

## **Meeting Room and Committee Scheduling, a New Groupwise Tool.**

### **So you want to call a meeting.**

Many of you know that our email system “Groupwise”, has a sophisticated calendaring and appointment scheduling that allows you to collaborate with your co-workers, organize your daily activities and share this information with others. Some of you are using this to varying degrees to schedule appointments with your clients and keep track of important meetings, appointments, share calendars and address books.

We have wanted to find a way to use Groupwise to help everyone in determining the availability of meeting rooms and find a way to avoid scheduling meetings that might conflict with other committee, council, or individuals meetings.

We would like you to review this document and consider exploring these features of Groupwise.

It has taken some time and experimentation to find a way that was accessible to everyone, easy to understand, and use. Presented here is an approach we think will meet these requirements. This approach may not be perfect, but will work better than the paper wall charts, back & forth phone calls and emails that occur now. We would appreciate if you could take the time to look at it, try it, and provide feedback & recommendations for changes. We are happy to make some changes, we are however limited to the features available in the Groupwise system.

### **A Note on use:**

A system like this is only useful if everyone participates, or at a minimum we know who is not participating. If after you have reviewed this document, you think the people that use the meeting space in your building will not benefit from this type of a scheduling tool, then we do not have to include the meeting space in the system; I would recommend we try however. If you need some help in understanding how to use it, we would be more than happy to assist you directly. We have tried to explain how to use the system in this document, however there are limits to how clear and how much detail you can put into a “How to document” of this type to explain what is a fairly complex system.

The extent to which you use the system is up to you, at a minimum we all need to use the “meeting rooms” schedule, whether you choose to use the committee meetings or personal scheduling is up to you. The more we all use it however the more effective it will be across the organization.

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### Things to Know:

We have created two new proxy accounts, each with an associated list of calendars. When you get to the calendar section you will see that we have colour coded the rooms and committees for clarity.

#### 1- *Meeting Rooms:*

- |                   |           |
|-------------------|-----------|
| a- Miniboard Room | f- Health |
| b- Chambers       | g- Elders |
| c- Lands          | h- CFS    |
| d- Education      | i- GYM    |
| e- Housing        |           |

#### 2- *Committee Meetings:*

- |                    |                 |
|--------------------|-----------------|
| a- Ad Hoc TR       | k- Housing      |
| b- CIF             | l- Land Invest  |
| c- CFS             | m- Land Mgmt.   |
| d- Council         | n- Membership   |
| e- Education       | o- Youth&Rec    |
| f- Elders Advisory | p- Personnel    |
| g- Environment     | q- Property Tax |
| h- Finance         | r- Treaty       |
| i- Fisheries       | s- NAIG         |
| j- Health          |                 |

We have also created two new user groups, each with an associated list of users:

- |                          |                     |
|--------------------------|---------------------|
| 1- Calendar editors      | 3- Calendar Viewers |
| a- Executive Secretaries | a- General Staff    |
| b- Office Mangers        | b- Outside parties  |
| 2-                       |                     |

It is possible to add more meeting rooms, committees and even other proxy accounts if desired, “department meetings” for instance might be a proxy group to add. I would suggest lets start with the first two and expand as everyone gets comfortable and starts using the system. In the short term, when you schedule your department meeting, book the space using this system, and in the description enter “Finance Committee” or similar. The more we use and add to it the more effective it will be for the entire organization.

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## Proxy accounts.

Proxy accounts are user accounts that have been shared by the owner or system to allow others to view and or make changes. An account that you have been given proxy access to can be setup by clicking on “File”, then selecting “Proxy” on the drop down menu, then typing in the name of the account in the dialog box that pops up. You can proxy to the two accounts we have created by entering the names “committees” and “meeting rooms”. You only need complete this “setup” step the first time you access a proxy account that has been shared with you.

