Lotus Notes Calendar Tips and Tricks
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Agenda
- Managing with User Preferences
- Repeating Meetings
- Rooms and Resources
- Upgrades and Coexistence
- Scheduling and Printing
- Time Zones and Daylight Saving Time
- Tips and Tricks
Managing with User Preferences

Help Users Avoid Mistakes

- Most users simply use their calendar
  - They may find a few functions they like
  - They may make mistakes that are easy to make
  - Accidental deletions from calendars are common
- Notes preferences can give users more options
  - Most make working in calendars more efficient
    - And can help stop mistakes
  - But sometimes more options lead to confusion
  - Helping users control their environment with preferences is possibly the highest impact change you can do
Options for Displaying in Mail Views

- There are ways to reduce the chances for inadvertent deletions
  Don’t display meetings in views that would tempt users to delete them
  All Documents and Sent seem to be the most tempting
  Users often don’t understand that only one copy exists
  Remove notices after you respond to keep Inbox clean

Options for Displaying in Mail Views (cont.)

- Types of notices to be shown in Inbox
  Options are:
    All
    None
    All except responses
    This one seems right
    But, if a room sends a decline, it’s a response
  With this option, the response shows in the MiniView and in the All Calendar Entries view
  You’ll need to train your users to check the MiniView
  Otherwise, they might miss a response
  Because it won’t be in the inbox (where they might delete it)
Options for Displaying in Mail Views (cont.)

- Autoprocessing
  - Automatic Inbox Management
    By default, users are prompted when they try to remove a calendar entry from any non-calendar view
    A better option is available
    Choose “Remove without prompting”!
    The notice is removed from the inbox, reducing clutter
    The notices are always in the All Calendar Entries view

A New Option for Notes 7

- Designed to help reduce the temptation to delete important notices
  After an invitation is accepted, if it’s in a mail folder
  “Remove From Folder” option is now available
Deleting from Calendar Views

- When users delete entries from any Calendar view:
  - Not the Inbox, but Calendar views
    - Calendar, All Calendar Entries, etc.
  - There is no prompt unless it’s a repeating meeting
  - Soft deletions do not apply to calendar notices
    - The workflow would be broken
  - Education is the only option!
  - When a document is deleted from the calendar, it’s gone
    - Let’s see why

About Soft Deletions with Calendars

- Soft deleted documents are not truly deleted
  - Busytime would never be freed if Calendar entries were stored in Trash
    - Also there is no way for the code to know what is restored versus new
- Example: You have a meeting with a room
  - You cancel that meeting, freeing up the room and your time
  - I book that room and invite you at the newly free time
    - 24 hours later, you “restore” your meeting
      - We both now have valid acceptances – NOT GOOD!
- Soft deletes do not work for Resources or Meetings
  - You must let your users know this
How Repeating Meetings Work in Calendars

- In all releases since R5, repeating meetings have worked as parent/child document hierarchy
  - Parent document doesn’t show in calendar
  - Child documents show in calendar
  - Child documents have CalendarDateTime field
- CalendarDateTime field is on anything that shows in the mail calendar
  - Verify using the view selection formula of the calendar views
- Not the same in the Resource database in Domino 7 and beyond
  - All reservations show in the calendar in the RRDB
  - There is no parent/child relationship
How Repeating Meetings Work in Calendars (cont.)

- All instances of a meeting, parent or child, have the same ApptUNID
  This field is a text version of the UNID
  Child documents have RepeatInstanceDates field
  The pair of ApptUNID and RepeatInstanceDates identifies an individual instance of a meeting
  Each repeat instance (child document) also contains a $Ref field, which is the ApptUNID
  There is a hidden view called ($ApptUNID) in your mail
  In case you need it for troubleshooting
- TIP: If a meeting doesn’t show on the calendar
  Look in the All Calendar Entries view to see if it’s there
  Check for missing CalendarDateView fields

Initially, 2 documents appear in the All Calendar Entries View for repeating meetings
- The Parent documents contain the original dates
- The child document has the list of consecutive meetings in which all the items of the meeting are the same
- The child document shows in the calendar views
  Repeat instances are the same document displayed multiple times
How Repeating Meetings Work in Calendars (cont.)

- As individual meetings are rescheduled or changed, other child documents are created.
  
  For each instance changed, a new child document is created with the new information.
  
  For instances that are not changed, documents will be similar to the original child document.

