

EMS Master Calendar

Configuration Guide

V7

April 2019

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Introduction to Master Calendar Legacy Documentation

The purpose of the section is to answer your questions and guide you through the procedures necessary to install, configure and administer the EMS Master Calendar efficiently and effectively for legacy versions.

IMPORTANT: To ensure your users are benefiting from the newest features, enhancements, and fixes, EMS Software recommends that you upgrade to the most current release of your EMS product.

INTERESTED IN UPGRADING?

Contact EMS Sales at **(800) 440-3994**. For more information, visit www.emssoftware.com.

Preface

Welcome to the *Master Calendar Setup Guide*. The purpose of the *Master Calendar Setup Guide* is to answer your questions and guide you through the procedures necessary to use the Master Calendar system efficiently and effectively.

Using the manual

You will find the *Master Calendar Setup Guide* easy to use. You can simply look up the topic that you need in the table of contents or the index. Later, in this Preface, you will find a brief discussion of each chapter to further assist you in locating the information that you need.

Special information about the manual

The *Master Calendar Setup Guide* has a dual purpose design. It can be distributed electronically and then printed on an as-needed basis, or it can be viewed online in its fully interactive capacity. If you print the document, for best results, it is recommended that you print it on a duplex printer; however, single-sided printing will also work. If you view the document online, a standard set of bookmarks appears in a frame on the left side of the document window for navigation through the document. For better viewing, decrease the size of the bookmark frame and use the magnification box to increase the magnification of the document to your viewing preference.

Conventions used in the manual

The *Master Calendar Setup Guide* uses the following conventions:

- Information that can vary in a command—variable information—is indicated by alphanumeric characters enclosed in angle brackets; for example, <Calendar Name>. Do not type the angle brackets when you specify the variable information.
- A new term, or term that must be emphasized for clarity of procedures, is *italicized*.

- Master Calendar has been designed using responsive web design. This manual documents the tabs, fields, menus, and the available functionality from a full browser display. As a result, the labels that are displayed and the functions that are available on a menu or page when viewing the application in another device might be different than what is shown in this manual.
- Different site themes, which include the locations of Calendar Filters and color schemes, are available for a Master Calendar site. The theme that has been chosen for the screen captures in this manual might not be the same as the theme that your Master Calendar site administrator has chosen for your organization's site.
- The main menu can be customized for a Master Calendar site. The menu options that are shown in the screen captures in this manual might not be the same as the menu options that your Master Calendar administrator has set up for your organization's site.
- This manual is intended for both print and online viewing.
 - If information appears in blue, it is a hyperlink. Table of Contents and Index entries are also hyperlinks. Click the hyperlink to advance to the referenced information.

Assumptions for the manual

The *Master Calendar Setup Guide* assumes that:

- You are familiar with web-based applications and basic web functions and navigational elements.
- You are familiar with basic Windows content formatting and layout tools.

Organization of the manual

In addition to this Preface, the *Master Calendar Setup Guide* contains the following chapters and appendices:

- “[Getting Started with Master Calendar](#),” details the procedures for opening and logging in to Master Calendar. It also provides an overview of the major navigational elements and it details application features that are common to both a Master Calendar site administrator and a Master Calendar user.
- “[Configuring Groupings and Calendars](#),” details the managing of groupings and calendars in Master Calendar including adding, ordering, editing and

deleting groupings, and viewing the history for a grouping. It also details adding, editing and activating and inactivating calendars, ordering calendars, viewing the history for a calendar, and adding calendar URLs.

- “[Configuring Optional Information](#),” details the configuration of optional information in Master Calendar including adding, editing, and deleting event types, adding editing, and deleting event type views, adding, editing, and deleting custom field hints, adding, editing, and deleting event locations, adding, editing, and deleting user-defined questions, and adding editing, and deleting event icons.
- “[Configuring Special Dates and Announcements](#),” details the managing of special dates and announcements in Master Calendar including adding, editing, and deleting special dates, adding more dates to a recurring special date, adding, activating, inactivating, editing, and deleting announcements, and viewing the history for an announcement. It also details importing events, editing events, deleting events, and purging imported events and viewing the history for an imported event.
- “[Configuring Users and Templates](#),” details the managing of users and templates in Master Calendar including searching for users, adding and editing user records, activating and inactivating user records, deleting inactive users, and viewing the history for a user record. It also details adding user templates, specifying template permissions and assigning users to templates, activating and inactivating templates, editing templates, deleting templates and viewing the history for a template.
- “[Administering Master Calendar](#),” details that site administration functions that are available in Master Calendar including setting the theme for your Master Calendar site, changing the default settings for Master Calendar, managing RSS feeds, managing menu options, viewing and updating Master Calendar registration information, managing data sources and connectors, customizing email headers for automated emails, managing help text, and managing subscriptions.
- “[Site Configuration Settings](#),” details the Master Calendar site configuration settings.

Getting Started with Master Calendar

Master Calendar provides instant, online access to a centralized calendar of events that not only provides date, time and location, but also displays a detailed event description, directions to the venue and any other important information you choose to enter. This chapter details the procedures for opening and logging in to Master Calendar. It also provides an overview of the major navigational elements and it also details application features that are common to both a Master Calendar site administrator and a Master Calendar user.

This chapter covers the following topics:

- “Opening, Logging in to, and Logging Out of Master Calendar”
- “Master Calendar User Menu”
- “Using Hyperlinks on a Master Calendar Page”
- “Required Fields and Using Icons to Enter Data”

Opening, Logging in to, and Logging Out of Master Calendar

When a guest or a user first opens Master Calendar, or a user [logs in](#) to Master Calendar, the Master Calendar *Home page* opens. The page that you remain on after [logging out](#) of Master Calendar depends upon the log out option that you select.

To log in to Master Calendar

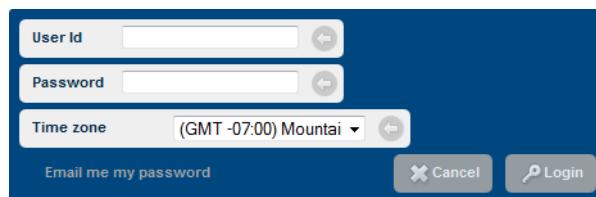
1. On the Master Calendar Home page, click Login.

The Login dialog box opens. You use this dialog box to enter your User Id and password to log in to Master Calendar. An option is also present to select a time zone.



The first time that you log in to Master Calendar as an administrator user (also referred to as a site administrator), you must use admin/admin as the User Id / password combination. It is recommended that you change this combination after your first login. See “[To edit a user](#)”.

Figure 1-1: Login dialog box



2. Enter your User Id and password.
3. Select a time zone.



The value that you select for time zone is automatically set as the default value for the time zone for any event that you submit. You can always change this value for an event.

4. Press ENTER, or click Login.

The Master Calendar Home page remains open. A User menu is available on this page. See “[Master Calendar User Menu](#)”.



For a new installation, you are prompted to enter your organization’s registration information. See “[Viewing and Updating Master Calendar Registration Information](#)”.

To log out of Master Calendar

- If you are on the Master Calendar Home page, then simply click Log Out next to your User Name. The Master Calendar Home page remains open.
- If you are on the Add Event page, then simply click Log Out next to your User Name. The Add Event page remains open.
- If you are on any of the Admin Panel pages (for example, Manage Events or Manage Special Dates), then under My Account, click Log Out.

The Master Calendar Login page opens. After you log in to Master Calendar from this page, the Manage Events page opens.

Figure 1-2: Master Calendar Login page

A screenshot of the Master Calendar Login page. The page has a dark blue header bar with three tabs: "Calendar", "Submit Event", and "My Account". Below the header is a grey header section with the text "RT - LOGIN HELP TEXT" and a "Login" button. The main content area is white and contains four input fields: "User Id:" with a red asterisk, "Password:" with a red asterisk, "Time zone:", and a dropdown menu showing "(GMT -07:00) Mountain Time". At the bottom of the form is a "Login" button and a link "Email me my password".

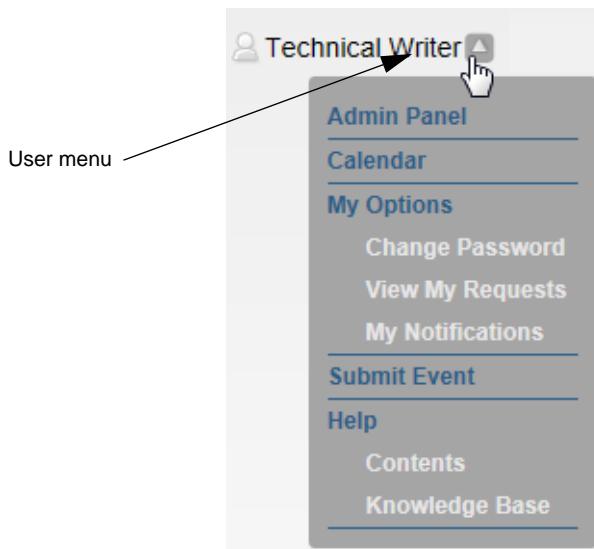
Master Calendar User Menu



The User menu is only one of many components on the Master Calendar Home page. It is discussed here because you must understand how to access all the Admin functions that are discussed in this Setup Guide. For a complete discussion of the default layout and the components of the Master Calendar Home page, see the Master Calendar Home page in Getting Started in the Master Calendar User's Manual.

After you log into Master Calendar, your User Name is displayed in the upper right corner of the Home page. A dropdown menu is available for the name. The options that are available on this User menu depend on whether you are a standard user, a Calendar Manager, or an administrator user (also referred to as a site administrator).

Figure 1-3: User menu, Calendar Manager or administrator user



Option	Description
Admin Panel	Displayed only for Calendar Managers or administrator users. A Calendar Manager or administrator user must click this option to open the Master Calendar Manage Events page. The Master Calendar main menu is displayed at the top of the page. From this page, you can view all the calendars to which you have access as a Calendar Manager, and you can access all the Master Calendar functions and system areas that are available to you either as a Calendar Manager or as a site administrator. Note: For Calendar Managers, see <i>Managing Events from the Manage Events page in the Master Calendar User's Manual</i> .
Calendar	Users or guests can click this option at any time to return to the Master Calendar Home page.
My Options	Displayed for standard users, Calendar Managers, and site administrators. See <i>Managing your Master Calendar Options</i> in the <i>Master Calendar User's Manual</i> .

Getting Started with Master Calendar

Option	Description
Submit Event	Opens the Add Event page. Users and guests use this page to submit events to calendars to which they have been granted access. See <i>Submitting an Event</i> in the <i>Master Calendar User's Manual</i> .
Help	Displayed for standard users, Calendar Managers, and site administrators. <ul style="list-style-type: none"> • Contents - Opens the Master Calendar Online Help. • Knowledge Base - Opens the EMS Support Center Knowledge Base for Master Calendar.

Figure 1-4: Master Calendar Manage Events page with main menu

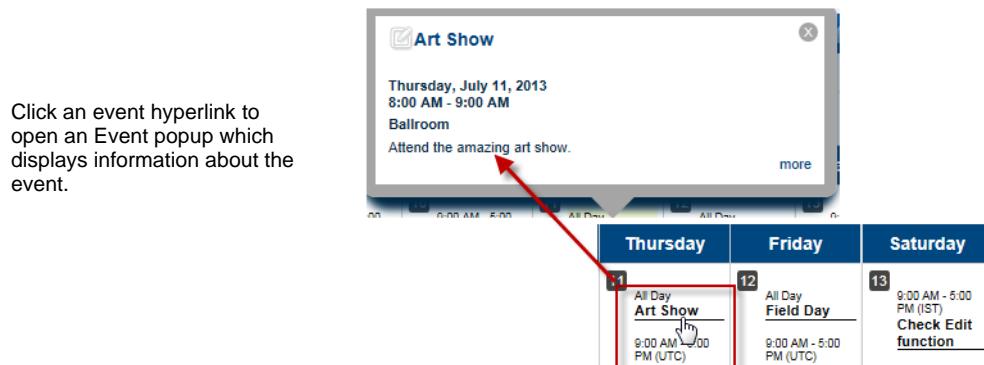
The screenshot shows the 'Manage Events' page of the Master Calendar. At the top, there is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. To the right of the navigation bar, it says 'Welcome: Technical Writer'. Below the navigation bar, there is a 'Filters' section on the left containing fields for Start Date (8/7/2013 Wed), End Date, Keyword, Calendar (Multiple Selected), Event Type (All), Location (All), and Source. To the right of the filters, there is an 'Actions' section with links: Delete | Approve | Reject | Print. Below these sections, there are two tabs: 'All' (selected) and 'EMS'. On the right side of the page, there is a table titled 'Pending Events' with columns: Title, First Event, Last Event, Calendar, and Priority. The table lists five events:

Title	First Event	Last Event	Calendar	Priority
Field Hockey Camp	8/12/2013 Mon	8/14/2013 Wed	Student Organizations	Medium
Student Affiliate of the ACS - Organizing Meeting	8/15/2013 Thu	8/15/2013 Thu	Other Students	Medium
Community Prayer Time	8/21/2013 Wed	8/21/2013 Wed	Faculty and Staff Training	Medium
SIFMA Training Managers Roundtable	8/22/2013 Thu	8/22/2013 Thu	Lectures & Seminars	High
SOMALIA LECTURE	8/22/2013 Thu	8/22/2013 Thu	Lectures & Seminars	Medium

Using Hyperlinks on a Master Calendar Page

On any Master Calendar page, any item that appears in *blue*, or is *underlined* (such as an event entry on a calendar) is a hyperlink. Different links have different purposes. For example, a link might open a blank email, or a page on which you can view the information for the selected item. In addition, if the link is for an event, depending on how you are logged in to the system, you might also be able to edit the information for the selected event and carry out other actions. (See *Managing an Event from the Event Summary Page* in the *Master Calendar User's Manual*.) If the link is a column header, then you can click the link to sort the displayed information based on the column header, and then click on the link again to reverse the sort order.

Figure 1-5: Example of a hyperlink on a Master Calendar page



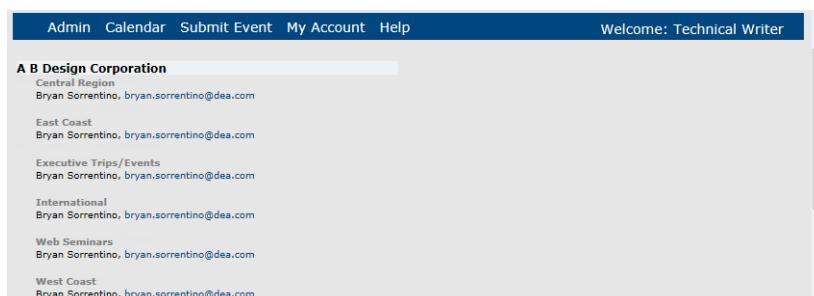
The Calendar Managers hyperlink and an RSS Feeds hyperlink are displayed at the bottom of every page in Master Calendar.

Figure 1-6: Calendar Managers and RSS Feeds links at bottom of Master Calendar pages

[Calendar Managers](#) | [RSS Feeds](#)

If you click the Calendar Managers hyperlink, the Calendar Managers page opens. This page displays all the currently active calendars in Master Calendar and their Calendar Managers by grouping. Any notes about a calendar are also displayed. The email address for a Calendar Manager is a hyperlink that you can click to open a blank email that you can fill out and send directly to the Calendar Manager.

Figure 1-7: Calendar Managers page



Getting Started with Master Calendar

If your site administrator has configured RSS feeds, then when you click the RSS Feeds hyperlink, a list of all currently active RSS feeds opens. Click on the RSS button below a feed to open the feed and view the information for the feed.



The first time that you click the RSS Feeds link, you might be prompted to download an RSS feed reader and carry out other activities before you can view a feed.

Figure 1-8: Viewing an RSS feed

A screenshot of a web browser displaying a list of RSS feeds. The top navigation bar includes Admin, Calendar, Submit Event, My Account, and Help. A message in the center says "Point your news reader to an address below to subscribe. You may subscribe to multiple feeds." Below this, there is a list of feeds with orange "RSS" links:

- Arts and Sciences News (RSS link circled)
- BBC News (RSS link)
- CNN News Feed (RSS link)
- Demonstration Test Feed (RSS link)

An annotation with a black arrow points from the text "Click the RSS link to open and view the information for the selected RSS feed." to the circled "RSS" link for Arts and Sciences News. The main content area shows four event entries under "Arts and Sciences News":

- RP Featured Event Test 12/11/2013 9:00 AM to 5:00 PM - Gittinger Hall
- RP Featured Event Test 12/10/2013 9:00 AM to 5:00 PM - Gittinger Hall
- RP Featured Event Test 12/9/2013 9:00 AM to 5:00 PM - Gittinger Hall
- RP Featured Event Test 12/8/2013 9:00 AM to 5:00 PM - Gittinger Hall

On the right side, there is a sidebar with filtering options:

- Displaying 255 / 255
- All 255
- Sort by: Date, Title, Author
- Filter by category:
 - (None) 152
 - Football 34
 - Dinner 1
 - Extracurricular 23
 - Game 3
 - Hockey 3
 - Woman's Event Type 1
 - Show 56

The “Subscribe to the feed” option is always available after you open the feed. By default, all notifications in all categories sorted by date (most recent date first) are displayed when an RSS feed first opens. Optionally, you can do one or more of the following:

- Enter a search string in the Displaying field to search for and display only those notifications that meet the search criteria.



*The search is limited to the exact order of the characters in the string; however, the search string is not case-sensitive and the search string can be found anywhere in the search results. For example, the search string “mental” returns notifications that contain either **Departmental** or **Mental Health Department**.*

- Sort the notifications for the feed by either Title or Author.
- Filter the notifications for the feed by category.

Required Fields and Using Icons to Enter Data

A required field is a field into which you must enter data before you can save an addition or modification in Master Calendar. A required field is denoted by a red asterisk to the right of it.

Figure 1-9: Example of a required field



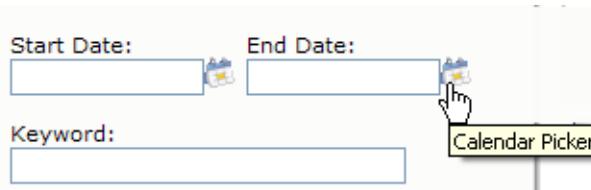
Many fields in Master Calendar, whether required or optional, have an icon next to them. For some fields with an icon next to them, you can manually enter data into the field, or you can click the icon next to the field to open a list from which you can select a value to populate the field. For other fields, your only option is to click the icon next to the field to open a list and select a value for the field. If you must use an icon to populate a field, then the field is not blank. Instead, a default value such as “Multiple Selected” or “all” is always displayed in the field.

Figure 1-10: Example fields with an icon next to them on a Master Calendar page

<p>Start Date: <input type="text"/> </p> <p>End Date: <input type="text"/> </p> <p>Calendars:*(Multiple Selected) </p> <p>Event Types: (all) </p> <p>Locations: (all) </p>	<p>For a date field, you can enter the date manually into the field, or you can click the Calendar Picker icon to open a calendar and select the date.</p> <p>For some fields, your only option is to click the icon next to the field to open a list and select a value for the field.</p>
--	--

Each icon is identified by a unique name in Master Calendar. If a procedure in the Master Calendar Setup Guide or Master Calendar User’s Manual refers to an icon and you are not certain as to which icon the procedure is referring, then place your mouse pointer on the icon to display the name of the icon in a tooltip.

Figure 1-11: Viewing the name of an icon



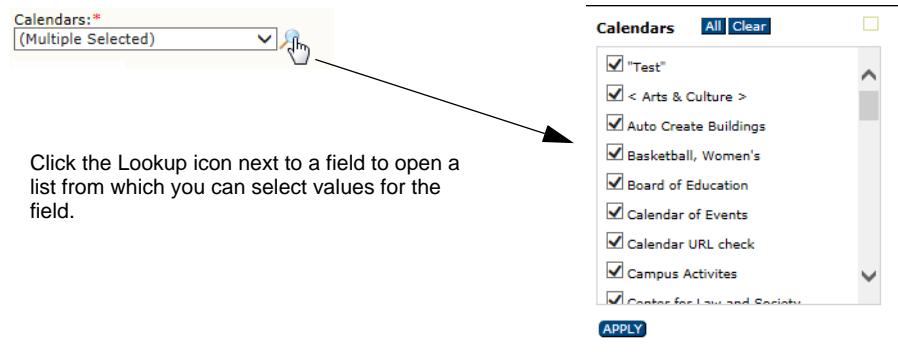
Four icons—the [Lookup icon](#), the [Calendar Picker icon](#), the [Color Picker icon](#), and the [Time Picker icon](#)—are used repeatedly in Master Calendar and function the same way regardless of the page on which they are used.

