

BIOTECHNOLOGY COMPUTING FACILITY

OnCore Facility Scheduler v1.0

OCF Scheduler
Resource User
Guide

OCF Scheduler

RESOURCE USER GUIDE

BIOTECHNOLOGY COMPUTING FACILITY - DIVISION OF BIOTECHNOLOGY

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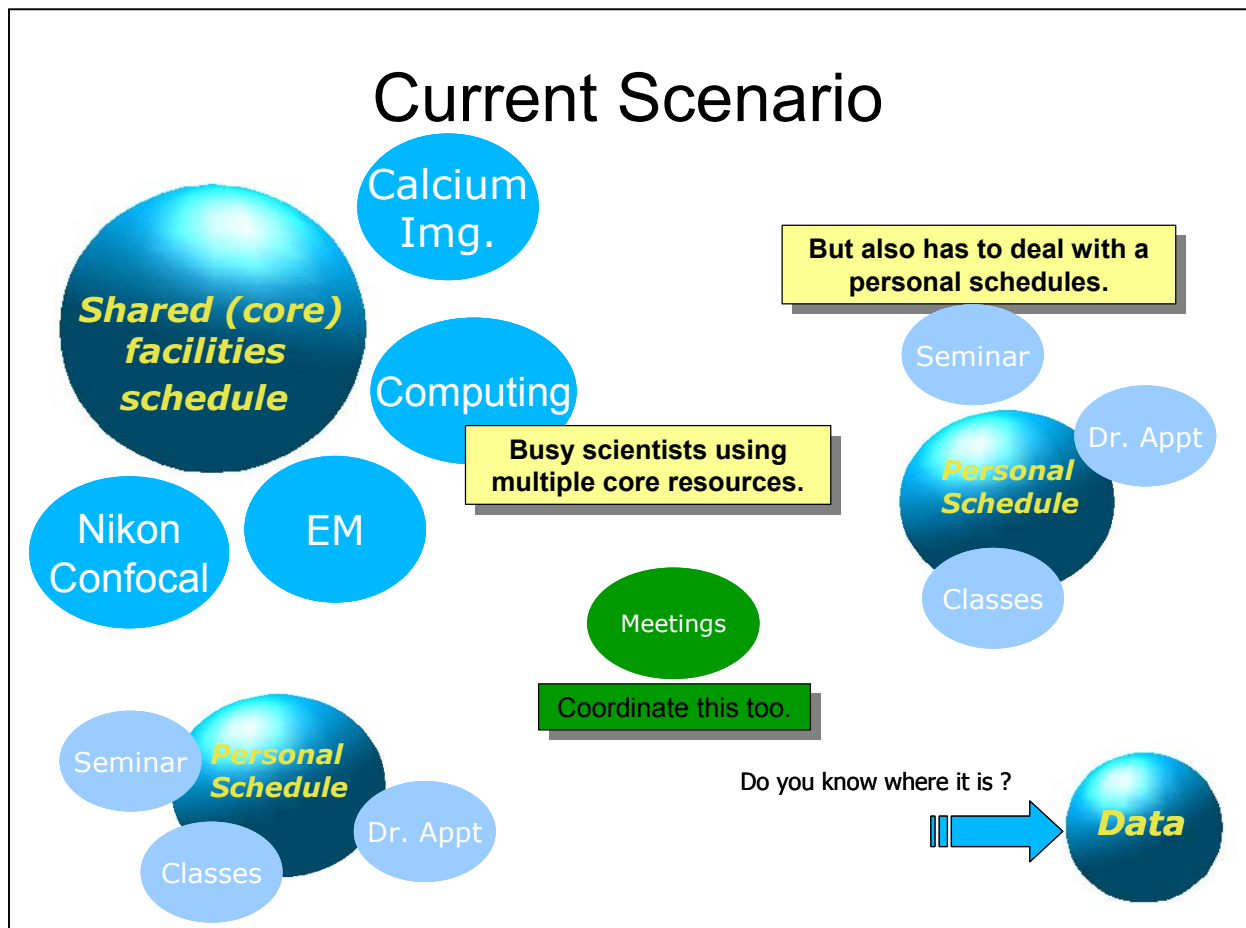
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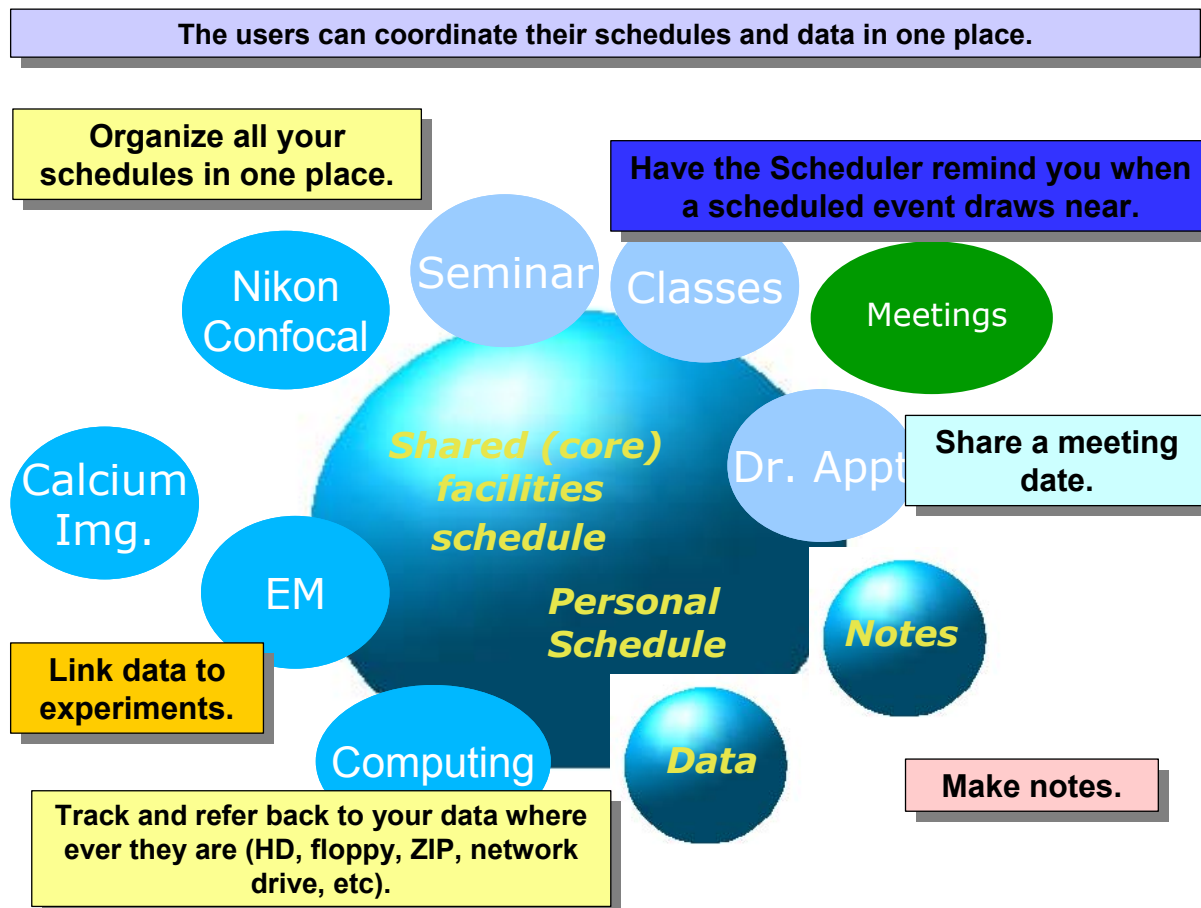
Overview

This guide will walk you through each of the different functions in the OnCore Facility (OCF) Scheduler. Due to minor updates and enhancements made to the program, some of the functionality in the OnCore Facility Scheduler may be slightly different as described in this guide.



- Scheduling on resources is done by scratching dates on a pad of paper located near the resource.
- Every one has their own personal schedules using post-it notes, pocket calendars, handheld devices and computers.
- You or your secretary may schedule many different meetings.
- Data obtained by you or your representative from the resource session may be stored on multiple removable drives or network drives.

The OCF Scheduler will try to help you organize your schedules and data in one convenient location by making them accessible using the web.



The OCF Scheduler user will use the system to schedule both professional and personal events.

The scheduler user will be able to schedule professional and personal events as well as tracking data gathered while using the resources in a single environment. However, all personal schedules are kept private and are not track by any resource administrator.

- Allows scheduler to cross talk with other core services.
- Allows scheduler to incorporate your personal schedule.
- Get detailed tracking and reporting of usage in different accounts.
- Get email, pager or phone reminders.
- Interfaces with PDAs.
- Link data gathered from other core services.
- Add notes to each session.
- Easily search notes and retrieve data.
- Grant other users access your calendar or data.
- Schedule a meeting by asking your participants to confirm.

Requirements

- You must register for a user account and follow your departmental policies.

- The scheduler requires cookies and java to be enabled in your browser. Please refer to your browser’s “Help” section for guidance in setting your browser preferences.

Navigating the Scheduler

You will be required to log into the system to view the scheduler. However, visitors may view resources in the Resource Schedule. Before we continue with this guide, get a feel for the navigating tools and windows in the OCF Scheduler.

