

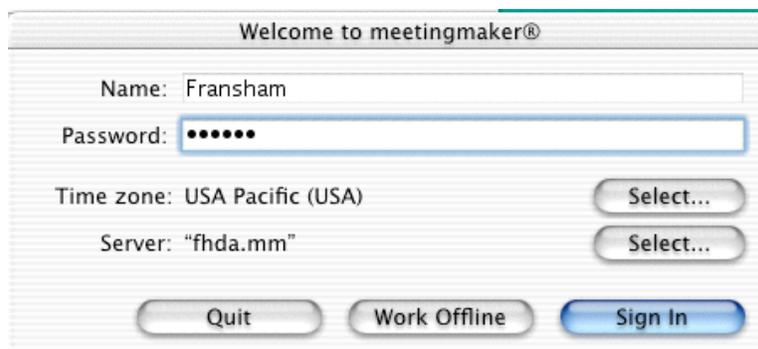
Welcome

Meetingmaker is a group scheduling tool that makes it easy to schedule meetings, plan activities, keep a prioritized to-do list, manage contacts, and coordinate your calendar with other Meetingmaker users on a network.

Meetingmaker is a client-server software application. One workstation (**fhda.mm**) functions as a Meetingmaker server, which handles communications among clients (users' workstations). The server stores Meetingmaker data for all users, processes Meetingmaker tasks, and sends notifications and messages among users.

Getting Started

Once a Meetingmaker account has been set up for you, you can access your account on campus from any networked computer that has the Meetingmaker client installed (preferably your own office computer).



The screenshot shows a login window for Meetingmaker. The title bar reads "Welcome to meetingmaker®". Below the title bar, there are four input fields: "Name:" with the text "Fransham", "Password:" with six black dots, "Time zone:" with the text "USA Pacific (USA)" and a "Select..." button to its right, and "Server:" with the text ""fhda.mm"" and a "Select..." button to its right. At the bottom of the window, there are three buttons: "Quit", "Work Offline", and "Sign In".

Usually your last name is your account name, unless you have a common/already used last name. When you are notified that you have an account, then you will be told the name you should use. If you're not sure, call the ETS Help Desk at TECH (8324) for assistance.

New accounts have not yet been assigned a password, so the first time you log in, leave the password area blank.

The Time zone: and Server: should already be identified as shown above. If not, call the ETS Help Desk at TECH (8324) for assistance in setting this up.

Click on the Sign In button to access your Meetingmaker account. If this is the first time you've accessed your account, it may take some time retrieving information before the Daily Calendar appears.

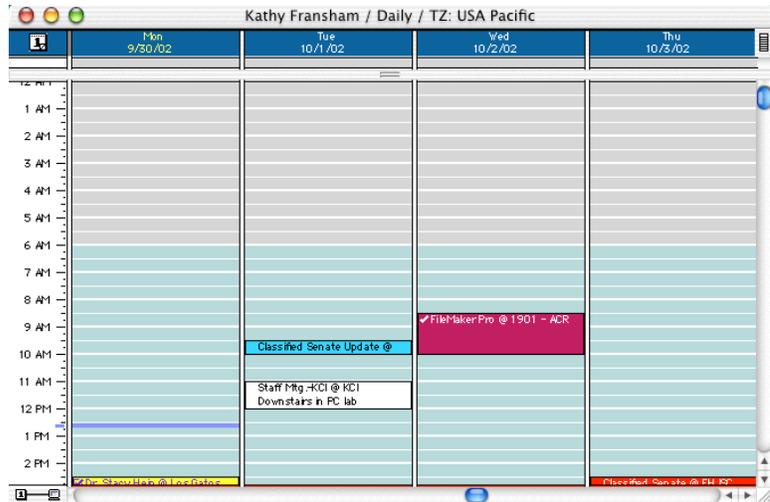
The first time you log in to Meeting Maker, the Proposal Window may appear with a list of meetings showing. For now, close that window. We'll return to the Proposal Window shortly.

The Meetingmaker Environment

The Meetingmaker environment consists of several important elements: the Daily Calendar, the Monthly Calendar, the Proposals Window, the To-Do List, the Contact List, and the Messages Window. You can access any of these from the View Menu. You can also view the Master Schedule, which allows you to view an overview of the schedule for an entire group.

The Daily Calendar

This is the view you'll use most often. It shows several days of activities. From this view you can set up your own activities and meetings.



The Monthly Calendar

This view is useful for seeing an entire month's worth of scheduled activities and meetings.



Customizing Meetingmaker

After logging into Meetingmaker the first time, you'll want to customize your account to serve your needs. There are two areas to do this in: **User Information** and **Preferences**.