Getting Started with Master Calendar

Lookup icon

Click the Lookup icon to open a list from which you can select one or more values to populate a field. To select all values in a single step, click All. After you make your selections, click Apply to close the dialog box. If you select more than one value from the list, but not all values, then the phrase “Multiple Selected” appears in the field after you make your selections and close the list. If you select all values on the list, then the field is populated with the phrase “All.”

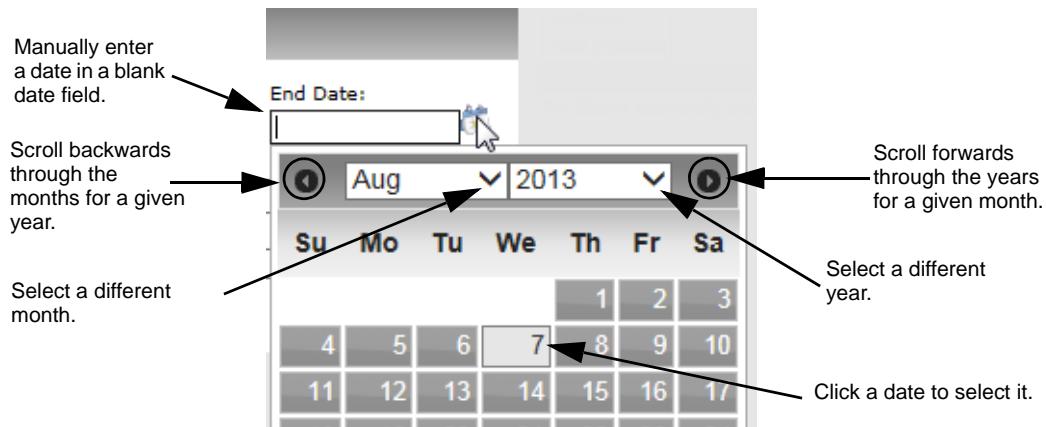
Figure 1-12: Example of using the Lookup icon to populate a field



Calendar Picker icon

For any date field in Master Calendar, you can manually enter the date, or you can click the Calendar Picker icon to open the Calendar Tool from which you can select a date for the field. The Calendar tool shows the current day’s date when it opens. You can click a date to select it, you can use the scroll features on the tool to select a different month for a given year or a different year for a given month, or you can use the dropdown list options to select a different month and/or year. If you manually enter a date in a date field, you can enter the date in any month/day/year format—mm/dd/yyyy, m/d/yy, and so on. The application always displays the date based on the language that is specified for your web browser and you cannot modify this.

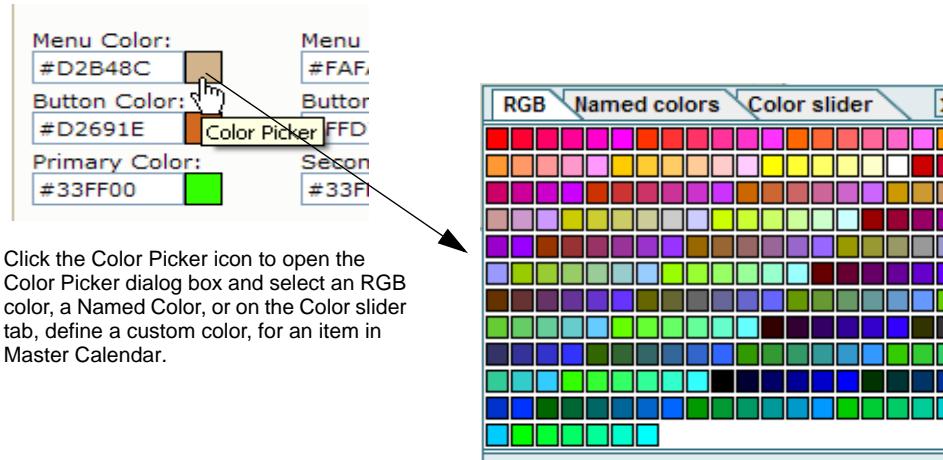
Figure 1-13: Calendar Tool



Color Picker icon

If you can specify a color for a selected item in Master Calendar, for example, an event label, then a Color Picker icon appears next to the item. You can manually enter an RGB or HEX value for the color in the field, you can click the Color Picker icon to open the Color Picker dialog box and select an RGB color or a Named Color, or you can define a custom color on the Color slider tab. After you use the Color Picker dialog box to select a color, the dialog box closes automatically and the Font Color field is populated with the RGB or HEX value for the selected color.

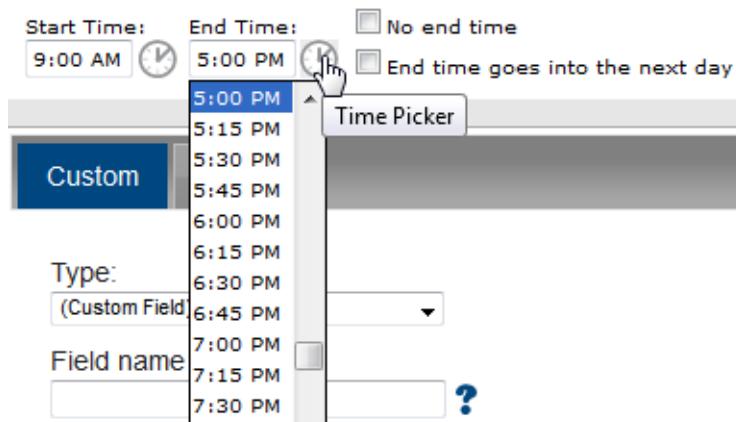
Figure 1-14: Color Picker dialog box



Time Picker icon

For any time field in Master Calendar, you can click the Time Picker icon to open a list from which you can select a time for the field. By default, the list shows 15 minute time increments for a 24 hour period.

Figure 1-15: Time Picker list



Configuring Groupings and Calendars

Managing groupings and calendars in Master Calendar consists of a variety of tasks, including adding, editing, and deleting groupings, adding, editing, and ordering calendars, and adding calendar URLs.

This chapter covers the following topics:

- “[Managing Groupings in Master Calendar](#)”
- “[Managing Calendars in Master Calendar](#)”
- “[Managing Calendar URLs](#)”



The option External Links is displayed on the Groupings and Calendars menu; however, it is currently not functional.

Managing Groupings in Master Calendar

A *grouping* in Master Calendar is a classification or division that contains one or more calendars. You typically use a grouping to distinguish one group of related calendars from another, or for identification purposes. For example, for a university calendar system, you might have a grouping for student union events, another grouping for athletic events, another grouping for invited speaker events, and so on.

Calendar groupings are displayed on the *Groupings page*. The Groupings page has an Active tab and Not Used tab. An *active* grouping is a groupings to which at least one calendar has been added. All currently active groupings in Master Calendar are displayed on the Active tab. All groupings that do not have at least one calendar added are displayed on the Not Used tab. By default, groupings are initially displayed on both tabs on the Groupings page in alphabetical order by grouping name, regardless of a grouping's sequence.

Figure 2-1: Groupings page, Active tab

Groupings			
	Name	Description	Sequence
<input type="checkbox"/>	A B Design Corporation	Divisions of A B Design Corporation	28
<input type="checkbox"/>	Acme Corporation		3

You can view calendars in a single grouping or from multiple groupings together. If appropriate, you can add an event to multiple calendars in multiple groupings. Managing groupings consists of [adding](#) groupings, [ordering](#) groupings, [editing](#) groupings, and [deleting](#) groupings. You can also [view](#) the history for a grouping.

To add a grouping

- Under the Admin Panel main menu option, point to Groupings and Calendars, and then click Groupings.

The Manage Groupings page opens. The Active tab is the opened tab.

Figure 2-2: Manage Groupings page, Active tab

Groupings			
	Name	Description	Sequence
<input type="checkbox"/>	A B Design Corporation	Divisions of A B Design Corporation	28
<input type="checkbox"/>	Acme Corporation		3
<input type="checkbox"/>	Administrative		10

Configuring Groupings and Calendars

2. Under Actions, click Add.

The Add Grouping page opens. The Details tab is the only tab on this page. You use the options on this tab to add the information for the grouping.

Figure 2-3: *Details tab*

The screenshot shows a web-based application interface. At the top is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar is a modal window titled 'Details'. Inside the modal, there are two input fields: 'Grouping Name:' with a red asterisk indicating it is required, and 'Grouping Description:'. At the bottom of the modal are two buttons: 'Save' and 'Cancel'.

3. Enter the grouping name.
4. Optionally, enter a description of the grouping.
5. Click Save.

The grouping is added as an *inactive* item to the Master Calendar and is displayed on the Not Used tab on the Manage Groupings page. The grouping is not displayed on the Active tab on the Manage Groupings page until you add at least one calendar to it. Also, until you change the default order of the groupings, the sequence for every grouping is zero. (See “[To order groupings](#)”.)

Figure 2-4: *Manage Groupings page, Not Used tab*

The screenshot shows a 'Manage Groupings' page. At the top is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar is a section titled 'Actions' with buttons for 'Add', 'Order', 'Edit', and 'Delete'. There are two tabs: 'Active' and 'Not Used', with 'Not Used' being the active tab. Below the tabs is a table with the following data:

Groupings			
<input type="checkbox"/>	Name	Description	Sequence
<input type="checkbox"/>	Announcements	General Community Announcements	6
<input type="checkbox"/>	Fundraising Events	Various fundraising organizational calendars	13
<input type="checkbox"/>	Grouping Test	testing	4
<input type="checkbox"/>	New testing group	testing purposes	0
<input type="checkbox"/>	PTA 1	PTA events	9
<input type="checkbox"/>	Staff & Faculty	Staff and Faculty Private Events	17
<input type="checkbox"/>	Test Group	Group Created for the purpose of testing	18
<input type="checkbox"/>	Vijay Group	Vijay group for testing 123	15
<input type="checkbox"/>	Winter Sports	Winter Sports	14

To order groupings

By default, groupings are initially displayed on both tabs on the Manage Groupings page in alphabetical order by grouping name, regardless of a grouping's sequence. You have two options for changing the order of the groupings:

- To change the order of groupings on the Manage Groupings page, you can click the Name column header to sort the groupings by reverse alphabetical order by grouping name. (Click the Name column header again to return the sort to alphabetical order.)
 - To change the order of the groupings on the Master Calendar Home page and on the various calendar pages, you can do the following:
1. Under the Admin Panel main menu option, point to Groupings and Calendars, and then click Groupings.

The Manage Groupings page opens. The Active tab is the opened tab.

Figure 2-5: Manage Groupings page, Active tab

Groupings		
<input type="checkbox"/> Name	Description	Sequence
<input type="checkbox"/> A B Design Corporation	Divisions of A B Design Corporation	28
<input type="checkbox"/> Acme Corporation		3
<input type="checkbox"/> Administrative		10
<input type="checkbox"/> Alumni Association	University Alumni Association	5
<input type="checkbox"/> American Chemical Society	Calendars for the different divisions of the ACS	31

2. Under Actions, click Order:

The Order Groupings page opens. A single list of all groupings (Active and Not Used) is displayed on the page.

Figure 2-6: Order Groupings page

Select a grouping and click Move Up or Move Down to move it to a new position.

Groupings: *

New testing group
Inactive
d
Acme Corporation
Grouping Test
Alumni Association
Announcements
Cultural Events
Announcements (Campus)
PTA 1
Administrative
Internal Calendars
Legal
Fundraising Events
Winter Sports
Vijay Group
Students
Staff & Faculty
Test Group
Public
Athletic Organizations

Move Up ++

Move Down --

Update Grouping Order Cancel

Configuring Groupings and Calendars

3. Select a grouping, and then click Move Up ++ or Move Down -- to move the grouping to a new position.
4. Click Update Grouping Order.
5. Click OK in the Grouping Order Saved message.

The next time that you open the Manage Groupings page, the updated sequence for all groupings on both tabs is displayed. You can now click the Sequence column header to sort the groupings by ascending sequence number, or you can click the Sequence column header again to sort the groupings by descending sequence number.

Figure 2-7: Manage Groupings page, Updated sequence for reordered groupings

Groupings			
<input type="checkbox"/>	Name	Description	Sequence
<input type="checkbox"/>	A B Design Corporation	Divisions of A B Design Corporation	29
<input type="checkbox"/>	Acme Corporation		7
<input type="checkbox"/>	Administrative		11
<input type="checkbox"/>	Alumni Association	University Alumni Association	6
<input type="checkbox"/>	American Chemical Society	Calendars for the different divisions of the ACS	32

To edit a grouping

You can edit the grouping name and the grouping description for both active and Not Used groupings.

1. Under the Admin Panel main menu option, point to Groupings and Calendars, and then click Groupings.

The Manage Groupings page opens. The Active tab is the opened tab.

Figure 2-8: Manage Groupings page, Active tab

Groupings			
<input type="checkbox"/>	Name	Description	Sequence
<input type="checkbox"/>	A B Design Corporation	Divisions of A B Design Corporation	28
<input type="checkbox"/>	Acme Corporation		3
<input type="checkbox"/>	Administrative		10
<input type="checkbox"/>	Alumni Association	University Alumni Association	5
<input type="checkbox"/>	American Chemical Society	Calendars for the different divisions of the ACS	31
<input type="checkbox"/>	Announcements (Campus)	Weekly Announcement to campus community	8
<input type="checkbox"/>	Associated Facilities		21

2. If needed, click the Not Used tab to open it.
3. Select the grouping that you are editing.
4. Under Actions, select Edit.

The Add Grouping page opens. The Details tab is the opened tab. This tab shows the current name for the grouping and, if available, a description for the grouping.

Figure 2-9: Add Grouping page, Details tab

5. Edit the grouping name, the grouping description, or both, as needed.
6. Click Save to save the edited grouping in Master Calendar.

To delete a grouping

You can delete only Not Used groupings. To delete an active grouping, you must first delete all the calendars in the grouping to change the grouping's status to Not Used, and then you can delete it. See “[To delete a calendar](#).”

1. Under the Admin Panel main menu option, point to Groupings and Calendars, and then click Groupings.

The Manage Groupings page opens. The Active tab is the opened tab.

Figure 2-10: Manage Groupings page, Active tab

Groupings			
<input type="checkbox"/>	Name	Description	Sequence
<input type="checkbox"/>	A B Design Corporation	Divisions of A B Design Corporation	28
<input type="checkbox"/>	Acme Corporation		3
<input type="checkbox"/>	Administrative		10
<input type="checkbox"/>	Alumni Association	University Alumni Association	5
<input type="checkbox"/>	American Chemical Society	Calendars for the different divisions of the ACS	31
<input type="checkbox"/>	Announcements (Campus)	Weekly Announcement to campus community	8
<input type="checkbox"/>	Associated Facilities		21

Configuring Groupings and Calendars

2. Click the Not Used tab to open it.
3. Select the grouping or groupings that you are deleting.



To select all groupings on the currently opened page for deletion in a single step, select Name. If you have multiple pages of groupings to delete, you must repeat this entire process on each page.

4. Under Actions, click Delete.

A message opens, asking you if you are sure that you want to delete all the selected groupings.

5. Click OK in the message.

A message opens indicating that all the selected groupings were successfully deleted.

6. Click OK in the message.

The Not Used tab is refreshed to show the remaining, if any, Not Used groupings in Master Calendar.

To view the history for a grouping

The history for a grouping consists of the original creation date of the grouping, the name of the user who created the grouping, the last date that the grouping was edited, and the name of the user who last edited the grouping. You can view the history for both active and inactive (not used) groupings.

1. Under the Admin Panel main menu option, point to Groupings and Calendars, and then click Groupings.

The Manage Groupings page opens. The Active tab is the opened tab.

Figure 2-11: Manage Groupings page, Active tab

The screenshot shows a web-based application interface for managing groupings. At the top is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar is a toolbar with an 'Actions' button and sub-options 'Add | Order | Edit'. A horizontal tab bar has two tabs: 'Active' (which is highlighted in blue) and 'Not Used'. The main content area is titled 'Groupings' and contains a table with three columns: 'Name', 'Description', and 'Sequence'. The table lists several groupings:

Name	Description	Sequence
A B Design Corporation	Divisions of A B Design Corporation	28
Acme Corporation		3
Administrative		10
Alumni Association	University Alumni Association	5
American Chemical Society	Calendars for the different divisions of the ACS	31
Announcements (Campus)	Weekly Announcement to campus community	8
Associated Facilities		24

2. If needed, click the Not Used tab to open it.
3. Select the grouping for which you are viewing the history.

4. Under Actions, select Edit.

The Add Grouping page opens. The Details tab is the opened tab.

Figure 2-12: Add Grouping page, Details tab

A screenshot of a web-based application interface titled "Add Grouping page". The top navigation bar includes links for Admin, Calendar, Submit Event, My Account, and Help. Below the navigation is a tab bar with "Details" and "History". The "Details" tab is selected, indicated by a blue background. The main content area contains two input fields: "Grouping Name:" with the value "Announcements" and "Grouping Description:" with the value "General Community Announcements". At the bottom of the form are two buttons: "Save" and "Cancel".

5. Click the History tab to open it and view the history for the selected grouping.

Figure 2-13: Add Grouping page, History tab

A screenshot of the same web-based application interface as Figure 2-12. The "History" tab is now selected, indicated by a blue background. The main content area displays the following historical information:
Created Date: 12/10/2009 11:56 AM
Created By: Karen King
Updated Date: 7/3/2013 2:17 PM
Updated By: Tammy Van Boening
At the bottom of the form are two buttons: "Save" and "Cancel".

Managing Calendars in Master Calendar

A *calendar* is the organizational tool that you use to display events in Master Calendar. You can organize and display events on a calendar by day, week, month, or year. You can define a calendar as broadly or as narrowly as you need to meet your specific business needs. For example, if you are managing events for a university campus, you could define a calendar for the entire campus, another calendar for a specific college, or even another calendar for a specific department. The maximum number of calendars that you can define is equal to the maximum number of calendars for which your organization is licensed. (See “[Viewing and Updating Master Calendar Registration Information](#)”.) You can view events for a single calendar, or you can select multiple calendars and view all their events in a single combined calendar.



The default settings for Master Calendar determine how the information is displayed for events on a combined calendar. See “[Managing Default Settings for Master Calendar](#)”

To add a calendar, at a minimum, you must add the required Details information. Optionally, you can specify the users who have access to the calendar, and you can add user-defined questions (UDQs) for the calendar, or you can add this information at a later date. Managing a calendar consists of [adding](#), [editing](#), and [deleting](#) calendars. You can also [generate](#) a Calendars List report and you can [view](#) the history for a calendar.

To add a calendar

- Under the Admin Panel main menu option, point to Groupings and Calendars, and then click Calendars.

The Manage Calendars page opens. The Active tab is the opened tab. All currently active calendars in Master Calendar are displayed on this page.

Figure 2-14: Manage Calendars page, Active tab

<input type="checkbox"/>	Name	Admin Email	Grouping	Access
<input type="checkbox"/>	Arts & Culture	sakthivel.p@indiumsoft.com	Cultural Events	Public
<input type="checkbox"/>	Auto Create Buildings	michael@dea.com	MHI Grouping	Public
<input type="checkbox"/>	Basketball, Women's	sales@dea.com	Sports & Recreation	Public
<input type="checkbox"/>	Board of Education	sales@dea.com	District Events	Public
<input type="checkbox"/>	Calendar of Events	sales@dea.com	Public	Public
<input type="checkbox"/>	Calendar URL check	sa@sa.com	Cultural Events	Public
<input type="checkbox"/>	Campus Activities	sales@dea.com	Students	Public
<input type="checkbox"/>	Center for Law and Society	sales@dea.com	Associated Facilities	Public
<input type="checkbox"/>	Center for Social Justice	sales@dea.com	Associated Facilities	Public
<input type="checkbox"/>	Central Reunion	bryan@dea.com	A B Design Corporation	Private

2. Under Actions, click Add.

The Add Calendar page opens. The Details tab is the opened tab. You use the fields on this tab to add the basic information for the calendar such as its name, the grouping to which it belongs, its access level, its default information, and so on.