### Troubleshooting Repeating Meetings

- If a meeting fails to show in the calendar views, it could have been deleted.
- The CalendarDateTime field could be corrupt.
- Or even missing.
- Some instances tied to virus or scanning software.
How Repeating Meetings Work in Calendars (cont.)

- There is currently no API to allow programmers to access this workflow
  But one is being developed
  No delivery date yet
- The C&S schema can help your developers

Rooms and Resources
How Repeating Rooms and Resources Work

- Pre-R7, room repeats are the same as the calendar
- In R7 and beyond:
  - Rooms and Resource database went back to the “old” (pre-R5) model
  - Each meeting instance is a single document
  - Easier to edit or modify single instances
  - Yes, even repeating meetings
  - If direct booked in the RRDB
  - Allowed the ability to implement Transfer Reservation
- Troubleshooting is clear cut
  - One document per repeat instance

How Repeating Rooms and Resources Work (cont.)

- Any non-repeating reservation request is a single document
  - The RnRMgr will process it and make changes to that specific doc as it is processed
- Any repeating reservation request is a single document that gets changed into a single document per repeat instance
  - All docs in the same meeting have the same ApptUNID value
  - There is no $Ref field involved
  - Use the ApptUNID item to find all the “children” docs
  - All part of the same set
Resource Reservations

- The Resource Reservation system changes completely after Domino 6.5.x
  - A new server task controls the Resource system
  - In Domino 6, there is still a chance for double-booking
    - If a user books in the resource database while a mail user is also booking
    - There’s no workaround for this
    - That’s why we re-worked the process
- A few tips will make the system work smoother until then

Resource Reservations Tips

- Having room owners can slow responses
  - Requesters must wait for approval
  - If possible, set rooms for No Owner restrictions
- Restricting available hours for rooms can confuse users
  - Choose to allow rooms to be used 24 hours a day
- For repeating meetings, book using the Resource Reservation database
  - Free time searches the first instance only
    - When searched from the mail
      - Still this way in Domino 7 and 8
      - When booked from inside the Resource database, all repeat instances are searched
Resource Reservations Tips (cont.)

- Users often want private rooms
  - You can hide the room from the directory with reader fields
  - You CANNOT hide it from schedule
  - It will return the rooms in a search for free rooms
- You cannot create a separate directory
- Free time searches the primary directory only
- You can create a room with no mail-in database document
  - That just doesn’t work …
  - Make them “Owner only can book”
  - Users can see and request them, but they get turned down

Quick Setup Tips (Domino 6.x)

- To set up your Resource Reservations system:
  - Create a new resource database from the template
  - Give yourself the proper role to create resource
    - You’ll forget to do this
  - Create your site
    - Your location document must list the correct domain
  - Create resources
    - Let adminp run
      - It creates the mail-in database documents
      - Replicate and index the directory
  - Use your new system!
Quick Upgrade Tips (Domino 6 to 7 or 8)

- File → Database → Replace Design
  Or use the convert task with the –d option
  See Admin Help for details
- Load the RnRMgr server task
  Only needed on the servers where Resource databases exist
  Add to the server INI or config doc to ensure startup
- Enable all four scheduled agents
  They are disabled when you replace a design
  For all databases, every time
- Earlier versions of the Resource Reservation databases will fail on a Domino 7 server!
  Technote 1219243 gives details

Which Does What?

- In versions prior to Notes 7
  Sched task manages busytime
  For each server individually
  CalConn talks server to server
  Router does autoprocessing and other processing functions
  Responses, Mail workflow
  The template itself has much code and does lots of work
  Both mail template and RRDB template
  Look at the Script libraries, forms, and views if you need proof
Which Does What? (cont.)

- Schedule Manager task in R7.x ignores the RRDB
  - During task startup, Sched task registers any database with a Calendar Profile
  - Unless it’s a Resource Database
  - RnRMgr does the things Sched used to do (and more)
  - Handles busytime
  - Talks to CalConn
- This is one reason Domino 6 RRDBs will not function on D7 servers
  - Domino 6 RRDBs also require router functionality that is moved to RnRMgr
  - R5 RRDBs will not work either
    - And aren’t supported

Which Does What? (cont.)

- RnRMgr is responsible for accepting or rejecting requests from all sources
  - Direct booked docs
  - Replicated from clustermates
  - Booked through mail
    - Helps prevent double booking
- Handles work formerly done elsewhere
  - By the Sched task – mentioned already
  - By the Router
  - In the RRDB template for the resource databases
Changes in the Direct Book Process

- When you create a new reservation in the database
  - The views and forms look almost the same as in Notes 6
  - Except
    - When you create a new reservation, the text on the form says “Your reservation request is not booked until the system determines that there are no conflicts for the requested date(s) and time(s).”

