The Different Local Storage dialog box appears when the current off-line Agenda is not owned by the user signing into CorporateTime. It allows you to preserve multiple off-line Agendas on the same workstation.

You have two options:

- **Browse:** Enter a different local directory to store your off-line Agenda.
- **Cancel:** Close the Different Local Storage dialog box and return to the Sign-in page. The current off-line Agenda remains the same. The next time this user signs into CorporateTime, this dialog box will appear again.

## Reconciling your Agendas

Reconciliation is the process of making your on-line and off-line Agendas consistent with one another by reconciling the Entries that cause inconsistencies (i.e. you decide which version of the Entry you want to keep). You may need to go through this process when you upload your off-line Agenda to your on-line Agenda.

- To update your off-line Agenda, select File menu > Download to Local File.
- To update your on-line Agenda, select File menu > Upload from Local File.

A display box appears on screen to show you the transfer progress.

## Host reconciliation

Depending on the settings entered in the Reconciliation tab of the Off-line Preferences dialog box, a message will appear when an Entry has been altered in either the off-line or host Agenda. It will

tell you which of your Agendas has modified Entries and ask if you would like to update your other Agenda.

1. If you select **Yes**, the Agenda Reconciliation dialog box appears. An icon in the top left corner of the dialog box indicates the type of Entry that needs to be reconciled. The Entry's status in the off-line and on-line Agendas is also indicated as deleted, modified, or unmodified.
2. The Off-line and On-line boxes give a summary of each Entry, allowing you to decide which one you want to keep.
  - Click **Yes** to replace the on-line Agenda version of the Entry.
  - Click **No** to keep the on-line Agenda version.

The Agenda then continues the reconciliation process.

## Conflicts detected

If Meetings are created or modified in both the host and off-line Agendas, scheduling conflicts can arise between these Meetings. Depending on your Off-line Preferences, the Conflicts Detected dialog box is called up in such cases.

1. The dialog box tells you which off-line Meeting is causing the conflicts, its time and date, the Meetings with which it conflicts, and the users and Resources for whom the selected Meeting causes a conflict.
2. You have three options:

- Ignore the conflict and add the off-line Meeting to your on-line Agenda.
- Reschedule the off-line Meeting using the Move Entry dialog box.
- Delete the off-line Meeting.

Once the decision is made, the Agenda will continue the reconciliation process.

## Web access information

When working off-line, you can still retrieve Web Access information locally if your system administrator has enabled the option. For more information, see “Web Access Settings” on page 86.

## Password reconciliation

The Password Reconciliation dialog box helps ensure that both the off-line and on-line Agenda passwords are the same. It appears when a user signs in or switches between their on-line and off-line Agendas and the passwords are not the same.

You have three options:

- Replace your off-line password with your on-line password.
- Replace your on-line password with your off-line password.
- Keep the passwords different.



# 15

## Importing & Exporting

This chapter describes how CorporateTime lets you import and export information:

- “Importing,” page 99
- “Exporting,” page 101

The Export and Import Utilities allow you to transfer data between your Agenda and a data file. Formats supported include various ASCII file formats, Schedule+ files, vCalendar, iCalendar and vCard objects.



Steltor's CorporateSync product allows users to synchronize Agenda and Address Book data with a vast array of handheld products. CorporateSync is not covered in this manual. For more on CorporateSync, contact your Steltor representative.

### Importing

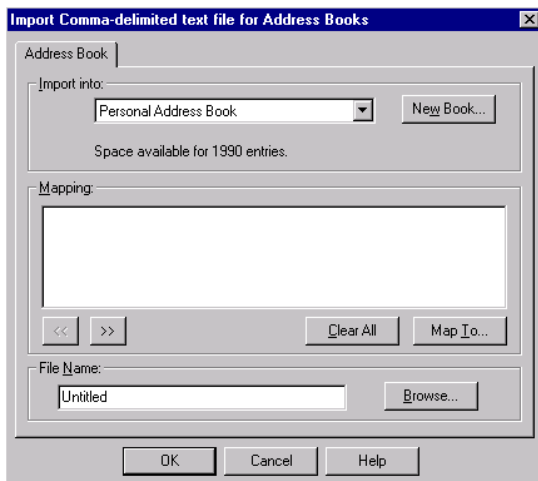
The Import Utility dialog box (File menu > Import Data) allows you to import data into your Agenda from certain files.

1. Select the type of file from which you will be importing your data.
2. Depending on your choice, you can import either Address Book data or Agenda data. The type of data that can be imported by a particular choice is displayed in the list box.
3. Click **Continue** [OK]. A dialog box will open, containing one of two tabs: Address Book or Agenda. These two tabs are discussed in the following sections. [The Choose a File dialog box will open. Select a file and then click Choose. Select the Address Book into which you would like to import the information or click **New** to create a new Address Book.]