Figure 2-15: Add Calendar page, Details tab

The screenshot shows the 'Add Calendar' page with the 'Details' tab selected. The interface has a dark blue header with tabs: Admin, Calendar, Submit Event, My Account, and Help. Below the header is a navigation bar with tabs: Details, Users, UDQs, and Event Types. The main content area contains the following fields:

- Calendar Name:** A required field with a red asterisk. The placeholder text is "Calendar Name".
- Calendar Description:** An optional text input field.
- Grouping:** A dropdown menu.
- Calendar Manager Name:** A required field with a red asterisk. The placeholder text is "Calendar Manager Name".
- Calendar Manager Email Address:** A required field with a red asterisk. The placeholder text is "Calendar Manager Email Address".
- Approval Email Address:** A multi-line text input field with a placeholder text "Separate multiple email addresses with comma." and a file browser icon.
- Calendar Status:** A radio button group with two options: "Active" (selected) and "Inactive".
- Calendar Access:** A radio button group with two options: "Public (Allow anyone to view calendar)" (selected) and "Private".
- Show Calendar Manager Contact Information:** A checked checkbox.
- Allow Public Submission of Events:** A checked checkbox.
- Show Cancelled Events:** A checked checkbox.
- Subscription:** A radio button group with three options: "Off" (selected), "Authenticated Users", and "All Users".

At the bottom of the form are two buttons: "Save" and "Cancel".

3. Enter the information for the calendar.

Field	Description
Calendar Name	The title or name of the calendar.
Calendar Status	The default is Active. You can set a calendar status to inactive even if the calendar has associated events. If you set a calendar status to inactive, then users cannot view it or log in to it to see any associated events.
Calendar Description	An optional text description of the calendar.
Grouping	Dropdown list. Available values are all active and inactive groupings that are currently available in Master Calendar.
Calendar Manager Name	The name of the person responsible for managing (adding, updating, and editing events, and so on) for the calendar.
Calendar Manager Email	The email for the Calendar Manager.

Configuring Groupings and Calendars

Field	Description
Approval Email Address	The email addresses for any additional persons who are responsible for approving or denying requests to submit events to the calendar. Separate multiple email addresses with a comma.
Calendar Access	Determines who has access to view the calendar: <ul style="list-style-type: none"> Public—The default value. If you select this value, any person who accesses your Master Calendar site can view the calendar. Private—if you select this value, only users who can log in to Master Calendar <i>and</i> who have been granted access to the calendar can view the calendar.
Show Calendar Manager Contact Information	Selected by default. Indicates whether the contact information for the Calendar Manager should be displayed on the Calendar Managers list.
Allow Public Submission of Events	Selected by default. Indicates whether anybody who can view the calendar can submit events to the calendar.
Show Cancelled Events	Selected by default. Indicates whether canceled events should be displayed on the calendar.
Subscription	Indicates whether: <ul style="list-style-type: none"> Only users can subscribe to receive information about additions or modifications to the calendar (Authenticated Users) or <ul style="list-style-type: none"> Both guests and users can subscribe (All Users). The default is Off, which means no subscriptions for either guests or users.

4. Do one of the following:

- If you want to add users, UDQS, and/or event types for the calendar at a later date, click Save to save the calendar as an *active* calendar in Master Calendar.
- To add the users, UDQs, and/or event types for the calendar at the time that you are adding the calendar, continue to the following as needed:
 - [“To add users to a calendar”](#)
 - [“To add UDQs to a calendar”](#)
 - [“To add the event types for a calendar”](#)

To add users to a calendar

To add a user to the calendar, the user must be classified as a Standard user or less. You cannot add a user to the calendar if the user is defined as an Administrator or higher.



A user must be defined in Master Calendar before you can add them to a calendar. To add users to Master Calendar, see “[To add a user](#)”.

- Under the Admin Panel main menu option, point to Groupings and Calendars, and then click Calendars.

The Manage Calendars page opens. The Active tab is the opened tab. All currently active calendars in Master Calendar are displayed on this page.

- Select the calendar to which you are adding users, and under Actions, click Edit.

The Add Calendar page opens. The Details tab is the opened tab.

- Click the Users tab to open it.

Any users who are already assigned roles in Master Calendar are displayed on this tab.

Figure 2-16: Add Calendar page, Users tab

- In the Search By dropdown list, indicate whether you want to search for a user by the User Name (the default search criterion) or by the user's Email Address.

Configuring Groupings and Calendars

5. Do one of the following:

- To search for all users (other than administrators) who have not already been assigned to a role for the selected calendar, leave the Find field blank and click Go.
- In the Find field, enter the search string and then click Go.



*The search is limited to the exact order of the characters in the string; however, the search string is not case-sensitive and the search string can be found anywhere in the search results. For example, the search string “clark” returns **Clark** Davidson, Matthew **Clark**, and so on.*

The user names that match your search criteria *and* that have not already been assigned to a role for the selected calendar (Viewer, Requestor, and so on) are displayed in the Users field.

6. To indicate the type of access that the user is to have to the calendar in Master Calendar, select the user (CTRL-click to select multiple users), and then click the Add button ► to move the users to the access type.

Field	Description
Viewer	The user can only view events on the calendar.
Requester	The user can view events on the calendar and submit events to the calendar; however, the submitted event is posted only if approved by the Calendar Manager.
Calendar User	The user can view events on the calendar and submit events to the calendar and the events are automatically posted without approval by the Calendar Manager.
Calendar Manager	The user can carry out all administration functions for the calendar (edit the calendar, create calendar URLs, submit events to the calendar without approval, add/edit/delete special dates, and so on.)



If you do not select a user for the calendar, the calendar is considered to be a private calendar—users cannot view events on the calendar, submit events to the calendar, and so on.

7. Do one of the following:

- To add UDQs and/or event types for the calendar at a later date, click Save to save the calendar as an *active* calendar in Master Calendar.
- To add the UDQs and/or event types at the time that you are adding the calendar, continue to the following as needed:
 - [“To add UDQs to a calendar”](#).
 - [“To add the event types for a calendar”](#).

To add UDQs to a calendar

A *user defined question (UDQ)* is a question that is asked of a user and that the user might need to answer before the user can request to submit an event to the calendar.



*A UDQ must be defined in Master Calendar before you can add it to a calendar.
To add a UDQ to Master Calendar, see “[Managing User Defined Questions](#)”.*

- Under the Admin Panel main menu option, point to Groupings and Calendars, and then click Calendars.

The Manage Calendars page opens. The Active tab is the opened tab. All currently active calendars in Master Calendar are displayed on this page.

- Select the calendar to which you are adding UDQs, and under Actions, click Edit.

The Add Calendar page opens. The Details tab is the opened tab.

- Click the UDQs tab to open it.

The UDQs that have been defined in Master Calendar are displayed by the UDQ name in the Questions field.

Figure 2-17: Add Calendar page, UDQs tab

Details	Users	UDQs	Event Types
Questions:	Contract Work Questions New test Target Audience Testing Visitor Survey		
	Selected Questions: ▶ [Empty list]		
	Save Cancel		

- Select the UDQ (or CTRL-click to select multiple UDQs) that you are adding to the calendar, and then click the Add button ▶ to move them to the Selected Questions field.



If you add a UDQ in error, simply select the UDQ (or CTRL-click to select multiple UDQs), and then click the Remove button ◀ to remove them from the calendar.

Configuring Groupings and Calendars

5. Do one of the following:
 - To add users and/or event types for the calendar at a later date, click Save to save the calendar as an *active* calendar in Master Calendar.
 - To add the users and/or event types at the time that you are adding the calendar, continue to the following as needed:
 - “[To add users to a calendar](#)”
 - “[To add the event types for a calendar](#)”

To add the event types for a calendar

The event types that you select for a calendar will be the only event types from which a guest or user can select when submitting an event to the calendar.

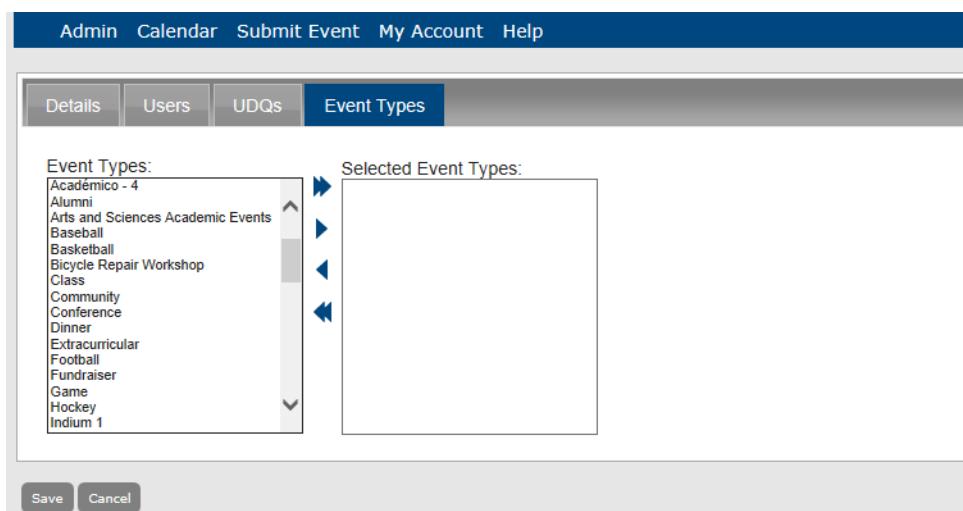
1. Under the Admin Panel main menu option, point to Groupings and Calendars, and then click Calendars.

The Manage Calendars page opens. The Active tab is the opened tab. All currently active calendars in Master Calendar are displayed on this page.

2. Select the calendar to which you are adding event types, and under Actions, click Edit.
The Add Calendar page opens. The Details tab is the opened tab.
3. Click the Event Types tab to open it.

The event types that have been defined in Master Calendar are displayed in the Event Types field.

Figure 2-18: Add Calendar page, Event Types tab



4. Select the event type (or CTRL-click to select multiple event types) that you are adding to the calendar, and then click the Add button ➤ to move them to the Selected Event Types field.
5. Do one of the following:
 - To add users and/or UDQs for the calendar at a later date, click Save to save the calendar as an *active* calendar in Master Calendar.
 - To add the users and/or UDQs at the time that you are adding the calendar, continue to the following as needed:
 - [“To add users to a calendar”](#)
 - [“To add UDQs to a calendar”](#)

To edit a calendar

When you edit a calendar, not only can you edit information for the calendar (such as the calendar name, the email for the Calendar Manager, and so on), but also you can activate or deactivate the calendar.

1. Under the Admin Panel main menu option, point to Groupings and Calendars, and then click Calendars.

The Manage Calendars page opens. The Active tab is the opened tab. All currently active calendars in Master Calendar are displayed on this page.

Figure 2-19: Manage Calendars page, Active tab

Calendars			
<input type="checkbox"/> Name	Admin Email	Grouping	Access
Arts & Culture	sakthivel.p@indiumsoft.com	Cultural Events	Public
Auto Create Buildings	michael@dea.com	MHI Grouping	Public
Basketball, Women's	sales@dea.com	Sports & Recreation	Public
Board of Education	sales@dea.com	District Events	Public
Calendar of Events	sales@dea.com	Public	Public
Calendar URL check	sa@sa.com	Cultural Events	Public
Campus Activities	sales@dea.com	Students	Public
Center for Law and Society	sales@dea.com	Associated Facilities	Public
Center for Social Justice	sales@dea.com	Associated Facilities	Public
Central Region	bryan@dea.com	A B Design Corporation	Private
Chamber of Commerce	sales@dea.com	Public	Public
Charter Communications	spectrumwriting@q.com	Contract Projects	Public

2. Select the calendar that you are editing.

Configuring Groupings and Calendars

3. Under Actions, select Edit.

The Add Calendar page opens. The Details tab is the opened tab.

Figure 2-20: Add Calendar page, Details tab

The screenshot shows the 'Add Calendar' page with the 'Details' tab selected. The interface includes a top navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation is a tab bar with 'Details', 'Users', 'UDQs', 'Event Types', and 'History'. The main content area contains the following fields:

- Calendar Name:** Chemistry Students
- Calendar Status:** Active (radio button selected)
- Calendar Description:** (empty text area)
- Grouping:** American Chemical Society (dropdown menu)
- Calendar Manager Name:** Tammy Van Boening
- Calendar Manager Email Address:** info@spectrumwritingllc.com
- Approval Email Address:** info@spectrumwritingllc.com (multiple email entry field)
- Calendar Access:**
 - Public (radio button selected)
 - Private
- Show Calendar Manager Contact Information:** checked
- Allow Public Submission of Events:** checked
- Show Cancelled Events:** checked
- Subscription:**
 - Off
 - Authenticated Users
 - All Users (radio button selected)

At the bottom are 'Save' and 'Cancel' buttons.

4. Edit the information for the calendar.

Field	Description
Calendar Name	The title or name of the calendar.
Calendar Status	The default is Active. You can set a calendar status to inactive even if the calendar has associated events. If you set a calendar status to inactive, then users cannot view it or log in to it to see any associated events.
Calendar Description	An optional text description of the calendar.
Grouping	Dropdown list. Available values are all active and inactive groupings that are currently available in Master Calendar.
Calendar Manager Name	The name of the person responsible for managing (adding, updating, and editing events, and so on) for the calendar.
Calendar Manager Email	The email for the Calendar Manager.
Approval Email Address	The email addresses for any additional persons who are responsible for approving or denying requests to submit events to the calendar. Separate multiple email addresses with a comma.

Configuring Groupings and Calendars

Field	Description
Calendar Access	<p>Determines who has access to view the calendar:</p> <ul style="list-style-type: none"> • Public—The default value. If you select this value, any person who accesses your Master Calendar site can view the calendar. • Private—if you select this value, only users who can log in to Master Calendar <i>and</i> who have been granted access to the calendar can view the calendar.
Show Calendar Manager Contact Information	Selected by default. Indicates whether the contact information for the Calendar Manager should be displayed on the Calendar Managers list.
Allow Public Submission of Events	Selected by default. Indicates whether anybody who can view the calendar can submit events to the calendar.
Show Cancelled Events	Selected by default. Indicates whether canceled events should be displayed on the calendar.
Subscription	<p>Indicates whether:</p> <ul style="list-style-type: none"> • Only users can subscribe to receive information about additions or modifications to the calendar (Authenticated Users) or • Both guests and users can subscribe (All Users). <p>The default is Off, which means no subscriptions for either guests or users.</p>

5. Edit the information on this tab as needed, or click on any of the other tabs (Users or UDQs) to open them and edit the information on these tabs as needed. See “[To add users to a calendar](#)” and/or “[To add UDQs to a calendar](#).”
6. Click Save to save the edited calendar in Master Calendar.

Configuring Groupings and Calendars

To delete a calendar

You can delete both active and inactive calendars.

1. Under the Admin Panel main menu option, point to Groupings and Calendars, and then click Calendars.

The Manage Calendars page opens. The Active tab is the opened tab.

Figure 2-21: *Manage Calendars page, Active tab*

Calendars				
<input type="checkbox"/>	Name	Admin Email	Grouping	Access
<input type="checkbox"/>	Arts & Culture	sakthivel.p@indiumsoft.com	Cultural Events	Public
<input type="checkbox"/>	Auto Create Buildings	michael@dea.com	MHI Grouping	Public
<input type="checkbox"/>	Basketball, Women's	sales@dea.com	Sports & Recreation	Public
<input type="checkbox"/>	Board of Education	sales@dea.com	District Events	Public
<input type="checkbox"/>	Calendar of Events	sales@dea.com	Public	Public
<input type="checkbox"/>	Calendar URL check	sa@sa.com	Cultural Events	Public
<input type="checkbox"/>	Campus Activities	sales@dea.com	Students	Public
<input type="checkbox"/>	Center for Law and Society	sales@dea.com	Associated Facilities	Public
<input type="checkbox"/>	Center for Social Justice	sales@dea.com	Associated Facilities	Public
<input type="checkbox"/>	Central Region	bryan@dea.com	A B Design Corporation	Private
<input type="checkbox"/>	Chamber of Commerce	sales@dea.com	Public	Public
<input type="checkbox"/>	Charter Communications	spectrumwriting@q.com	Contract Projects	Public

2. If needed, click Inactive to open the tab.
3. Select the calendar or calendars that you are deleting.



To select all calendars on the currently opened page for deletion in a single step, select Name. If you have multiple pages of calendars to delete, you must repeat this entire process on each page.

4. Under Actions, click Delete.

A message opens, asking you if you are sure that you want to delete all the selected calendars.

5. Click OK in the message.

A message opens indicating that all the selected calendars were successfully deleted.

6. Click OK in the message.

The Active or Inactive tab is refreshed accordingly in Master Calendar.

To generate a Calendars List report

You can generate a Calendars List report, which lists all the active or inactive calendars that are configured in Master Calendar. The report includes the calendar name and description, the email address for the calendar administrator, the grouping to which the calendar belongs (if applicable), the public or private classification for the calendar, and the default format and view (for example, List and Weekly). It also indicates whether canceled events are to be displayed on the calendar and whether weekends are to be displayed on the calendar.

- Under Admin Panel main menu option, point to Groupings and Calendars, and then click Calendars.

The Manage Calendars page opens. The Active tab is the opened tab.

Figure 2-22: Manage Calendars page, Active tab

<input type="checkbox"/>	Name	Admin Email	Grouping	Access
<input type="checkbox"/>	Arts & Culture	sakthivel.p@indiumsoft.com	Cultural Events	Public
<input type="checkbox"/>	Auto Create Buildings	michael@dea.com	MHI Grouping	Public
<input type="checkbox"/>	Basketball, Women's	sales@dea.com	Sports & Recreation	Public
<input type="checkbox"/>	Board of Education	sales@dea.com	District Events	Public
<input type="checkbox"/>	Calendar of Events	sales@dea.com	Public	Public
<input type="checkbox"/>	Calendar URL check	sa@sa.com	Cultural Events	Public
<input type="checkbox"/>	Campus Activities	sales@dea.com	Students	Public
<input type="checkbox"/>	Center for Law and Society	sales@dea.com	Associated Facilities	Public
<input type="checkbox"/>	Center for Social Justice	sales@dea.com	Associated Facilities	Public
<input type="checkbox"/>	Central Region	bryan@dea.com	A B Design Corporation	Private
<input type="checkbox"/>	Chamber of Commerce	sales@dea.com	Public	Public

- Do one of the following:

- If you are generating a Calendars List report for all *active* calendars in your Master Calendar, under Actions, click Print.
- If you are generating a Calendars List report for all *inactive* calendars in Master Calendar, click the Inactive tab to open it, and then under Actions, click Print. An onscreen preview of the Calendars List report opens in its own window. A variety of options are available from this preview, including (from left to right at the top of the onscreen preview) the options to search the report results, print the report in its entirety, print the currently displayed report page, and export the report to a file and save the file. See [Figure 2-23](#).



PDF is the default format for exporting to a file. Other allowed formats are Xls, Xlsx, Rtf, Mht, Text, Image, and Csv.

Configuring Groupings and Calendars

Figure 2-23: Onscreen preview for a Calendars List report

Name	Description	Admin Email	Grouping	Private	Format	View	Listview Type	Show Canceled	Show Weekends
Alumni		chris@dea.com	Other Calendars and Links	False	List	Weekly	Detailed	True	True
Arts & Humanities	A & M Description	chris@dea.com	Cultural Events	False	List	Weekly	Standard	True	True
Athletics	Athletics	chris@dea.com	Sr. High	False	Grid	Monthly	Condensed	True	True

To view the history for a calendar

The history for a calendar consists of the original creation date, the name of the user who created the calendar, the last date that the calendar was edited, and the name of the user who last edited the calendar. You can view the history for both active and inactive calendars.

1. Under the Admin Panel main menu option, point to Groupings and Calendars, and then click Calendars.

The Manage Calendars page opens. The Active tab is the opened tab. All currently active calendars in Master Calendar are displayed on this tab.