Some Terminologies Used in the Guide

Resource = Nikon Confocal, FACS, a computer, etc.

Session = the time slot you have signed up for.

Event = what is happening during the sign up time (*cy3 in situ...*).

Description = (optional) detailed information about the event.

Schedule = calendar.

Below is an example of the typical page in the Scheduler.

The screenshot shows the 'Edit User Information' page in the OCF Scheduler. At the top, there are five navigation tabs: 'Resource Schedule', 'Personal Schedule', 'My Data', 'Public Calendars', and 'Search'. On the left side, there is a vertical menu with three buttons: 'Scheduler User', 'Set Password', and 'Accounts'. The main content area is titled 'Edit User Information' and contains a form with various fields for user details, including login name, address, room number, city, state, zip code, affiliation, department, PI, and preferred account. A 'Submit' button is located at the bottom of the form. Below the form, there are dropdown menus for 'Resource', 'Month', 'Week', and 'Year'. At the bottom of the page, there is a 'Navigation Bar' with links for 'Personal Schedule', 'Resource Schedules', 'Another User's Calendar', and 'Search'. A status message indicates the user is logged in as 'User, Scheduler' and provides links for 'Login/Logout', 'Preferences', and 'Profile'. Three callout boxes provide additional information: a yellow box at the bottom left explains the 'Navigation Bar', a green box at the bottom right explains the 'Navigation Tabs', and a white box on the right side points to the 'Login Status' link in the footer.

Your Login Status is located at the bottom of the page above the **Navigation Links**.

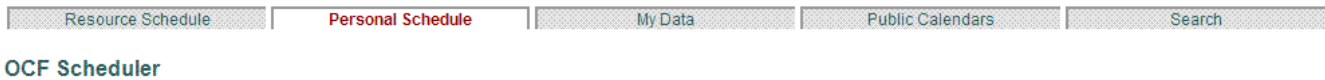
The **Navigation Bar** allows you to navigate user settings.

At the top of the page are the **Navigation Tabs** to easily navigate the Resource Schedule, Personal Schedule, My Data, Public Calendars and the Search Tool.

Navigation Links

Setting up a New User Profile

Visit your departmental resource page to access the OCF Scheduler.



OCF Scheduler

Scheduler Login

[New User Sign up](#)

User Name:

Password:

GO!

Keep me logged in on this machine.

[Forgot your login information?](#)

Note: This application requires cookies to be enabled.

OCF Scheduler

- Click on the “**New User Sign up**” link to access the new user registration page and create a user profile.

New User Registration

<p>Login Name: <input type="text"/> <i>no spaces please</i></p> <p>First Name: <input type="text"/></p> <p>Last Name: <input type="text"/></p> <p>E-mail address: <input type="text"/></p> <p>Alternate email: <input type="text"/></p> <p>Phone: <input type="text"/></p>	<p>Address: <input type="text"/></p> <p>Room #: <input type="text"/></p> <p>City: <input type="text"/></p> <p>State: <input type="text"/></p> <p>Zipcode: <input type="text"/></p> <p>Affiliation: <input type="text" value="NOT SELECTED"/></p> <p>Department: <input type="text" value="NOT SELECTED"/></p>
<p>Make Public: <input type="checkbox"/> <i>(Let other users view your personal calendar)</i></p> <p>Password: <input type="password"/></p> <p>Password (again): <input type="password"/></p>	<p><i>*required information for billable resources:</i></p> <p>PI: <input type="text" value="NOT SELECTED"/></p> <p>Account #: <input type="text"/></p> <p style="color: red; font-size: small;"><i>additional accounts can be added later</i></p>

This information is not required if the resource that you want access is a free resource.

Submit

**Required for billable resources*

- Fill out the form.
- For billable resources, include your P.I. and account number ***if you will be using any billable resources.***

New User Registration	
Login Name: <input type="text" value="agellon"/> <i>no spaces please</i> First Name: <input type="text" value="Al"/> Last Name: <input type="text" value="Agellon"/> E-mail address: <input type="text" value="agellon@u.arizona.edu"/> Alternate email: <input type="text"/> Phone: <input type="text" value="(520) 621-1797"/>	Address: <input type="text" value="1041 E. Lowell St."/> Room #: <input type="text" value="240"/> City: <input type="text" value="Tucson"/> State: <input type="text" value="AZ"/> Zipcode: <input type="text" value="85721"/> Affiliation: <input type="text" value="In-state University"/> Department: <input type="text" value="ARL - Biotechnology"/> Make Public: <input checked="" type="checkbox"/> <i>(Let other users view your personal calendar)</i> Password: <input type="password" value="*****"/> Password (again): <input type="password" value="*****"/>
<div style="text-align: center;">Submit</div>	

**Required for billable resources*

- Click on “**Submit**” to create a new profile.

You can always edit your user profile after you have created it. This action will take you to the Resource Scheduler page listing all current services in the group.

Alternate

New User – Email Already in the Database

If you are creating a new user account but although you have previously created one, a message in a new page will indicate this.

The email specified is already in use

The email you specified is already registered in the system

Request User Account Information: *(Scheduler User)*

Email Address agellon@u.arizona.edu

You may inquire about the account information that was previously created or simply create another account with the same email address.

Send me my account information

Create another account with this email

- Clicking on the “**Send me my account information**” button will send you an email messages containing your login name and password.

Dear Scheduler User,

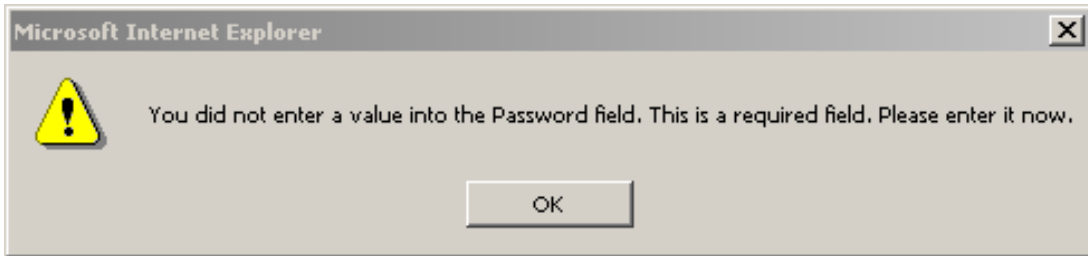
OCF Scheduler login information:

Login Name: USER
 Password: what?iexist?

This information was sent to agellon@u.arizona.edu because a request for login/password was made from 128.196.193.109 on May 21, 2003, 12:56 pm

Thank you,
 OCF Scheduler Administrator

- Clicking on the “**Create another account with this email**” button will continue with the new account set-up with the same email address. This option is especially useful for administrators or those who want to keep different profiles for different accounts.
- Make sure to re-enter a password



Account Information

The account information is only required if you requested a ***billable resource*** when you signed up for an account. For example, some departments may have many resources where resources are available free of use such as departmental or group computer workstations.

If you do not include the billing information, your profile status is complete but in the “User Information” section, will have an asterisk (*) next to your status. However, when you request to use a billable resource, you will be required to provide an account number and account holder (Principal Investigator). Your status will become “**Complete**”.

Alternate

New User – New Account Number in the Database

This window appears if you have requested a billable resource and your account number is not in our database.

The screenshot shows a web form titled "User Registration" with a red header. Below the header is a message: "Please provide the requested information to complete the registration". The form is divided into a section titled "Account Information" with a red header. Inside this section, a red message states: "Account number you specified is not in the database. Please provide the following information for account number 121212:". There are three input fields: "Account Name" (a text box), "Description" (a larger text area with scrollbars), and "Expiration Date" (three dropdown menus). A red "Save" button is located at the bottom right of the form.

- Enter the account name: You can add several accounts in your user profile by specifying unique names to each of your accounts.
- Enter a description: Give a short description of your account.
- Enter an expiration date: Enter the date when your account will be terminated.

Review Your Profile

Once you have created your profile, you will be taken to the Resource Schedule page listing all resources currently in service. Scroll down at the bottom of the page. There, you will see your logon status.

The screenshot shows a status bar with a light gray background. It contains the text "You are logged in as: User, Scheduler" in red. Below this are three red links: "Login/Logout", "Preferences", and "Profile". At the bottom of the bar are four red links: "Personal Schedule", "Resource Schedules", "Another User's Calendar", and "Search".

Before you proceed to scheduling a resource, double-check your user information.

- To view or update your profile, scroll down to click on the "**Profile**" link.

The Profile Manager

The profile manager page will allow you to edit your information; change your password and add/delete additional account associations to your user name.

The screenshot shows the 'Edit User Information' form. The form is divided into two columns. The left column contains: Login Name: USER; Profile Status: User Profile Complete; First Name: Scheduler; Last Name: User; E-mail address: agellon@u.arizona.edu; Alternate email: (empty); Phone: (520) 621-9791; Make Public: (Let other users view your personal calendar). The right column contains: Address: 1041 E. Lowell St.; Room #: BSW240; City: Tucson; State: AZ; Zipcode: 85721-0088; *Affiliation: In-state University; *Department: ARL; *PI: NOT SELECTED; *Preferred Account: 121212 (additional accounts can be through profile accounts). A 'Submit' button is at the bottom of the form. The page has navigation tabs at the top: Resource Schedule, Personal Schedule, My Data, Public Calendars, Search. A sidebar on the left has buttons: Scheduler User, Set Password, Accounts. At the bottom, there are filters: Resource: (dropdown), Month: Jan 2003, Week: Jan 27 - Feb 2, Year: 2003. A login status message says: You are logged in as: User, Scheduler. Links: Login/Logout, Preferences, Profile. Footer: Personal Schedule | Resource Schedules | Another User's Calendar | Search.