## Importing data into an Address Book

To import data into an Address Book:

1. Select the Address Book you want to import into using the drop-down list box. Click **New Book** to create a new Address Book.
2. Select the Mapping fields you want to use. Click the arrow buttons to scroll through fields.
  - Click **Clear All** to deselect all chosen fields.
  - Click **Map To** to add fields from the menu that appears.
3. Type the name of the Address Book file you are importing from or click **Browse** to search for it in your local directories.
4. Click **OK**. A progress bar will appear.



*The title of this dialog box is the choice you selected in the Import Utility dialog box.*

## Importing data into an Agenda

To import data into an Agenda:

1. Choose the data you want to import.
  - Meetings, Day Events, Daily Notes
  - Tasks
2. Set the period for which you wish to import data.
  - To set a range of dates, select Range and choose From and To dates.
  - To export all your Entries in your Agenda, select All.
  - To customize a time period, select Custom and set the time period in the boxes below.
3. Enter the name of the file from which you will be importing data in the File Name edit box or click **Browse** to search for it in your local directories.

## Importing vCalendar Entries

To import vCalendar Entries:

- Choose File menu > Import Data.
- Drag and drop Entries from your desktop into your Agenda.
- Copy the Entries using the cut, copy and paste commands. Any kind of Entry can be imported and exported from any View in this way. Any application that can paste plain text or the vCalendar registered format to your clipboard can open a vCalendar object.

## Exporting

The Export Utility dialog box (File menu > Export Data) allows you to export information from Agendas into text files.

1. Select the type of file to which you will be exporting your data.
2. Depending on your choice, you can export either Address Book data or Agenda data. The type of data that can be exported by a particular choice is displayed in the list box.
3. Click **Continue**. A dialog box will open containing one of two tabs: Address Book or Agenda. These two tabs are discussed in the following sections.

### Exporting an Address Book

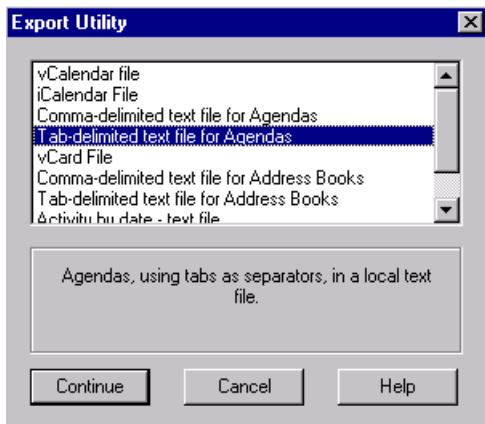
To export data from an Address Book:

1. Select the Address Book you want to export using the drop-down list box.
2. Set the Export Fields you wish to use.
  - Click **Add** to add fields from the menu that appears.
  - Click **Clear All** to deselect all chosen fields.
  - Click **Delete** to deselect a field.
  - Click **Up** and **Down** to scroll through the fields.
3. CorporateTime automatically assigns file names to files created when you export. Click **Browse** to change directories or the file name.

## Exporting an Agenda

To export data from an Agenda:

1. Choose the data you want to export.
  - Meetings, Day Events, Daily Notes
  - Tasks
2. Set the period for which you wish to export data.
  - To set a range of dates, select Range and choose From and To dates.
  - To export all Entries in your Agenda, select All.
  - To customize a time period, select Custom and set the time period in the boxes below.
3. Select the Agenda from which you want to export data.
  - If exporting to a file, search for the file by clicking **Browse**. CorporateTime automatically assigns file names to files created when you export. If you select the name of a person or a Resource in the list box, the corresponding file name is displayed in the edit box below. Change the names of these files if you wish.



*Depending on your choice, you can export Address Book and/or Agenda data.*

## Exporting vCalendar Entries

To export vCalendar Entries:

- Choose File menu > Export Data.
- Hold down the **Ctrl** [**Control**] key and drag and drop the Entries out of your Agenda onto your desktop.
- Copy the Entries using the cut, copy and paste commands. Any kind of Entry can be imported and exported from any view in this way. Any application that can paste plain text or the vCalendar registered format to the clipboard can open a vCalendar object.