Figure 2-24: Manage Calendars page, Active tab

Name	Admin Email	Grouping	Access
Arts & Culture	sakthivel.p@indiumsoft.com	Cultural Events	Public
Auto Create Buildings	michael@dea.com	MHI Grouping	Public
Basketball, Women's	sales@dea.com	Sports & Recreation	Public
Board of Education	sales@dea.com	District Events	Public
Calendar of Events	sales@dea.com	Public	Public
Calendar URL check	sa@sa.com	Cultural Events	Public
Campus Activities	sales@dea.com	Students	Public
Center for Law and Society	sales@dea.com	Associated Facilities	Public
Center for Social Justice	sales@dea.com	Associated Facilities	Public
Central Region	bryan@dea.com	A R Design Corporation	Private

2. If needed, click the Inactive tab to open it.
3. Select the calendar for which you are viewing the history.
4. Under Actions, select Edit.

The Add Calendar page opens. The Details tab is the opened tab.

Figure 2-25: Add Calendar page, Details tab

Admin Calendar Submit Event My Account Help

Calendar Name: *

Calendar Description:

Grouping: *

Calendar Manager Name: *

Calendar Manager Email Address: *

Approval Email Address: *

Separate multiple email addresses with comma.

Calendar Access:

- Public (Allow anyone to view calendar) Private
- Show Calendar Manager Contact Information
- Allow Public Submission of Events
- Show Cancelled Events

Subscription:

- Off Authenticated Users All Users

Save Cancel

5. Click the History tab to open it and view the history for the selected calendar.

Figure 2-26: Add Calendar page, History tab

Admin Calendar Submit Event My Account Help

Details Users UDQs Event Types History

Created Date: 7/22/2013 2:42 PM
Created By: Technical Writer
Updated Date: 7/24/2013 10:31 AM
Updated By: Technical Writer

Save Cancel

Managing Calendar URLs

A *calendar URL* provides a quick and convenient way for your guests or users to specify search criteria by which to navigate and view the calendars in Master Calendar. For example, a user can specify one or more calendars in your system for which they want to view events, the specific type of event to view on these calendars, and for even a specific event type, only those event types that take place at a specific location. A URL can be for a single calendar or it can be for a calendar that combines the events from multiple calendars. Managing calendar URLs consists of [adding](#) a URL and [editing](#) an existing URL.

To add or edit a calendar URL

When you are adding a calendar URL, the fields that are displayed on the URL page are determined by what is currently configured and active in Master Calendar. For example, if you do not have any event types currently configured and active in Master Calendar, then the Event Types dropdown list is not displayed on the URLs page. The following procedure is shown with all the available options for adding a calendar URL.



For procedures that detail how to configure optional information such as event types, see “[Configuring Optional Information](#)”.

1. Under the Admin Panel main menu option, point to Groupings and Calendars, and then click Calendar URLs.

The Calendar URL page opens.

Figure 2-27: Calendar URL page

The screenshot shows the 'Calendar URL' configuration page. At the top, there's a navigation bar with links: Admin Panel, Calendar, Submit Event, My Account, and Help. Below the navigation bar, there are several dropdown menus and input fields:

- Calendars:** A dropdown menu with a red asterisk (*) next to it, indicating it's a required field. It has a clear button and a refresh icon.
- Event Types:** A dropdown menu showing '(all)' with a red asterisk (*). It also has a clear button and a refresh icon.
- Locations:** A dropdown menu showing '(all)' with a red asterisk (*). It has a clear button and a refresh icon.
- Keyword:** An input text field.
- Default Calendar View:** A dropdown menu set to 'Month'.
- Default Calendar Format:** Radio buttons for 'Calendar' (selected) and 'List'.
- List View Style:** Radio buttons for 'Detailed' (selected) and 'Basic'.
- Checkboxes:** Three checkboxes: 'Hide Header', 'Hide Calendar Filters', and 'Allow Viewing Access to Private Calendars'.
- Buttons:** Two buttons: 'Make Url' (in a dark blue box) and 'Cut And Paste URL:' followed by a text input field.
- Links:** A 'Test Url' link at the bottom.

2. Enter or edit the information for the URL.

Field	Description
Calendars	A list of all active calendars to which you have access as Calendar Manager. Click the Lookup icon to open the Calendars dialog box and select the calendar or calendars.
Event Types	A list of all active event types that are currently configured in Master Calendar. Click the Lookup icon to open the Event Types dialog box and select the event types by which to search.
Locations	A list of all active event locations that are currently configured in Master Calendar. Click the Lookup icon to open the Locations dialog box and select the locations by which to search.
Keyword	<p>Enter the search string by which to search for specific events.</p> <p>Note: The search is limited to the exact order of the characters in the string; however, the search string is not case-sensitive and the search string can be found anywhere in the search results. For example, the search string “ball” can return Football, Baseball, Ballgame, and so on. These search results can be found in the event name, the event description, and so on.</p>
Default Calendar View	<p>Dropdown list. Available values for how the calendar is displayed to a viewer are:</p> <ul style="list-style-type: none"> • Month—The default value, which is a single month at a time. • Day—The current day. • Week—The current week.
List View Style	<p>Applicable only if the calendar display is in the List view.</p> <ul style="list-style-type: none"> • Detailed List—The default value. • Basic List—Omits some of the details regarding the actual event that are displayed in the Detailed List view.

3. Optionally, if you intend to display the calendar in an iFrame on your organization’s website, for a cleaner, more integrated display, select one or both of the following:
 - Hide Header
 - Hide Calendar Filters
 4. Optionally, if guests or users are to have access to calendars that are marked as Private, then select Allow Viewing Access to Private Calendars.
 5. Click Make URL.
- Master Calendar creates the calendar URL. It is displayed in the Cut and Paste URL field.
6. Optionally, to verify that the system displays the correct calenders with the correct information, click Test Url.

Configuring Groupings and Calendars

7. To paste the URL wherever you need to use it (in a document, in an email, and so on):
 - Click Cut and Paste URL to automatically select the URL.
 - With the cursor on the selected URL, use CTRL-C or right-click and on the context menu that opens, select Copy.
 - Place the cursor where you want to paste the URL and use CTRL-V or right-click and on the context menu that opens, select Paste.

Configuring Optional Information

In Master Calendar, when you manage the information, you can manage it at a basic level or you can enhance it with optional information. For example, when you are adding a calendar URL, you can add it based solely on event keywords, or you can add it based on optional information such as the event type, the event location, as well as the event keywords.

This chapter covers the following topics:

- “[Managing Event Types](#)”
- “[Managing Event Type Views](#)”
- “[Managing Event Locations](#)”
- “[Managing Event Sub-Locations](#)”
- “[Managing Departments](#)”
- “[Managing Custom Field Hints](#)”
- “[Managing User Defined Questions](#)”
- “[Managing Event Icons](#)”
- “[Managing Cultures](#)”

Managing Event Types

An *event type* is a colored label that you can apply to an event in Master Calendar. These labels make it easier for your guests and users to distinguish between different events in Master Calendar, to identify the purpose of an event, and to search for events in Master Calendar. For example, if you are managing a calendar system for a university campus, your event types might include athletic events, invited speaker events, and so on. Managing event types consists of [adding](#) event types, [activating](#) event types, [inactivating](#) event types, [editing](#) event types, and [deleting](#) event types.

To add an event type



Rather than creating new event types, if you are an EMS customer, then you can use the Data Sources function in Master Calendar to import your EMS event types directly into Master Calendar. See “[Managing Data Sources](#)”.

1. Under the Admin Panel main menu option, point to Configuration, and then click Event Types.

The Event Types page opens. The Active tab is the opened tab. All currently active event types in Master Calendar are displayed on this tab.

Figure 3-1: Event Types page, Active tab

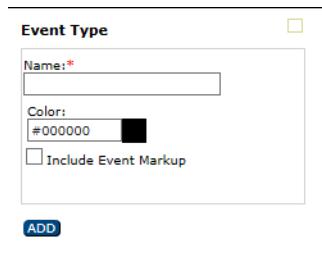
Event Types		
<input type="checkbox"/> Title	Color	Include Event Markup
<input type="checkbox"/> Alumni	#0000FF	True
<input type="checkbox"/> Baseball		False
<input type="checkbox"/> Basketball		False
<input type="checkbox"/> Class		False
<input type="checkbox"/> Community		False
<input type="checkbox"/> Concert	#CCCC00	True
<input type="checkbox"/> Conference	#33CC33	False
<input type="checkbox"/> Dinner		False
<input type="checkbox"/> Extracurricular		False
<input type="checkbox"/> Football		False
<input type="checkbox"/> Fundraiser		False
<input type="checkbox"/> Game		False
<input type="checkbox"/> Hockey		False

Configuring Optional Information

2. Under Actions, click Add.

The Event Type dialog box opens. You use this dialog box to name the event type and to define the color for the event type label. You can also indicate whether to include the event markup () for the event.

Figure 3-2: Event Type dialog box



3. In the Name field, enter the name for the event type.
4. Optionally, do one or both of the following:
 - In the Color field, select another color for the event type.



The color is displayed for events of this type in the Calendar view on the Master Calendar Home page.

- To optimize the search information for the event so that it is easily found by search engines, select Include Event Markup.

5. On the Event Type dialog box, click Add.

The Event Type is added to Master Calendar as an *active* event type.

To activate an event type

- Under the Admin Panel main menu option, point to Configuration, and then click Event Types.

The Event Types page opens. The Active tab is the opened tab. All currently active event types in Master Calendar are displayed on this tab.

Figure 3-3: Event Types page, Active tab

Event Types			
<input type="checkbox"/>	Title	Color	Include Event Markup
<input type="checkbox"/>	Alumni		False
<input type="checkbox"/>	Baseball	#0000FF	True
<input type="checkbox"/>	Basketball		False
<input type="checkbox"/>	Class		False
<input type="checkbox"/>	Community		False
<input type="checkbox"/>	Concert	#CCCC00	True
<input type="checkbox"/>	Conference	#33CC33	False
<input type="checkbox"/>	Dinner		False
<input type="checkbox"/>	Extracurricular		False
<input type="checkbox"/>	Football		False
<input type="checkbox"/>	Fundraiser		False
<input type="checkbox"/>	Game		False
<input type="checkbox"/>	Hockey		False

- Click the Inactive tab to open it.

All currently inactive event types in Master Calendar (title and color) are displayed on this tab.

Figure 3-4: Event Types page, Inactive tab

Event Types			
<input type="checkbox"/>	Title	Color	Include Event Markup
<input type="checkbox"/>	Academic		False
<input type="checkbox"/>	Athletic		False
<input type="checkbox"/>	Bicycle Repair Workshop	#000000	False
<input type="checkbox"/>	Home Crafts Fair	#CC33FF	True
<input type="checkbox"/>	MS Fundraiser	#FF00FF	False

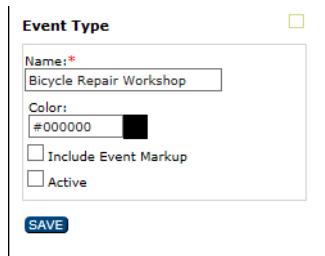
- Select the event type that you are activating.

Configuring Optional Information

4. Under Actions, select Edit.

The Event Type dialog box opens. The dialog box shows the event type name and the event type color. The Active option is not selected.

Figure 3-5: Event Type dialog box, Inactive event type



5. Select Active.

6. Click Save.

The event type is activated and is displayed on the Active tab on the Events Types page.

Figure 3-6: Event Types page, Active tab

The page has a top navigation bar with Admin, Calendar, Submit Event, My Account, and Help. Below it is an 'Actions' section with Add | Edit | Delete. A horizontal tab bar has 'Active' (selected) and 'Inactive'. The main area is titled 'Event Types' and contains a table:

Title	Color	Include Event Markup
Alumni		False
Baseball	#0000FF	True
Basketball		False
Bicycle Repair Workshop	#000000	False
Class		False

To inactivate an event type

- Under the Admin Panel main menu option, point to Configuration, and then click Event Types.

The Event Types page opens. The Active tab is the opened tab. All currently active event types in Master Calendar are displayed on this tab.

Figure 3-7: Event Types page, Active tab

Event Types			
	Title	Color	Include Event Markup
<input type="checkbox"/>	Alumni		False
<input type="checkbox"/>	Baseball	#0000FF	True
<input type="checkbox"/>	Basketball		False
<input type="checkbox"/>	Bicycle Repair Workshop	#000000	False
<input type="checkbox"/>	Class		False

- Select the event type that you are inactivating.
- Under Actions, select Edit.

The Event Type dialog box opens. The dialog box shows the event type name and the event type color. The Active option is selected.

Figure 3-8: Event Type dialog box, Active event type

Event Type	
Name:	<input type="text" value="Bicycle Repair Workshop"/>
Color:	<input type="color" value="#000000"/>
<input type="checkbox"/> Include Event Markup	<input checked="" type="checkbox"/> Active
SAVE	

- Clear the Active option.

Configuring Optional Information

5. Click Save.

The event is inactivated and now is displayed on the Inactive tab of the Event Types page.

Figure 3-9: Event Types page, Inactive tab

Title	Color	Include Event Markup
Academic		False
Athletic		False
Bicycle Repair Workshop	#000000	False
Home Crafts Fair	#CC33FF	True
MS Fundraiser	#FF00FF	False

To edit an event type

You can edit the name, the color, or the Event Markup status for an active or an inactive event type.

1. Under the Admin Panel main menu option, point to Configuration, and then click Event Types.

The Event Types page opens. The Active tab is the opened tab. All currently active event types in Master Calendar are displayed on this tab.

Figure 3-10: Event Types page, Active tab

Title	Color	Include Event Markup
Alumni		False
Baseball	#0000FF	True
Basketball		False
Bicycle Repair Workshop	#000000	False
Class		False

2. If needed, click the Inactive tab to open it.
3. Select the event type that you are editing.

- Under Actions, select Edit.

The Event Type dialog box opens. The dialog box shows the event type name and the event type color.

Figure 3-11: Event Type dialog box

The dialog box has a title bar "Event Type". Inside, there's a form with fields:
Name:
Color: (represented by a small black square)
 Include Event Markup
 Active
A blue "SAVE" button is at the bottom.

- Edit the name of the event, the color, and/or the Event Markup status as needed.
- Click Save to save the edited event type in Master Calendar.

To delete an event type

You can delete an active or an inactive event type. If you delete an active event type, the event label is deleted for all past and current events; however, the URL remains associated with the events. Going forward, the event type in its entirety—label and URL—is not available for use.

- Under the Admin Panel main menu option, point to Configuration, and then click Event Types.

The Event Types page opens. The Active tab is the opened tab. All currently active event types in Master Calendar are displayed on this tab.

Figure 3-12: Event Types page, Active tab

Event Types			
	Title	Color	Include Event Markup
<input type="checkbox"/>	Alumni	#0000FF	False
<input type="checkbox"/>	Baseball	#0000FF	True
<input type="checkbox"/>	Basketball	#000000	False
<input type="checkbox"/>	Bicycle Repair Workshop	#000000	False
<input type="checkbox"/>	Class	#000000	False

- If needed, click the Inactive tab to open it.

Configuring Optional Information

3. Select one or more event types to be deleted.



To select all event types on the currently opened page for deletion in a single step, select Title. If you have multiple pages of event types to delete, you must repeat this entire process on each page.

4. Under Actions, click Delete.

A message opens asking you if you are sure that you want to delete all the selected event types.

5. Click OK in the message.

A message opens indicating that all the selected event types were successfully deleted.

6. Click OK in the message.

The Active tab or Inactive tab is updated to reflect the deletion of the event types.

Managing Event Type Views

An *event type view* is a grouping or collection of event types. An event type view makes it easier for your guests or users to search for multiple event types in a single step, rather than carrying out multiple searches for different event types. For example, if you are managing calendars for a university campus, you might group the event types of Women's Swimming, Women's Track and Field, Women's Soccer, and Women's Basketball under the event type view of "Women's Athletic Events." Managing event type views consists of [adding](#) event type views, [activating](#) and [inactivating](#) event view types, [editing](#) event type views, and [deleting](#) event type views. You can also [view](#) the history for an event view type.

To add an event type view



You can add only active event types to an event type view. If you first need to activate an event type so that you can add it to a view, see "[To activate an event type](#)".

- Under the Admin Panel main menu option, point to Configuration, and then click Event Type Views.

The Manage Event Type Views page opens. The Active tab is the opened tab. All currently active event type views in Master Calendar are displayed on this tab.

Figure 3-13: Manage Event Type Views page, Active tab

Event Type Views	
<input type="checkbox"/>	Title
<input type="checkbox"/>	Arts and Sciences Academic Events
<input type="checkbox"/>	Indium 1
<input type="checkbox"/>	Men's Athletic Events
<input type="checkbox"/>	MHI - Event Types
<input type="checkbox"/>	Sports
<input type="checkbox"/>	Women's Athletic Events
<input type="checkbox"/>	Women's Intramural Athletic Events

Configuring Optional Information

2. Under Actions, click Add.

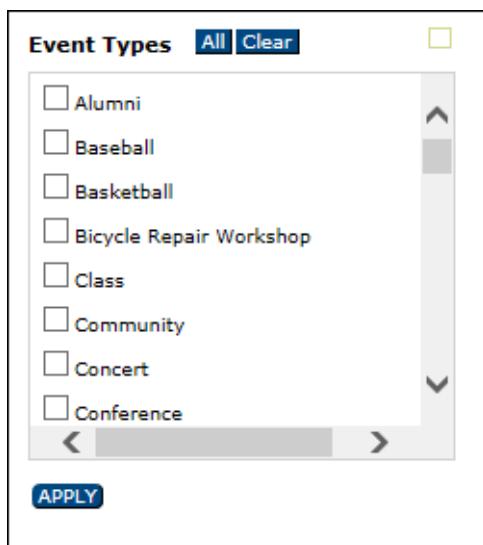
The Add Event Type Views page opens. The Details tab is the only tab on this page.

Figure 3-14: Add Event Type Views page, Details tab

A screenshot of a web-based application interface. At the top is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar is a modal dialog box titled "Details". Inside the dialog box, there is a section labeled "General Info" containing two fields: "Description:" with a text input field and "Event Types:" with a dropdown menu. At the bottom of the dialog box are two buttons: "Add" and "Cancel".

3. In the Description field, enter a description for the event type view.
4. On the Event Types dropdown list, do one of the following:
 - Select a single event type.
 - Click the Lookup icon to open the Event Types dialog box. This dialog box lists all the currently active event types in Master Calendar. Select multiple event types (to select all Event Types in a single step, click All), and then click Apply.

Figure 3-15: Event Types dialog box



To select all event types in a single step, click All.

5. Click Add.

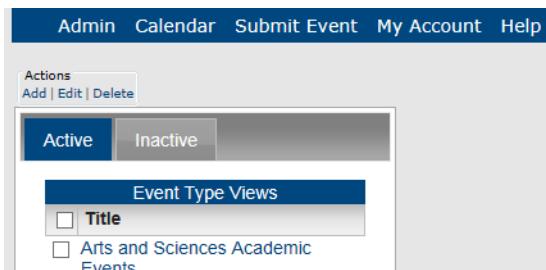
The Event Type View is added as an *active* item in Master Calendar.

To activate an event type view

1. Under the Admin Panel main menu option, point to Configuration, and then click Event Type Views.

The Manage Event Type Views page opens. The Active tab is the opened tab. All currently active event type views in Master Calendar are displayed on this tab.

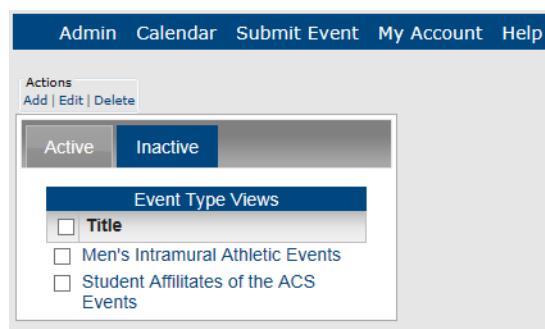
Figure 3-16: Manage Event Type Views page, Active tab



2. Click the Inactive tab to open it.

All currently inactive event type views in Master Calendar are displayed on this tab.

Figure 3-17: Manage Event Type Views page, Inactive tab



3. Select the event type view that you are activating.

Configuring Optional Information

- Under Actions, click Edit.