- Make the necessary changes.
- Click on the **“Submit”** button to update the changes.

Setting Your Password

You may change your password at anytime by accessing the Profile Manger.

The screenshot shows the 'Set Password' form. It has two input fields: 'New Password:' and 'Verify Password:'. Below the fields is a red 'Set Password' button.

- Enter a new password.
- Re-enter the new password.
- Click on **“Set Password”** to update the changes.

Accounts

The account information is listed in the accounts list page. You may enter multiple accounts using a single profile. And, you may remove obsolete accounts here. The information will show the account names that you have given them, account numbers, expiration dates and your descriptions of the accounts. You may choose which default account is used by the Scheduler.

- Choose the appropriate account as your default account (click on the radio button under the “**Default**” heading).
- To remove obsolete accounts, click on the “**Remove**” link.

NOTICE: When you click on the “Remove” link, you will NOT get a verification pop-up notice. Your account profile will be removed immediately.

Add a New Account

- Enter the account number in the text box.
- Click on the “Add to List” button to submit the account number.

If the account number is not already in the database, a new page will open.

Add New Account

This account is not in the database.
Please provide the requested information about this account.

Account Name Account Number 222111

Description

Expiration Date

- Enter the name of the account.
- Give a description of the account.
- Enter the expiration date by using the pull down menu.
- Click on the “**Save**” button to create the new account
- OR, Click on the “**Exit**” button to abort the creation of a new account.

Setting Your Preferences

You may customize the way you view your calendar here.

Resource Schedule
Personal Schedule
My Data
Public Calendars
Search

Preferences

Language:

Preferred view:

Include Invites: Yes No

Time format: 12 hour 24 hour

Display unapproved: Yes No

Display week number: Yes No

Week starts on: Sunday Monday

Work hours: From to

Colors

Document text:

Document background:

Calendar background:

Calendar highlight:

Calendar text:

Resource: **Month:** **Week:** **Year:**

You are logged in as: **User, Scheduler**
[Login/Logout](#) | [Preferences](#) | [Profile](#)

- Choose and set your preferred language and calendar views.
- Calendar views may be set by day, week, month or year.
- Click on **“Yes”** on the **“Include Invites”** if plan to use the collaborations feature of the Scheduler.
- Choose the time format.
- Click on **“Yes”** on the **“Display unapproved”** if plan to use the collaborations feature of the Scheduler. This will notify you of any invitations that need approval in the Scheduler.
- Choose whether to display the week number on the calendar.
- Choose the day your week will start on.
- Choose your workday window.
- Choose your display color preferences of your calendar.
- Click on the **“Save Preferences”** button to apply the preferences.

This action will open your personal schedule with your preferences displayed.

Sharing a Calendar

You may allow other members to view your calendar. Sharing your calendar is necessary for the collaborations feature of the Scheduler.

Preferences

Language: English

Preferred view: Month

Include Invites: Yes No

Time format: 12 hour 24 hour

Display unapproved: Yes No

Display week number: Yes No

Week starts on: Sunday Monday

Work hours: From 8:00am to 5:00pm

Colors

Document text: Select...

Document background: Select...

Calendar background: Select...

Calendar highlight: Select...

Calendar text: Select...

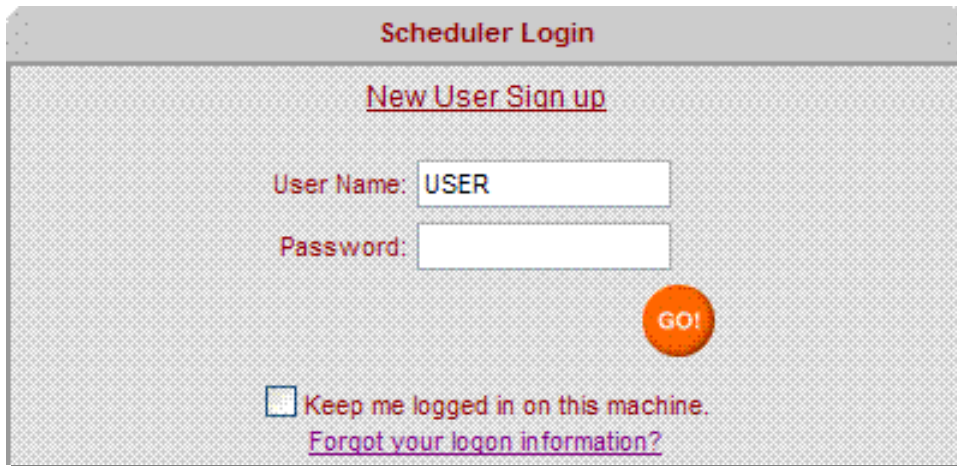
Save Preferences Help...

- Make sure to check “Include Invites” radio button
- Click on the “Save Preferences” button to apply the changes.
- This action will take you back to your “Personal Schedule”.

See [“Inviting Members”](#).

Forgot My Password

If you have forgotten your “User Name” and/or “Password”, you may retrieve them here.



Scheduler Login

[New User Sign up](#)

User Name:

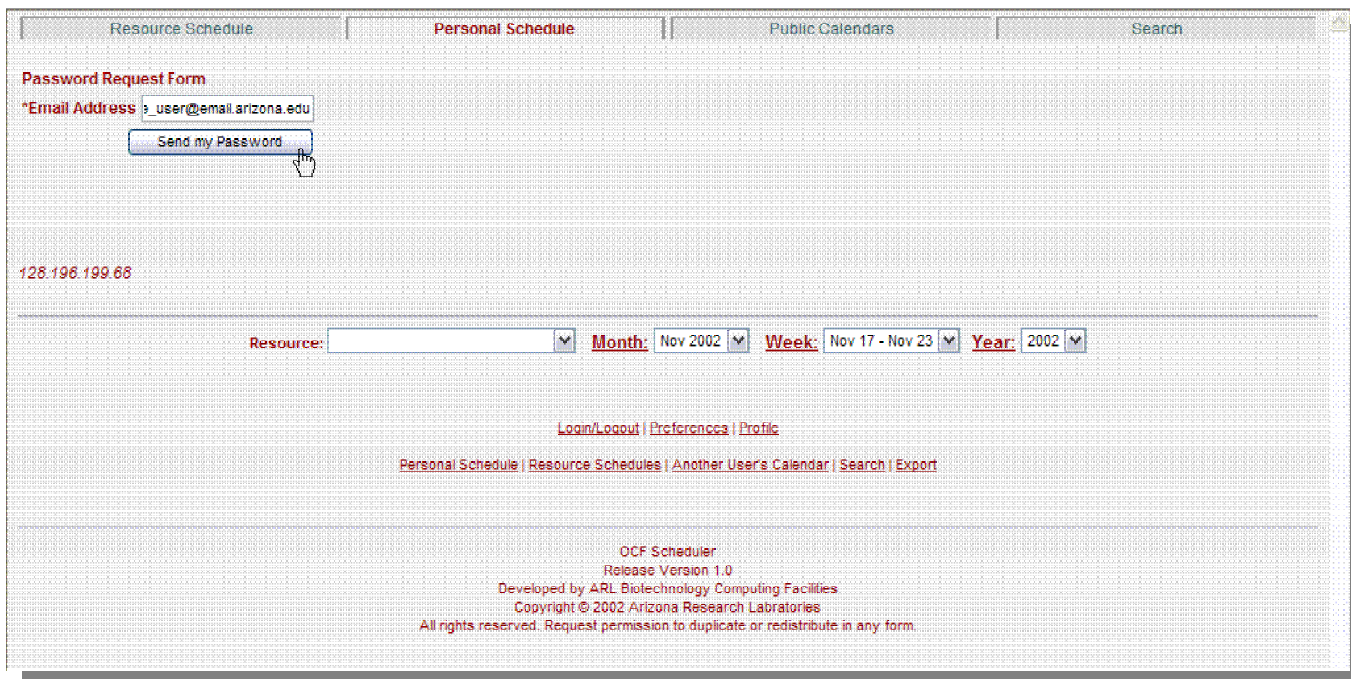
Password:

Keep me logged in on this machine.