Appendix

**A****Key Conventions**

<b>Function</b>	<b>Windows</b>	<b>Macintosh</b>
Open on-line Help	F1	Control+Click
Open an Agenda	Ctrl+A	Command+O
Open a Group View	Ctrl+G	Command+G
Open an Agenda as a Designate	Ctrl+D	Shift+Command+O
Open a Task View	Ctrl+T	Command+K
Open Tasks as Designate	---	Shift+Command+K
Open the In-tray	Ctrl+I	Command+I
Open an Address Book	Ctrl+B	Shift+Command+A
Print	Ctrl+P	Command+P
Print Selected Entry	---	Shift+Command+P
Quit	---	Command+Q
Close Window	---	Command+W
New Meeting	F2	Command+N
New Daily Note	F3	Command+D
New Day Event	F4	Command+E
New Task	F7	Command+T
New Address Book Entry (Address Book View)	F6	Command+N
Edit/Reply to Selected Entry	F5	Command+Return
Duplicate Entry	Ctrl+2	Shift+Command+D
Reschedule [Move] Entry	Ctrl+M	Shift+Command+R
Delete Entry	Delete	Delete

Cut	Ctrl+X	Command+X
Copy	Ctrl+C	Command+C
Paste	Ctrl+V	Command+V
Search Directory	F12	Command+S
Locate a Person	---	Command+L
Manage Groups	---	Command+M
View Day	F8	---
View Week	F9	---
View Month	F10	---
Reminders On/Off	Ctrl+R	---
Find Entry (In-tray only)	Ctrl+Shift+F	Command+Shift+F
Add Bookmark	Ctrl+J	Command+B
Remove Bookmark	Ctrl+K	Shift+Command+B
Next Bookmark	Ctrl+N	Command+J
Set Filter	Ctrl+E	Shift+Command+F
Show Active Tasks	Ctrl+F6	---
Refresh All	---	Command+R
Search Agenda	Ctrl+F	Command+F

Appendix

**B****Menu Commands****File menu**

<i>Agenda &gt; Open</i>	Open your own Agenda or the Agenda of another user or Resource.
<i>Agenda &gt; Open As Designate</i>	Open an Agenda on behalf of a user or Resource for whom you have Designate Rights.
<i>Agenda &gt; Open Group View</i>	Open a Group Agenda so that you can view the Daily View of several users and Resources at once.
<i>Tasks &gt; Open</i>	Open your own or another user's Task View.
<i>Tasks &gt; Open As Designate</i>	Open the Task View of a user for whom you have Designate Rights.
<i>Open In-tray</i>	Open the In-tray, allowing you to manage Entries you have refused, accepted, sent out or those to which you have not yet replied.
<i>Address Book &gt; Open</i>	Create or edit an Address Book.
<i>Address Book &gt; New</i>	Create an Address Book.
<i>Address Book &gt; Properties [Get Info]</i>	Edit the properties of an Address Book you have created.
<i>Address Book &gt; Delete</i>	Delete an Address Book.
<i>Address Book &gt; Publish</i>	Publish an Address Book to other users.
<i>Address Book &gt; Retrieve Published</i>	Retrieve a published Address Book from the server.
<i>Address Book &gt; Modify Published</i>	Edit an Address Book you have published.
<i>Address Book &gt; Delete Published</i>	Delete an Address Book you have published.

<b><i>Address Book &gt; Backup</i></b>	Back up an Address Book on the server.
<b><i>Address Book &gt; Restore Backup</i></b>	Restore an Address Book you have backed up.
<b><i>Address Book &gt; Delete Backup</i></b>	Delete an Address Book you have backed up.
<b><i>Download To Local File</i></b>	Download your on-line Agenda for off-line use.
<b><i>Upload From Local File</i></b>	Upload your off-line Agenda to your on-line Agenda.
<b><i>Work Off-line/On-line</i></b>	Disconnect from the server and open your off-line Agenda. Connect to the server and open your on-line Agenda if you are currently off-line.
<b><i>Launch Mail Application</i></b>	Open your mail application if you have chosen one on the External Applications tab of the General Preferences dialog box (Options menu > General).
<b><i>Export Data</i></b>	Export data to a file or laptop.
<b><i>Import Data</i></b>	Import data from a file or laptop.
<b><i>Print</i></b>	Print the current view.
<b><i>Print Selected Entry</i></b>	Print the selected Entry.
<b><i>Page Setup</i></b>	Change your printing options.
<b><i>Close</i></b>	Close the active window.
<b><i>Exit [Quit]</i></b>	Quit the application.