The image shows a screenshot of the Novell GroupWise interface. The main window is titled "Novell GroupWise - IS Vacation Calendar". The menu bar includes "File", "Edit", "View", "Actions", "Tools", "Accounts", "Window", "Help", and "Export Spam". The "File" menu is open, showing options like "New", "Open Archive", "Open Backup", "Open View...", "Save As...", "Import Documents...", "Import POP3/IMAP...", "Proxy...", "Sharing...", "Properties", "Print...", "Print Calendar...", "Retrieve...", "Mode", "Work Offline", and "Exit". The "Proxy..." option is highlighted. A callout box points to the "File" menu with the text "1- Select File then Proxy".

Below the main window, a "Proxy" dialog box is open. The "Name:" field contains "Committee meetings". The "Proxy list:" table shows the following entries:

User Name	Address
Peter Luckham	luckham.PO_CTO.Cowichan
Committee meetings	Committee.PO_CTO.Cowichan
Elders	Elders@cowichantribes.com
Vacation Calendar	IS_calendar.PO_CTO.Cowicha
Meeting rooms	Meetings.PO_CTO.Cowichan

A callout box points to the "Name:" field with the text "2- Enter the proxy name here and hit enter, repeat the steps for the second proxy. Hint: Committee meetings Meeting rooms".

Another callout box points to the "Proxy list:" table with the text "3- Select here two view proxy accounts after you have set them up in steps one and two."

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Now if you have been successful in setting up the proxy accounts when you click online or proxy, you will have access to the following two calendars:

The image displays three screenshots of the Groupwise calendar interface, illustrating the 'Online' and 'Proxy' views and their respective color-coded lists.

**Top Screenshot: Online View**  
The 'Online' view shows a calendar for 11/29/07. The left sidebar lists folders: Mailbox [4], Calendar, Contacts, Cabinet, and IS Vacation Calendar dental. A callout box points to the 'Online' dropdown menu with the text: "Click online or proxy to select proxy view of shared calendar".

**Middle Screenshot: Proxy View (Meeting rooms)**  
The 'Proxy' view shows a calendar for 11/07/07. The left sidebar lists folders: Meeting rooms Home, Cabinet, and Calendar. A list of meeting rooms is shown with color-coded checkboxes: Mini Board (green), Chambers (blue), Lands (grey), Education (red), Housing (orange), Health (light green), Elders (teal), CFS (purple), Gym (yellow), Checklist, Documents, Junk Mail, Mailbox, and Sent Items. A callout box points to this list: "Note the list of meeting rooms colour coded for clarity". Another callout box points to a meeting event on 12/13: "12:00 PM meeting", with the text: "Note colour of meeting corresponds to meeting room".

**Bottom Screenshot: Proxy View (Committee meetings)**  
The 'Proxy' view shows a calendar for 11/07/07. The left sidebar lists folders: Committee meetings Home, Mailbox, Sent Items, and Calendar. A list of committees is shown with color-coded checkboxes: AD Hoc TR (orange), CIF (blue), CFS (red), Council (yellow), Education (green), Elders ADV (teal), Environment (grey), Finance (red), Fisheries (light green), Health (light green), Housing (orange), Land Invest (purple), Land Mgmt (yellow), Membership (green), Youth&Rec (pink), Personnel (light green), Property Tax (pink), Treaty (green), Documents, Checklist, Work In Progress, Cabinet, Junk Mail, and Trash. A callout box points to this list: "Note the list of committees also colour coded". Another callout box points to a meeting event on 12/19: "6:00 PM regular Health", with the text: "And again committee colour corresponds to committee list on left".

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Now lets look at the calendar page, and find out what meeting rooms are busy and what committees are meeting when.