[Forgot your logon information?](#)

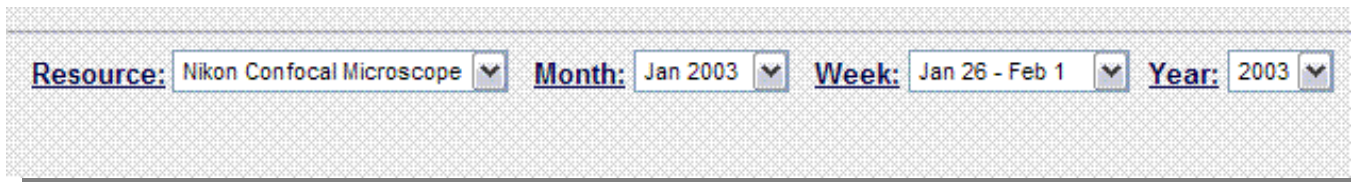
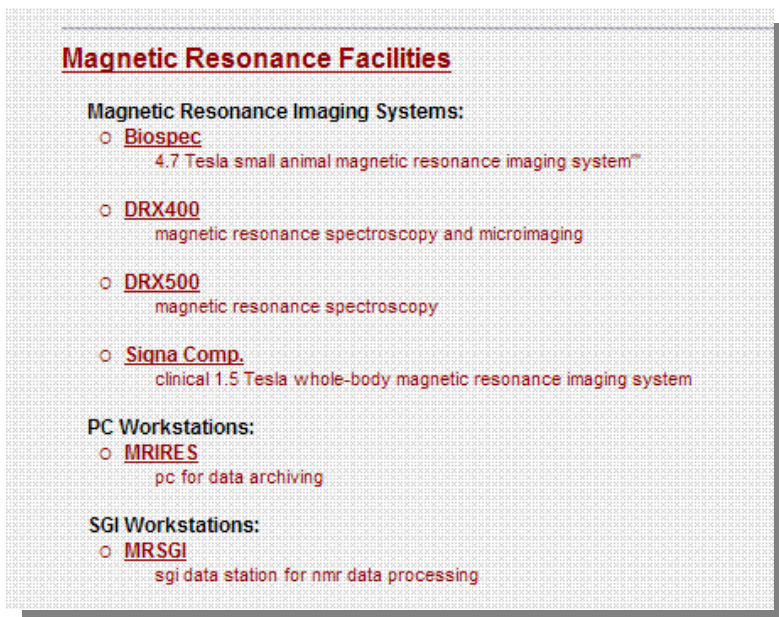
- Click on the **“Forgot your logon information?”** link at the “Scheduler Login” page.

This action will take you to the **“Password Request Form”**. If you have entered a different email address at registration and do not remember it, please contact the appropriate resource administrator. Alternatively, you may also create a new user profile with the correct information.



- Enter your email address used at the time of registration.
- Click on the “**Send my Password**” button to request the Scheduler to email the login information to you.

The Resource Schedule



- To see the schedules of resources, click on the links or choose the resource at the “Resource” pull down menu at the bottom of the page.

The Resource Calendar

You must be an account holder to view this section. The OCF Scheduler requires cookies and java to be enabled in your browser. Please refer to your browser’s “Help” section for guidance in setting your browser preferences.

The screenshot shows the 'Resource Schedule' tab selected. The main heading is 'January 2003 Reservations for Ligeti'. The calendar grid has columns for Sun, Mon, Tue, Wed, Thu, Fri, and Sat. Each cell contains a date and an 'Add New' link. The date 28 is highlighted in grey and contains a reservation for '11am>Scheduler User'. At the bottom, there is a 'Notify me when times become available' button and filter menus for Resource (Ligeti), Month (Jan 2003), Week (Jan 26 - Feb 1), and Year (2003).

- Use the pull-down menu for the “MONTH” views months past or future.
- Use the pull-down menu for a “SPECIFIC DATE” will open detail by day.
- You may choose to view by month, week or year by using the links at the bottom of the calendar.
- Click on the “Add New” link to add an event.
- If the day schedule is full, click on the “Notify” button to add you to a waiting list if a time slot becomes available.

Viewing the Calendar

The calendar will be viewed according to how you set your preferences. To view by week, month or year, click on the links or use the pull up menu to choose a specific date. To view the calendar by day, click on a specific day (the number) to display the window by day. The current date will be highlighted.

Scheduled events will be displayed on the calendar. To visualize a brief description of an event, simply move the mouse over it (see the image above). The event name and the description associated with the event will be displayed and clicking on the event will show details of that event.

- Mouse over a scheduled event to view the schedule synopsis.

Scheduling Time

The amount of time you may reserve prior to an event will be depending on how your resource administrator configured the scheduler. Please refer to your resource web page for information.

- Logon to the scheduler and proceed to the resource of interest.
- To schedule a time slot, click on the “**Add New**” link on the calendar.

Note: If you are accessing a billable resource for the first time, you will be required to complete the billing information (see “Creating an Account List”). The scheduler will not permit you to enter a time in the past.

If the resource that you are trying to access is not a billable resource (the managing department will not charge you), the Scheduler will take you to the “**Event Manager**”. Proceed to “**Adding an Event**”, otherwise you must first get authorization to use the resource.

Requesting Access

If a resource requires new user authorization, you will be given the option to request access.

The Killer PC 2 resource requires administrative approval

If you would like to use the Killer PC 2 schedule, you must first be granted access by the calendar administrator. You will receive an email when your request has been processed.

[Send Access Request](#)

You will see the message above **if a resource requires special approval** before the initial scheduling of time is permitted. This option is usually required if a resource requires special training or certification. Send in a request and the resource administrator will contact you via email with the authorization.

- Click on the “[Send Access Request](#)” button to submit a request.

If you try to log on without prior approval, a status report will be given to you.

The Killer PC 2 resource requires administrative approval

If you would like to use the Killer PC 2 schedule, you must first be granted access by the calendar administrator. You will receive an email when your request has been processed.

Your access request has been submitted to the [Killer PC 2 administrator](#) , but has not yet been processed.

Once you receive an email notification from the Scheduler, you may then proceed to scheduling an event.

Adding an Event

Reserve Time for computer

Al Agellon

The availability of the resource is displayed here.

<p>Event Name: <input type="text" value="Time on the computer"/></p> <p>Description: <input style="width: 90%;" type="text" value="for analysis"/></p> <p>Date: <input type="text" value="22"/> <input type="text" value="May"/> <input type="text" value="2003"/> <input type="button" value="Select..."/></p> <p>Time: <input type="text" value="5"/> : <input type="text" value="00"/> <input checked="" type="radio"/> am <input type="radio"/> pm</p> <p>Duration: <input type="text" value="1 hour"/></p> <p>Session Requests <i>(emailed to Admin)</i></p> <input style="width: 90%;" type="text" value="help!!!!!!"/>	<p>Availability</p> <p>Sundays All Day</p> <p>Mondays All Day</p> <p>Tuesdays All Day</p> <p>Wednesdays All Day</p> <p>Thursdays All Day</p> <p>Fridays All Day</p> <p>Saturdays All Day</p>
---	--

Send confirmation email:

Send reminder: in advance

Send to: agellon@u.arizona.edu

Export this entry (Palm, Outlook, iCal)

Messages here will be sent to the resource administrator

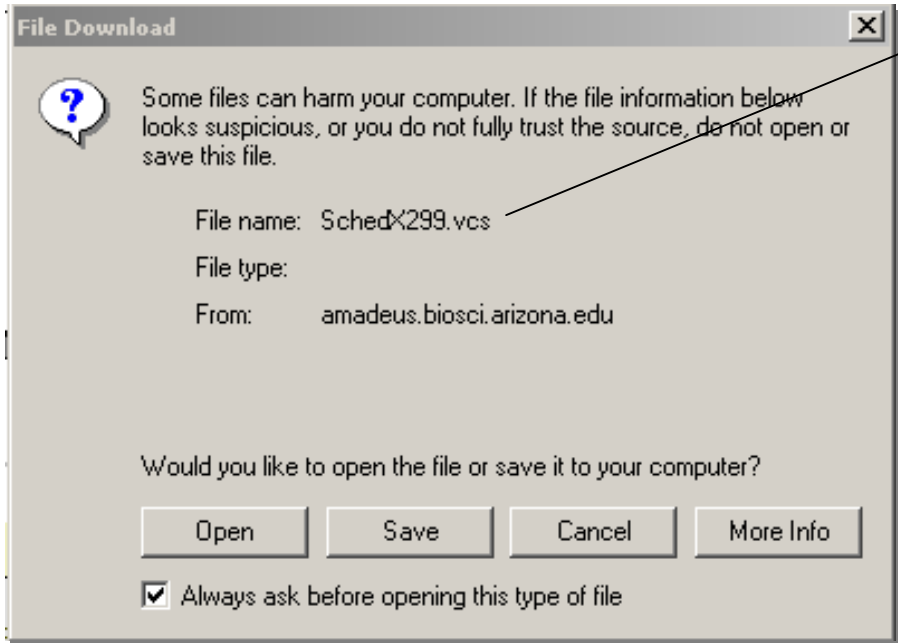
Alternate email addresses will show if here.

- Enter an event name.
- Give a brief description of the event.
- Enter the time, date, and duration of the scheduled event.
- Enter any session requests in the “**Session Requests**” textbox.
- If email confirmation is desired, check on the “**Send confirmation email**” checkbox.
- Enter a value in the “**Send reminder**” textbox.
- If being reminded, check the correct email address to use- you may have configured an alternate email address to use.
- If you want to export the entry, click on the **Export this entry (Palm, Outlook, iCal)** checkbox.
- Click on the “**Save**” button to save the event.

When you save the event, the scheduler will add your event to the calendar and if you exported the entry, you will be prompted to save the file.

View	22	Add New	23
	5-6:00pm>Agellon		
View	29	Add New	30

Events are written on the reservations calendar when entries are submitted.