## **Edit menu**

<b><i>New &gt; Meeting</i></b>	Create a Meeting.
<b><i>New &gt; Daily Note</i></b>	Create a Daily Note.
<b><i>New &gt; Day Event</i></b>	Create a Day Event.
<b><i>New &gt; Task</i></b>	Create a Task.
<b><i>Edit Entry</i></b>	Edit an Entry you have selected.
<b><i>View Entry</i></b>	View an Entry you have selected but do not own.
<b><i>Duplicate Entry</i></b>	Make a copy of an Entry you have selected.
<b><i>Reschedule Entry</i></b>	Change the time and/or date of a selected Entry.
<b><i>Delete Entry</i></b>	Delete a selected Entry.

<b><i>Find Entry</i></b>	Locate the selected Entry in your Agenda's In-tray.
<b><i>Cut</i></b>	Cut a selected Entry from your Agenda and place it on the clipboard. You can then paste it into an editor or an e-mail message in vCalendar format.
<b><i>Copy</i></b>	Copy the selected Entry from your Agenda to the clipboard. You can then paste it into an editor or an e-mail message in vCalendar format.
<b><i>Paste</i></b>	Paste the contents of your clipboard into your Agenda.
<b><i>Search Agenda</i></b>	Search your Agenda for Entries that fit user-specified criteria.

## **Directory menu**

<b><i>Search Directory</i></b>	Find out more information about users and Resources.
<b><i>Locate a Person</i></b>	See what a user, Resource or group has scheduled at a specific time. You must have the appropriate Access Rights to be able to view such Entries.
<b><i>Manage Groups</i></b>	Create, delete and edit groups.
<b><i>Manage Holidays</i></b>	Modify the Holiday list. You must have the proper authorization to manage Holidays.

## **Options menu**

<b><i>Agenda</i></b>	Modify your Agenda's display, notification and wireless preferences.
<b><i>In-tray</i></b>	Choose which Entries will be included in the In-tray, as well as when the In-tray will appear.
<b><i>Scheduling</i></b>	Set the time frames used by the Suggest date/time feature.
<b><i>Entry Defaults</i></b>	Set your default Importance levels, Access levels, Reminders and/or Priority Levels for your Entries.
<b><i>General</i></b>	Edit your Name, Date and Time, External Applications and Time Zone preferences.
<b><i>Off-line</i></b>	Customize the settings of your off-line Agenda.
<b><i>User Information</i></b>	Display the system's information about you. If your system allows it, you can also modify this information.
<b><i>Change Password</i></b>	Modify your password.
<b><i>Manage Connections</i></b>	Manage your server connections.
<b><i>Access Rights</i></b>	Set what information about your Entries other users can view or edit.

## View menu

<b><i>View Day</i></b>	Display the Daily Agenda.
<b><i>View Week</i></b>	Display the Weekly Agenda.
<b><i>View Month</i></b>	Display the Monthly Agenda.
<b><i>Refresh All</i></b>	Refresh all windows.
<b><i>Reminder</i></b>	Turn Reminders on or off.
<b><i>Icons</i></b>	Turn display of icons on or off.
<b><i>Meeting Colors</i></b>	Decide whether to color-code Meetings by Importance level, Attendance status or Ownership.
<b><i>Decrease Time Slot</i></b>	Decrease the interval represented by each time slot.
<b><i>Increase Time Slot</i></b>	Increase the interval represented by each time slot.
<b><i>Decrease Row Height</i></b>	Decrease the space allotted for each time slot.
<b><i>Increase Row Height</i></b>	Increase the space allotted for each time slot.
<b><i>Toolbar</i></b>	Display or hide the Toolbar.
<b><i>Status Bar</i></b>	Display or hide the Status Bar.

## Window menu

<b><i>Window 1, 2, ...</i></b>	Display the specified window.
<b><i>Stack Windows</i></b>	Display windows one on top of the other, with their titles visible.
<b><i>Tile Windows</i></b>	Display windows in a row, one beside the other.

## Help menu

<b><i>Contents</i></b>	Open the HTML Help.
<b><i>Product Information</i></b>	Open your Web browser to a URL specified by your System Administrator. The location may vary depending on whether you are working on-line or off-line. The default location is the Web access information page on the Steltor web site.
<b><i>About CorporateTime</i></b>	Display the version number of CorporateTime.

## **Task View, Edit menu**

<i>Edit Task</i>	Edit the selected Task.
<i>Duplicate Task</i>	Duplicate the selected Task.
<i>Delete Task</i>	Delete the selected Task.

## **Task View, View menu**

<i>Show All Tasks</i>	Display all existing Tasks.
<i>Show Incomplete Tasks</i>	Display only incomplete Tasks.
<i>Show Completed Tasks</i>	Display only completed Tasks.
<i>Show Active Tasks</i>	Display only active Tasks.
<i>Sort by Description</i>	List Tasks alphabetically by description.
<i>Sort by Due Date</i>	List Tasks according to their due dates.
<i>Sort by Start Date</i>	List Tasks according to their start dates.
<i>Sort by Priority</i>	List Tasks according to their priority.
<i>Sort by Completion Level</i>	List Tasks according to their completion status.