Proxy x Calendar Filter:

Meeting rooms Home

- Calendar
- Mini Board
- Chambers
- Lands
- Education
- Housing
- Health
- Elders
- CFS
- Gym
- Checklist
- Documents
- Junk Mail
- Mailbox
- Sent Items
- Trash [1]
- Work In Progress

11/07/07 Today MeetingRooms 1 Day 7 Week 31 Month 365 Year 31 Vacation zebbar my multi

November 2007

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
29						
5						
12	13 12:00 PM meeting	14	15 12:00 PM meeting 12:00 PM meeting	16	17 12:00 PM football	18
19	20	21	22 12:00 PM lunch meeting	23	24	25
26	27	28 9:00 AM test	29	30	1	2

Now you can see in this example using the colour codes that the CFS board room has a meeting at 12:00 on the 13<sup>th</sup> and that both the Chambers and Education board rooms have meetings at 12:00 on the 15<sup>th</sup>. Not a good time to schedule your meeting in those locations.

Proxy x Calendar Filter:

Committee meetings Home

- Mailbox
- Sent Items
- Calendar
- AD Hoc TR
- CIF
- CFS
- Council
- Education
- Elders ADV
- Environment
- Finance
- Fisheries
- Health
- Housing
- Land Invest
- Land Mgmt
- Membership
- Youth&Rec
- Personnel
- Property Tax
- Treasury
- Documents
- Checklist
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- Cabinet
- Junk Mail
- Trash

11/07/07 Today MeetingRooms 1 Day 7 Week 31 Month 365 Year 31 Vacation zebbar my multi

November 2007

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
29	30	31	1			
5 6:00 PM regular council	6	7 5:45 PM regular Health	8			
12 6:00 PM regular council	13	14 5:45 PM regular Health	15			
19 6:00 PM regular council	20	21 5:45 PM regular Health	22			
26 6:00 PM regular council	27	28 5:45 PM regular Health	29	30	1	2

In this example you can see that Council meets regularly at 6:00 on Mondays, and Health meets regularly on Wednesdays at 5:45.

So if you wanted to hold a meeting and ask these people to attend then those days would not be a good choice.

In a nutshell, that's how you can figure out what is already going on so you can schedule your meeting in a room that is not occupied and have the best chance of having the people you want to attend, show up at your meeting.

Some of you are familiar with how to add posted appointments to a calendar and so may want to skip the next part, or read along for review if you know a better way let us know.

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### Process Review:

Before we move on to posting appointments lets just review the process of scheduling a meeting.

- 1- Pick a few dates that you think you might like to hold your meeting, and figure out who you are going to want to attend determine if they already sit or participate in other meetings or committees.
- 2- Pick the best location and an alternative location that you would like to hold the meeting at.
- 3- Proxy to the meeting rooms calendar, and check to see if the dates and times you have in mind are free at the particular location you are interested in. Once you have found a free date go to the next step if you are not worried about conflicting committees then you can post your meeting and go to posting appointments.
- 4- Proxy to the Committee meeting calendar, and check the dates that you have found are free at your meeting room of choice. If you find that none of the committees are meeting that day then you are set to post your meeting.
- 5- One thing to note here is some of the more sophisticated Groupwise users are using there calendars to schedule appointments already, there calendars may indicate that they are busy at certain times, if it's important to determine if certain individuals are available you can do what is called a busy search, I will cover this later. Further to this, mistakes do happen, perhaps someone forgot to mark there calendar busy and so may not be available. It's always a good idea to confirm by email or phone that a person is available to attend if it's important.