Event entries can be exported and into PIMs or PDAs

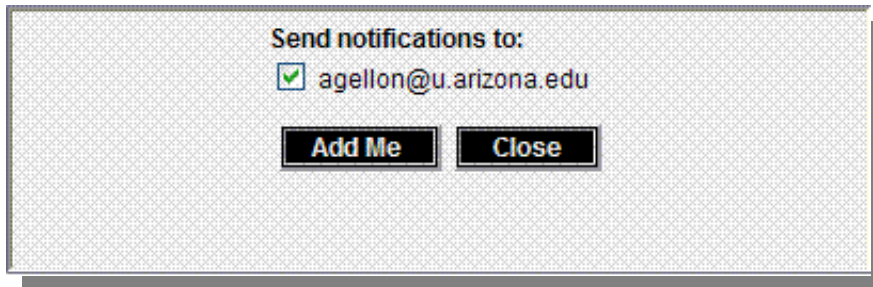
- Click on the **“Save”** button to export the event to your PDA, Outlook or vCal. You will be asked by your operating system where to store the file.

Scheduling Conflict

If an event entry is accepted, your request will be added to the calendar. However, if another user has reserved time on a particular resource that you wish to use, you will be given an option to be notified if the requested time becomes available.



- If you wish to receive an email if the specific time becomes available, then click the “**Notify me when times become available**” button.



- Select the desired email address(es) and click on the “**Add Me**” button. You will receive an email notification each time another user’s appointment is cancelled or if they finish early (the user must log off the system).



Special Logon

Sometimes, users forget to log off systems or perhaps are scheduled but may be away from work for a variety of reasons. In these special cases, contact your resource administrator to override reservations.

The Event Manager

You must be an account holder to view this section. The OCF Scheduler requires cookies and java to be enabled in your browser. Please refer to your browser’s “Help” section for guidance in setting your browser preferences.

Event Overview

This view will display the information about your event entry.

- Click on the “**Event Overview**” button on the navigation bar. The event manager will post how much time you have to cancel a scheduled event.

View Calendar

This view will display the calendar according to your preference settings.

View Month	Sun Jan 26	Mon Jan 27	Tue Jan 28	Wed Jan 29	Thu Jan 30	Fri Jan 31	Sat Feb 01
8:00am							
9:00am							
10:00am							
11:00am			• 11am>Scheduler User				
12:00pm							
1:00pm					• 1pm>Scheduler User	• 1pm>Al Agellon	
2:00pm							
3:00pm							
4:00pm							
5:00pm							

- Click on the **“View Calendar”** button on the navigation bar to display the calendar.

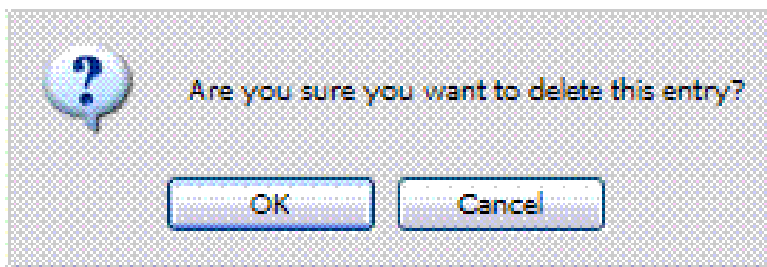
Edit Entry

You may modify the event name, description, date, time and the duration of a scheduled event. The event manager will also indicate up to when you may edit the event.

Click on the **“Edit Entry”** button on the navigation bar to modify your event entry. Make the necessary edits to the entry then click on the **“Save”** button when completed.

Delete Entry

If you must delete an event within the minimum time to cancel, you must contact the resource administrator to make the deletion for you.



- To delete an event, simply click on the **“Delete Entry”** button on the navigation bar.
- Confirm by clicking on **“OK”** button on the dialog box.

Notification Options

The notification options will allow you to configure Scheduler to remind you of an upcoming event or not. To modify your notification options, click on the “**Notification Options**” button on the navigation bar.

- Add the number of hours before the email reminder will be sent out or do not remind yourself by not checking the “**Send to**” checkbox.
- Click on the “**Save**” button to make the changes.

Session Notes

The session notes function in the Scheduler allows you to make text entries related to your event.

- If you want to attach notes to your entry, click on the “**Session Notes**” button on the navigation bar and enter your notes on the dialog box.
- Click on the “**Save**” button to attach the notes to your entry.

File Links

The file links view will allow you to manage files associated with your work by linking files stored in multiple locations (hard-drive, network drive, Zip disks, etc.) to your sessions. Links will be updated on the display.

Link Local Files To Ligeti Session For Scheduler User

Analysis II

Tuesday, February 4, 2003 at 10:00am - 2:00pm

Current Session Files			
Upload Date	File Name	Description	Remove Link
No files linked to this session.			

A link will be created between this session and a file on the computer you are using.
Linked files cannot be accessed from another computer.
(this option is recommended for larger files that you wish to access from this computer)

Link local files to this Ligeti session:

Description

Local File

- To add links to files, give a description to the link.
- Then click on the “**Browse**” button to browse your system.
- To link to a file on the local or mounted drive, click on the “**Create Link**” button to link the file to the event.

Link Local Files To Ligeti Session For Scheduler User

Analysis II

Tuesday, February 4, 2003 at 10:00am - 2:00pm

Current Session Files			
Upload Date	File Name	Description	Remove Link
Tuesday, January 28, 2003 2:30PM	OnCore Facility Scheduler.ppt	Scheduler Help Files	<input type="checkbox"/>

Unlink Selected

A link will be created between this session and a file on the computer you are using. Linked files cannot be accessed from another computer. (this option is recommended for larger files that you wish to access from this computer)

Link local files to this Ligeti session:

Description

Local File

Create Link

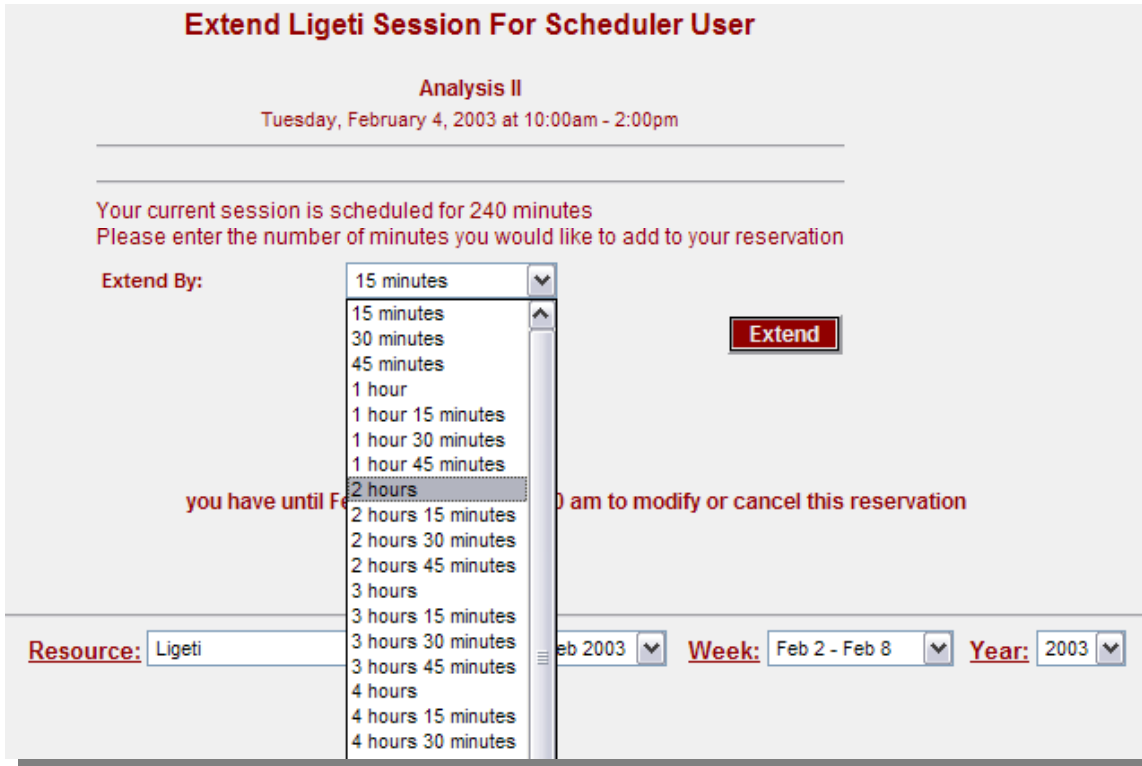
- To remove file associations to your session, check on the “**Remove Link**” checkbox.
- Click on the “**Unlinked Selected**” button.



- Confirm the action by clicking on the “**OK**” button in the dialog box.

Extend Session

This option will allow you to modify your event entry and extend your session should you think that you have underestimated your time slot reservation. There may be a maximum allowance tied to a particular resource. You may only extend your session if there is a time slot open after your scheduled event. You may modify the event if the event is not within the minimum window for cancellation. Contact the administrator of the resource that you are using to make changes if within minimum time window or extending beyond the maximum time allowance.