  This means that the RnRMgr must run first

New Reservation Request

Your reservation request is not booked until the system determines that there are no conflicts for the requested date(s) and time(s).

Digging a Little Deeper

- A new field is inserted on the request
  - RQStatus
    - The R7 RRDB template and the R7 Router set the field
      - “T” on any new docs that are created/delivered
  - The request lands in a hidden view for processing
    - $nlookup
      - If multiple requests for the same room are sent, they sort out here
  - RnRMgr processes the request
    - Changes the RQStatus field
      - “A” – Accepted
      - “R” – Rejected or Declined
Digging a Little Deeper (cont.)

- Some documents may be missing the RQStatus field
  These are pre-R7 documents
- RnRMgr requires this field on documents
  If you are programming to generate your own requests, you need to add this field with this value
  Or risk RnRMgr not picking up and processing the request

RRDB Clustering

- R7 and beyond support clustering of the Resource database
  Requirements:
    - Primary server must be R7 or later
    - The design of all clustered copies of the database must be R7 or later
    - RnRMgr must be running on the servers that will act as backup
- The Admin server of an RRDB is considered the primary server
  Other clustermates will be used in alphabetical order
How RRDB Clustering Works

- When the primary server stops processing requests:
  - Clustermates realize it's not coming back
  - The next server in the cluster picks up the processing
    - Remember, they go in alphabetical order
    - This server will continue to process all requests
      - Until it goes down or is recycled
      - Then processing will fail back to the primary
  - You do not need to let it fail back
    - Any of the clustermates can do the work

Clustering

- Once a day, RnRMgr scans for any “missed” docs
  - Or docs that were created by clustermates and replicated over
    - Refresh runs at 2 am
      - Also when RnRMgr task restarts
- Plan your cluster in advance
  - So you know which server will be the first backup
- Release 6 servers can hold a replica copy of a D7 RRDB
  - It cannot process requests, only supply backup copy of RRDB
  - You won’t do it though
    - You have to turn off the router
Preferred Sites and Resources

- Problem: There are often too many rooms listed
  You have to drill down through many levels to find “your” rooms
- Solution: Favorite Sites and Favorite Resources
  You can limit the list to the ones you use the most
  Create a list on the Preferences tab of your calendar
  Create a list as you use the rooms
  You can also use a mail policy

Preferred Sites and Resources (cont.)

- Set up in preferences (or use a policy)

![Image of Lotus software Preferences settings](image-url)
Preferred Sites and Resources (cont.)

- How it works:
  - List is maintained in the user's Calendar Profile
- How to use this:
  - Use a policy to set for users if you know their location at registration time
  - Leave it open for them to add or modify
- If a room is deleted or renamed
  - The user list isn't updated
    - User still sees old name or deleted room
      - SPR # GFLY6K8QFK
        - Investigating for future fix

Upgrades and Coexistence
Coexistence and Upgrades

- Notes Calendar and Resource systems are complex
  - The code exists in several places
    - In the “core” code (compiled code) of the server and client
    - In the server in several places
      - Router
      - Sched
      - CalConn
      - RnRMgr
    - In the mail templates
    - In the resrcx.ntf template
  - When you upgrade only one of these, you may not get the optimum experience

Coexistence and Upgrades (cont.)

- Notes and Domino are famous for backward compatibility
  - And C&S systems are backward compatible
    - To a point
- Domino 7 servers require the Domino 7 design for RRDB
  - Any older designs will fail
    - We saw the reasons why earlier
      - The new server task made the change necessary
    - You must upgrade the design
Coexistence and Upgrades (cont.)

- Some of the newest features require that you upgrade server, templates, and client
  - Because changes are made in several places
  - You can get partial functioning of new features with partial upgrades sometimes
- Notes 6 clients can use the Domino 7 RRDB
  - Either through the calendar or direct booking
  - You do not have to upgrade the client mail server or template
  - You can upgrade RRDB today
  - Get the new features

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Coexistence and Upgrades (cont.)

- Notes 5 clients cannot use the Domino 7 RRDB
  - Even through the calendar in early versions of 7
  - Technote 7006547 states that SUPPORTED clients can use the new RRDB
  - R5 is an unsupported client version
  - Domino 7.0.3 has a template fix for R5 clients booking through C&S
Upgrading the Resource Reservation System

- Upgrade the server to Domino 7.0.2 (or later)
- Before restarting the server
  - Upgrade the design of the database
    - nconvert -d databasefilename * resrc7.ntf
    - Use the correct syntax for your OS
  - Open the database and enable the four scheduled agents
    - Autoreminder
    - Purge Documents
    - RenameReservations and SendNotice
    - Update Blocker Documents
  - Use an ID that will allow the agents to run properly
  - Select the proper server

Upgrading the Resource Reservation System (cont.)