The Add Event Type Views page opens. The Details tab is the only tab on this page. The tab shows the description for the event type view and the event type that was selected for the view. The Active option is not selected.

Figure 3-18: Add Event Type Views page, Details tab, Inactive event type view

Admin Calendar Submit Event My Account Help

Details History

General Info

Description:^{*}
Men's Intramural Athletic Events

Event Types:^{*}
(Multiple Selected)

Active

Save Cancel

- Select Active.

- Click Save.

The event type view is activated in Master Calendar and now is displayed on the Active tab of the Manage Event Type Views page.

Figure 3-19: Manage Event Type Views page, Active tab

Admin Calendar Submit Event My Account Help

Actions
Add | Edit | Delete

Active Inactive

Event Type Views

Title

Arts and Sciences Academic Events

Indium 1

Men's Athletic Events

Men's Intramural Athletic Events

MHI - Event Types

Sports

Women's Athletic Events

Women's Intramural Athletic Events

To inactivate an event type view

- Under the Admin Panel main menu option, point to Configuration, and then click Event Type Views.

The Manage Event Type Views page opens. The Active tab is the opened tab. All currently active event type views in Master Calendar are displayed on this tab.

Figure 3-20: Manage Event Type Views page, Active tab

The screenshot shows a web-based application interface. At the top is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below this is a toolbar with buttons for Actions, Add, Edit, and Delete. A main content area has tabs for Active and Inactive, with Active being the selected tab. Underneath is a section titled "Event Type Views" with a checkbox labeled "Title". A list of event types follows, each with its own checkbox: Arts and Sciences Academic Events, Indium 1, Men's Athletic Events, Men's Intramural Athletic Events, MHI - Event Types, Sports, Women's Athletic Events, and Women's Intramural Athletic Events. The "Men's Intramural Athletic Events" checkbox is checked.

- Select the event type view that you are inactivating.
- Under Actions, click Edit.

The Add Event Type Views page opens. The Details tab is the opened tab. The tab shows the description for the event type view and the event type that was selected for the view. The Active option is selected.

Figure 3-21: Add Event Types View page, Details tab, Active event type view

The screenshot shows the Add Event Types View page. At the top is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below this is a toolbar with buttons for Actions, Add, Edit, and Delete. A main content area has tabs for Details and History, with Details being the selected tab. Underneath is a section titled "General Info" containing a "Description:" field with the value "Men's Intramural Athletic Events" and an "Event Types:" dropdown menu set to "(Multiple Selected)". Below these is a checkbox labeled "Active" which is checked. At the bottom are "Save" and "Cancel" buttons.

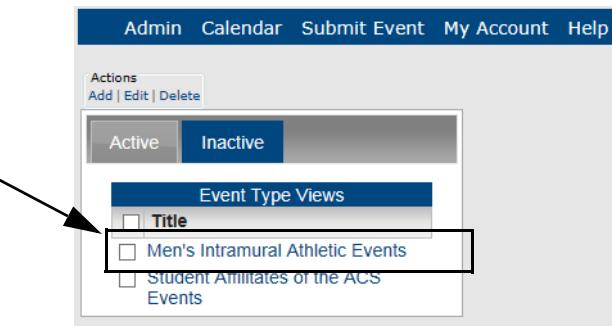
- Clear the Active option.

Configuring Optional Information

5. Click Save.

The event type view is inactivated in Master Calendar and now is displayed on the Inactive tab of the Manage Event Type Views page.

Figure 3-22: Manage Event Type Views page, Inactive tab



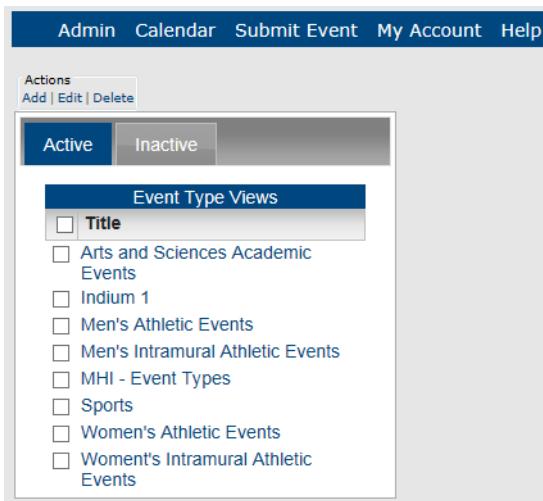
To edit the description or event types for an event type view

You can edit the description or event types or both for active and inactive event type views.

1. Under the Admin Panel main menu option, point to Configuration, and then click Event Type Views.

The Manage Event Type Views page opens. The Active tab is the opened tab. All currently active event type views in Master Calendar are displayed on this tab.

Figure 3-23: Manage Event Type Views page, Active tab



2. If needed, click the Inactive tab to open it.
3. Select the event type view that you are editing.

4. Under Actions, click Edit.

The Add Event Type Views page opens. The Details tab is the opened tab. The tab shows the description for the event type view and the event type selected for the view. If multiple types were selected, (Multiple Selected) is displayed in the field.

Figure 3-24: Add Event Type Views page, Details tab

The screenshot shows a web-based application interface. At the top is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar is a tabbed panel with 'Details' and 'History' tabs; 'Details' is highlighted. Underneath is a section titled 'General Info'. It contains a 'Description:' field with the value 'Men's Intramural Athletic Events' and an 'Event Types:' dropdown menu set to '(Multiple Selected)'. There is also a checkbox labeled 'Active' which is unchecked.

5. Edit the description of the event type view, the event types associated with the view, or both as needed.
6. Click Save to save the edited event type view in Master Calendar.

To delete an event type view

You can delete an active or an inactive event type view.

1. Under the Admin Panel main menu option, point to Configuration, and then click Event Type Views.

The Manage Event Type Views page opens. The Active tab is the opened tab. All currently active event type views in Master Calendar are displayed on this tab.

Figure 3-25: Manage Event Type Views page, Active tab

The screenshot shows a web-based application interface. At the top is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar is a section titled 'Actions' with 'Add | Edit | Delete' buttons. Underneath is a tabbed panel with 'Active' and 'Inactive' tabs; 'Active' is highlighted. A table titled 'Event Type Views' lists items with checkboxes: 'Title' (unchecked), 'Arts and Sciences Academic Events' (unchecked), and 'Indium 1' (unchecked).

2. If needed, click the Inactive tab to open it.

Configuring Optional Information

3. Select one or more event type views to be deleted.



To select all event type views on the currently opened page for deletion in a single step, select Title. If you have multiple pages of views to delete, you must repeat this entire process on each page.

4. Under Actions, click Delete.

A message opens asking you if you are sure that you want to delete all the selected event type views.

5. Click OK in the message.

A message opens indicating that all the selected event type views were successfully deleted.

6. Click OK in the message.

The Active tab or Inactive tab is updated to reflect the deletion of the event type views.

To view the history for an event type view

The history for an event type view consists of the original creation date of the view, the name of the user who created the view, the last date that the view was edited, and the name of the user who last edited the view. You can view the history for both active and inactive event type views.

1. Under the Admin Panel main menu option, point to Configuration, and then click Event Type Views.

The Manage Event Type Views page opens. The Active tab is the opened tab. All currently active event type views in Master Calendar are displayed on this tab.

Figure 3-26: Manage Event Type Views page, Active tab

The screenshot shows a web-based application interface. At the top is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar is a toolbar labeled "Actions" with buttons for Add, Edit, and Delete. Underneath the toolbar is a tab bar with two tabs: "Active" (which is highlighted in blue) and "Inactive". A section titled "Event Type Views" contains a table with a single row. The row has a checkbox column, a "Title" column, and a "Last Edited" column. The table shows the following data:

	Title	Last Edited
<input type="checkbox"/>	Arts and Sciences Academic Events	
<input type="checkbox"/>	Indium 1	
<input type="checkbox"/>	Men's Athletic Events	

2. If needed, click the Inactive tab to open it.
3. Select the event type view for which you are viewing the history.

Configuring Optional Information

- Under Actions, click Edit.

The Add Event Type Views page opens. The Details tab is the opened tab.

Figure 3-27: Add Event Type Views page, Details tab

A screenshot of a web-based application interface. At the top, there is a horizontal navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below this, a modal window is open. The modal has two tabs at the top: 'Details' (which is highlighted in blue) and 'History'. The main content area is titled 'General Info'. It contains two form fields: 'Description:' with the value 'Men's Intramural Athletic Events' and 'Event Types:' with a dropdown menu showing '(Multiple Selected)' and a small icon. There is also a checkbox labeled 'Active' which is unchecked.

- Click the History tab to open it and view the history for the selected event type view.

Figure 3-28: Event Type Views page, History tab

A screenshot of a web-based application interface. At the top, there is a horizontal navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below this, a modal window is open. The modal has two tabs at the top: 'Details' (which is greyed out) and 'History' (which is highlighted in blue). The main content area displays event history information:
Created Date: 7/5/2013 11:00 AM
Created By: Technical Writer
Updated Date: 8/7/2013 3:00 PM
Updated By: Technical Writer

Managing Event Locations

The *event location* is the location where the event is to take place. For example, if you are managing a calendar for a university's athletic events, you could set up a list of possible locations for the event, such as the stadium, the field house, the sports arena, and so on.

When you set up a location in Master Calendar, you can also provide a URL, an address, the hours of operation, and a phone number for the location. For example, if you are managing a university's athletic calendar, and you add the football stadium as a location, you can also provide a URL to a webpage that shows a map of the stadium. The Location field for an event can be an optional field, or it can be a required field, depending upon your Master Calendar parameter settings. (See [Appendix A, “Site Configuration Settings.”](#)) Managing event locations consists of adding event locations, activating and inactivating event locations, editing event locations, and deleting event locations.

To add an event location

1. Under the Admin Panel main menu option, point to Configuration, and then click Locations.

The Manage Locations page opens. The Active tab is the opened tab. All currently active event locations in Master Calendar are displayed on this tab. If the event location was created in Master Calendar, then the location is a hyperlink. If the event location was imported from EMS during the addition of a connector (see “[To add a connector](#)”), then the location is not a hyperlink.

Figure 3-29: Manage Locations page, Active tab

Actions			Location	Location Url
Edit	Delete	Add	_RP Adelaide	
Edit	Delete		_RP Boston	
Edit	Delete		_RP Boston	
Edit	Delete		_RP Boston	
Edit	Delete		Académico - 1	
Edit	Delete		Académico - 2	
Edit	Delete		Arizona Memorial Stadium	
Edit	Delete		City Park	
Edit	Delete		Civic Center	http://www.dea.com
Edit	Delete		Combo Room Test 1	
Edit	Delete		Combo Room Test 1	
Edit	Delete		Combo Room Test 1	
Edit	Delete		Dale Hall Towers	

2. Under Actions, click Add.

The Add Location page opens. You use the options on this page to name the event location. This name is displayed in a dropdown list when a guest or user clicks the Lookup icon next to the Location field on the Submit Events page. Optionally, you can also provide a URL, an address, the hours of operation, and a phone number for the location.

Figure 3-30: Add Location page

The screenshot shows a web-based application interface for adding a location. The top navigation bar includes links for Admin, Calendar, Submit Event, My Account, and Help. The main content area contains a form with the following fields:

- Name: * (Required field)
- Url:
- Address:
- Hours:
- Phone:
- A checkbox labeled "Active" which is checked by default.

Below the form are two buttons: "Save" and "Cancel". To the right of the "Address" field is a "Get Geocode" button.

3. In the Location field, enter a name or description for the location.
4. Enter any of the optional information (URL, Address, Hours, and/or Phone) for the location.



If you want to confirm the address location, then after you enter an address, click Get Geocode which finds the associated geographic coordinates (expressed as latitude and longitude) from the address. A View Map option is then displayed which you can click to preview a map of the address.

5. By default, Active is selected for the event. To add the event location as an *inactive* location, clear the Active option.
6. Click Add.

The location is added in Master Calendar.

Configuring Optional Information

To activate an event location

1. Under the Admin Panel main menu option, point to Configuration, and then click Locations.

The Manage Locations page opens. The Active tab is the opened tab. All currently active event locations in Master Calendar are displayed on this tab.

Figure 3-31: Manage Locations page, Active tab

A screenshot of a web-based application titled "Manage Locations". The top navigation bar includes links for Admin, Calendar, Submit Event, My Account, and Help. Below the navigation is a toolbar with "Actions" and "Add" buttons. A tab bar below shows "Active" (which is selected) and "Inactive". The main content area is a table titled "Locations" with columns for "Actions", "Location", and "Location Url". The table lists various locations with their corresponding URLs:

Actions	Location	Location Url
	_RP Adelaide	
	_RP Boston	
	_RP Boston	
	_RP Boston	
	Académico - 1	
	Académico - 2	
	Arizona Memorial Stadium	
	City Park	
	Civic Center	http://www.dea.com
	Combo Room Test 1	
	Combo Room Test 1	
	Combo Room Test 1	
	Dale Hall Towers	

2. Click the Inactive tab to open it.

All currently inactive event locations in Master Calendar are displayed on this tab.

Figure 3-32: Manage Locations page, Inactive tab

A screenshot of the same web-based application, showing the "Inactive" tab selected. The main content area is a table titled "Locations" with columns for "Actions", "Location", and "Location Url". The table lists two locations with their URLs:

Actions	Location	Location Url
	Alabama Memorial Stadium	http://www.google.com
	Arizona Intramural Athletic Building	

3. Select the event location that you are activating.

Configuring Optional Information

- Under Action, click Edit.

The Add Location page opens. The Active option is not selected.

Figure 3-33: Add Location page, Inactive location

The screenshot shows the 'Add Location' form. The 'Name:' field contains 'Alabama Memorial Stadium'. The 'Url:' field contains 'www.google.com'. The 'Address:' field contains 'Memorial Stadium Tuscaloosa, AL 36221'. Below the address is a link '(32.4057741, -87.04383510000002) View Map'. A 'Get Geocode' button is to the right. Under 'Hours:', there is a dropdown menu set to 'Seasonal'. There is also a 'Phone:' field which is empty. At the bottom, there is an unchecked checkbox labeled 'Active', followed by 'Save' and 'Cancel' buttons.

- Select Active.

- Click Save.

The event location is activated in Master Calendar and now is displayed on the Active tab of the Manage Locations page.

Figure 3-34: Manage Locations page, Active tab

The screenshot shows the 'Manage Locations' page with the 'Active' tab selected. At the top, there are 'Actions' and 'Add' buttons. Below is a table with columns 'Actions', 'Location', and 'Location Url'. The table lists several locations: '_RP Adelaide', '_RP Boston', '_RP Boston', '_RP Boston', 'Académico - 1', 'Académico - 2', 'Alabama Memorial Stadium' (which is highlighted with a red box), and 'Arizona Memorial Stadium'. Each row has a delete icon in the 'Actions' column.

Actions	Location	Location Url
	_RP Adelaide	
	_RP Boston	
	_RP Boston	
	_RP Boston	
	Académico - 1	
	Académico - 2	
	Alabama Memorial Stadium	http://www.google.com
	Arizona Memorial Stadium	

Configuring Optional Information

To deactivate an event location

1. Under the Admin Panel main menu option, point to Configuration, and then click Locations.

The Manage Locations page opens. The Active tab is the opened tab. All currently active event locations in Master Calendar are displayed on this tab.

Figure 3-35: Manage Locations page, Active tab

Actions	Location	Location Url
	_RP Adelaide	
	_RP Boston	
	_RP Boston	
	_RP Boston	
	Académico - 1	
	Académico - 2	
	Alabama Memorial Stadium	http://www.google.com
	Arizona Memorial Stadium	

2. Select the event location that you are deactivating.
3. Under Actions, click Edit.

The Add Location page opens. The Active option is selected.

Figure 3-36: Add Location page, Active location

Name: Get Geocode

Url:

Address:

Hours:

Phone:

Active

4. Clear the Active option.

5. Click Save.

The event location is inactivated in Master Calendar and now is displayed on the Inactive tab of the Manage Locations page.

Figure 3-37: Manage Locations page, Inactive tab

Locations		
Actions	Location	Location Url
	Alabama Memorial Stadium	http://www.google.com
	Arizona Intramural Athletic Building	

To edit an event location

You can edit the name, or any of the optional information (URL, address, hours of operation, and/or phone number) for an active or an inactive event location.

- Under the Admin Panel main menu option, point to Configuration, and then click Locations.

The Manage Locations page opens. The Active tab is the opened tab. All currently active event locations in Master Calendar are displayed on this tab.

Figure 3-38: Manage Locations page, Active tab

Actions	Location	Location Url
	_RP Adelaide	
	_RP Boston	
	_RP Boston	
	_RP Boston	
	Académico - 1	
	Académico - 2	
	Arizona Memorial Stadium	
	City Park	
	Civic Center	http://www.dea.com
	Combo Room Test 1	
	Combo Room Test 1	
	Combo Room Test 1	
	Dale Hall Towers	

- If needed, click the Inactive tab to open it.

Configuring Optional Information

3. Click on the name of the location that you are editing.

The Add Location page opens.

Figure 3-39: Add Location page

The screenshot shows a web-based form titled "Add Location". The top navigation bar includes links for Admin, Calendar, Submit Event, My Account, and Help. The main form has the following fields:

- Name: Alabama Memorial Stadium
- Url: www.google.com
- Address: Memorial Stadium Tuscaloosa, AL 36221
- Hours: Seasonal
- Phone: (This field is empty)
- Active:

At the bottom of the form are two buttons: "Save" and "Cancel". To the right of the address field is a "Get Geocode" button, and below it is a coordinate pair "(32.4057741, -87.04383510000002) View Map".

4. Edit the name of the location, or any of the optional information (URL, address, hours of operation, and/or phone number) as needed.
5. Click Save to save the edited event location in Master Calendar.

To delete an event location

You can delete an active or an inactive event location only if no sub-locations (for example, a room) reference the location. If any sub-locations reference the selected location, you must first delete the sub-locations, and then you can delete the location.



Because you can delete a location only if no sub-locations reference it, EMS Software recommends reviewing your sub-locations first and deleting the appropriate sub-locations before you attempt to delete a location. See “Managing Event Sub-Locations”.

If you delete an active event location, any current events that use this location are not affected. The deletion simply means that going forward, the location is not available for use.



You can delete only one location at a time. If you have multiple pages of event locations to delete, you must repeat this entire process for each location on each page.

1. Under the Admin Panel main menu option, point to Configuration, and then click Locations.

The Manage Locations page opens. The Active tab is the opened tab. All currently active event locations in Master Calendar are displayed on this tab. See [Figure 3-40](#).

Figure 3-40: Manage Locations page, Active tab

The screenshot shows a web-based application interface for managing locations. At the top is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar is a toolbar with buttons for Actions (containing Add) and tabs for Active (selected) and Inactive. A table lists locations with columns for Actions, Location, and Location Url. The table contains 14 rows of location data.

Actions	Location	Location Url
	_RP Adelaide	
	_RP Boston	
	_RP Boston	
	_RP Boston	
	Académico - 1	
	Académico - 2	
	Arizona Memorial Stadium	
	City Park	
	Civic Center	http://www.dea.com
	Combo Room Test 1	
	Combo Room Test 1	
	Combo Room Test 1	
	Dale Hall Towers	

2. If needed, click the Inactive tab to open it.
3. Click the Delete icon that is next to the location that you are deleting. Two results are possible:
 - If any sub-locations reference the selected location, a dialog box opens indicating the number of sub-locations that reference it. You must first delete these sub-locations before you can delete the location. See “[Managing Event Sub-Locations](#)”.
 - If no sub-locations reference the selected location, a message opens asking you if you are sure that you want to delete the selected location. Continue to [Step 4](#).
4. Click OK in the message.
A message opens indicating that the selected location was deleted.
5. Click OK in the message.
The Active tab or Inactive tab is updated to reflect the deletion of the event location.

Managing Event Sub-Locations

You can specify just a location for an event, or you can specify a location and a *sub-location*. A *sub-location* is a further definition/clarification of where an event is to take place. For example, if you specify a building as the event location for a chemistry lab practical, you could specify in which room in the building the lab practical is to take place. The Sub-Location field might or might not be displayed for a location, depending upon your Master Calendar parameter settings. (See [Appendix A, “Site Configuration Settings”](#).) You can identify a sub-location with the name or phrase that best suits your organization’s needs, for example, room, field, and so on. Managing event locations consists of [adding](#) event sub-locations, [activating](#) and [inactivating](#) event sub-locations, [editing](#) event sub-locations, and [deleting](#) event sub-locations.