### Posting appointments:

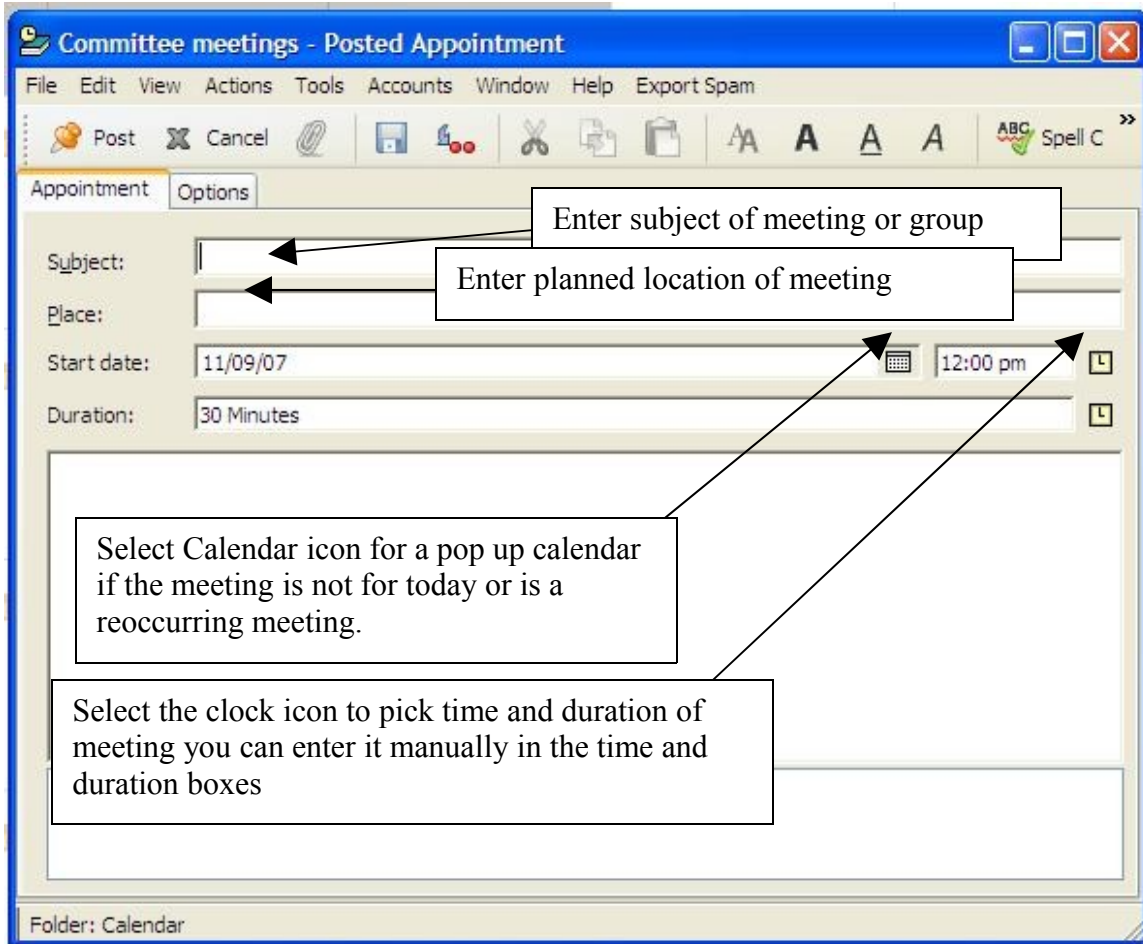
As you may recall we set up two groups Viewers and Editors, if you are not an editor then you will need to email your department executive secretary, office manger or system champion and ask them to post the meeting for you. So email them the date, time and place selected and they will look after it. Once you have had confirmation that your meeting is scheduled then you can send out your invitations and get ready for your meeting.

Posting appointments is easy, first select the meeting room or committee from the colour coded list on the left, then right click on the date you want to set your meeting or schedule your committee then select New posted appointment.

