

Scheduling

In the previous section, we focused on very basic scheduling and clearing of activities. However, much of our scheduling these days seems to be anything but basic. You can choose other options in the Scheduling dialog box. Let's review them now.

Scheduling Activities for Other ACT! Users

When you share an ACT! database with other users on a network, you may find yourself in the enviable position of assigning tasks to the other ACT! users. Each activity in the Task List and Calendar is scheduled for one user or the other. In effect, each user of your database has a personal Task List and Calendar.

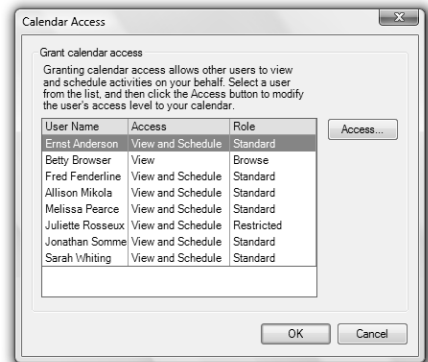
ACT! allows one user of a shared database to create activities for another user. However, it is up to you (the user) to grant scheduling rights to other users.

...grant scheduling rights to other users

1. **Schedule, Grant Calendar Access...**

The **Calendar Access** dialog box displays.

All users (other than yourself) are listed. Every user can view every other user's calendars (can't change that). Managers and Administrators already have access to both **View and Schedule** for all users in the database. Permission to schedule an activity on your behalf can only be modified for Standard and Restricted users.



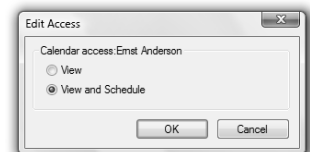
How To...



Browse users can't schedule anything.

2. Select the user you wish to grant scheduling rights to your calendar. Click **Access...**

The **Edit Access** dialog box displays.



3. Choose **View and Schedule** and click **OK**.

It probably goes without saying if you choose **View**, the selected user can view your calendar but not schedule activities for you.

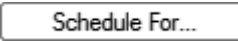
- Repeat steps 2 and 3 for other users for whom you wish to grant/restrict scheduling access, click **OK**.

The modified users are now be able to schedule activities for you (or not).

Once you have been granted scheduling access to another user's calendar, you can begin to load up their calendar for them (be careful, you know what they say about power corrupting...).

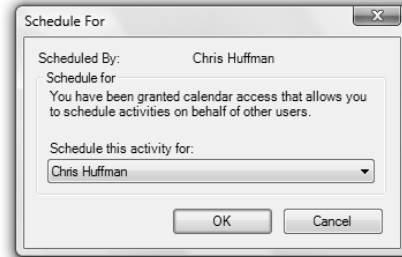
How To...

...schedule an activity for someone else in your company


- Look up the Contact you want to schedule the activity with.
- Create the activity as you normally would.
- Click the **Schedule For...** button at the  bottom of the Schedule Activity dialog box.
- From the **Schedule this activity for:** list, choose the user you want to assign this activity for. Remember, unless they grant you the right to schedule for them, you may not see their name in the list.
- Click **OK** when you are done.

Example: To set up lunch with Betty Jones for a fellow employee named Allison, look up Betty, *not* Allison.

The **Schedule For** dialog box displays with your name as the user for whom the activity is scheduled.



The activity displays on the designated user's calendar.


 *If you have been assigned an Administrator or Manager security role, you already have the right to schedule for other users. They don't need to grant you access.*

Practice: Getting the Monkey Off Your Back

Try It...

Step	What to do	How to do it/Comments
1.	Wow, you've got so much to do this week. Let's delegate a few things to others in your company.	

Try It...


Step	What to do	How to do it/Comments
2.	<p>There are at least two activities we could ask others to handle for us...</p> <ul style="list-style-type: none"> ✓ Ask Melissa (your Assistant) to call Sandy Ryan to schedule your next meeting date. ✓ Select any activity that you like on the Task List and reassign to Allison Mikola. 	<p>Look up Sandy Ryan. Click the Schedule Call icon on the toolbar. In the Regarding box, type "Schedule a meeting." Click the Schedule For button and select Melissa from the user list. Finish scheduling the activity.</p>  <p>Display the Task List view. Double-click an activity to edit it. Click Schedule For... and change user from Chris Huffman to Allison Mikola. Click OK.</p>
3.	What happened to the activity?	It was removed from your list since it isn't scheduled for you any more.

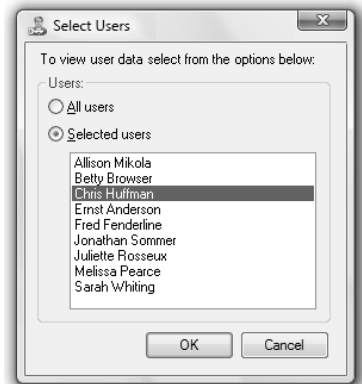
Displaying Multiple Users in Your Calendar or Task List

If you share a database with other ACT! users, you may find it useful to see their activities in the Calendar view, as well as your own. Usually ACT! shows only your own activities in the Calendar or Task List views, but you can easily display other users' schedules as well.

...filter the Calendar or Task List for a user

How To...

- In Calendar or Task List view, click the **Select Users** button.  Click any name to select it; click a selected name to unselect it.
- Choose...
 - All users** to show everyone's activities,
 - or
 - Selected users** to hand-pick the display.
- Click **OK**. Your Calendar or Task List view is updated with the selected user(s) activities.



ACT! remembers your User list selections until you change them to something else.