“Rooms” is the default label for sub-location. To change this label to better suit your organization’s business needs, see “[Managing Default Settings for Master Calendar](#)”.

To add an event sub-location



You can add an event sub-location only to an active event location. If you need to activate an event location before you can add a sub-location to it, see “[To activate an event location](#)”.

1. Under the Admin Panel main menu option, point to Configuration, and then click <Sub-Locations>, where <Sub-Locations> is the name or phrase that you used to identify sub-locations in Master Calendar, for example, Rooms.
The Manage Sub-Locations page opens. The Active tab is the opened tab. When this tab first opens, it is blank.
2. On the Locations dropdown list, select the active location to which you are adding the sub-location.



Active locations are displayed in black on the Locations dropdown list. Inactive locations are displayed in red and (Inactive) is displayed after the location name.

All currently active event sub-locations for the selected location in Master Calendar are displayed on the Active tab. See [Figure 3-41](#).

Figure 3-41: Manage Sub-Locations page, Active tab

	Room	Location
<input type="checkbox"/>	Room 101	Gittinger Hall
<input type="checkbox"/>	Room 102	Gittinger Hall
<input type="checkbox"/>	Room 103	Gittinger Hall

- Under Actions, click Add.

The <Sub-Location> dialog box opens. You use this dialog box to name the event sub-location. This name is displayed in a dropdown list when a guest or user clicks the Lookup icon next to the Location field on the Submit Events page.

Figure 3-42: <Sub-Location> dialog box

- In the <Sub-Location> field, enter a name or description for the sub-location.
- Optionally, do one or both of the following:
 - On the Location dropdown list, select a different active location.
 - By default, Active is selected for the sub-location. To add the sub-location as an *inactive* location in Master Calendar, clear the Active option.
- Click Save.

The sub-location is added in Master Calendar.

Configuring Optional Information

To activate an event sub-location

You can activate an event sub-location for a location that was created in Master Calendar or a location that was imported from EMS.

1. Under the Admin Panel main menu option, point to Configuration, and then click <Sub-Locations>, where <Sub-Locations> is the name or phrase that you used to identify sub-locations in Master Calendar, for example, Rooms.

The Manage Sub-Locations page opens. The Active tab is the opened tab. When this tab first opens, it is blank.

2. On the Locations dropdown list, select the location for which you are activating the sub-locations.

All currently active event sub-locations for the selected location in Master Calendar are displayed on the Active tab.

Figure 3-43: Manage Sub-Locations page, Active tab

The screenshot shows the 'Manage Sub-Locations' page with the 'Active' tab selected. At the top, there is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar, there is an 'Actions' section with 'Add | Edit | Delete' buttons. A 'Locations:' dropdown menu is set to 'Gittinger Hall'. The main content area has two tabs: 'Active' (which is selected) and 'Inactive'. Below the tabs is a table titled 'Rooms' with columns 'Room' and 'Location'. The table contains four rows: Room 101, Room 102, Room 103, and Room 104, all located in Gittinger Hall.

	Room	Location
<input type="checkbox"/>	Room 101	Gittinger Hall
<input type="checkbox"/>	Room 102	Gittinger Hall
<input type="checkbox"/>	Room 103	Gittinger Hall

3. Click the Inactive tab to open it.

All currently inactive event sub-locations for the selected location in Master Calendar are displayed on this tab.

Figure 3-44: Manage Sub-Locations page, Inactive tab

The screenshot shows the 'Manage Sub-Locations' page with the 'Inactive' tab selected. The layout is identical to Figure 3-43, with the same navigation bar, 'Actions' section, 'Locations:' dropdown set to 'Gittinger Hall', and the 'Rooms' table. However, the table only contains two rows: Room 104 and Room 105, both located in Gittinger Hall.

	Room	Location
<input type="checkbox"/>	Room 104	Gittinger Hall
<input type="checkbox"/>	Room 105	Gittinger Hall

4. Select the event sub-location that you are activating.
5. Under Action, click Edit.

The <Sub-Location> dialog box opens. The Active option is not selected.

Figure 3-45: Sub-Location dialog box, Inactive location



6. Select Active.
7. Click Save.

The event sub-location is activated in Master Calendar and now is displayed on the Active tab of the Manage Sub-Locations page.

Figure 3-46: Manage Sub-Locations page, Active tab

	Room	Location
<input type="checkbox"/>	Room 101	Gittinger Hall
<input type="checkbox"/>	Room 102	Gittinger Hall
<input type="checkbox"/>	Room 103	Gittinger Hall
<input type="checkbox"/>	Room 104	Gittinger Hall

To deactivate an event sub-location

You can activate an event sub-location for a location what was created in Master Calendar or imported from EMS.

1. Under the Admin Panel main menu option, point to Configuration, and then click <Sub-Locations>, where <Sub-Locations> is the name or phrase that you used to identify sub-locations in Master Calendar, for example, Rooms.

The Manage Sub-Locations page opens. The Active tab is the opened tab. When this tab first opens, it is blank.

Configuring Optional Information

2. On the Locations dropdown list, select the location for which you are inactivating the sub-location.

All currently active event sub-locations for the selected location in Master Calendar are displayed on the Active tab.

Figure 3-47: Manage Sub-Locations page, Active tab

The screenshot shows a web-based application interface. At the top is a blue header bar with white text containing links: Admin, Calendar, Submit Event, My Account, and Help. Below the header is a toolbar with a 'Actions' button (containing 'Add | Edit | Delete') and a 'Locations' dropdown menu set to 'Gittinger Hall'. A main content area features a table titled 'Rooms' with two tabs at the top: 'Active' (which is selected) and 'Inactive'. The table has columns for a checkbox, 'Room', and 'Location'. Five rows are listed, all corresponding to 'Room 104' located in 'Gittinger Hall'. The 'Room' column includes a dropdown arrow icon.

3. Select the event sub-location that you are inactivating.
4. Under Actions, click Edit.

The Sub-Location dialog box opens. The Active option is selected.

Figure 3-48: Sub-Location dialog box, Active location

This is a modal dialog box titled 'Room'. It contains fields for 'Room:' (set to 'Room 104') and 'Location:' (set to 'Gittinger Hall'). A checkbox labeled 'Active' is checked. At the bottom of the dialog are 'Cancel' and 'Save' buttons, along with a small decorative graphic.

5. Clear the Active option.

6. Click Save.

The event sub-location is inactivated in Master Calendar and now is displayed on the Inactive tab of the Manage Sub-Locations page.

Figure 3-49: Manage Sub-Locations page, Inactive tab

Rooms		
	Room ^	Location
<input type="checkbox"/>	Room 104	Gittinger Hall
<input type="checkbox"/>	Room 105	Gittinger Hall

To edit an event sub-location

You can edit the name for a sub-location only if the sub-location is assigned to a location that was created in Master Calendar. The sub-location can be an active or inactive location. You cannot edit a sub-location if the sub-location is assigned to a location that was imported from EMS during the addition of a connector. (See “[To add a connector](#)”.)

1. Under the Admin Panel main menu option, point to Configuration, and then click <Sub-Locations>, where <Sub-Locations> is the name or phrase that you used to identify sub-locations in Master Calendar, for example, Rooms.

The Manage Sub-Locations page opens. The Active tab is the opened tab. When this tab first opens, it is blank.

2. On the Locations dropdown list, select the location for which you are editing the sub-location.

All currently active event sub-locations for the selected location in Master Calendar are displayed on the Active tab.

Figure 3-50: Manage Sub-Locations page, Active tab

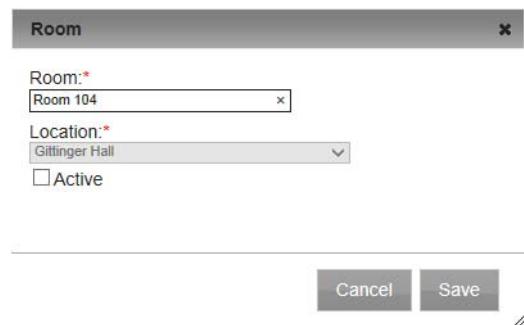
Rooms		
	Room ^	Location
<input type="checkbox"/>	Room 101	Gittinger Hall
<input type="checkbox"/>	Room 102	Gittinger Hall
<input type="checkbox"/>	Room 103	Gittinger Hall

Configuring Optional Information

3. If needed, click the Inactive tab to open it.
4. Select the sub-location that you are editing.
5. Under Action, click Edit.

The <Sub-Location> dialog box opens.

Figure 3-51: Sub-Location dialog box



6. Edit the name of the sub-location, its location, or both as needed.
7. Click Save to save the edited event sub-location in Master Calendar.

To delete an event sub-location

You can delete both active and inactive sub-locations. If you delete an active event sub-location, any current events that use this sub-location are not affected. The deletion simply means that going forward, the sub-location is not available for use.

1. Under the Admin Panel main menu option, point to Configuration, and then click <Sub-Locations>, where <Sub-Locations> is the name or phrase that you used to identify sub-locations in Master Calendar, for example, Rooms.

The Manage Sub-Locations page opens. The Active tab is the opened tab. When this tab first opens, it is blank.

2. On the Locations dropdown list, select the location for which you are deleting the sub-locations.

All currently active event sub-locations for the selected location in Master Calendar are displayed on the Active tab. See [Figure 3-52](#).

Figure 3-52: Manage Sub-Locations page, Active tab

	Room ^	Location
<input type="checkbox"/>	Room 101	Gittinger Hall
<input type="checkbox"/>	Room 102	Gittinger Hall
<input type="checkbox"/>	Room 103	Gittinger Hall

3. If needed, click the Inactive tab to open it.
4. Select one or more event sub-locations to be deleted.



To select all event sub-locations on the currently opened page for deletion in a single step, select <Sub-Location>, for example, Room. If you have multiple pages of sub-locations to delete, you must repeat this entire process on each page.

5. Under Actions, click Delete.

A message opens asking you if you are sure that you want to delete all the selected event sub-locations.

6. Click OK in the message.

A message opens indicating that all the selected sub-locations were successfully deleted.

7. Click OK in the message.

The Active tab or Inactive tab is updated to reflect the deletion of the event sub-locations.

Managing Departments

A *department* is a division of a business specializing in a particular product or service, for example, the Personnel department, or a division of a college dealing with a particular field of knowledge, for example, the Department of Chemistry. You can configure departments for Master Calendar so that additional information/clarification can be provided for an event. For example, if you are managing calendars for a university campus and you specify a multi-use building as an event location, you could also specify the department that is hosting the event. Managing departments consists of [adding](#) departments, [activating](#) departments, [inactivating](#) departments, [editing](#) departments, and [deleting](#) departments.



“Departments” is a default label. To change this label to better suit your organization’s business needs, see “[Managing Default Settings for Master Calendar](#)”.

To add a department

1. Under the Admin Panel main menu option, point to Configuration, and then click Departments.

The Departments page opens. The Active tab is the opened tab. All currently active departments in Master Calendar are displayed on this tab.

Figure 3-53: Departments page, Active tab

Department	
<input type="checkbox"/>	Chemistry
<input type="checkbox"/>	English
<input type="checkbox"/>	Math

2. Under Actions, click Add.

The Department dialog box opens. You use this dialog box to name the department. See [Figure 3-54](#).

Figure 3-54: Department dialog box

3. In the Name field, enter the name for the department.
4. On the Department dialog box, click Add.

The Department is added to Master Calendar as an *active* department.

To activate a department

1. Under the Admin Panel main menu option, point to Configuration, and then click Departments.

The Departments page opens. The Active tab is the opened tab. All currently active departments in Master Calendar are displayed on this tab.

Figure 3-55: Departments page, Active tab

Department	
<input type="checkbox"/>	Chemistry
<input type="checkbox"/>	English
<input type="checkbox"/>	Math

2. Click the Inactive tab to open it.

All currently inactive departments in Master Calendar are displayed on this tab. See [Figure 3-56](#).

Configuring Optional Information

Figure 3-56: Departments page, Inactive tab

The screenshot shows a web-based application interface for managing departments. At the top is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar is a toolbar with buttons for Actions (Add, Edit, Delete). A tab bar has two tabs: Active (selected) and Inactive. Under the Active tab, there is a table with a single row labeled 'Department'. The table contains three columns: a checkbox, the department name, and a link to 'Edit'. The department names listed are Biology and MHI Department.

	Department	
<input type="checkbox"/>	Biology	Edit
<input type="checkbox"/>	MHI Department	Edit

3. Select the department that you are activating.
4. Under Actions, select Edit.

The Department dialog box opens. The dialog box shows the department name. The Active option is not selected.

Figure 3-57: Department dialog box, Inactive department

The screenshot shows a 'Department' dialog box. It has a title bar 'Department' and a close button. Inside, there is a form field labeled 'Department:' with a red asterisk indicating it is required. The input field contains 'Biology'. Below the input field is a checkbox labeled 'Active' which is not checked. At the bottom of the dialog box is a 'SAVE' button.

5. Select Active.
6. Click Save.

The department is activated and is displayed on the Active tab on the Departments page.

Figure 3-58: Departments page, Active tab

The screenshot shows the same web-based application interface as Figure 3-56, but with the Active tab selected. The table under the Active tab now shows four rows, each representing a department: Biology, Chemistry, English, and Math. The first row (Biology) is highlighted with a black rectangle. An arrow points from the left margin towards this highlighted row. The columns are identical to Figure 3-56: a checkbox, the department name, and an 'Edit' link.

	Department	
<input type="checkbox"/>	Biology	Edit
<input type="checkbox"/>	Chemistry	Edit
<input type="checkbox"/>	English	Edit
<input type="checkbox"/>	Math	Edit

To inactivate a department

- Under the Admin Panel main menu option, point to Configuration, and then click Departments.

The Departments page opens. The Active tab is the opened tab. All currently active departments in Master Calendar are displayed on this tab.

Figure 3-59: Departments page, Active tab

The screenshot shows a web-based application interface for managing departments. At the top is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar is a toolbar labeled 'Actions' with buttons for Add, Edit, and Delete. A tab bar has two tabs: 'Active' (which is highlighted in blue) and 'Inactive'. Underneath the tabs is a table with a header row 'Department' and a data row 'Department'. The data row contains four entries: Biology, Chemistry, English, and Math, each preceded by a small square checkbox. The background of the page is light gray.

- Select the department that you are inactivating.
- Under Actions, select Edit.

The Department dialog box opens. The dialog box shows the department name. The Active option is selected.

Figure 3-60: Department dialog box, Active department

The screenshot shows a 'Department' dialog box. At the top is a title 'Department' with a close button 'X'. Below the title is a form field labeled 'Department:*' containing the value 'Biology'. Underneath the form field is a checkbox labeled 'Active' which is checked. At the bottom of the dialog box is a 'SAVE' button.

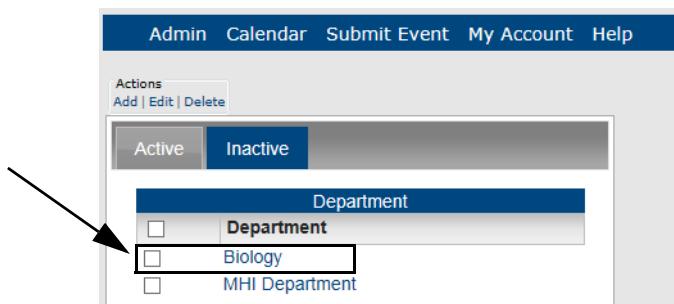
- Clear the Active option.

Configuring Optional Information

5. Click Save.

The department is inactivated and now is displayed on the Inactive tab of the Departments page.

Figure 3-61: Departments page, Inactive tab



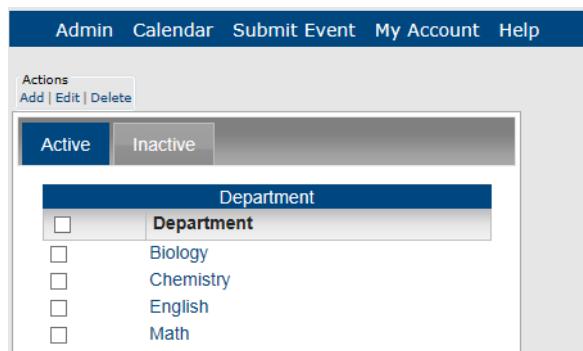
To edit a department name

You can edit the name for both an active or an inactive department.

1. Under the Admin Panel main menu option, point to Configuration, and then click Departments.

The Departments page opens. The Active tab is the opened tab. All currently active departments in Master Calendar are displayed on this tab.

Figure 3-62: Departments page, Active tab



2. If needed, click the Inactive tab to open it.
3. Select the department that you are editing.

- Under Actions, select Edit.

The Department dialog box opens. The dialog box shows the department name.

Figure 3-63: Department dialog box

Department

Department:*

Active

SAVE

- Edit the name of the department as needed.
- Click Save to save the edited department in Master Calendar.

To delete a department

If you delete an active department, any current events that use this location are not affected. The deletion simply means that going forward, the department is not available for use.

- Under the Admin Panel main menu option, point to Configuration, and then click Departments.

The Departments page opens. The Active tab is the opened tab. All currently active departments in Master Calendar are displayed on this tab.

Figure 3-64: Departments page, Active tab

Actions	
Add Edit Delete	
Active Inactive	
Department	
<input type="checkbox"/>	Department
<input type="checkbox"/>	Biology
<input type="checkbox"/>	Chemistry

- If needed, click the Inactive tab to open it.
- Select one or more departments to be deleted.



To select all departments on the currently opened page for deletion in a single step, select Department. If you have multiple pages of departments to delete, you must repeat this entire process on each page.

Configuring Optional Information

4. Under Actions, click Delete.

A message opens asking you if you are sure that you want to delete all the selected departments.

5. Click OK in the message.

A message opens indicating that all the selected departments were successfully deleted.

6. Click OK in the message.

The Active tab or Inactive tab is updated to reflect the deletion of the departments.

Managing Custom Field Hints

A *custom field* is found on the Add Event page. Custom fields supply additional information about the events that are posted to a calendar. A guest or user can read this additional information about the event when they view the event on the calendar. As a Master Calendar manager, you can supply *hints* or suggestions about the purpose or use of these custom fields to the event requestor. For example, if you are managing calendars for a university campus, and one of these calendars is for athletic events, you might add a custom field that indicates where ticket pricing information is available for the event. Managing custom field hints consists of [adding](#) custom field hints, [activating](#) and [inactivating](#) custom field hints, [editing](#) custom field hints, and [deleting](#) custom field hints.

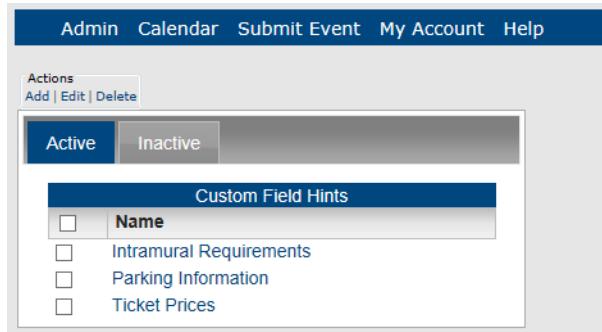
To add a custom field hint

When you add a custom field hint, you are adding to a global list, which means that any hint that you add can be made available for any event submission form.

1. Under the Admin Panel main menu option, point to Configuration, and then click Custom Field Hints.

The Custom Field Hints page opens. The Active tab is the opened tab. All currently active custom field hints in Master Calendar are displayed on this tab.

Figure 3-65: Custom Field Hints page, Active tab



2. Under Actions, click Add.

The Custom Field Hint dialog box opens. You use this dialog box to name the custom field hint. This name is displayed in a dropdown list when a guest or user clicks the Lookup icon next to a Custom field on the Submit Events page. See [Figure 3-65](#).

Configuring Optional Information

Figure 3-66: Custom Field Hint dialog box



3. In the Custom Field Hint field, enter a name or description for the custom field.
4. Click Add.

The hint is added as an *active* custom field hint in Master Calendar.