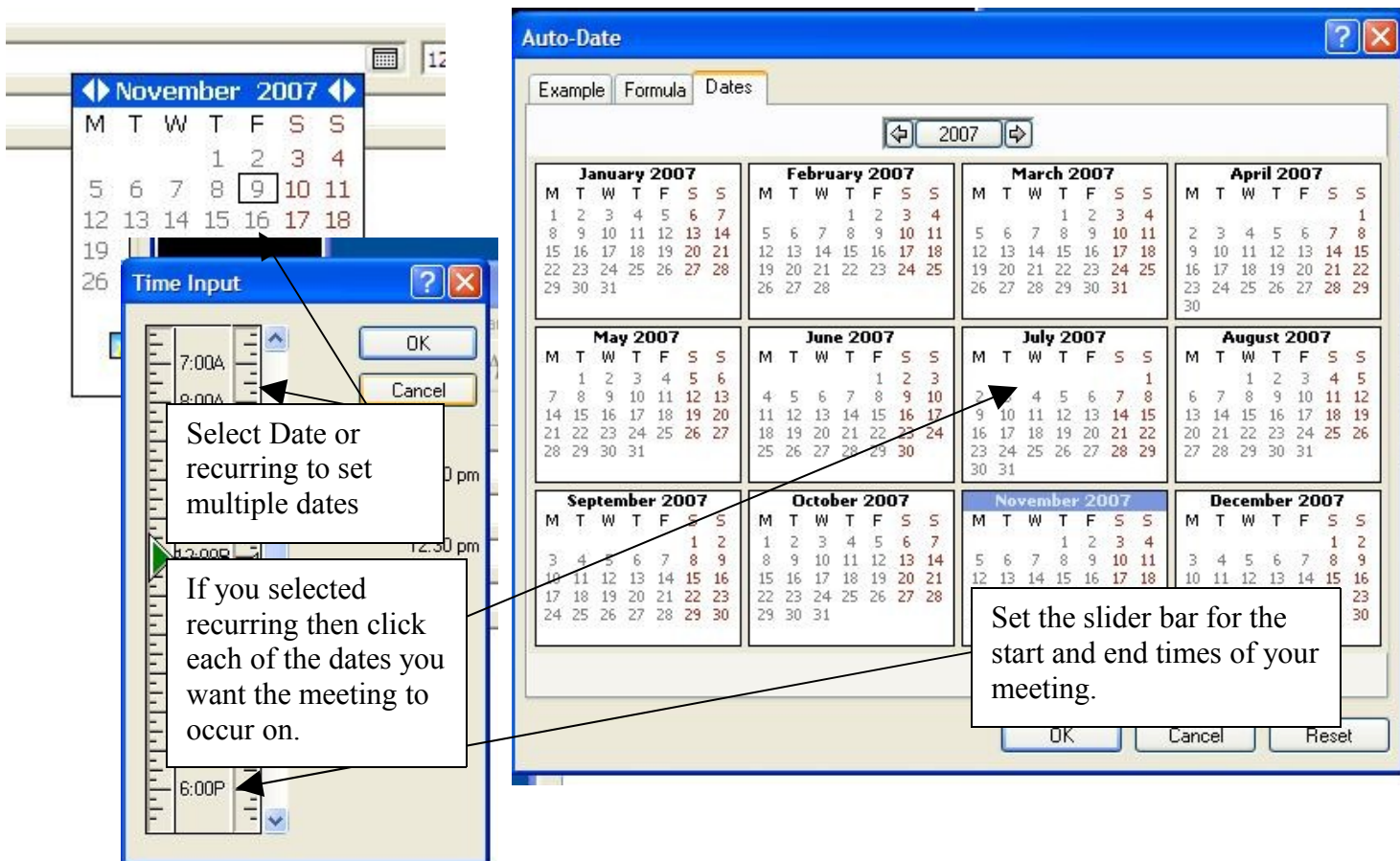


This will launch a dialog box that you can fill in the meeting details.

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Select the calendar day or click on recurring if this meeting repeats regularly.