User Information

The screenshot shows the 'User Information' dialog box with the following fields and values:

- First Name: Kathy
- Last Name: Fransham
- Title: Technology Trainer
- Home Phone: (empty)
- Dept: ETS Room: 3523
- Work Phone: 650-949-7025
- Company: Foothill College
- Mobile Phone: (empty)
- Address: 12345 El Monte Road
- Pager: (empty)
- City: Los Altos Hills
- Fax: 650-949-7123
- State: CA Zip: 94022
- Other Phone: (empty)
- Country: USA
- Other Phone: (empty)
- E-mail: franshamkathy@fhda.edu
- Other Phone: (empty)
- Custom 1: (empty)
- Custom 2: (empty)
- Custom 3: (empty)
- Custom 4: (empty)
- Info: (empty)

Work Days, Hours, and Time zone:

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	6:00 4:30	6:00 4:30	6:00 4:30	6:00 4:30		

From: 6 : 00 AM Off Day
To: 4 : 30 PM
Time zone: USA Pacific (USA)

User Information includes such information as your title, department, company, address, telephone number, and e-mail address. You should also set your Work Hours and Work Days when you enter your User Info. While it is not critical that you enter any of this information, it does make working with Meetingmaker easier. For example, when you set your work days and hours, then if someone invites you to a meeting outside of those hours, Meetingmaker will notify them that you may not be available.

Preferences

Preferences help you tailor Meetingmaker's appearance and function to your needs. To access Preferences in Mac OS 9, choose Preferences... from the Edit menu. To access it in Mac OS X, choose Preferences... from the meetingmaker Client menu. (If you're using a Windows computer, I think Preferences... is under the Edit menu, but I'm not sure.)

The Preferences dialog box has six tabs (for six different dialog boxes).

Login

The Login box allows you to set or change your password. It is **HIGHLY RECOMMENDED** that you set a password to prevent others from accessing your account.

The Login tab contains a 'Password' section with a note: 'Passwords can be of any length and include any combination of characters.' Below this are three input fields: 'Current:', 'New:', and 'Verify:'. At the bottom, there are two checkboxes: 'Remember Password/Sign In Automatically' and 'Notify When Connection to Server is Lost'.

General

The most important feature in this dialog box is entering your e-mail settings. This will allow you to send meeting invitations to people outside the District via e-mail.

The General tab includes several sections: 'User Lists' with checkboxes for 'Contacts include QuickList', 'Show last name first', 'Use comma to separate names', and 'Shade rows in lists'; 'Proposal Latency' with 'Auto-accept during free time' and 'Delete proposals after' (set to 7 days); 'E-Mail Settings' with fields for 'Local SMTP Host' (mercury.fhda.edu), 'E-Mail Address' (franshamkathy@fhda.edu), and 'E-Notify Address'; and 'Master Schedule' with 'Show' (1 day) and 'Update every' (60 minutes) settings, plus an 'Initiate proxies on opening view' checkbox.

Notifications

When you receive a proposal from someone, Meetingmaker wants to know how you want to be notified. You make these settings in this area.

You can set how far in advance you want to be notified of an activity or meeting under the Reminder Defaults area. This is for "most messages." A single message can have a different notification time set individually from inside that activity/meeting.

The Notification tab features two columns of notification options: 'When New Proposal Arrives' and 'When New Message Arrives'. Both columns have checkboxes for 'Blink Icon', 'Bring [Proposals/Messages] Window to Front', 'Play Sound', 'Bring meetingmaker to Front', 'Send Email', and 'Restrict Email Times'. Below these is the 'Reminder Defaults' section with three columns: 'Minutes Before Activities', 'Minutes Before Meetings', and 'Minutes Before Banners'. Each column has radio buttons for 'Never' and a spinner for '0 : 15'. At the bottom, there is a 'Time Restrictions for email notifications' table and 'From'/'To' time pickers.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
6:00	6:00	6:00	6:00	6:00	6:00	6:00
	5:00	5:00	5:00	5:00	5:00	

Notice the Reminder Defaults window looks similar to the area where you set up your User Working Hours. Don't get confused and put your working hours in this area.

Calendar

In the Calendar dialog box, you can set how many days you want to show in the Daily Calendar area. Also set if you want only work days to show, or to include the weekend. A new feature is the **Split Overlapped Items** which causes more than 1 activity at a time to show side-by-side, instead of one on top of the other.