To activate a custom field hint

1. Under the Admin Panel main menu option, point to Configuration, and then click Custom Field Hints.

The Custom Field Hints page opens. The Active tab is the opened tab. All currently active custom field hints in Master Calendar are displayed on this tab.

Figure 3-67: Custom Field Hints page, Active tab

A screenshot of the "Custom Field Hints" page. The top navigation bar includes links for Admin, Calendar, Submit Event, My Account, and Help. Below the navigation is a toolbar with "Actions" and buttons for "Add", "Edit", and "Delete". A tab bar at the top shows "Active" (which is selected) and "Inactive". The main content area is titled "Custom Field Hints" and lists four items: "Name", "Intramural Requirements", "Parking Information", and "Ticket Prices", each preceded by a checkbox.

2. Click the Inactive tab to open it.

All currently inactive custom field hints in Master Calendar (title and color) are displayed on this tab. See [Figure 3-68](#).

Configuring Optional Information

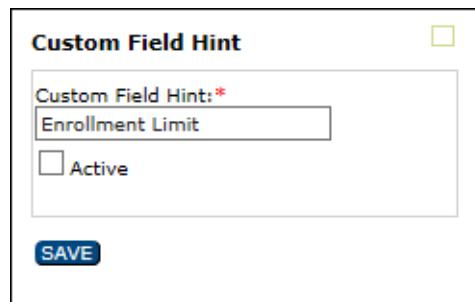
Figure 3-68: Custom Field Hints page, Inactive tab

The screenshot shows a web-based application interface. At the top is a blue header bar with white text: "Admin", "Calendar", "Submit Event", "My Account", and "Help". Below the header is a toolbar with the word "Actions" and buttons for "Add", "Edit", and "Delete". Underneath the toolbar is a navigation bar with two tabs: "Active" (which is selected and highlighted in grey) and "Inactive". The main content area is titled "Custom Field Hints". It contains a table with four rows, each with a checkbox and a link: "Name", "Enrollment Limit", "Enrollment Pre-requisites", and "Managing PM's name".

3. Select the custom field hint that you are activating.
4. Under Actions, select Edit.

The Custom Field Hint dialog box opens. The dialog box shows the custom field hint name. The Active option is not selected.

Figure 3-69: Custom Field Hint dialog box, Inactive custom field hint



5. Select Active.
6. Click Save.

The custom field hint is activated and is displayed on the Active tab on the Custom Field Hints page.

Figure 3-70: Custom Field Hints page, Active tab

The screenshot shows the "Custom Field Hints" page again, but this time the "Active" tab is selected. The table in the center of the page now has a different row highlighted with a red box and a black arrow pointing to it. This row corresponds to the "Enrollment Limit" entry from the previous dialog box. The other three rows remain unselected.

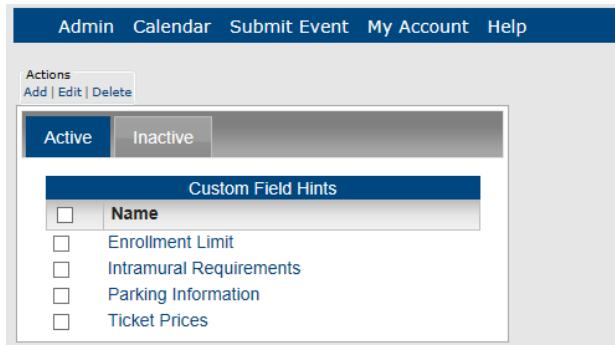
Configuring Optional Information

To inactivate a custom field hint

1. Under the Admin Panel main menu option, point to Configuration, and then click Custom Field Hints.

The Custom Field Hints page opens. The Active tab is the opened tab. All currently active custom field hints in Master Calendar are displayed on this tab.

Figure 3-71: Custom Field Hints page, Active tab



2. Select the custom field hint that you are inactivating.
3. Under Actions, click Edit.

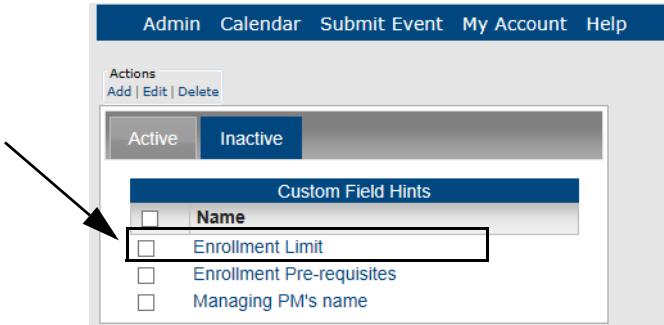
The Custom Field Hint dialog box opens. The dialog box shows the name for the custom field hint. The Active option is selected.

Figure 3-72: Custom Field Hint dialog box, Active hint



4. Clear the Active option.
5. Click Save.

The custom field hint is inactivated in Master Calendar and now is displayed on the Inactive tab of the Custom Field Hints page. See [Figure 3-73](#).

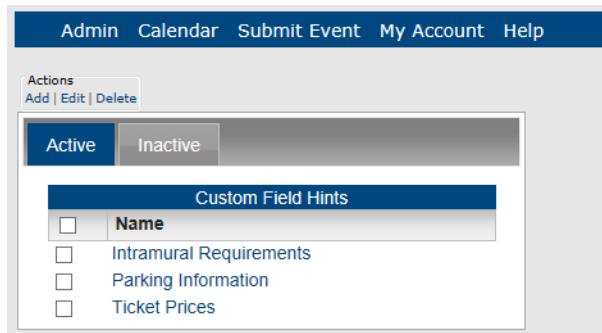
Figure 3-73: Custom Field Hints page, Inactive tab

To edit the name for a custom field hint

You can edit the name for both active and inactive custom field hints.

1. Under the Admin Panel main menu option, point to Configuration, and then click Custom Field Hints.

The Custom Field Hints page opens. The Active tab is the opened tab. All currently active custom field hints in Master Calendar are displayed on this tab.

Figure 3-74: Custom Field Hints page, Active tab

2. If needed, click the Inactive tab to open it.
3. Select the custom field hint that you are editing.
4. Under Actions, select Edit.

The Custom Field Hint dialog box opens. The dialog box shows the custom field hint name. See [Figure 3-75](#).

Configuring Optional Information

Figure 3-75: Custom Field Hint dialog box, Active hint



5. Edit the custom field hint name as needed.
6. Click Save.

The edited custom field hint is saved in Master Calendar.

To delete a custom field hint

You can delete an active or an inactive custom field hint. If you delete an active custom field hint, any current events that use the hint are not affected. The deletion simply means that going forward, the custom field hint is not available for use.

1. Under the Admin Panel main menu option, point to Configuration, and then click Custom Field Hints.

The Custom Field Hints page opens. The Active tab is the opened tab. All currently active custom field hints in Master Calendar are displayed on this tab.

Figure 3-76: Custom Field Hints page, Active tab

A screenshot of the "Custom Field Hints" page. The top navigation bar includes Admin, Calendar, Submit Event, My Account, and Help. A sub-navigation bar below shows Actions (Add | Edit | Delete). There are two tabs: "Active" (selected) and "Inactive". A table lists custom field hints with checkboxes: Name (selected), Intramural Requirements, Parking Information, and Ticket Prices.

2. If needed, click the Inactive tab to open it.
3. Select one or more custom field hints to be deleted.



To select all custom field hints on the currently opened page for deletion in a single step, select Name. If you have multiple pages of hints to delete, you must repeat this entire process on each page.

Configuring Optional Information

4. Under Actions, click Delete.

A message opens asking you if you are sure that you want to delete all the selected custom field hints.

5. Click OK in the message.

A message opens indicating that all the selected custom field hints were successfully deleted.

6. Click OK in the message.

The Active tab or Inactive tab is updated to reflect the deletion of the custom field hints.

Managing User Defined Questions

A *user defined question* (UDQ) is a question that can be posed to a guest or user as part of the process of submitting an event. A UDQ can be optional or required, and you can assign a one or more UDQs to one or more calendars of your choice when you are creating the calendars. Managing UDQs consists of [adding](#) UDQs, [activating](#) and [inactivating](#) UDQs, [editing](#) UDQs, and [deleting](#) UDQs. You can also [view](#) the history for a UDQ.

To add a UDQ

When you add a UDQ, you can assign the UDQ to one or more calendars.

- Under the Admin Panel main menu option, point to Configuration, and then click User Defined Questions.

The Manage UDQs page opens. The Active tab is the opened tab. All currently active UDQs in Master Calendar are displayed on this tab.

Figure 3-77: Manage UDQs, Active tab

User Defined Questions		
<input type="checkbox"/> Name	Prompt Text	Type
<input type="checkbox"/> Contract Work Questions	Have you implemented the project timing software prior to this date?	Text
<input type="checkbox"/> Medical Release	Have you provided a signed and dated medical release form from your doctor indicating that your eligible to participate in this event?	Text
<input type="checkbox"/> Target Audience	What is the Target Audience for this presentation?	Text

- Under Actions, click Add.

The Add UDQ page opens. The Details tab is the opened tab. You use the options on this tab to specify the information for the UDQ. See [Figure 3-78](#).

Figure 3-78: Add UQD page, Details tab

The screenshot shows a web-based configuration interface for adding a User-Defined Question (UDQ). The top navigation bar includes links for Admin, Calendar, Submit Event, My Account, and Help. A secondary navigation bar below it has tabs for 'Details' (which is selected) and 'Calendars'. The main content area is titled 'General Info' and contains several input fields and controls:

- Name:** A text input field.
- Question Type:** A dropdown menu currently set to 'Text'.
- Default Value:** A text input field.
- Display Text:** A text input field.
- Sequence:** A text input field containing the value '0'.
- Internal:** A checkbox labeled 'Internal'.
- Response Required:** A checkbox labeled 'Response Required'.

At the bottom of the form are two buttons: 'Add' and 'Cancel'.

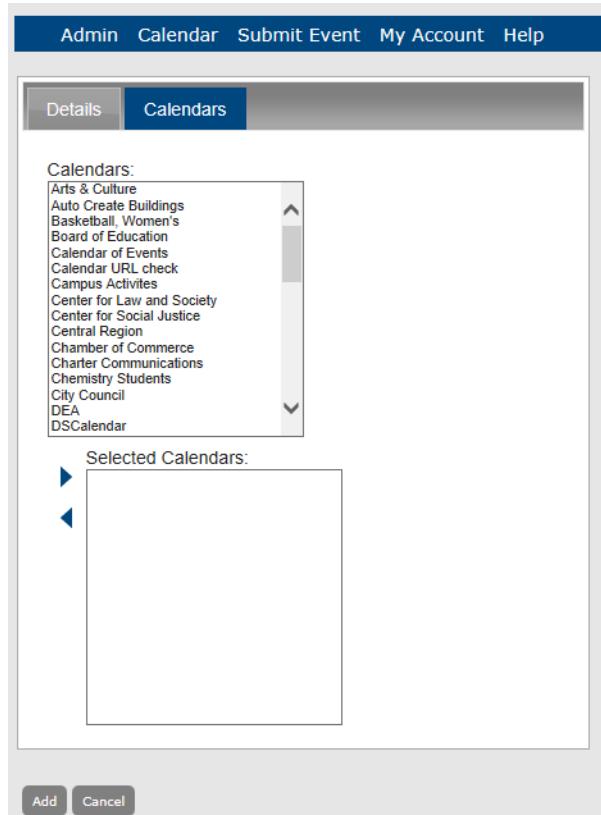
3. Enter the information for the UDQ.

Field	Description
Name	The name of the UDQ. This name is displayed in a pick list on the UDQs tab for calendar configuration.
Question Type	Dropdown list with four options - Text, Date, Numeric, and List. Indicates the required format for the answer to a UDQ.
Default value	A pre-assigned value for the UDQ that is displayed on the Submit Event page. A guest or user can edit this value as needed.
Display Text	The text that is displayed for the UDQ under Additional Information on the Submit Event page.
Sequence	The order in which the UDQs are displayed under Additional Information on the Submit Event page. This is a required value. If you give all the UDQs the same sequence number, then the UDQs are displayed in alphabetical order under Additional Information; otherwise, they are displayed in ascending order (Sequence 1, Sequence 2, Sequence 3, and so on).
Internal	If selected, then the question is not displayed in the event description; otherwise, the question is displayed in the event description.
Response Required	If selected, then a guest or user must answer the question before they can submit the event; otherwise, the guest or user does not have to answer the question to submit the event. Note: If you specify a default value for a UDQ, but then make a response required, Master Calendar ignores the default value.

Configuring Optional Information

4. Click the Calendars tab to open it.

Figure 3-79: Add UDQ page, Calendars tab



5. In the Calendars list, click the calendar to you are assigning the UDQ (CTRL-click to select multiple calendars), and then click the Add button ➤ to add the selected calendars to the Selected Calendars list.
6. Click Add.

The UDQ is saved as an *active* UDQ in Master Calendar.

To activate a UDV

- Under the Admin Panel main menu option, point to Configuration, and then click User Defined Questions.

The Manage UDQs page opens. The Active tab is the opened tab. All currently active UDQs in Master Calendar are displayed on this tab.

Figure 3-80: Manage UDQs page, Active tab

User Defined Questions			
<input type="checkbox"/>	Name	Prompt Text	Type
<input type="checkbox"/>	Contract Work Questions	Have you implemented the project timing software prior to this date?	Text
<input type="checkbox"/>	Medical Release	Have you provided a signed and dated medical release form from your doctor indicating that you're eligible to participate in this event?	Text
<input type="checkbox"/>	Target Audience	What is the Target Audience for this presentation?	Text

- Click the Inactive tab to open it.

All currently inactive UDQs in Master Calendar are displayed on this tab.

Figure 3-81: Manage UDQs page, Inactive tab

User Defined Questions			
<input type="checkbox"/>	Name	Prompt Text	Type
<input type="checkbox"/>	Age Restriction	Participation is limited to age 18 and over. Are you over 18 years of age?	Text
<input type="checkbox"/>	Visitor Survey	First time visiting this Calendar?	List

- Select the UDQ that you are activating.
- Under Actions, click Edit.

The Add UDQ page opens. The Details tab is the opened tab. The Active option is not selected. See [Figure 3-82](#).

Configuring Optional Information

Figure 3-82: Add UDV page, Details tab, Inactive UDV

The screenshot shows a web-based application interface for managing User Defined Questions (UDQs). At the top, there is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar, there are three tabs: Details (selected), Calendars, and History. The main content area is titled "General Info". It contains the following fields:

- Name: *
- Question Type:
- Default Value:
- Display Text: *
- Sequence: *
- Internal
- Response Required
- Active

At the bottom of the form are two buttons: Save and Cancel.

5. Select Active.

6. Click Save.

The UDV is activated in Master Calendar and now is displayed on the Active tab of the Manage UDQs page.

Figure 3-83: User Defines Questions page, Active tab

The screenshot shows a table titled "User Defined Questions" with the following data:

Name	Prompt Text	Type
Age Restriction	Participation is limited to age 18 and over. Are you over 18 years of age?	Text
Contract Work Questions	Have you implemented the project timing software prior to this date?	Text
Medical Release	Have you provided a signed and dated medical release form from your doctor indicating that you are eligible to participate in this event?	Text
Target Audience	What is the Target Audience for this presentation?	Text

To inactivate a UDQ

- Under the Admin Panel main menu option, point to Configuration, and then click User Defined Questions.

The Manage UDQs page opens. The Active is the opened tab. All currently active UDQs in Master Calendar are displayed on this tab.

Figure 3-84: Manage UDQs page, Active tab

User Defined Questions		
<input type="checkbox"/> Name	Prompt Text	Type
<input type="checkbox"/> Age Restriction	Participation is limited to age 18 and over. Are you over 18 years of age?	Text
<input type="checkbox"/> Contract Work Questions	Have you implemented the project timing software prior to this date?	Text
<input type="checkbox"/> Medical Release	Have you provided a signed and dated medical release form from your doctor indicating that you're eligible to participate in this event?	Text
<input type="checkbox"/> Target Audience	What is the Target Audience for this presentation?	Text

- Select the UDQ that you are inactivating.
- Under Actions, click Edit.

The Add UDQ page opens. The Details tab is the opened tab. The Active option is selected.

Figure 3-85: Add UDQ page, Details tab, Active UDQ

General Info

Name:^{*}
Age Restriction

Question Type:
Text

Default Value:
Yes

Display Text:^{*}
Participation is limited to age 18 and over.

Sequence:^{*}
0

Internal
 Response Required
 Active

Save Cancel

Configuring Optional Information

4. Clear the Active option.
5. Click Save.

The UDQ is inactivated in Master Calendar and now is displayed on the Inactive tab of the Manage UDQs page.

Figure 3-86: Manage UDQs page, Inactive tab

The screenshot shows the 'Manage UDQs' page with the 'Inactive' tab selected. At the top, there's a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar is an 'Actions' section with buttons for Add, Edit, and Delete. The main area has two tabs: 'Active' (which is currently selected) and 'Inactive'. Underneath these tabs is a table titled 'User Defined Questions' with three columns: 'Name', 'Prompt Text', and 'Type'. There are two rows of data:

Name	Prompt Text	Type
<input type="checkbox"/> Age Restriction	Participation is limited to age 18 and over. Are you over 18 years of age?	Text
<input type="checkbox"/> Visitor Survey	First time visiting this Calendar?	List

To edit a UDQ

You can edit any and all information for both active and inactive UDQs.

1. Under the Admin Panel main menu option, point to Configuration, and then click User Defined Questions.

The Manage UDQs page opens. The Active is the opened tab. All currently active UDQs in Master Calendar are displayed on this tab.

Figure 3-87: Manage UDQs page, Active tab

The screenshot shows the 'Manage UDQs' page with the 'Active' tab selected. The interface is identical to Figure 3-86, featuring a navigation bar, an 'Actions' section, and a table titled 'User Defined Questions'. The table contains three rows of data:

Name	Prompt Text	Type
<input type="checkbox"/> Contract Work Questions	Have you implemented the project timing software prior to this date?	Text
<input type="checkbox"/> Medical Release	Have you provided a signed and dated medical release form from your doctor indicating that you're eligible to participate in this event?	Text
<input type="checkbox"/> Target Audience	What is the Target Audience for this presentation?	Text

2. If needed, click the Inactive tab to open it.
3. Select the UDQ that you are editing.

4. Under Actions, click Edit.

The Add UDQ page opens. The Details tab is the opened tab.

Figure 3-88: Add UDQ page, Details tab

The screenshot shows the 'Add UDQ page' with the 'Details' tab selected. The 'General Info' section includes fields for Name (Age Restriction), Question Type (Text), Default Value (Yes), Display Text (Participation is limited to age 18 and over), Sequence (0), and checkboxes for Internal (unchecked), Response Required (checked), and Active (unchecked). At the bottom are 'Save' and 'Cancel' buttons.

5. Edit the information for the UDQ as needed.

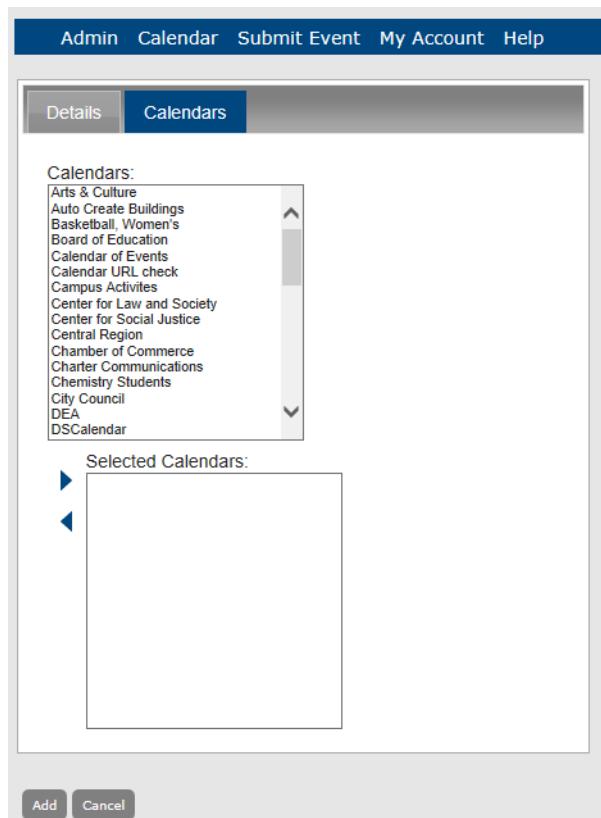
Field	Description
Name	The name of the UDQ. This name is displayed in a pick list on the UDQs tab for calendar configuration.
Question Type	Dropdown list with four options - Text, Date, Numeric, and List. Indicates the required format for the answer to a UDQ.
Default value	A pre-assigned value for the UDQ that is displayed on the Submit Event page. A guest or user can edit this value as needed.
Display Text	The text that is displayed for the UDQ under Additional Information on the Submit Event page.
Sequence	The order in which the UDQs are displayed under Additional Information on the Submit Event page. This is a required value. If you give all the UDQs the same sequence number, then the UDQs are displayed in alphabetical order under Additional Information; otherwise, they are displayed in ascending order (Sequence 1, Sequence 2, Sequence 3, and so on).
Internal	If selected, then the question is not displayed in the event description; otherwise, the question is displayed in the event description.
Response Required	If selected, then a guest or user must answer the question before they can submit the event; otherwise, the guest or user does not have to answer the question to submit the event. Note: If you specify a default value for a UDQ, but then make a response required, Master Calendar ignores the default value.