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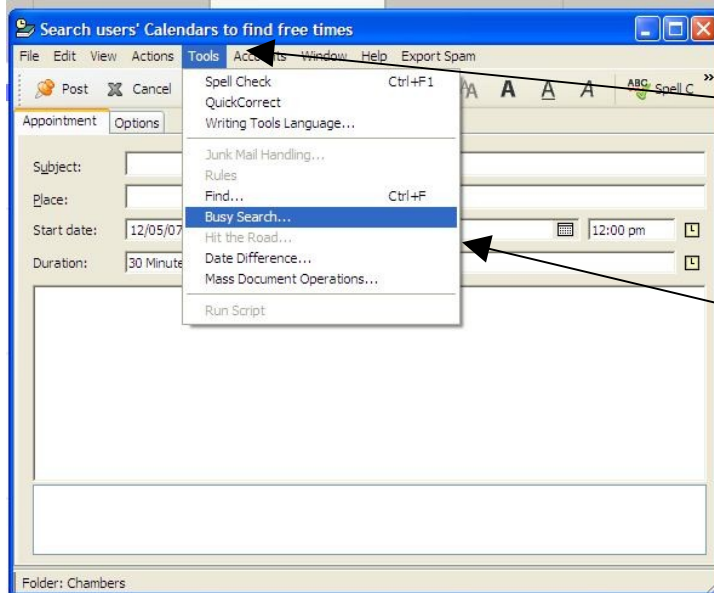
Once you have completed all of these steps then you can post your meeting by clicking the post button.

Remember you will need to post the meeting on both the meeting rooms calendar and the committees meeting calendar if you are expect a committee to attend, do not post it on the committee if you are only wanting one person to attend from that committee, also be sure to follow protocol for inviting a committee to a meeting. Just because you posted it does not mean they are going to come, talk to the chair the person responsible for scheduling the committee meetings or the individual.

### Busy Search:

This is a quite complex feature and really requires more detail than can be described here but review and practice using this feature will help you master it. You can also reference the GW User Guide or online help for more detail.

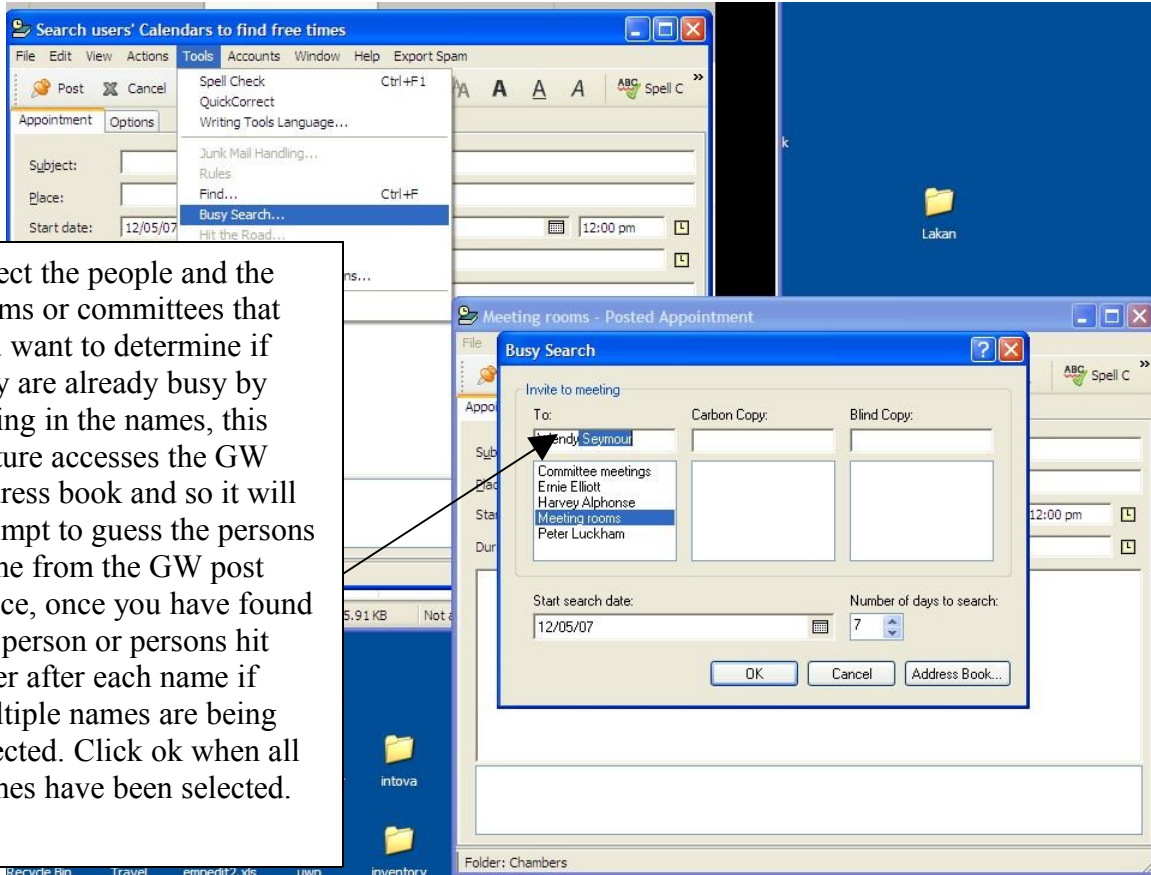
Right clicking on a calendar day and selecting new posted appoint will bring up the post appointment dialog box. Select Tools, then busy search.



