



# OHIO IT Planning Calendar Procedure

## Overview

The OHIO IT Calendar encapsulates several important milestones used by OHIO IT and the University. This procedure will guide the CES I on the maintenance and entry of calendar items. Visit the chart on [Obtaining Event Dates and Approvals](#) to coordinate the annual review of dates.

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### ✓ How to Link the Calendar to Your Personal Outlook (for Calendar Administrators)

### ^ Manage the OHIO IT Calendar via Outlook

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**NOTE:** You must link the calendar in SharePoint to Outlook to be able to manage the calendar from Outlook. See [How to link the calendar to your personal Outlook \(for calendar administrators\)](#).

1. Open **Outlook**.
2. Select the Calendar icon on the left navigation panel.
3. Scroll down to **Other Calendars**.
4. Place a checkmark in the box next to the calendar(s) you wish to view.
5. Enter, manage, and delete items from the calendar as you would for your personal Outlook calendar. Visit Microsoft for an [Introduction to the Outlook Calendar](#).

**NOTE:** Calendars can be moved in this navigation section by selecting and dragging. If you are unable to locate the calendar you are looking for it may be in another location in your navigation pane, or it needs to be linked to your Outlook account. See [How to link your account](#) section above.

**WARNING:** Any changes you make in Outlook will be represented in the live calendar so be careful what and how you add!

## ^ Manage the OHIO IT Calendar via SharePoint

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**NOTE:** Before starting, ensure that you have the correct administrative access to SharePoint. You may need to contact a Microsoft Administrator for access.

## Add a Calendar Item

1. Visit the [OHIO IT Calendar](#), or [OHIO IT Intranet](#).
2. Select the gear icon in the upper right corner of the browser.
3. Select [Site Contents](#) from the SharePoint menu.
4. Select the calendar you intend to edit (i.e., Budget, Performance, Planning, Board of Trustees etc.).
5. Once the calendar opens, select the day you want to modify. When a day is selected, **+Add** should appear in the day field.
6. Select the +Add to enter an event.
7. A new form will open.
8. Add a short descriptive title to the event.
  - *Note: Be sure the title is concise! The calendar will only display about 24 characters in the published day field.*
9. Select the location (optional).
  - *Note: This is important for events that occur on site.*
10. Select the date and time.
  - If the event ranges over a length of time or days, then select the range.
  - If the event is "all day" select the checkbox titled "All day."
11. Enter a brief description. Hyperlinks to outside resources can be copied and pasted into this field.
12. Select whether or not this is an all-day event. All milestones/deadlines that are not meetings should be entered as an all-day event.
13. Select **Save**.

## Delete a Calendar Item

1. Visit the [OHIO IT Calendar](#), or [OHIO IT Intranet](#).
2. Select the gear icon in the upper right corner of the browser.
3. Select [Site Contents](#) from the SharePoint menu.
4. Open the calendar page in your browser.
5. Select the calendar you intend to edit (i.e., Budget, Performance, Planning, Board of Trustees).
6. Select the calendar item you intend to delete.
7. Select **Delete Item** in the menu bar.

## Edit a Calendar Item

1. Visit the [OHIO IT Calendar](#), or [OHIO IT Intranet](#).
2. Select the gear icon in the upper right corner of the browser.
3. Select [Site Contents](#) from the SharePoint menu.
4. Open the calendar page in your browser.
5. Select the calendar you intend to edit (i.e., Budget, Performance, Planning, Board of Trustees).
6. Select the calendar item you want to edit.
7. Select either **Edit Series** or **Edit Item** from the tool menu depending on what you need to edit.
8. Make changes as needed.

## ^ Calendar Planning

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This section provides an overview of the planning process for the OHIO IT Calendar.

### Build a Jira Issue

A [Jira template](#) has been provided to make the annual maintenance windows easier to manage. Clone the template and plan for multiple sprints at the designated times(s) if necessary.

The following charts indicate the desired calendar review windows for when user stories should be written. The user story and acceptance criteria should be written as follows:

As a member of OHIO IT, I need a one-stop calendar that includes important key dates for the organization so that I can plan my and my team's work effectively.