Calendar dialog box settings:

- Tab: Calendar
- Daily: Show 4 day(s). Work days only, Show Week Number, Twice normal size, Split Overlapped Items
- Open to: Today at 5:00 AM
- Font: Geneva, Size: 10
- Monthly: Open to: Sunday, Work days only, Show event times
- Banners: Display banners below the daily view, Font: Geneva, Size: 9
- Print in Black and White Only

Filters

You can assign category titles to your Contact List, To-Dos, categories and To-Do Priorities. The categories shown are defaults. You can edit these lists to reflect something more meaningful to yourself if you desire.

Filters dialog box settings:

Contact Category Titles:	To-Do Category Titles:	To-Do Priority Titles:
Business	Business	Urgent
Personal	Personal	Important
Family	Family	High
Office	Office	Medium
Travel	Travel	Normal
QA	QA	Low
Development	Development	None
Tech Support	Tech Support	
Marketing	Marketing	
Sales	Sales	
Partners	Partners	
Executive	Executive	
International	International	
Government	Government	
Miscellaneous	Miscellaneous	

Labels

You can assign labels to your meetings and activities, making your daily calendar more colorful.

If you don't like the default colors and assigned names, come into this dialog box and change them.

Labels dialog box settings:

Label Name	Color
Fun Stuff	Green
Joe	Blue
color 3	Purple
Kathy	Red
color 5	Yellow
Cool Class	Cyan
Off-campus	Light Blue
Label 8	Yellow
Label 9	Purple
Label 10	Orange
Go to school	Red
Label 12	Blue
Label 13	Grey
Label 14	Yellow
Label 15	Cyan

Master Schedule:

- Busy time (Light Blue)
- No information (Grey)
- Work hours (Pink)
- Non-work hours (Light Green)

You can now close the Preferences dialog box. You're done with it. You probably won't have to return often to this area once you have it set up the way you like.

Activities, Meetings, and Banners

- An activity is a scheduled event that does not involve guests. You can create activities on your calendar to ensure that other Meetingmaker users know you're unavailable during that time. You can create recurring activities that take place at regular intervals. You can turn an activity into a meeting by clicking the Invite Guests button.
- A meeting is an event to which you invite other Meetingmaker users, resources, or locations. Meetings appear in your calendar and show up as busy time to other users. You can view the availability of your meeting guests before sending your meeting proposal. You can even invite external guests who are not Meetingmaker users to a meeting.
- You can create banners to mark single or multi-day events in your calendar that have no associated time. You can use banners to mark vacation time, travel time, deadlines, and other important dates.

Working With Activities

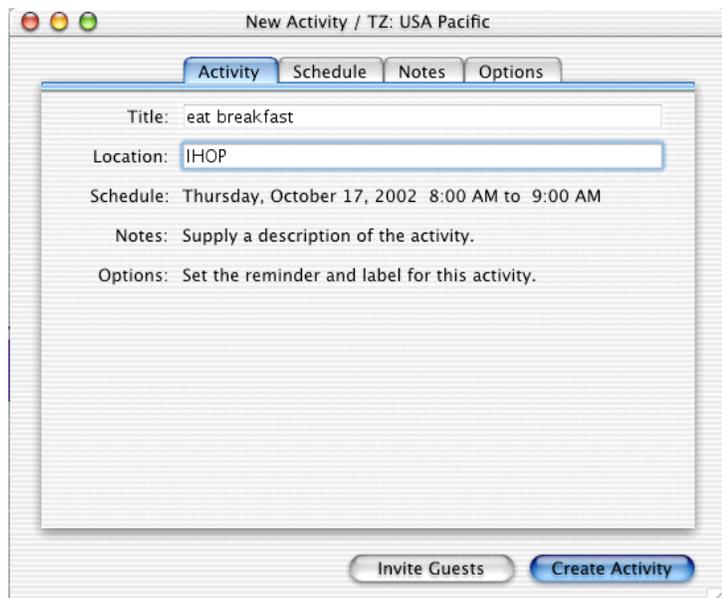
Create an Activity

Although you can create a new activity by choosing **New Activity** from the File Menu, my favorite method is to find the time I want the activity to begin on the Daily Calendar and click and drag down as far as necessary, blocking out the desired time.

The dialog box to the right appears, waiting for you to fill in a title for the activity and a location.

As you can see from the tabs at the top of the box, there are other options, but it is not necessary to fill any of those out, unless you need to change the time listed in the Schedule area.

If the activity will occur more than once, it may be easiest for you to set the frequency in the Schedule area. Click on the Frequency... button to access that window.