## **Task View, File menu**

<i>Print Selected Entry</i>	Print the selected Task.
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## **Address Book View, Edit menu**

<i>New Address Book Entry</i>	Create an Address Book Entry.
<i>Add Bookmark</i>	Mark an Address Book Entry, allowing you to scroll through and print specified Entries.
<i>Remove Bookmark</i>	Remove a bookmark from an Address Book Entry.
<i>Next Bookmark</i>	Scroll to the next bookmarked Address Book Entry.

## **Address Book View, View menu**

<i>Open All Folders</i>	Open all folders in your Address Book, displaying all your Entries.
-------------------------	---

<b><i>Close All Folders</i></b>	Close all folders in your Address Book, hiding all your Entries.
<b><i>Settings</i></b>	Customize your Address Book display through Columns, Settings and Folders.
<b><i>Set Filter</i></b>	Create a filter to select only Address Book Entries that fit specific criteria.
<b><i>Remove Filter</i></b>	Remove the Address Book filter currently being used.

### **Meetings, contextual pop-up menu (Right-click)**

<b><i>Will Attend</i></b>	You will attend this Meeting.
<b><i>Will Not Attend</i></b>	You will not attend this Meeting.
<b><i>Will Confirm Later</i></b>	You have not yet decided if you will attend this Meeting.
<b><i>Send Mail</i></b>	Send an e-mail message to any or all users invited to this Meeting, depending on their notification preferences.

### **Daily Notes & Day Events, contextual pop-up menu (Right-click)**

<b><i>Keep in Agenda</i></b>	You will keep this Entry in your Agenda.
<b><i>Remove from Agenda</i></b>	You will not keep this Entry in your Agenda.
<b><i>Decide Later</i></b>	You have not yet decided if you will keep this Entry in your Agenda.

### **Tasks, contextual pop-up menu (Right-click)**

<b><i>Completed</i></b>	The Task has been completed.
<b><i>Not Completed</i></b>	The Task has not been completed.

Appendix

**C****Glossary**

<b><i>Access Level</i></b>	Controls who can access information about your Entry or Task. There are four different levels: Normal, Confidential, Personal and Public.
<b><i>Access Rights</i></b>	Sets what information about your Entries other users on the system are able to view or edit.
<b><i>ACE</i></b>	The Authentication, Compression and Encryption mechanisms used by your server connection.
<b><i>Address Book</i></b>	Keeps track of all your business and personal contacts. Create as many Address Books as you need.
<b><i>Address Book Entry</i></b>	The listing you have for a business or personal contact.
<b><i>Agenda</i></b>	The calendar you use to enter Entries (Meetings, Day Events, Daily Notes and Tasks).
<b><i>Associate</i></b>	To open an attached file, it must first be associated with an application capable of reading it. If your system cannot find an application with which to open an attached file, it will ask you to associate the file with a suitable one.
<b><i>Attachment</i></b>	Attach a file to a Meeting or Task using the Details tab of the New or Edit Meeting or Task dialog boxes.
<b><i>Attendance Status</i></b>	The status of a Meeting indicates your response to it. Meetings color-coded by status appear as follows: <ul style="list-style-type: none"><li>• Accepted Entry: green</li><li>• Unknown Status: yellow</li><li>• Refused Entry: red</li><li>• Accepted Tentative Entry: dark green</li><li>• Unknown Status, Tentative Entry: dark yellow</li><li>• Refused Tentative Entry: dark red</li></ul>
<b><i>Attendee</i></b>	A user or Resource invited to an Entry.