- Click on the “Extend Session” button on the navigation bar to access the configuration page.
- Use the pull-down menu to add additional time to your session.
- Click on the “Extend” button to commit to the time.
- This action will take you back to the [“Event Overview”](#).

Resource Info

This view will display the availability of the resource that you are accessing. The availability of the resource is also found in the [“Adding an Event”](#) page.

Ligeti Information

GeneSpring - Microarray Analysis Workstation

Availability

Sundays All Day

Mondays All Day

Tuesdays All Day

Wednesdays All Day

Thursdays All Day

Fridays All Day

Saturdays All Day

Modification Limit: 48 hours in advance.

There is no charge for this resource

[Close](#)

This information is not found in the “Adding an Event” section.

- Click on the Resource Info button on the navigation bar.

The Personal Schedule

You must be an account holder to view this section. The OCF Scheduler requires cookies and java to be enabled in your browser. Please refer to your browser's "Help" section for guidance in setting your browser preferences.

The personal schedule displays the list of all your upcoming events, collaboration events (i.e. meetings), and option to view the whole calendar or export the recorded events to other programs or devices. Unapproved events (scheduled by others) will also be displayed here. Events tagged with the asterisk are events that require your approval. This option will only be displayed if you configured Scheduler to [display all unapproved events](#). The example below shows a typical personal schedule window.

Personal Schedule for Scheduler User

Resource	Name	Date	From	To	Created By	Details
Ligeti	Analysis II	2/4/03	10:00	14:15	You	View
Ligeti	an event	1/28/03	11:00	14:00	You	View
Ligeti	Analysis	1/30/03	13:00	16:00	You	View

*=Unapproved

Export (Palm, Outlook, iCal)

Unexported upcoming events
 All unexported events (past and future)
 All upcoming events
 All events (past and future)

Export

Month: Jan 2003 Week: Jan 27 - Feb 2 Year: 2003

You are logged in as: User, Scheduler
[Login/Logout](#) | [Preferences](#) | [Profile](#)

[Personal Schedule](#) | [Resource Schedules](#) | [Another User's Calendar](#) | [Search](#)

Clicking on the "View" in the details column will take you to the "Event Overview" of the resource that you have reserved. The export option function is described in the "Adding an Event" section.

A new page will open with the information detailing the event.

Ligeti Reservation for Scheduler User

an event

Description: description of an event

Date: Tuesday, January 28, 2003
 Time: 11:00am
 Duration: 180 minutes
 Priority: Medium
 Access: Public
 Created by: USER (You)
 Updated: Monday, January 27, 2003 10:16am
 Participants: Scheduler User

The time allotted to cancel this reservation has passed.
 The scheduled time slot can no longer be changed.

The Personal Calendar

Your personal calendar will be displayed according to your personal preferences. It will combine both your reservation entries and your personal schedules. To access the personal calendar, click on the “**View Personal Calendar**” button in the while in the personal schedule page.

Resource Schedule	Personal Schedule	My Data	Public Calendars	Search			
<<Prev Next>> January 27 - February 2, 2003 Scheduler User							
View Month	New Entry	New Entry	New Entry	New Entry	New Entry	New Entry	New Entry
	Mon Jan 27	Tue Jan 28	Wed Jan 29	Thu Jan 30	Fri Jan 31	Sat Feb 01	Sun Feb 02
8:00				• 08:30>Doctor's appointment			
9:00							
10:00							
11:00		• 11:00>Ligeti					
12:00							
13:00				• 13:00>Ligeti			
14:00							
15:00							
16:00							
17:00							

[\[Printer Friendly\]](#)

Resource: Month: Jan 2003 Week: Jan 27 - Feb 2 Year: 2003

Adding a Personal Event

In this section, you will be able to schedule an event and make them available for public viewing or completely private. You are able to set repeating events and remind you of upcoming events via email, pager or phone. Event entries can easily be to your favorite PIM or PALM device.

- To add an entry, click on the “**New Entry**” link in the personal calendar. You will be taken to the “**Personal Event Manager**”.

Add Personal Entry

Scheduler User

Event Name:

Description:

Date:

Time: :

Duration: minutes

Access: (let others view event details)

Repeat Type: None Daily Weekly Monthly (by day) Monthly (by date) Yearly

Repeat End Date: Use end date

Repeat Day: Sunday Monday Tuesday Wednesday Thursday Friday Saturday
(for weekly)

Frequency:

Send reminder: in advance

Send to: agellon@u.arizona.edu

Export this entry (Palm, Outlook, iCal)

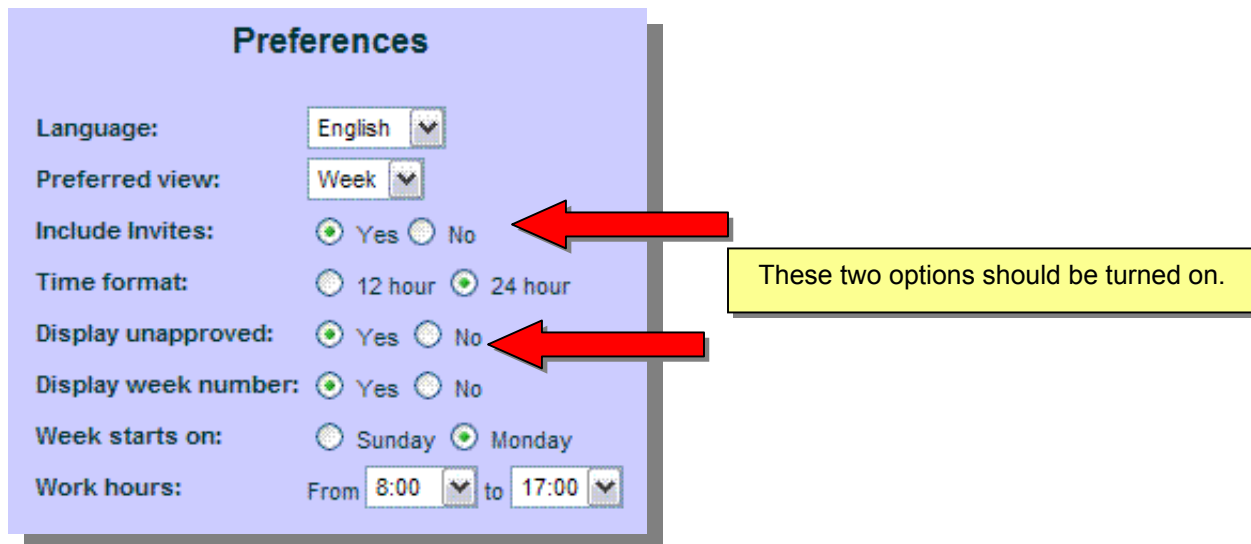
- Enter a name to the event in the textbox.
- Enter a brief description of the event.
- Set the date of the event by using the pull-down menu or click on the “**Select**” button to choose a date.

May 2003						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
				01	02	03
04	05	06	07	08	09	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

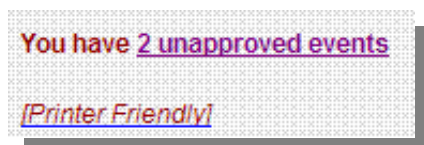
- Enter the time to the event in the textbox.
- Enter the amount of time for the event in minutes.
- Using the pull-down menu, select whether the event is to be made private or available for public access.
- If the event is to be repeating, configure how the event should be repeated.
- If you wish to be reminded of an upcoming event, use the pull-down menu to configure when you want the reminder and where the reminder should be sent.
- If you wish to export the event entry, click on the “**Export**” checkbox (also see “[Adding an Event](#)” for additional information).
- When completed, click on the “**Save**” button to record the entry.

Inviting Members to Your Event

You can use this option to schedule a meeting and inviting members to your event. The invitees will be given an opportunity to accept or reject your request. An invitation will automatically add entries in their own “**Personal Schedule**”. Rejections will remove the rejected entry from the Scheduler. In your preferences, assure that you have checked “**Include Invites**”. It is also suggested that you check “**Display Unapproved**” to flag unapproved events in your “**Personal Schedule**”.



By choosing the “Display Unapproved” option, you will see a notification at the lower left hand side of your personal calendar.



Clicking on the link will display all unapproved appointments that you can confirm or reject.



- Clicking on the “Approve/Confirm” button will record the event as approved.
- Clicking on the “Reject” button will record the event as rejected and removed from your calendar.

To create and invite members for a meeting, follow the instructions in the [previous section](#). There is one difference in this view; there is a list of participants to choose from.



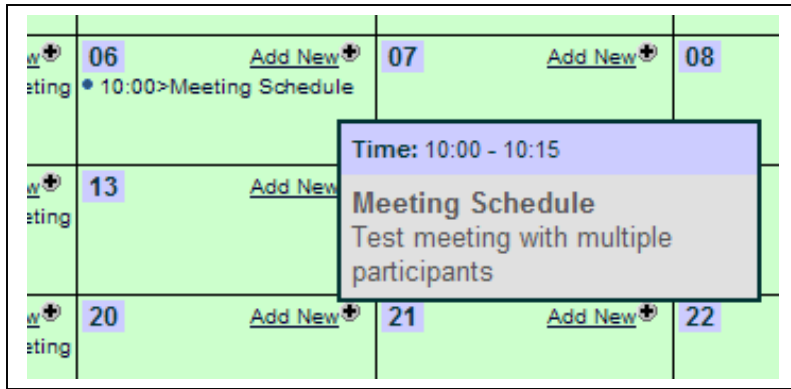
Partial view of the Event Manager with “**Include Invites**” options “**NO**”.