New Activity / TZ: USA Pacific

Activity Schedule Notes Options

Title: eat breakfast

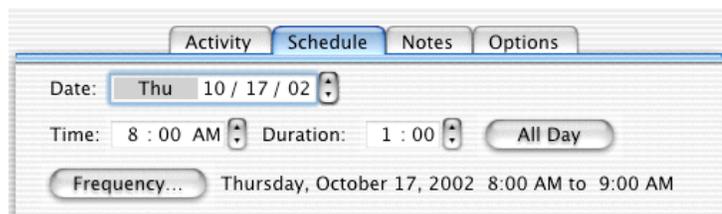
Location: IHOP

Schedule: Thursday, October 17, 2002 8:00 AM to 9:00 AM

Notes: Supply a description of the activity.

Options: Set the reminder and label for this activity.

Invite Guests Create Activity



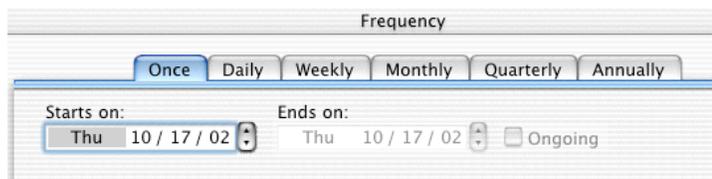
Activity Schedule Notes Options

Date: Thu 10 / 17 / 02

Time: 8 : 00 AM Duration: 1 : 00 All Day

Frequency... Thursday, October 17, 2002 8:00 AM to 9:00 AM

Click on the tab that corresponds with how often this activity will occur: daily, weekly, monthly, etc. Then fill in the starting/stopping dates and any other information requested. Click OK. At the bottom of the window, click on Create Activity and you're all set.



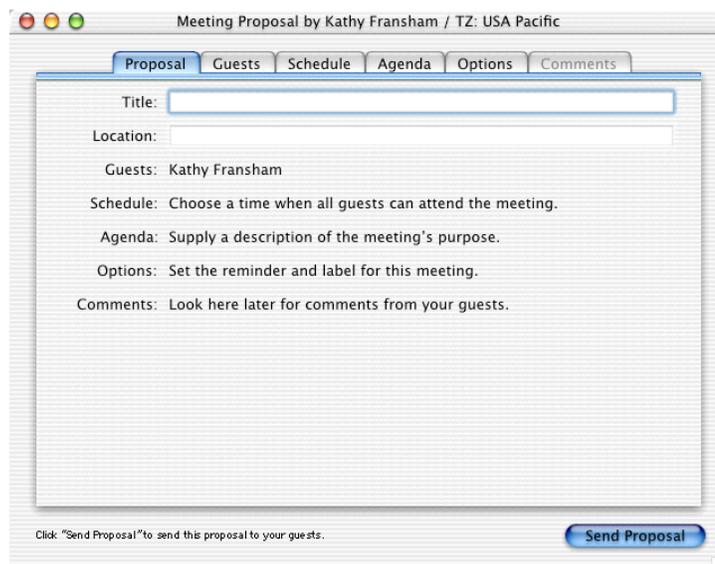
To Cancel an Activity

If you need to cancel an activity, click once on the activity in the Daily Calendar. Then choose Cancel Activity from the Edit Menu. If an activity is scheduled more than one time, you'll have the opportunity to cancel just this activity or all of them.



Working With Meetings

Meetings are very similar to activities, except activities are events that just concern yourself, whereas meetings include guests, rooms and/or equipment. In fact, you can easily change an activity into a meeting by clicking on the Invite Guests button at the bottom of the dialog box. My preferred method of creating a meeting is to drag to select the time I want the meeting to be (creating an activity) and then inviting guests (switching the activity into a meeting).