<b><i>Bookmark</i></b>	A Bookmark allows you to scroll through or print selected Address Book Entries.
<b><i>Calendar</i></b>	A tool that is found in the New Entries dialog box. It can be used to select a date for the Entry.
<b><i>Calendar domain</i></b>	A unique identifier representing a customer account on the calendar server. Multiple domains may exist on the same server independently of each other. Needed only if your organization is an Application Server Provider (ASP).
<b><i>Combined column</i></b>	The Combined column is found in the Group View. It indicates the periods of time during which one or more of the included users or the Resources is booked for an Entry.
<b><i>Connection Editor</i></b>	Create a new CorporateTime Server connection and edit its domain, node and ACE settings.
<b><i>Connection Manager</i></b>	See and edit the different server connections available to you when connecting to CorporateTime. Enable automatic sign-in if you use Windows NT or Mac OS 9 and greater and establish a default server connection.
<b><i>Daily Note</i></b>	A memo you can enter into your Agenda. It has a specific date but no start or end time. Daily Notes can be up to 64 characters long and are displayed in your Daily, Weekly and Monthly Agendas.
<b><i>Day Event</i></b>	An Entry that runs for an entire day but does not block out specific time in your Agenda, allowing you to schedule Meetings as usual. Day Events can be up to 64 characters long and are displayed in your Daily, Weekly and Monthly Agendas.
<b><i>Default</i></b>	The preset selection for an option. It is the value the Agenda uses unless you specify otherwise.
<b><i>Designate</i></b>	Someone who has the right to modify another user's Entries in that user's name. Designates can perform operations according to the Access Rights the other user has granted them. However, you can never set Access Rights while working as a Designate for someone else.
<b><i>Designate Rights</i></b>	The powers you give to another user to let them work as a Designate in your Agenda.
<b><i>Domain</i></b>	The domain makes up part of your e-mail address. Have CorporateTime display each user's domain name by choosing Options menu > General and selecting the Organization checkbox on the Names tab.
<b><i>Entry</i></b>	Anything that appears in the In-tray or your Agenda pages (i.e. Meetings, Tasks, Daily Notes, Holidays and Day Events).

<b><i>Groups</i></b>	A collection of users and/or Resources that users can create to facilitate certain functions in CorporateTime. They are useful when you want to quickly invite multiple users and/or Resources to an Entry.
<b><i>Group Types</i></b>	<p>There are three group types: Private, Members-only and Public.</p> <ul style="list-style-type: none"><li>• Private groups are only available for use by their creators.</li><li>• Members-only groups are available for use only by members of the group.</li><li>• Public groups are available for use to everyone on the system. However, they can only be modified by the group's owner.</li></ul>
<b><i>Holidays</i></b>	A Holiday is a special occasion or commemoration of an event. The System Administrator must give you authorization to create Holidays.
<b><i>Importance Level</i></b>	<p>Assign different levels of importance to your Meetings. Meetings color-coded by Importance appear as follows:</p> <ul style="list-style-type: none"><li>• Highest Importance: red</li><li>• High Importance: pink</li><li>• Normal Importance: turquoise</li><li>• Low Importance: blue</li><li>• Lowest Importance: green</li></ul>
<b><i>In-tray</i></b>	Entries received from other users appear in the In-tray. The In-tray also has a folder containing all the Entries you have sent other users.
<b><i>Local User</i></b>	A user on the server node you are currently signed into.
<b><i>Meeting</i></b>	Entries with a specific start and end time. Set Reminders for your Meetings, make them recur on a regular basis and invite other users and Resources to them.
<b><i>Node</i></b>	A node is a database located on a server. There often are several nodes on one server. Nodes are identified by a number or a name, called a node alias.
<b><i>Off-line</i></b>	Not connected to the server. You can only access Agendas you have downloaded to the local database.
<b><i>On-line</i></b>	Connected to the server.
<b><i>Organization Unit</i></b>	A subdivision of your organization set by your system administrator, such as the Finance or Accounting division. Users can have as many as four organization units.
<b><i>Ownership</i></b>	<p>A Meeting is owned by the person or Resource in whose Agenda the Entry was created. Meetings color-coded by ownership appear as follows:</p> <ul style="list-style-type: none"><li>• Owned Entry: blue</li><li>• Invited Entry: pink</li></ul>