- Check the ACL to ensure that an Admin server is selected
  - This will be your primary server if clustering
- Make sure the RnRMgr task is set to run
- Restart the server
  - You’re ready to use your new system
Upgrading the Resource Reservation System (cont.)

- There’s currently a problem with 7.0, 7.0.1, and 7.0.2 templates
  - They improperly convert some entries created when the database design was Domino 5 or 6
  - Some fields are missing or empty
- Fixed in 7.0.3, but you’ll need to repair the documents
  - Technote 1255213 has the details and a tool to repair the fields

Scheduling and Printing
Fine-Tune Scheduling

- Let Notes help you find free time
  - The default view for the Scheduler is the “Details” view
  - This is a good view with a graphical interface
  - It’s very good for small groups of invitees
  - Also good for single instance meetings
  - The Summary selection works better with larger groups
  - It’s also the only real option for repeating meetings

When repeat meetings are booked from the calendar, Notes checks first instance only!
  - And it’s always done it this way

Scheduling Options

- The Summary scheduler allows you to select the percent of users to check
  - This can be important when a large group is involved
- You can also check times for the next $n$ days
  - For up to 30 days
  - Note that the default is for the suggested day only!
  - Even for repeating meetings
Printing Your Calendar

- Many options exist for printing calendars
- Cal Print support was dropped after Notes 5
  - Almost every option it had is included in the calendar now
  - People still miss the planner if they ever used it
  - Printing to document is very helpful
  - Calendar List helps save space and paper
  - Plus many other styles
- Let’s explore

Printing Basics

- This is easy enough
- Some views get crowded
- You have many choices
- So many you may not know them all
Calendar Style Tab

- Notice the handy entry at the bottom
  - Hide private entries
  - Prints the word "Private" beside the entry
- Vary the font and layout of the printed product!
  - Get more on your paper

Calendar Style Tab (cont.)

- Grayed out options appear only when they are applicable
  - Expand rows, time slots as needed
  - Spread week across three pages
    - For weekly style
  - Use row/column format
    - Weekly style only
      - Prints days down the page
  - Include weekends
  - Print three month banner
    - Helps to visualize your schedule
Page Setup Tab

- Choose how the page is laid out
- If the invitee list would print more than three lines
  The Expand Names field content box is available
  By default, Notes now only prints three lines of invitees
  In mail, too!

Print to Document

- There's no Print button!
  You must Preview first
  Then print or forward the document
Time Zones and Daylight Saving Time

Daylight Saving Time

- What a headache that was!
  - It's not over yet ...
- How Notes and Domino handle time:
  - Time is stored as GMT internally
  - Converted to your time zone
  - The OS supplies the time to Notes/Domino
  - The time zone is also supplied
  - Can be overridden in the client
Daylight Saving Time (cont.)

- Time zone information is stored in Notes C&S documents like this
  \[Z=5$DO=1$DL=4\ 1\ 1 10\ -1\ 1$ZX=26$ZN=Eastern\]
  Detailed in “How time zone information is stored in Notes/Domino”
  www.ibm.com/support/docview.wss?rs=899&uid=swg21163045
  For 20 years, this line showed
  \[Z=5$DO=1$DL=3\ 2\ 1\ 11\ 11$ZX=26$ZN=Eastern\]
- All stored documents had to be changed
  After the OS was changed
  A non-IBM software limitation

Daylight Saving Time (cont.)

- It’s over now, right?
  Not necessarily
  DST was extended an hour in the Fall
  If you relied on users to change meetings before, they’ll need to check again
  The last week of October may be affected
  Plus, the US Congress reserved the right to roll back the changes in two years
  Which is why the DST fix agents supplied by Lotus only changed items two years out
  The change could be reversed by the US Congress
  Meetings scheduled more than two years out from today will be wrong if it isn’t
  Plus, Australia is getting into the act also
Daylight Saving Time (cont.)