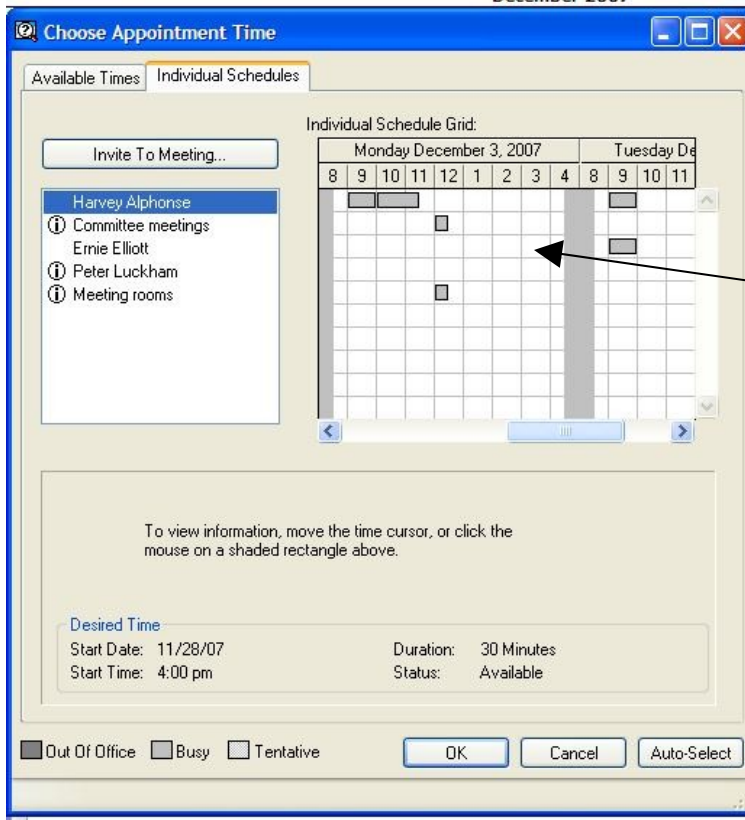
Select Tools

Select busy search

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Select the people and the rooms or committees that you want to determine if they are already busy by typing in the names, this feature accesses the GW address book and so it will attempt to guess the persons name from the GW post office, once you have found the person or persons hit enter after each name if multiple names are being selected. Click ok when all names have been selected.



You can see here that the gray areas on the time line indicate the person or places are busy on those dates at the particular time indicated at the top.

This is a very powerful feature and can be used beyond just scheduling meeting rooms. If you work and meet together with other staff regularly you may find this a very helpful feature in scheduling your time together.