Partial view of the “**Event Manager**” with “**Include Invites**” options “**YES**”.

- If you have checked “**Include Invites**” in your preferences, you will see a “**Participants**” window listing all members in the “**Event Manager**” when you add a new entry into the personal schedule.
- Invite a single user by highlighting their name or use the your keyboard control key to choose multiple participants.
- Click on the “**Save**” button to record the entry.

The “**Event Manager**” will add the event to yours and your invitees’ calendar in the “**Personal Schedule**”. Mousing over the meeting entry will show your descriptions and clicking on the event will open the “**Event Manager**”.



If your invitees accept your invitation to join your event, your “Event Manager” will note this.

Meeting Schedule

Description: Test meeting with multiple participants

Date: Thursday, February 6, 2003

Time: 10:00

Duration: 15 minutes

Priority: Medium

Access: Public

Created by: AGELLON (You)

Updated: Tuesday, February 4, 2003 14:53

Participants: Al Agellon
Gavin Nelson
James Jeffers (?)

This section displays invited participants that have accepted your request.

This section displays invited participants that have not responded to your request yet. Note that the (?) symbol is displayed.

If any of your invitees reject your invitation to an event for whatever reason, your “Event Manager” will also note this.

Meeting Schedule

Description: Test meeting with multiple participants

Date: Thursday, February 6, 2003
 Time: 10:00
 Duration: 15 minutes
 Priority: Medium
 Access: Public
 Created by: AGELLON (You)
 Updated: Tuesday, February 4, 2003 14:53
 Participants: Al Agellon
 Gavin Nelson
 James Jeffers (Rejected)

Event Overview
View Calendar
Edit Entry
Delete Entry
Info...
Notification Options
Session Notes
File Links
Info...

This section displays invited participants that have accepted your request.

This section displays invited participants that have **rejected** your request. Note that the (?) symbol now displays **(Rejected)**.

Invited to Join an Event

When someone invites you to join an event, the OCF Scheduler will send you an email providing you with the name, description and the time of the event. A link to the “**Event Manager**” will be provided in the email to allow you to accept or reject an invitation.

Meeting with multiple participants

Description: Meeting with multiple participants

Date: Thursday, February 6, 2003
 Time: 16:00
 Duration: 20 minutes
 Priority: Medium
 Access: Public
 Created by: [JJEFFERS](#)
 Updated: Tuesday, February 4, 2003 15:25
 Participants: James Jeffers
 Al Agellon (?)

Event Overview
View Calendar
Info...
Notification Options
Session Notes
File Links
Info...

Approve/Confirm **Reject**

The person inviting you to an event.

The person being invited you to an event

If you approve the appointment, the person setting the meeting will see this in their calendar.

Created by: [JJEFFERS](#)
 Updated: Tuesday, February 4, 2003 15:28
 Participants: Al Agellon
 James Jeffers

Approve/Confirm

If you reject the appointment, the person setting the meeting will see this in their calendar.

Created by: [JJEFFERS](#)
 Updated: Tuesday, February 4, 2003 15:25
 Participants: James Jeffers

 Al Agellon (Rejected)

Reject

You can also view all invitations (whether accepted or rejected) listed in the “**Upcoming Events**” section of your “**Personal Schedule**”. Unapproved upcoming events will only be displayed here if you have checked “**Display Unapproved**” in you preferences.

A scheduled event record that resulted from an invitation will be deleted from your calendar if you reject an invitation to join an event.

The view shown below will update when you accept or reject an invitation.

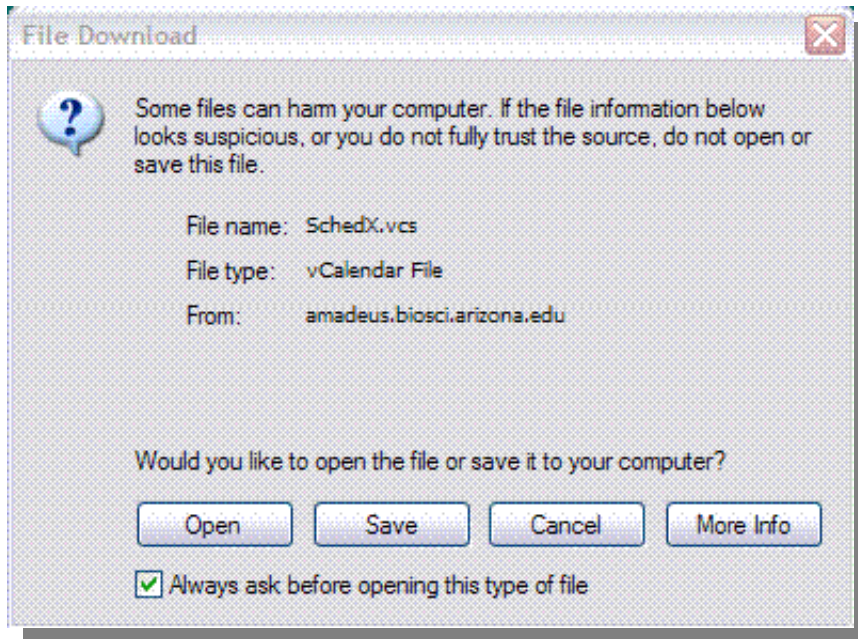
Upcoming events						
Resource	Name	Date	From	To	Created By	Details
(personal entry)	Meeting Schedule	2/6/03	10:00	10:15	You	View
(personal entry)	*Confidential Meeting	2/6/03	11:00	11:30	James Jeffers	View
(personal entry)	*Another meeting with multiple participants	2/6/03	14:00	15:00	James Jeffers	View
(personal entry)	*Meeting with multiple participants	2/6/03	16:00	16:20	James Jeffers	View
* =Unapproved						

[View Personal Calendar](#)

View and confirm individual events here.

Exporting Scheduled Events

Events can be exported for use with other personal information management programs such as Outlook or for use with PDA devices such as the Palm devices. To export the file, click on the “**Export**” button.



- Save the file to disk.

Upcoming events		
Date	From	To
1/28/03	11:00	14:00

My Data

You must be an account holder to view this section. The OCF Scheduler requires cookies and java to be enabled in your browser. Please refer to your browser's "Help" section for guidance in setting your browser preferences.

My Data will display the "File Upload Summary" listing all uploaded files associated with individual events and the "Linked File Summary" listing all linked files to events. Your ability to upload files into a network drive will depend whether your OCF Scheduler Administrator has set up this option. Please contact your resource administrator for the availability of this option. The linking of files option is always available to you.

Resource Schedule | Personal Schedule | My Data | Public Calendars | Search

Data for Scheduler User

File Upload Summary

No uploaded files found

Linked File Summary

Files For Ligeti Entries:

Name	Time	Number of Files	Details
Analysis II	Tuesday, February 4, 2003 at 10:00 - 14:15	1	View

Resource: Month: Jan 2003 Week: Jan 27 - Feb 2 Year: 2003

You are logged in as: User, Scheduler
[Login/Logout](#) | [Preferences](#) | [Profile](#)

[Personal Schedule](#) | [Resource Schedules](#) | [Another User's Calendar](#) | [Search](#)

- Click on the **“View”** link to see the details of the event in **“Event Manager”**.

Viewing Public Calendars

You must be an account holder to view **Public Calendars**. You may view other members' calendars if they allow public viewing of their calendars. This setting is required if you plan to use for collaborations such as setting up meetings. Private records can always be made public.

After log in, a page will open displaying all available public calendars.

- Choose a link to a member's public calendar to view it.
- To add an event to another user's calendar, click on the **“Add New”** link. This action will open your **“Event Manager”**. You can then schedule an event and invite other members as described in the previous section.

Searching Your Calendar

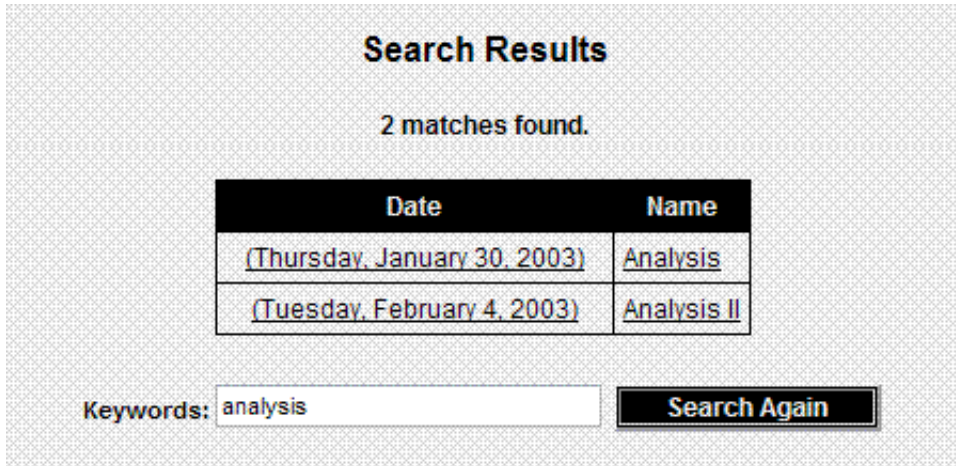
To search your calendar for keywords, click on the menu tab at the top of the page to access the search function. You must be logged in for this function to work. Here, you can search for a keyword associated with your events. For example, search for “Analysis”.

