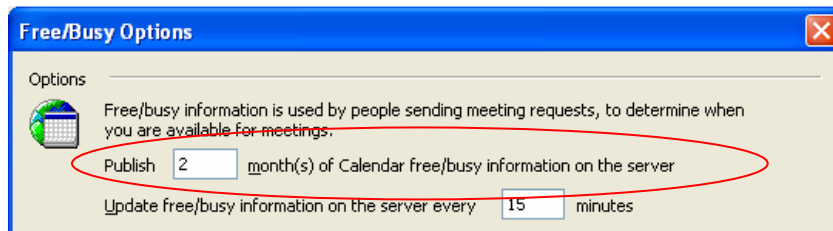




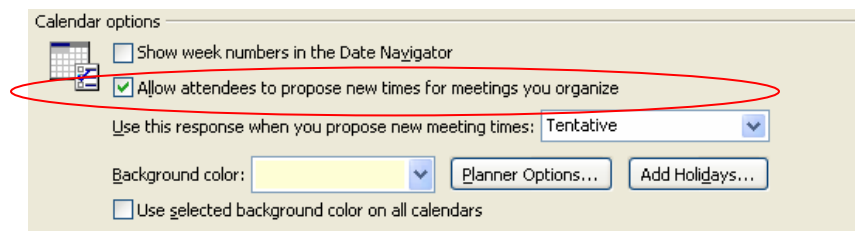
### Pre-Migration - Department Check List

To ensure you and your department co-workers are ready to begin using Outlook Calendar on the morning of Monday April 7<sup>th</sup>, your department should meet to discuss the following:

- ✓ Determine if the department will institute consistent Outlook Calendar settings for the following:
  - **Do you want everyone in your department to publish the same number of months of Free/Busy?**
    - Outlook Calendar defaults to two months of published Free/Busy time. This setting determines how far out in the future other users can see if you are available for meetings. If the department schedules meetings well in advance, having each department employee change their setting to 6 or 12 months may make sense.



- **Will everyone in the department use the same option setting for allowing attendees to propose a new meeting time?**
  - Whenever you send a meeting proposal, Outlook by default (option setting) allows all attendees to suggest an alternative meeting time, should they have a conflict. It may make sense for your department to agree on a consistent setting of either allowing this or turning it off.
    - If this feature is turned off, users can still allow attendees the ability to propose an alternative meeting time by setting the option on the message proposal.



- ✓ Make sure there is a plan in place to communicate the names of department tracking calendars (e.g., department vacation calendar) that will be used in Outlook Calendar. Designate someone from the department who will be responsible for communicating the name(s) of the calendar(s) as well as instructions on how department employees can access it. This information should be provided to department employees on the morning of April 7<sup>th</sup>.

**Please note, do not change any of your Outlook Calendar settings until the system is live on April 7<sup>th</sup>.**

### During Migration

Starting on April 4<sup>th</sup> at 7:00 PM, the migration process for Outlook Calendar will begin. Please be aware of the following during this period:

- ✓ MeetingMaker will be available in “**Work Off-line mode**” on your local computer during and after migration. This will allow you to:
  - View any upcoming appointments and meetings over the conversion weekend (5<sup>th</sup> and 6<sup>th</sup>)
  - Spot check your MeetingMaker conversion data against Outlook Calendar after go-live.
- ✓ During the conversion weekend, imports from MeetingMaker into Outlook Calendar will be done in realtime. **Please refrain from using the system during this period, if possible, and do not tamper with any calendar invite emails.** If it is critical for you to use email during this weekend, please use the Outlook Web Access Client, not the Entourage or Outlook mail client. Note that no email will be lost during the conversion.
- ✓ If you absolutely need to access mail during the conversion weekend, we recommend using the web client: <https://icemail.harvard.edu>

### Go-live – Settings

On Monday morning of April 7<sup>th</sup>, you can begin to use Outlook Calendar. Prior to making your first appointment or sending out you first meeting proposal, you should do the following:

- ❖ **Set your Outlook Calendar options:**
  - Define your **work schedule**.
    1. Select **Tools>Options** from the menu bar
    2. Click **Calendar Options...** button (on the **Preference** tab).
    3. Select the checkbox next to each day that you work
    4. Select your **Start time** and **End time** from the drop dropdown lists below the checkboxes.
    5. Click **OK** twice.
  - Set the number of months of **Free/Busy** you want to publish (Note: Check with your manager to see if your department will be using a prescribed number of months).
    1. Select **Tools>Options** from the menu bar
    2. Click the **Calendar Options...** button (on the **Preference** tab).
    3. Click the **Free/Busy Options...** button on the bottom left.
    4. Change the **Publish month(s)** value from two to the new number.
    5. Click **OK** twice.
  - If you do not want attendees to **propose a new meeting time**, uncheck this option setting. (Note: Check with your manager to see if your department will be using a prescribed option setting for this feature). To prevent attendees from proposing new times for meeting you initiate, do the following:
    1. Select **Tools>Options** from the menu bar
    2. Click **Calendar Options...** button (on the **Preference** tab).
    3. Uncheck the “**Allow attendees to propose new times for meetings you organize**” checkbox.
    4. Click **OK**.

For complete work instructions on all of the tasks you can perform in Calendar, please visit the Eureka web site (<http://eureka.harvard.edu>). The materials are located under **Desktop>Microsoft Outlook Calendar**. To get there directly, type this URL: <http://eureka.harvard.edu/Eureka/jobaids.cfm?categoryID=190&y=0>

## Go-live (continued)

❖ Share your calendar using **Permissions** (similar to MeetingMaker proxy list)

- To share your calendar, do the following:
  1. On the Calendar navigation pane (left side of Calendar window), click **Share My Calendar...** (it will appear as a link).
  2. In the Calendar Properties dialog box, click **Add**.
  3. In the **Type Name** or **Select from List** box, type the name of the person you're going to share with or select the name from the list.
  4. Under **Add Users**, click **Add ->**, repeat until you have all the names you are sharing your calendar with, then click **OK**.
  5. On the Permissions tab, verify that every person's name you added appears under the **Name** section.
  6. Select each name to grant permissions to. If several names are going to have the same permission, select them by holding your Control key (Ctrl) down and clicking on their names. If you are granting unique permissions for each person, you will need to select one at a time and check off the permissions.
  7. Select permissions. You can either use the Permission Level list (**Reviewer** would be comparable to MeetingMaker proxy access of read only) or you can check off permissions using the checkboxes provided.
    - **Note:** You must grant some type of permission. If you leave the **Permission Level** set to **None**, the individual you have granted access to will not be able to view your calendar.
  8. Click **OK**.
  9. Send an e-mail notifying your co-workers that you have shared your calendar with them. In the email, copy and paste the section below on how they can access a shared calendar.

❖ Accessing **Shared Calendars** (co-workers or department calendars)

1. On the Calendar navigation pane (left side of Calendar window), click **Open a Shared Calendar...** (it will appear as a link).
2. In the **Open a Shared Calendar** dialog box, click **Name** and type or select the name of the person whose calendar has been shared with you. (If you are looking for a department calendar, type the name of the calendar [e.g., CWD's Vacation Calendar].)
3. Click **OK**.

For complete work instructions on all of the tasks you can perform in Calendar, please visit the Eureka web site (<http://eureka.harvard.edu>). The materials are located under **Desktop>Microsoft Outlook Calendar**. To get there directly, type this URL: <http://eureka.harvard.edu/Eureka/jobaids.cfm?categoryID=190&y=0>

This completes this guide in getting you started with Outlook Calendar. For complete details on all of the tasks you can perform in Calendar, please refer to the Eureka links below:

### Using Calendar

- **Schedule an Appointment (an event that has no attendees)**
  - <http://eureka.harvard.edu/Eureka/getdocument.cfm?id=250>
- **Schedule a Meeting**
  - <http://eureka.harvard.edu/Eureka/getdocument.cfm?id=251>
- **Using Tasks**
  - <http://eureka.harvard.edu/Eureka/getdocument.cfm?id=268>
- **Using Notes**
  - <http://eureka.harvard.edu/Eureka/getdocument.cfm?id=257>