Given I'm the coordinator of the OHIO IT calendar, when it's time for the annual/bi-annual update, then:

- *The approved organizations/persons have been contacted, and the dates authorized for use in the calendar (See the wiki page to see which organizations/events are authorized).*
- *Dates have been entered according to the established format (use past entries)*
- *New calendar entries have been peer reviewed*
- *New calendar items (that have not been included before) have been considered*
- *This template is copied and setup for the next calendar maintenance window*

### Obtaining Event Dates and Approvals

Each entry type has different approval requirements and is added annually based on the cadence of an originating organizations' end of planning. For example, Board of Trustees dates are planned on a fiscal year schedule which cycles from July until June of the following year. Therefore, these dates are planned in spring before the beginning of the new fiscal year.

A few guidelines:

- All items should be entered based on the style of existing entries.
- Be careful to compose entries so that they display well in the calendar.
- Some entries (such as items from the holiday calendar) are easy to set as recurring. These items are currently scheduled out to 2033 but should be checked annually to ensure correctness.

### Event Details, Review Windows, and Ad Hoc Calendar Dates

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#### May Review Window

Organizational Cycle	When new dates are available	Specific Date Types	Contact	Calendar Group	Notes
Academic	May	Semester start and end dates, first day of classes, last day of classes	<a href="#">Larissa Barnhart</a> in the Registrar's Office	University Closures/Special Dates	The <a href="#">Academic Calendar</a> is projected over a five-year period. A complete schedule can be requested directly from the Registrar's office. Calendars are approved by early March.
Board of Trustees	May	All internal and external dates such as meetings and planning milestones	Shelly Bean, Secretary to the Board of Trustees	Board of Trustees	Board of Trustees dates are published following the April meeting.

Organizational Cycle	When new dates are available	Specific Date Types	Contact	Calendar Group	Notes
Change Freeze Dates	May	Program blackout dates corresponding with the beginning and ending of each term.	<a href="#">Carlos Walker</a> with Project Management	Maintenance Windows	Blackout dates are typically produced at the same time that the new academic calendar is released. <a href="#">OIT Maintenance windows</a> .
Grades Due/Available	May	When Grades are Due/Available for the coming semesters	<a href="#">Kensey Love</a> with the Registrar's Office	University Closures/Special Dates	Reference the <a href="#">Production Calendar</a> .
Monthly Effort Reporting	May	All planning dates useful to managers	<a href="#">Melissa Weaver</a> in Project Management	Monthly Effort Reporting	This always occurs on the 2 <sup>nd</sup> business day of every month.
No Meeting Days	May	NA	NA	University Closures/Special Dates	This always occurs on the 1st Monday of every month. In case of University closures and/or holidays, this can be rescheduled to the next available Monday.
OKRs	May	All planning dates useful to managers	<a href="#">Amanda Davis</a> in Campus Engagement	Planning	The annual review window is the first business day of June. Refer to the Overview of Milestones in the <a href="#">OKR Calendar Milestones</a> when determining new dates (will be migrated to SharePoint soon).
Open Registration begins	May	The dates when students are able to register for classes for upcoming semesters	TBD/ <a href="#">Kensey Love</a> with the Registrar's Office	University Closures/Special Dates	Reference the <a href="#">Production Calendar</a> .

### December Review Window

Organizational Cycle	When new dates are available	Specific Date Types	Contact	Calendar Group	Notes
Budget	December	All planning dates useful to managers	<a href="#">Angie Iafrate</a> with Workforce Management	Budget	
Grades Due/Available	December	When Grades are Due/Available for the coming semesters	<a href="#">Kensey Love</a> with the Registrar's Office	University Closures/Special Dates	Reference the <a href="#">Production Calendar</a> .
Holidays	December	All University holidays and closures	Visit the <a href="#">University holiday schedule</a> .	University Closures/Special Dates	Human Resources will publish a new holiday schedule before the beginning of every new fiscal year.
OHIO-DAN	December	Meeting dates for the upcoming year	<a href="#">Haley Riwniak</a> with Digital Accessibility	Social and Community Events	
OIT Social Events	December	All OIT social event dates for the upcoming year	<a href="#">Renee Stickel</a> with IT Project Management	Social and Community Events	
Open Registration begins	December	The dates when students are able to register for classes for upcoming semesters	TBD/ <a href="#">Kensey Love</a> with the Registrar's Office	University Closures/Special Dates	Reference the <a href="#">Production Calendar</a> .