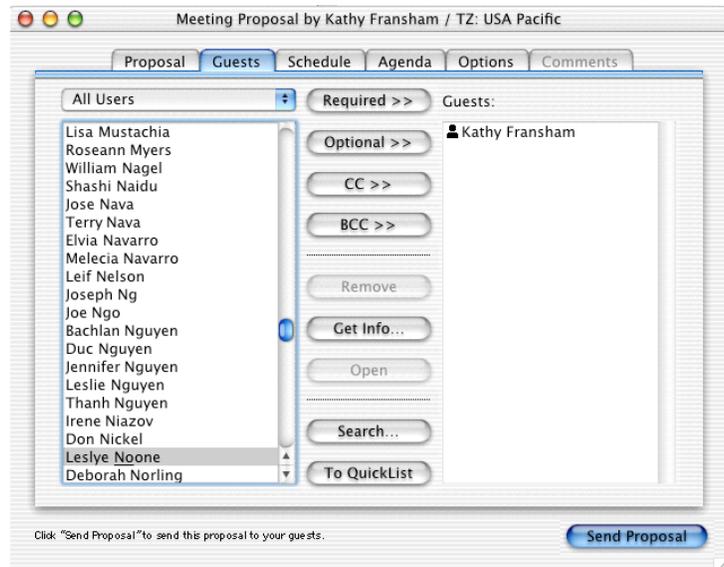


Another way to create meetings is to choose Propose Meeting... from the File Menu. You'll get the dialog box seen above. Once again you put in a title and location for your meeting. On the next tab, Guests, you choose the people you want to invite to the meeting, and on the 3rd tab, Schedule, you need to assign a time for the meeting. Under the Agenda tab you can write whatever you want about the reasons for the meeting, so the invited guests have a better idea of what it will be about. The Options tab contains options that will affect only your own Meetingmaker account, such as assigning a label or setting how far in advance of the meeting you'd like to be reminded. The Comments tab only becomes available if one of your invited guests sends a comment back to you with their Yes/No response.

Inviting Guests

At right is the box you'll see when you invite guests to a meeting. On the left is a listing of people within the District that have Meeting Maker accounts. On the right is a list of people you are inviting to the meeting, including yourself.

Names are listed in alphabetical order by last name. They may or may not have the last name first in the list (it's an option set in Preferences). Simply drag the blue slider around until you see the person's name. Alternatively, you can start typing their last name and the window will jump to the correct area. Once you've identified the person, double-click on their name and it will jump over to the right list as a required guest.



You may notice that guests can be Required or Optional. If you double-click, then the guest will be required and the icon next to their name will be black. If their attendance at the meeting is optional, just click once on their name, and then click on the Optional button. Their name will jump to the list of guests, but the icon will be gray instead of black.

The icon next to guest's names may not look like a little head on shoulders. If there is a line running through the icon, it means they have a scheduling conflict. If the icon looks like a crescent moon with stars, it means that the time chosen is not part of their work day.

Once you click on the Send Proposal button, you may get a message that one or more of your required guests seems to not be able to come due to a scheduling conflict. It will ask if you want to send the proposal anyway. I always say yes, because it's possible that the guest would rather come to my meeting than whatever they had previously scheduled. I leave it up to the guest to decide.

QuickLists

If you have a group of co-workers that you frequently invite to meetings, you can create a QuickList (Group) for easy selection. However, that feature is not working for me; I keep getting an Internal Error message. It used to work but maybe with the upgrade of MM 7, something went wrong.

The Contact List

The Contact List, which is found under the View menu, keeps track of information about people outside the District. You can invite guests from your Contact List to Meetingmaker events even if they are not Meetingmaker users using e-mail.

Before you can send email to contacts, invite external guests to Meetingmaker events, or receive email notification of upcoming events, you must set your email preferences.

Proposals

When you create a meeting your guests receive a meeting proposal. You respond to and manage your proposals in the Proposals window. This will automatically appear when you launch Meetingmaker if you've been invited to a meeting. You can also see this window by choosing Proposals from the View menu.

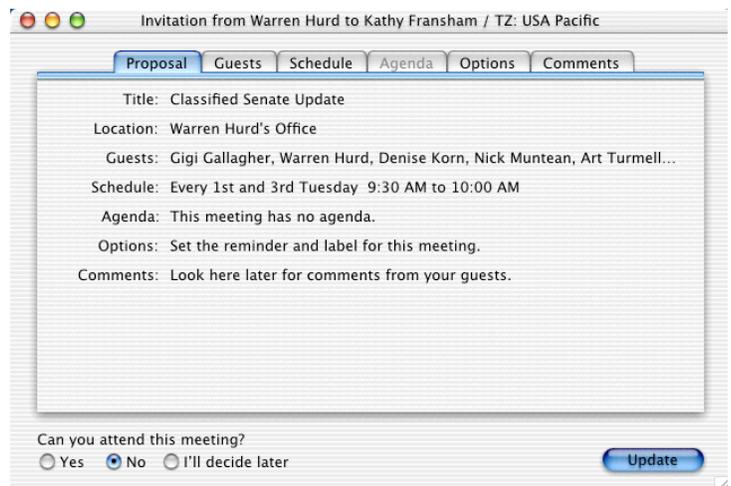
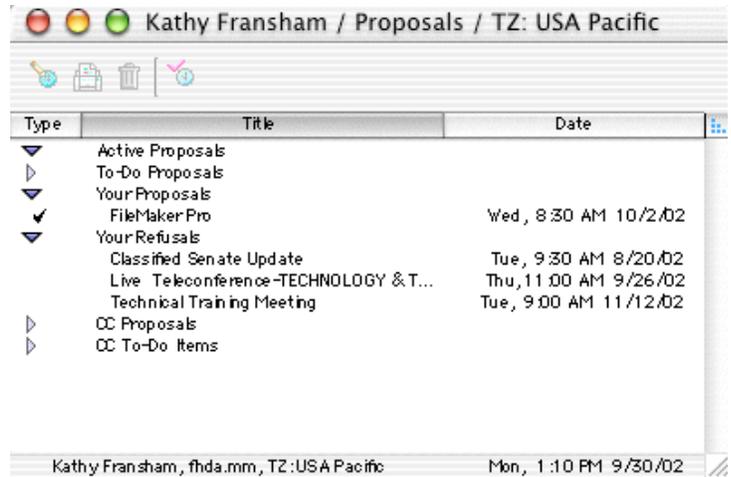
Under the Active Proposals will be a list of any activities to which you've been invited and haven't yet responded.