Search Your Calendar

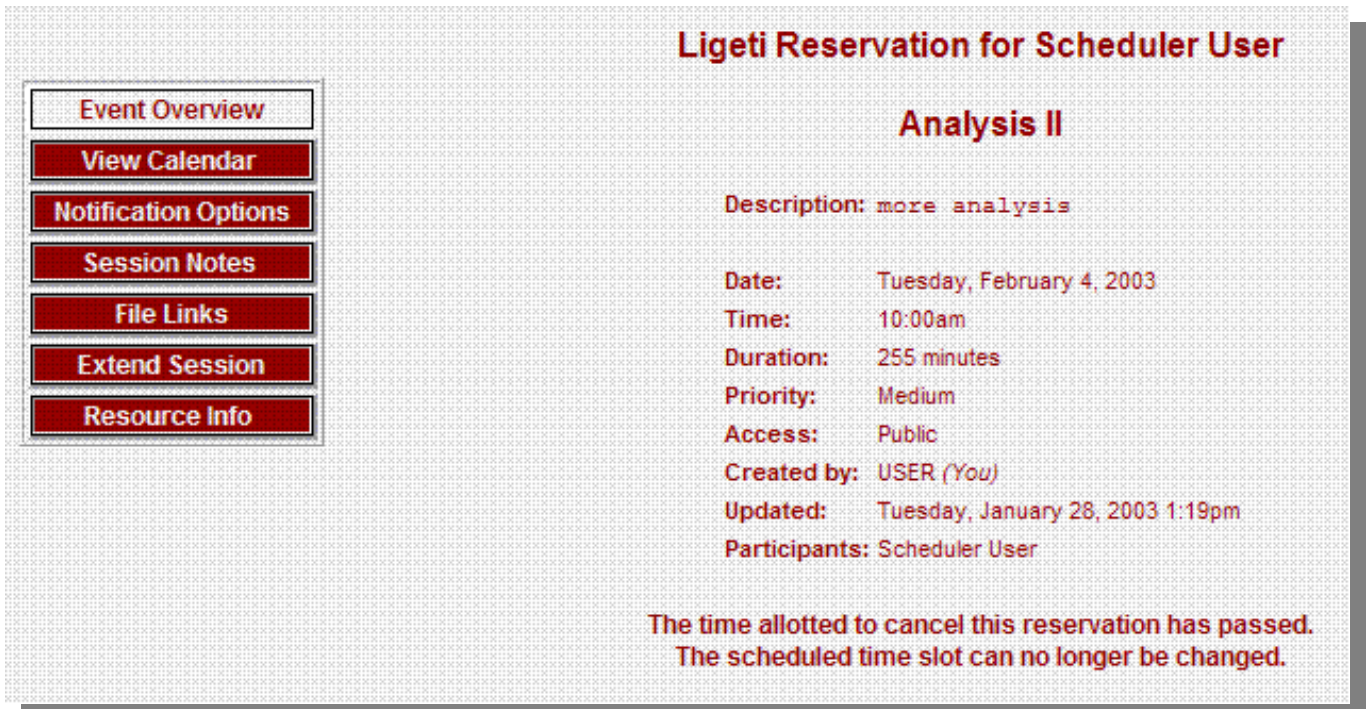
Keywords:

- Type in the keyword into the textbox.
- Click on the **“Search”** button to submit the query.

If a keyword exists, you will be taken to the search results page. In the example below, 2 hits on the query is displayed.



- To search for another keyword, type the word into the textbox and click on the “**Search Again**” button to submit a new query.
- Or, click on any of the result will open the record.



Here you will have access to your session notes if you have entered them.

- Click on the “**Session Notes**” button on the navigation bar to open the notes.

This will refer back to any session notes that you have recorded. This section is useful in adding permanent entries as thoughts come to mind.

- If you want to see if you have linked any files during this session or long after, click on the **“File Links”** button on the navigation bar to refer back to any files linked that is associated with your session.

- You may create any additional links or unlink any files generated during an event. You may also do this at anytime by accessing the [“File Links”](#) option.

Printing the Calendar View

**January 2003
Reservations for Ligeti**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			01 Add New	02 Add New	03 Add New	04 Add New
05 Add New <small>(Week 00)</small>	06 Add New	07 Add New	08 Add New	09 Add New	10 Add New	11 Add New
12 Add New <small>(Week 01)</small>	13 Add New	14 Add New	15 Add New	16 Add New	17 Add New	18 Add New
19 Add New <small>(Week 02)</small>	20 Add New	21 Add New	22 Add New	23 Add New	24 Add New	25 Add New
26 Add New <small>(Week 03)</small>	27 Add New	28 Add New • 11am>Scheduler User	29 Add New	30 Add New • 1pm>Scheduler User	31 Add New • 1pm>AI Agellon	

[\[Printer Friendly\]](#) Notify me when times become available

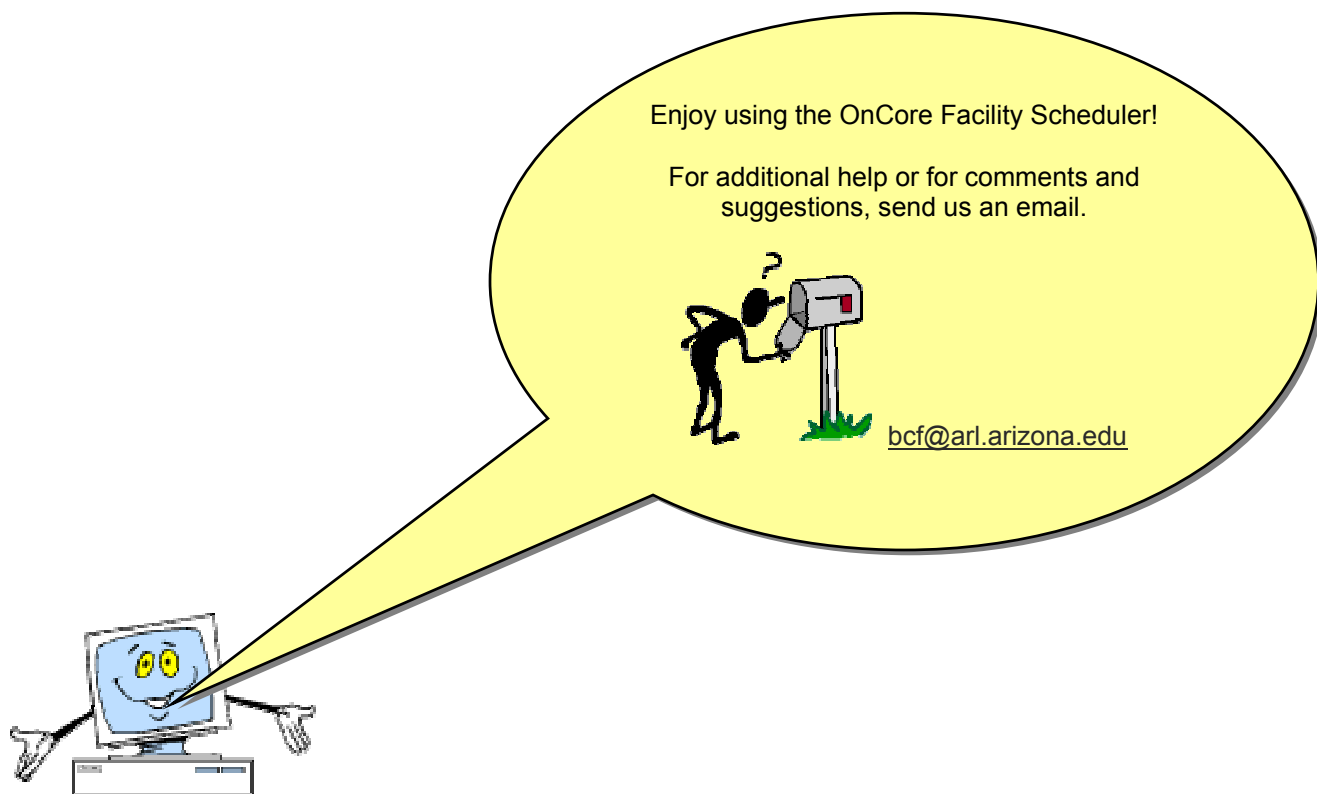
Resource: Month: Week: Year:

- To print a printer friendly view of the calendar, click on the **“Printer Friendly”** link located at the bottom left corner of the calendar. The Scheduler will open another window with a printer friendly display.

**January 2003
Reservations for Ligeti**

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			01	02	03	04
05 <small>(Week 00)</small>	06	07	08	09	10	11
12 <small>(Week 01)</small>	13	14	15	16	17	18
19 <small>(Week 02)</small>	20	21	22	23	24	25
26 <small>(Week 03)</small>	27	28 11am>Scheduler User	29	30 1pm>Scheduler User	31 1pm>AI Agellon	

- This view can be printed out using your browser’s print function.



Acknowledgements

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