- Owned Tentative Entry: dark blue
- Invited Tentative Entry: purple











<b><i>Personal Address Book</i></b>	Address Books kept locally and not shared with other users.
<b><i>Priority</i></b>	The level of importance for a Task. Tasks can be assigned a numeric or alphabetic value and sorted by this field.
<b><i>Published Address Book</i></b>	Address Books shared with selected users over the server.
<b><i>Reconciliation</i></b>	The process of making your on-line and off-line Agendas consistent with one another. When you reconcile your Agendas, you decide which version of an Entry you want to keep, thereby eliminating any inconsistencies between them. You may need to reconcile your Agendas when you upload your off-line Agenda.
<b><i>Refresh</i></b>	Updates the Agenda and In-tray Views to include any new Entries that have been created since the last refresh. Views are refreshed automatically every 15 minutes or manually when you choose View menu > Refresh All.
<b><i>Reminder</i></b>	A Pop-up Window or Upcoming Reminder set to remind a user about an upcoming Entry.
<b><i>Remote User</i></b>	A user whose Agenda is on a different node or server. Remote user names appear with an (R). They can be invited to Entries in the same way as local users. Remote users cannot act as Designates.
<b><i>Resource</i></b>	An inanimate object, such as a conference room or a piece of equipment, that has its own Agenda.
<b><i>Scheduling Rights</i></b>	Grants another user the ability to invite you to Entries. Users set scheduling rights on the Scheduling tab of the Access Rights dialog box.
<b><i>Search Agenda</i></b>	Search a user's Agenda for attendees or a string of words within a date range.
<b><i>Search Parameter</i></b>	Defines your search by restricting it to specific criteria.
<b><i>Server</i></b>	The centralized database of user data to which the workstations of a network are connected.
<b><i>Status Bar</i></b>	The Status Bar can be displayed at the bottom of CorporateTime windows. To display or hide the Status Bar, choose View menu > Status Bar.
<b><i>Task</i></b>	A specific project that needs to be completed. Enter a Task in your Agenda, either on its own or linked to a Meeting. It can have a start date and due date, a start time and due time, as well as a Priority and Access level.
<b><i>Tentative</i></b>	Tentative Meetings are not yet official.

<b><i>Time Control</i></b>	A tool you can use to enter a time into your Agenda. It opens when you click the Clock button in a dialog box.
<b><i>Time Slot</i></b>	Individual blocks of time represented on your Daily and Weekly Agendas as rectangles. The height and time length of time slots can be adjusted using commands from the View menu.
<b><i>Toolbar</i></b>	Provides quick mouse access to many of your Agenda's functions. To display or hide the Toolbar, choose View menu > Toolbar.
<b><i>vCalendar</i></b>	A file format (*.vcs) that allows you to transfer data from your Agenda to other applications, including e-mail, word processing, Web browsers and other time management programs. The format is platform-independent.
<b><i>Viewing Rights</i></b>	Rights users can assign to view Entries and Tasks in their Agenda.
<b><i>Web Access</i></b>	Allows users to view information provided by their system administrator using a Web browser. The default location is the product information page on the Stelcor Web site.









Appendix

**D****Icon and Button Glossary****Daily, Weekly and Group Views**







	Round Checkmark	The attendee has accepted the invitation.
	Round "X"	The attendee has refused the invitation.
	Round Question Mark	The attendee has not yet replied to the invitation.
	Information	Information is included with the Meeting. This icon only appears if "One icon" is selected in the Display tab of the Agenda Preferences dialog box.
	Pencil	The Meeting includes details.
	Paper Clip	The Meeting includes an attachment.
	Group	Other users are invited to the Meeting.
	Bell	The Meeting has a Reminder.
	Padlock	You are not authorized to view this Meeting.
	Modify Members	Change the users and Resources currently included in the Group Agenda.

**Notes View**






	Day Event	The Entry is a Day Event.
	Note	The Entry is a Daily Note.






	Holiday	The Entry is a Holiday.
	Upcoming Meeting	Reminder for an Upcoming Meeting.
	Upcoming Task	Reminder for an Upcoming Task.
	Upcoming Note	Reminder for an Upcoming Daily Note.
	Upcoming Day Event	Reminder for an Upcoming Day Event.
	Upcoming Holiday	Reminder for an Upcoming Holiday.

## Monthly View







	Grid	Returns the calendar grid to its default setting.
	More	There is more information in the grid square than is currently visible.
	Day Event	The Entry is a Day Event.
	Note	The Entry is a Daily Note.
	Holiday	The Entry is a Holiday.
	Red "X"	The user will not attend the Meeting.

## In-tray




	Meeting	The Entry is a Meeting.
	Day Event	The Entry is a Day Event.
	Note	The Entry is a Daily Note.
	Holiday	The Entry is a Holiday.
	Repeating Entry	Indicates a Repeating Entry.




	Green Checkmark	The attendee has accepted the invitation.
	Red "X"	The attendee has refused the invitation.
	Blue Question Mark	The attendee has not yet replied to the invitation.
	Attending But Would Like to Reschedule	The user will attend the Meeting, but would prefer if it were scheduled for another time.
	Not Attending But Would Like to Reschedule	The user will not attend the Meeting, but would attend if it were scheduled for another time.

## Address Book










	New Address Book Entry	Opens the New Address Book Entry dialog box.
	Open All Folders	Expands all folders in the current Address Book.
	Close All Folders	Closes all folders in the current Address Book.
	Entry View Selector	Displays the Entry View.
	List View Selector	Displays the List View.
	Bookmark	The Address Book Entry is bookmarked.

## Task View and Task Display


	Task (black outline)	The Task is due in the future.
	Overdue Task (red outline)	The Task's due date has passed, but the Task has not yet been marked off as complete.
	Completed Task	The Task has been completed.