Double-click on a listing and you will be able to read all about the invitation, along with the opportunity to respond.

If you want to attend, click **Yes**. If you can't go, Click **No**. If you want to think about it, click **I'll decide later**.

If you want to tell the proposer something about the meeting, click on the **Comments** tab and write whatever you want the proposer to know. Then click on the **Update** button.

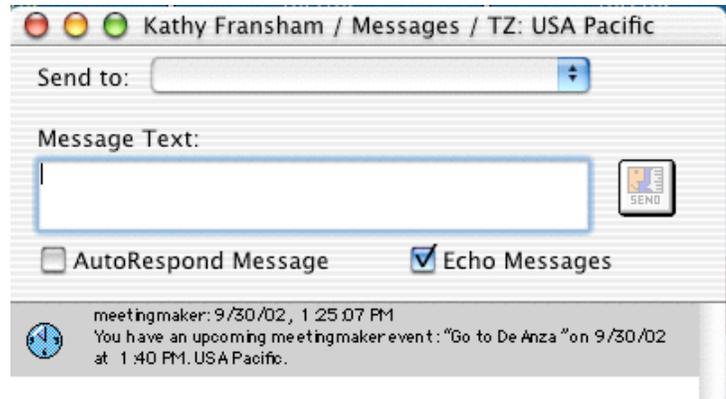
If you've responded **No** to a proposal, it will be listed in the Proposals window under **Your Refusals**. You can open up that message and change to **Yes** if you want.



Messages

Messages include instant messages, reminder notifications, broadcast messages, and other information. You can read and send messages in the Messages window.

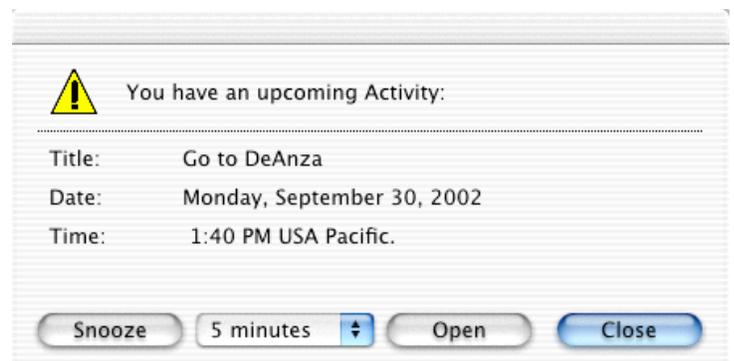
For our purposes, we will just discuss reminder notifications. You can read more about other message features in the online Meetingmaker help feature (discussed at the end of this handout.)



Reminder Notifications

When an activity on your calendar is coming up (15 minutes before is the default setting), Meetingmaker will send you a message that it is coming up. It will look like the message at the bottom of the image above. If you just close this box, everything will go away. However, it could be that you want to "Snooze" a few more minutes and then be reminded again. In that case, double-click on the message (on the blue clock is a good place to click). Another window will appear, allowing you to set the message to Snooze for whatever time you set.

By the way, you only get meeting reminders if Meetingmaker is on. If the program is inactive and you're not logged in, you won't be getting any reminders. This is a good reason to leave Meetingmaker on during your entire work day.



The To-Do List

You can use the To-Do List to create, update, print, and delete to-do items. The To-Do List displays the Percent Done, Status, Priority, Title, Date, and Category of to-do items. You can also filter the To-Do List to only show items of a particular category. If you want to know more about To-Dos, go to the Online Help feature located under the Help menu.

Working With Proxies

A proxy is another Meetingmaker user who you have granted access to your calendar. You can grant a proxy Read/Write or Read Only rights to your Meetingmaker account. Some people may give you proxy to their account.