- But for now, things are calm with respect to DST
  - Some nuances are arising
    - iCal meetings are showing unexpected time differences
    - Computers in Europe may still have versions of Windows with old DST rules
    - Can affect times for three weeks in the Spring and one week in the Fall
  - This year and next
Imported Calendars

- Notes can now import iCal calendars
  - www.icalshare.com is a good place to find some
  - Companies and schools use this standard to publish schedules
- How to use:
  - Download the calendar (example: Cambridge U Calendar)
  - Import the schedule
    - File ➔ Import ➔ Calendar File (*.ics)
    - Or simply drag and drop the file onto the calendar
    - Give it a name and choose which to import

Imported Calendars (cont.)

- Import Dialog Box

Note created from iCalendar Conversion has been placed on your Calendar
Exported Calendars

- Limitations exist in ND6 and 7
  - It does not currently support exporting anniversaries, all day events, and repeating entries
  - They are exported as Broadcast meetings
    - Meaning they must be accepted
- Lotus Notes 8 updates iCal processing
  - Import and export options and performance are improved
  - Stay tuned for new features

Calendar Cleanup

- Calendar Cleanup can help users get rid of old entries
  - This can help with mail file size
Calendar Cleanup (cont.)

- It uses the archiving function of Notes
  - The code exists today, but under the Archiving function
  - Access Calendar Cleanup under More action bar item
  - This feature deletes calendar entries permanently
    - Use for true cleanup!
    - We do warn you!

Summarizing Your Schedule

- This is my personal favorite
- Users will forget they selected this and call
  “Hello, Help Desk – the boxes are gone on my calendar”
  - What?
  - Training is the only workaround
  - But it’s a clean look
Alarms

- Alarms are a good thing
  You choose when the alarms go off and for which entries
  You’ll get this call at some point
  “Hello, Help Desk, my BlackBerry goes off at 4 am for All Day Events”
  Don’t set alarms on All Day Events!
  The start time is 4 am, end time is 8 pm
  Worse yet, it does for this for holidays too

Delivery Options for Calendar Notices

- The Delivery Options button is on notices involving others
  Meeting Notice
  Group To Do
  Some are similar to Mail options
  Signing and Encrypting
  Delivery Reports
  Some are unique
  I do not want replies
  These are Broadcast Meetings
  Prevent counter or delegation
Yearly Calendar View

- This exists in DWA only

Quick Check of Free Resources

- To quickly check the schedules of rooms or resources
  Create a group calendar with those rooms
  Group calendars are a display of free time
  Set up several
  One per floor!
International Calendar Options

- Set in User Preferences ➔ International ➔ Calendar
- You can display two time zones or add a secondary calendar
  These are visible on views where space is available
  They don’t show in Monthly views
- There are other localized display options

Copy Into

- Copy Calendar entries into Calendar, Mail, or To Do items
  Use the Copy into New button in the Calendar views
  Message, Calendar Entry, To Do
  Or simply drag onto the icon on the bookmark bar!
  Invitees are copied into To: field for mail
  You may need to edit the list
  All data and attachments are copied across
- This saves you time and effort!
Protect Your Free Minutes

- You've had those busy days
  You only have one hour of free time between meetings
  You really want to have some time
  But don't want a calendar entry people can see
  "Buffer" the meetings you're invited to
  If you're not the chair, add time to the end of a meeting
  Instead of ending at 10:00 am, it ends at 10:10 am
  When people search for a free hour, you don't have one!

Finding the Unread Mail

- Here's a call you've had
  "Hello, Help Desk?"
  "My mail file icon shows a bunch of unread documents, but I don't have any in my inbox"

- Before you start troubleshooting unread marks:
  Check the All Calendar Entries view
  If you're not showing meeting responses in your inbox, they never get marked as "Read"
  Sometimes reschedules leave unread notices

- Open the Meetings or All Calendar Entry view
  Expand All (Ctrl +)
  Select All and Mark All Read
**Working with To Do**

- To Do can be a simple task management tool
  - Assign items to yourself or others
  - Can help keep timeline for your records
  - Track on your calendar or in To Do view
- Workflow is similar to repeating meetings
  - Can prohibit delegation or declining
  - Can repeat
  - Notes will move the tasks forward in your Calendar until you mark them complete
- Follow Up Flags act like To Do entries
  - When you synch them with handhelds

**Find More Information**

- IBM Lotus/Domino Hints and Tips Web Site
  - www.alanlepofsky.net
- Notes/Domino Best Practices: Calendaring & Scheduling
  - www.ibm.com/support/docview.wss?rs=899&uid=swg27009325
- Numerous developerWorks articles
- Lotus Notes Help database
  - It’s VERY detailed
- Lotus Notes C&S Schema
Questions?

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