



SETTING UP SHARED CALENDARING

Summary

Use shared calendaring to enable your users to more easily coordinate their activities. Set the sharing model for users' personal calendars and set up public calendars and resources to manage group activities and shared resources.

What Is Shared Calendaring?

Shared calendaring is a set of features that help users track events organization-wide. Organizations using any Salesforce edition (except Personal Edition) have access to the following features:

- Users can view each other's calendars to see what events are scheduled. If calendar sharing permissions allow it, users can also add events to other users' calendars and even change the details of other users' existing events.
- The multi-user calendar view displays several users' calendars all at once.

Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations can use the following additional features:

- Public calendars track events that apply to a group of users. For example, department event calendars, project calendars, and production schedules.
- Resource calendars track the schedules of conference rooms, overhead projectors, and other company resources.

Creating Public Calendars and Resources

To create a public calendar or resource:

1. From Setup, enter *Public Calendars and Resources* in the **Quick Find** box, then select **Public Calendars and Resources**.
2. Click **New** next to Public Calendars or Resources.
3. Give the calendar or resource a name.
4. Check **Active**.
5. Click **Save**.
6. To make the new calendar or resource available to others, click **Sharing**, and set the sharing as described later in this tip sheet.

Tip

When you create a public calendar or resource, make it available to others by sharing it with specific users, groups, roles, and roles and subordinates.

Public Calendar Tips

- To simplify public calendar access, create a bookmark, a web integration link in the Home tab, or a hyperlink on your company's intranet.
- To display a list of public and resource calendars, from Setup, enter *Public Calendars and Resources* in the Quick Find box, then select **Public Calendars and Resources**.

Adding Events to Public Calendars and Resources

Adding an event to a public calendar is similar to adding an event to your personal calendar:

1. Click the Home tab, then click the Day View, Week View, or Month View icon below the calendar.
2. Click **[Change]** next to **Calendar for** at the top of the calendar.
3. Select Public Calendars & Resources, then choose the name of the public calendar. Be sure to choose a public calendar, not a resource.
4. In the day view, click the desired time. In the week or month view, click **New** next to the desired day.

To schedule an event for a resource, invite the resource to a multi-person event by clicking **Add Invitees** and choosing to search within *Resources*. For information about how to create a multi-person event, see the online help.

Sharing User Calendars, Public Calendars, and Resources

To set sharing for personal user calendars:

1. From Setup, enter *Sharing Settings* in the Quick Find box, then select **Sharing Settings**.
2. Click **Edit** in the Organization-Wide Defaults related list of the Sharing Settings page.
3. Choose a default security access setting from the **Calendar** drop-down list.

Users can modify calendar sharing individually to make their calendars even more accessible to other users.

To set sharing for a public calendar or resource:

1. From Setup, enter *Public Calendars and Resources* in the Quick Find box, select **Public Calendars and Resources**, and then click **Sharing** next to the calendar that you want to share.
2. Click **Add**, select public groups, roles, or users, and add them to *New Sharing*.
3. In *Calendar Access*, select the desired sharing level.

To allow all users to access a public calendar or resource, share it with the public group *Entire Organization*.