To Create a Proxy:

1. From the Edit menu, select Proxy List...
The Edit Proxies window appears.
2. Select the desired user and click either Read/Write or Read-Only.
The user you selected appears in the right pane under Your Proxies.
3. Click OK.
The Edit Proxies window closes. The user you selected can now proxy your account.

You can switch a proxy between read/write and read-only status at any time. Read/Write proxies can administer your calendar and propose meetings in your name. Read-Only proxies can only view your calendar without making any changes.

If someone has granted you proxy to their calendar, their name will appear under the Proxy menu. Simply drag down to their name and release the mouse button. Their schedule will shortly appear. If you've been granted Read-Only proxy, then you won't be able to make changes. If you no longer want proxy access to someone's calendar, you can't do anything yourself. You will have to notify that person and ask them to remove your proxy access.

Printing, Web Publishing, and Exporting

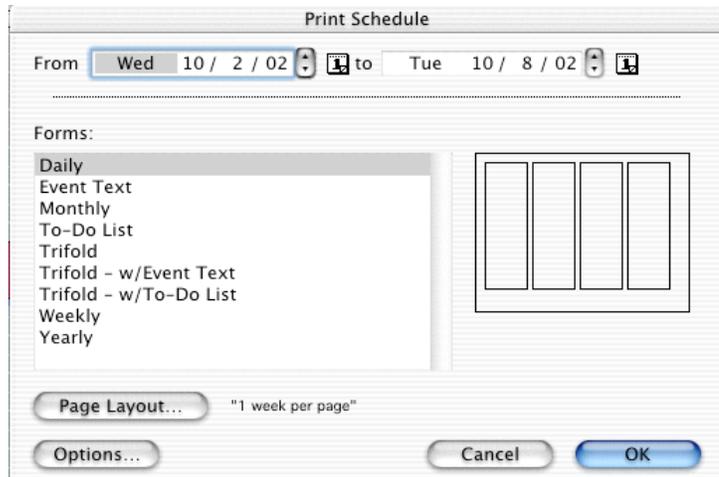
You can print your calendar and other Meetingmaker data, such as your To-Do list, Contacts, or event details. You can publish your calendar to a web page, or set your calendar to publish automatically to a web page at regular intervals. You can also export your Meetingmaker data to various formats.

Since exporting your calendar and publishing it on a web page are not widely used features, I'm not going to discuss them here. You can get more details by visiting the online help feature listed under the Help menu.

Data from Meeting Maker can be shared onto your Palm handheld computer, but that is a fairly complex procedure that will not be covered in this lesson. Once again, use the online help feature located under the Help menu.

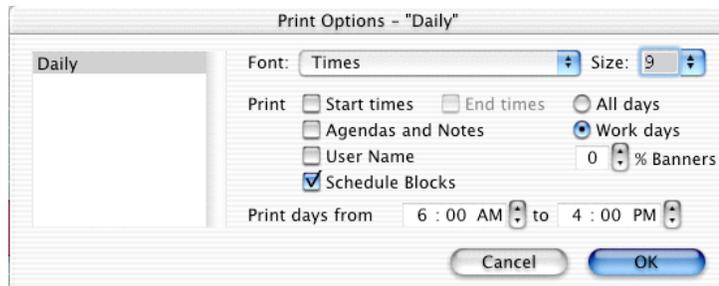
Printing

At the right is the dialog box which appears when you choose Print Schedule from the File menu. As you can see, you can choose the dates you want to print, along with exactly what it is you want to print.



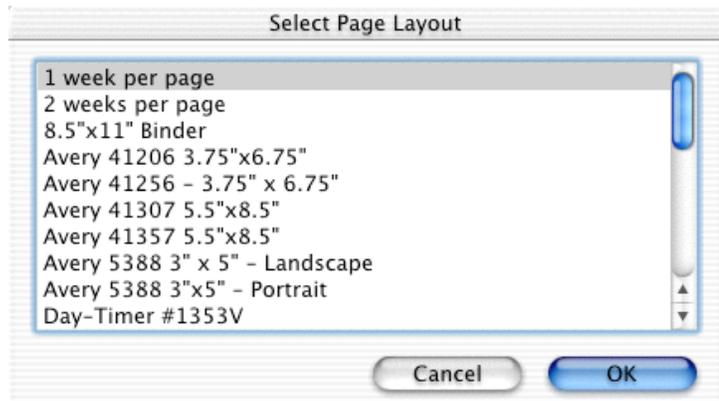
Print Options

When you click on the Options button at the bottom of the Print Schedule box, this window appears. You can choose your font styles, etc. here.