	Pencil	The Task includes details.
	Paper Clip	The Task includes an attachment.
	Bell	The Task has a Reminder.

## Dialog Box

	Round Checkmark	The attendee has accepted the invitation.
	Round "X"	The attendee has refused the invitation.
	Round Question Mark	The attendee has not yet replied to the invitation.
	Attending but Would Like to Reschedule	The attendee will attend the Meeting, but would prefer if it were scheduled for another time.
	Not Attending but Would Like to Reschedule	The attendee will not attend the Meeting, but would attend if it were scheduled at another time.
	Gray Circle	Several instances of a Repeating Entry are selected.
	Mail Message	Send a mail message to other users.
	Calendar	Opens the Calendar, letting you set the date for an Entry you are scheduling.
	Clock	Opens the Time Control, letting you set the time for an Entry you are scheduling.

## Adding Names

	Checkmark	Enters information you typed in an edit box.
---	-----------	--



Search

Opens the Directory Search dialog box.



Group

Opens the Group Selection dialog box, letting you add group members to a list of users.

## Cursors



Drag &amp; Drop

Appears when you click an Entry you can drag to another location.



View Resizing

Appears when you click a view splitter. Lets you resize the view.



Moving

Appears when you click a Meeting. Lets you move a Meeting you own.



Resizing

Change the duration of a selected Meeting in your Daily and Weekly Agenda Pages. Click the edge of a selected Meeting to modify it.



Cannot Drop It Here

Appears when you drag an Entry to somewhere it cannot be dropped.

## Toolbar Buttons



Open an Agenda

Opens an Agenda you own or that of another user.



Open In-tray

Opens your In-tray.



Open Tasks

Opens a Task View.
















Address Book

Opens the Address Book Selection dialog box, allowing you to create or modify an Address Book.







Group

Opens a Group View.

	Find Entry	Locates the selected In-tray Entry in your Agenda.
	View Day	Switches to the Daily Agenda page.
	View Week	Switches to the Weekly Agenda page.
	View Month	Switches to the Monthly Agenda page.
	New Meeting	Opens the New Meeting dialog box.
	New Task	Opens the New Task dialog box.
	New Day Event	Opens the New Day Event dialog box.
	New Daily Note	Opens the New Daily Note dialog box.
	Print	Lets you access the Print dialog box or print the current view.
	Launch Mail	Starts your Mail application, depending on your External Applications Preferences.
	Product Information	Starts your Web browser, depending on your External Applications Preferences.
	AppleGuide	 Starts the on-line help system.

## Status Bar Icons

	New Entries	There are new Entries in your In-tray.
	Off-line	You are working off-line.
	On-line	You are working on-line.
	Status Bar	Your Pop-up Reminders are on.



## Reminder Icons



About a Meeting

The Reminder is for a Meeting.



About a Note

The Reminder is for a Daily Note.



About a Day Event

The Reminder is for a Day Event.



About a Task

The Reminder is for a Task.

## Date Selection Icons



More Above

There are Entries earlier in the time period that are not currently visible on-screen. Appears on the extreme left of your Date Control Bar.



More Below

There are Entries later in the time period that are not currently visible on-screen. Appears on the extreme left of your Date Control Bar.



More Above & Below

There are Entries earlier and later in the time period that are not currently visible on-screen. Appears on the extreme left of your Date Control Bar.



Double Left Arrow

In the Daily Agenda, this button brings you back a week.

In the Weekly Agenda, this button brings you back four weeks.

In the Monthly Agenda, this button brings you back six months.

On the Calendar, this button brings you back a year.

**Left Arrow**

In the Daily Agenda, this button brings you back a day.

In the Weekly Agenda, this button brings you back a week.

In the Monthly Agenda, this button brings you back a month.

On the Calendar, this button brings you back a month.

**Right Arrow**

In the Daily Agenda, this button brings you forward a day.

In the Weekly Agenda, this button brings you forward a week.

In the Monthly Agenda, this button brings you forward a month.

On the Calendar, this button brings you forward a month.

**Double Right Arrow**

In the Daily Agenda, this button brings you forward a week.

In the Weekly Agenda, this button brings you forward four weeks.

In the Monthly Agenda, this button brings you forward six months.

On the Calendar, this button brings you forward a year.

## Reconciliation Icons

**About a Meeting**

The Entry you are reconciling is a Meeting.

**About a Note**

The Entry you are reconciling is a Daily Note.

**About a Day Event**

The Entry you are reconciling is a Day Event.

**About a Task**

The Entry you are reconciling is a Task.





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