Organizational Cycle	When new dates are available	Specific Date Types	Contact	Calendar Group	Notes
Performance	December	All planning dates useful to managers	<a href="#">Angie lafrate</a> with Workforce Management	Performance Evaluations	

## Ad Hoc Calendar Dates

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Advisory Community meetings are the only events currently entered into the calendar on an ad hoc basis. Due to the decentralized management and the inconsistent publishing of these events on the Calendar of University Events (CUE) the CES I adds these event dates as they become available. There is currently no official review window for these dates.

Other events are added ad hoc as requested. These events must be reviewed and approved for Strategy Management. See [Authorizing New Calendar Entries](#).

## ^ OKR Calendar Milestones

Use the following table when setting the OKRs dates during the annual review. The items within the column titled "OHIO IT Calendar" should be copied into the calendar to maintain the established naming convention.

Quarter	Month	Step(s) to Execute	Schedule	OHIO IT Calendar Title
Q3	January	4. Finalizing Quarterly OKRs	Third business day of the new quarter	Q3: Quarterly OKRs Finalized due 5 p.m.
		6. Monthly Status Updates	Last business day of the month	Q3: OKR Status Updates due 5 p.m.
	February	6. Monthly Status Updates	Last business day of the month	Q3: OKR Status Updates due 5 p.m.
	March	2. Quarterly Drafts	Five business days prior to end of quarter	Q4: Quarterly OKR Drafts due
		3. Portfolio Director Review of Quarterly Drafts	Last business day of the quarter	Q4: Portfolio Director Review of Quarterly Drafts due 5 p.m.
		5. End of Quarter Scoring	Last business day of the quarter	Q3: OKR Scoring due 5 p.m.
Q4	April	4. Finalizing Quarterly OKRs	Third business day of the new quarter	Q4: Quarterly OKRs Finalized due 5 p.m.
		6. Monthly Status Updates	Last business day of the month	Q4: OKR Status Updates due 5 p.m.
	May	6. Monthly Status Updates	Last business day of the month	Q4: OKR Status Updates due 5 p.m.
	June	1. Setting Deadlines Annually	First business day <i>June Only</i>	Annual Review of OKR dates
		2. Quarterly Drafts	Five business days prior to end of quarter	Q1: Quarterly OKR Drafts due
		3. Portfolio Director Review of Quarterly Drafts	Last business day of the quarter	Q1: Portfolio Director Review of Quarterly Drafts due 5 p.m.
		5. End of Quarter Scoring	Last business day of the quarter	Q4: OKR Scoring due 5 p.m.

Q1	July	4. Finalizing Quarterly OKRs	Third business day of the new quarter	Q1: Quarterly OKRs Finalized due 5 p.m.
		6. Monthly Status Updates	Last business day of the month	Q1: OKR Status Updates due 5 p.m.
	August	6. Monthly Status Updates	Last business day of the month	Q1: OKR Status Updates due 5 p.m.
	September	2. Quarterly Drafts	Five business days prior to end of quarter	Q2: Quarterly OKR Drafts due
		3. Portfolio Director Review of Quarterly Drafts	Last business day of the quarter	Q2: Portfolio Director Review of Quarterly Drafts due 5 p.m.
		5. End of Quarter Scoring	Last business day of the quarter	Q1: OKR Scoring due 5 p.m.
Q2	October	4. Finalizing Quarterly OKRs	Third business day of the new quarter	Q2: Quarterly OKRs Finalized due 5 p.m.
		6. Monthly Status Updates	Last business day of the month	Q2: OKR Status Updates due 5 p.m.
	November	6. Monthly Status Updates	Last business day of the month	Q2: OKR Status Updates due 5 p.m.
	December	2. Quarterly Drafts	Five business days prior to end of quarter	Q3: Quarterly OKR Drafts due
		3. Portfolio Director Review of Quarterly Drafts	Last business day of the quarter	Q3: Portfolio Director Review of Quarterly Drafts due 5 p.m.
		5. End of Quarter Scoring	Last business day of the quarter	Q2: OKR Scoring due 5 p.m.

## ✓ Authorizing New Calendar Entries