Page Layout

When you click on the Page Layout... button, you have a list of many styles to choose from. If you use one of those daily calendar binders, you can probably choose a layout to correspond to your binder from this list.

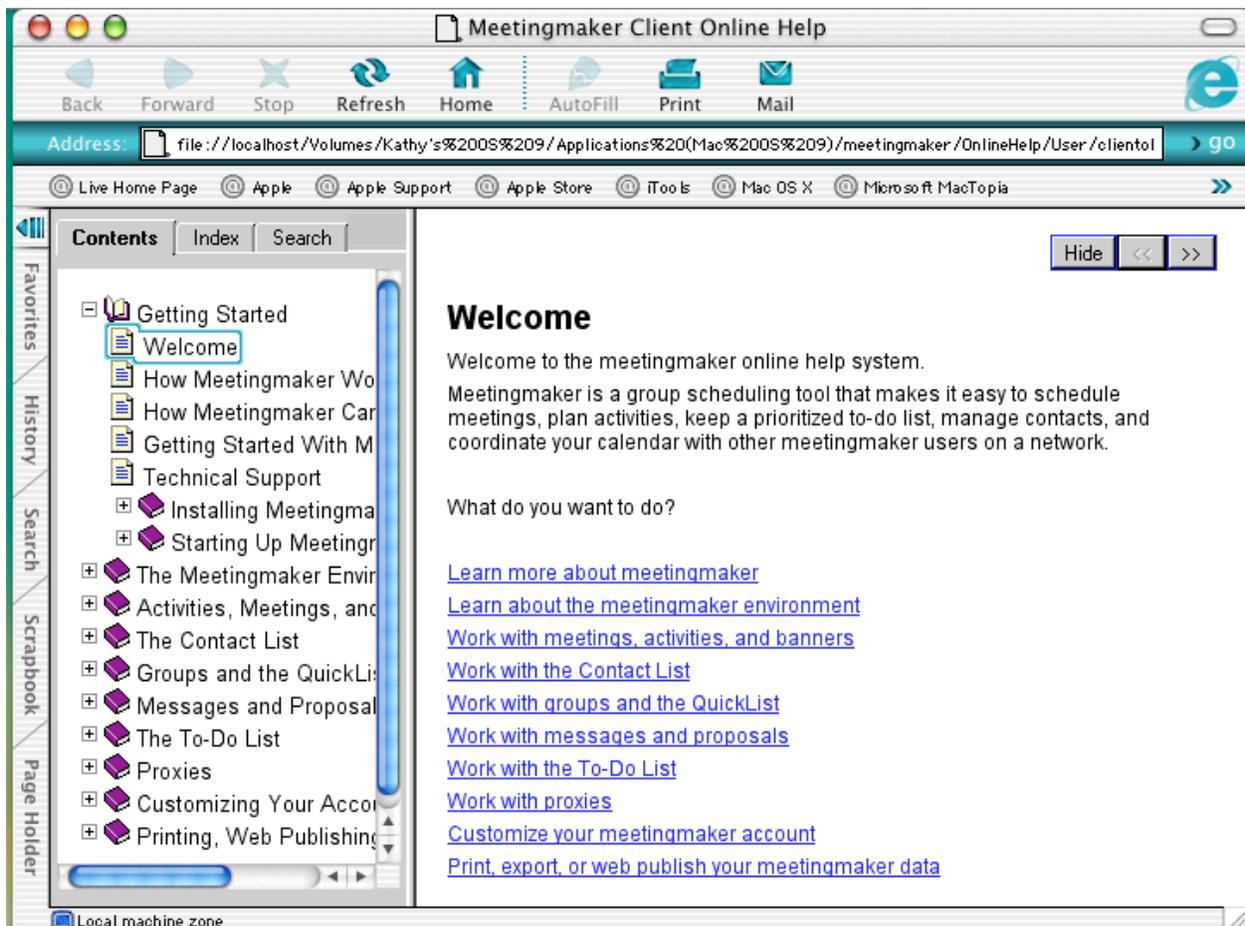


Online Help Feature

While this handout covers a lot of the features of Meetingmaker, there is still more information that has not been covered.

An *excellent* online help feature is right at your fingertips to answer all your questions! When the Meetingmaker client software was installed onto your computer, this help feature was automatically included. Simply go to the Help menu and choose Contents if you want general Meetingmaker help, or Conduits for Palm Devices help if you want to connect your Palm/ Handspring device up to Meetingmaker.

Your preferred browser, Netscape or Internet Explorer, will launch and the help window will appear. You will not really be accessing information from the Internet, however, so if you're not currently connected, that's OK.



And don't forget, you can also call the ETS Help Desk at TECH (8324) for assistance.