Configuring Optional Information

Field	Description
Active	If selected, indicates that the UDQ is available for selection when you are configuring a calendar; otherwise, it is unavailable.

6. Click the Calendars tab to open it.

Figure 3-89: Add UDQ page, Calendars tab



7. Do one of the following:

- In the Calendars list, click the calendar to which you are assigning the UDQ (CTRL-click to select multiple calendars), and then click the Add button ➤ to add the selected calendars to the Selected Calendars list.
- In the Selected Calendars list, click the calendar from which you are removing the UDQ (CTRL-click to select multiple calendars), and then click the Remove button ◀ to return the calendars to the Calendars list.

8. Click Save to save the edited UDQ in Master Calendar.

To delete a UDQ

You can delete an active or an inactive UDQ. If you delete an active UDQ, any current events that use the UDQ are not affected. The deletion simply means that going forward, the UDQ is not available for use.

- Under the Admin Panel main menu option, point to Configuration, and then click User Defined Questions.

The Manage UDQs page opens. The Active is the opened tab. All currently active UDQs in Master Calendar are displayed on this tab.

Figure 3-90: Manage UDQs page, Active tab

User Defined Questions			
	Name	Prompt Text	Type
<input type="checkbox"/>	Contract Work Questions	Have you implemented the project timing software prior to this date?	Text
<input type="checkbox"/>	Medical Release	Have you provided a signed and dated medical release form from your doctor indicating that you're eligible to participate in this event?	Text
<input type="checkbox"/>	Target Audience	What is the Target Audience for this presentation?	Text

- If needed, click the Inactive tab to open it.
- Select one or more UDQs to be deleted.



To select all UDQs on the currently opened page for deletion in a single step, select Name. If you have multiple pages of UDQs to delete, you must repeat this entire process on each page.

- Under Actions, click Delete.

A message opens asking you if you are sure that you want to delete all the selected UDQs.

- Click OK in the message.

A message opens indicating that all the selected UDQs were successfully deleted.

- Click OK in the message.

The Active tab or Inactive tab is updated to reflect the deletion of the UDQs.

Configuring Optional Information

To view the history for a UDQ

The history for a UDQ consists of the original creation date of the UDQ, the name of the user who created the UDQ, the last date that the UDQ was edited, and the name of the user who last edited the UDQ. You can view the history for both active or inactive UDQs.

1. Under the Admin Panel main menu option, point to Configuration, and then click User Defined Questions.

The Manage UDQs page opens. The Active is the opened tab. All currently active UDQs in Master Calendar are displayed on this tab.

Figure 3-91: Manage UDQs page, Active tab

The screenshot shows the 'Manage UDQs' page with a dark blue header containing 'Admin', 'Calendar', 'Submit Event', 'My Account', and 'Help'. Below the header is a toolbar with 'Actions' (Add, Edit, Delete) and tabs for 'Active' (selected) and 'Inactive'. The main area is titled 'User Defined Questions' and contains a table with two rows. The columns are 'Name' (checkbox), 'Prompt Text', and 'Type'. The first row has a checkbox next to 'Contract Work Questions', with the prompt text 'Have you implemented the project timing software prior to this date?' and type 'Text'. The second row has a checkbox next to 'Medical Release', with the prompt text 'Have you provided a signed and dated medical release form from your doctor indicating that you are eligible to...' and type 'Text'.

Name	Prompt Text	Type
<input type="checkbox"/> Contract Work Questions	Have you implemented the project timing software prior to this date?	Text
<input type="checkbox"/> Medical Release	Have you provided a signed and dated medical release form from your doctor indicating that you are eligible to...	Text

2. If needed, click the Inactive tab to open it.
3. Select the UDQ for which you are viewing the history.
4. Under Actions, click Edit.

The Add UDQ page opens. The Details tab is the opened tab.

Figure 3-92: Add UDQ page, Details tab

The screenshot shows the 'Add UDQ' page with a dark blue header containing 'Admin', 'Calendar', 'Submit Event', 'My Account', and 'Help'. Below the header is a toolbar with 'Details' (selected), 'Calendars', and 'History' tabs. The main area is titled 'General Info' and contains several input fields:

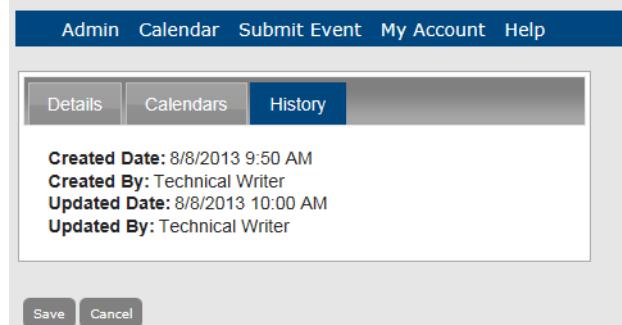
- Name:
- Question Type:
- Default Value:
- Display Text:
- Sequence:
- Checkboxes:
 - Internal
 - Response Required
 - Active

At the bottom are 'Save' and 'Cancel' buttons.

Configuring Optional Information

5. Click the History tab to open it and view the history for the selected UDQ.

Figure 3-93: Add UDQ page, History tab



Managing Event Icons

An *event icon* is a graphic symbol (typically a simple picture) that further identifies an event. By default, when you associate an active event icon with an event, the icon is always displayed in the event description. You can also have the icon displayed in a tooltip and on the calendar for the event. You can use two sizes of icons in Master Calendar—a *large* icon, which must be 25 pixels wide and no more than 25 pixels in height, and a *small* icon, which must be 12 pixels wide and no more than 12 pixels in height. Managing event icons consists of adding event icons to tooltips or calendars, activating and inactivating event icons, editing event icons, and deleting event icons.

To add a large event icon

When you add an event icon, you must, at a minimum, add a large icon. You can also add a small icon at the same time, or you can save the event icon and, if needed, add a small icon at a later date.



When you add an event icon, the title/name of the event icon is displayed as an option under Custom Fields on the Add Event page. See Submitting an Event in the Master Calendar User's Manual.

- Under the Admin Panel main menu option, point to Configuration, and then click Event Icons.

The Manage Event Icons page opens. The Active tab is the opened tab. All currently active event icons in Master Calendar are displayed on this tab.

Figure 3-94: Manage Event Icons page, Active tab

Event Icons			
	Title	Large Icon	Small Icon
<input type="checkbox"/>	Accepted Entry	●	●
<input type="checkbox"/>	Skype Available	●	●

- Under Actions, click Add.

The Add Event Icon page opens. The Details tab is the only tab on this page. You use the options on this tab to name the event icon, and to indicate to which items (tooltips or calendars) to add the icons. By default, Show icon on tooltip is selected. See Figure 3-95.

Configuring Optional Information

Figure 3-95: Add Event Icon page, Details tab

The screenshot shows a web-based application interface for managing event icons. At the top, there is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar, a blue header bar contains the word 'Details'. The main content area has a form with the following fields:

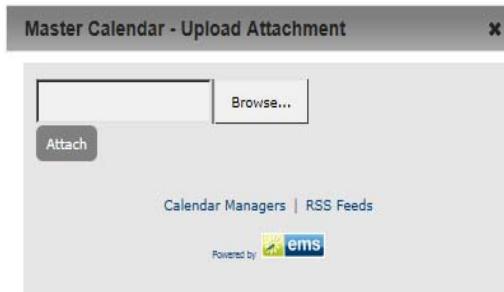
- Title:** A text input field with a red asterisk indicating it is required.
- Large Icon:** A link labeled "Add Large Icon".
- Small Icon:** A link labeled "Add Small Icon".
- Show icon on tooltip:** A checked checkbox.
- Show icon on calendar (Requires a small icon):** An unchecked checkbox.

At the bottom of the form are two buttons: "Save" and "Cancel".

3. In the Title field, enter a name or description for the event icon.
4. Click Add Large Icon.

The Upload Attachment dialog box opens.

Figure 3-96: Upload Attachment dialog box



5. Click Browse to open the Choose File dialog box to browse to and select the large event icon.
6. After you select the large event icon in the Choose File dialog box, click Open.

The Choose File dialog box closes, and the Browse field in the Upload Attachment dialog box is automatically populated with the full directory path (including the file name) for the large event icon.

Configuring Optional Information

7. In the Upload Attachment dialog box, click Attach.

The Upload Attachment dialog box closes, and the Details tab is updated to reflect the addition of the large event icon. In addition, a “remove” option is displayed next to the name of the event icon. You can click this option to remove an icon if you added an icon in error, or if you want to replace the icon with another one.



If the icon that you are attempting to add as the large icon exceeds the allowed dimensions (25 pixels x 25 pixels), then after you click Attach, the Browse field in the Upload Attachment dialog box is not automatically populated. Instead, it remains blank and a message is displayed above the Browse field that indicates the allowed dimensions for the icon.

8. Do one of the following:

- Click Save to save the large event icon as an active icon in Master Calendar. The icon is displayed on the Active tab of the Manage Event Icons page. You can add a small event icon, if needed, at a later date.

Figure 3-97: Manage Event Icons page, Active tab

Event Icons			
	Title	Large Icon	Small Icon
<input type="checkbox"/>	Accepted Entry	●	
<input type="checkbox"/>	Skype Available	S	
<input type="checkbox"/>	Video Event	■	

- Continue to “To add a small event icon” below.

To add a small event icon

You can add a small icon for both active and inactive event icons.

1. If the Details tab for a selected event icon is already open, continue to [Step 4](#); otherwise, continue to [Step 2](#).
2. Under the Admin Panel main menu option, point to Configuration, and then click Event Icons.

The Manage Event Icons page opens. The Active tab is the opened tab. All currently active event icons in Master Calendar are displayed on this tab. See [Figure 3-100](#).

Configuring Optional Information

Figure 3-98: Manage Event Icons page, Active tab

The screenshot shows a web-based application interface for managing event icons. At the top is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar is a toolbar with buttons for Actions (Add | Edit | Delete). Underneath is a tabbed section with Active (selected) and Inactive tabs. The main content area is titled "Event Icons" and contains a table with three columns: Title, Large Icon, and Small Icon. The table has four rows, each corresponding to an event icon:

Title	Large Icon	Small Icon
Accepted Entry	Green circle icon	
Skype Available	Blue square icon with 'S'	
Video Event	Black square icon with a white question mark	

3. If needed, click the Inactive tab to open it.
4. Select the event for which you are adding the small icon.
5. Under Actions, click Edit.

The Add Event Icon page opens. The Details tab is the opened tab. You use this dialog box to name the event icon, and to indicate to which items (tooltips or calendars) to add the icons. By default, Show icon on tooltip is selected.

Figure 3-99: Add Event Icon page, Details tab

The screenshot shows the "Add Event Icon" dialog box with the "Details" tab selected. The form fields include:

- Title:
- Large Icon:
- Small Icon:
- Checkboxes:
 - Show icon on tooltip
 - Show icon on calendar (Requires a small icon)
 - Active

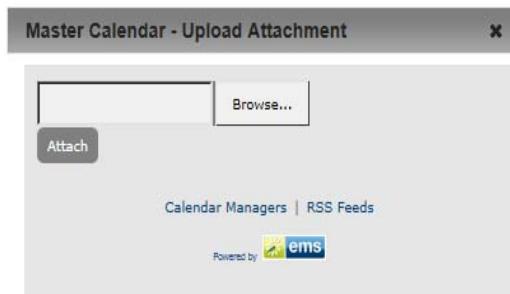
At the bottom are "Save" and "Cancel" buttons.

Configuring Optional Information

6. Click Add Small Icon.

The Upload Attachment dialog box opens.

Figure 3-100: Upload Attachment dialog box



7. Click Browse to open the Choose File dialog box to browse to and select the small event icon.
8. After you select the small event icon in the Choose File dialog box, click Open.

The Choose File dialog box closes, and the Browse field in the Upload Attachment dialog box is automatically populated with the full directory path (including the file name) for the small event icon.

9. In the Upload Attachment dialog box, click Attach.

The Upload Attachment dialog box closes, and the Details tab is updated to reflect the addition of the small event icon. In addition, a “remove” option is displayed next to the name of the event icon. You can click this option to remove an icon if you added an icon in error, or if you want to replace the icon with another one.



If the icon that you are attempting to add as the small icon exceeds the allowed dimensions (12 pixels x 12 pixels), then after you click Attach, the Browse field in the Upload Attachment dialog box is not automatically populated. Instead, it remains blank and a message is displayed above the Browse field that indicates the allowed dimensions for the icon.

10. Optionally, do one or both of the following:

- If you do not want the icon to be displayed in the event tooltip, clear Show icon on tooltip.
- If you want to display the icon on the calendar entry, select Show icon on calendar.

Configuring Optional Information

11. Click Save to save the small event icon as an active icon in Master Calendar.

The icon is displayed on the Active tab of the Manage Event Icons page.

Figure 3-101: Manage Event Icons page, Active tab

A screenshot of a web-based application interface titled "Manage Event Icons". The top navigation bar includes links for Admin, Calendar, Submit Event, My Account, and Help. Below the navigation is a toolbar with "Actions" and buttons for Add, Edit, and Delete. A tab bar at the top has two tabs: "Active" (which is selected) and "Inactive". The main content area is titled "Event Icons" and contains a table with four rows. The columns are "Title", "Large Icon", and "Small Icon". The rows are: 1. Accepted Entry (Large Icon: green circle with a dot, Small Icon: green circle with a dot). 2. Skype Available (Large Icon: blue square with a white letter 'S', Small Icon: blue square with a white letter 'S'). 3. Video Event (Large Icon: black square with a white question mark, Small Icon: black square with a white question mark). 4. A row with a checkbox and a title cell that is empty.

Event Icons		
	Large Icon	Small Icon
<input type="checkbox"/> Accepted Entry	●	●
<input type="checkbox"/> Skype Available	S	S
<input type="checkbox"/> Video Event	?	?

To activate an event icon

1. Under the Admin Panel main menu option, point to Configuration, and then click Event Icons.

The Manage Event Icons page opens. The Active tab is the opened tab. All currently active event icons in Master Calendar are displayed on this tab.

Figure 3-102: Manage Event Icons page, Active tab

A screenshot of the "Manage Event Icons" page with the "Active" tab selected. The interface is identical to Figure 3-101, showing the "Event Icons" table with the same four rows: Accepted Entry, Skype Available, Video Event, and an empty row. The "Accepted Entry" row is highlighted with a red border.

Event Icons		
	Large Icon	Small Icon
<input type="checkbox"/> Accepted Entry	●	●
<input type="checkbox"/> Skype Available	S	S
<input type="checkbox"/> Video Event	?	?

2. Click the Inactive tab to open it.

All currently inactive event icons in Master Calendar are displayed on this tab.

Figure 3-103: Manage Event Icons page, Inactive tab

A screenshot of the "Manage Event Icons" page with the "Inactive" tab selected. The interface is identical to Figure 3-101, showing the "Event Icons" table with the same four rows. The "Accepted Entry" row is highlighted with a red border.

Event Icons		
	Large Icon	Small Icon
<input type="checkbox"/> Accepted Entry	●	●
<input type="checkbox"/> Skype Available	S	S
<input type="checkbox"/> Video Event	?	?

Configuring Optional Information

3. Select the event icon that you are activating.
4. Under Actions, click Edit.

The Add Event Icon page opens. The Details tab is the opened tab. The Active option is not selected.

Figure 3-104: Add Event Icon page, Details tab

The screenshot shows the 'Add Event Icon' page with the 'Details' tab selected. At the top, there's a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar, there are two tabs: 'Details' (which is active) and 'History'. The main content area contains the following fields:

- Title:** Video Event
- Large Icon:** LargeVideoEventIndicator.png (with a remove link)
- Small Icon:** Add Small Icon
- Show icon on tooltip:**
- Show icon on calendar (Requires a small icon):**
- Active:**

At the bottom of the form are two buttons: 'Save' and 'Cancel'.

5. Select Active.
6. Click Save.

The event icon is activated in Master Calendar and now is displayed on the Active tab of the Manage Event Icons page.

Figure 3-105: Manage Event Icons page, Active tab

The screenshot shows the 'Manage Event Icons' page with the 'Active' tab selected. At the top, there's a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar, there's an 'Actions' section with buttons for 'Add', 'Edit', and 'Delete'. There are also two tabs: 'Active' (which is active) and 'Inactive'. The main content area displays a table titled 'Event Icons' with the following data:

	Title	Large Icon	Small Icon
<input type="checkbox"/>	Accepted Entry	●	
<input type="checkbox"/>	Skype Available	S	
<input type="checkbox"/>	Video Event	■	

To inactivate an event icon

- Under the Admin Panel main menu option, point to Configuration, and then click Event Icons.

The Manage Event Icons page opens. The Active tab is the opened tab. All currently active event icons in Master Calendar are displayed on this tab.

Figure 3-106: Manage Event Icons page, Active tab

Event Icons			
	Title	Large Icon	Small Icon
<input type="checkbox"/>	Accepted Entry	●	
<input type="checkbox"/>	Skype Available	S	
<input type="checkbox"/>	Video Event	■	

- Select the event icon that you are inactivating.
- Under Actions, click Edit.

The Add Event Icon page opens. The Details tab is the opened tab. The Active option is selected.

Figure 3-107: Add Event Icon page, Details tab

Title:

Large Icon: [LargeVideoEventIndicator.png](#) [remove](#)

Small Icon: [Add Small Icon](#)

Show icon on tooltip
 Show icon on calendar (Requires a small icon)
 Active

Save **Cancel**

- Clear the Active option.

Configuring Optional Information

5. Click Save.

The event icon is inactivated in Master Calendar and now is displayed on the Inactive tab of the Manage Event Icons page.

Figure 3-108: Manage Event Icons page, Inactive tab

A screenshot of a web-based application interface titled "Manage Event Icons". The top navigation bar includes links for Admin, Calendar, Submit Event, My Account, and Help. Below the navigation is a toolbar with "Actions" (Add | Edit | Delete) and tabs for "Active" and "Inactive". The "Inactive" tab is selected. A table titled "Event Icons" lists items: "Video Event" with a large icon (a video camera) and a small icon (a video camera). The table has columns for a checkbox, Title (with a dropdown arrow), Large Icon, and Small Icon.

Event Icons			
	Title ^	Large Icon	Small Icon
<input type="checkbox"/>	Video Event		

To edit an event icon

For both active and inactive event icons, you can edit the name of the event icon, you can replace the icons, and you can specify if the icon is to be displayed on a tooltip or on the calendar event.

1. Under the Admin Panel main menu option, point to Configuration, and then click Event Icons.

The Manage Event Icons page opens. The Active tab is the opened tab. All currently active event icons in Master Calendar are displayed on this tab.

Figure 3-109: Manage Event Icons page, Active tab

A screenshot of the "Manage Event Icons" page with the "Active" tab selected. The interface is identical to Figure 3-108, but the table data shows three active icons: "Accepted Entry" (green circle icon), "Skype Available" (blue square icon with a white letter S), and "Video Event" (video camera icon). The "Large Icon" and "Small Icon" columns show the corresponding icons for each entry.

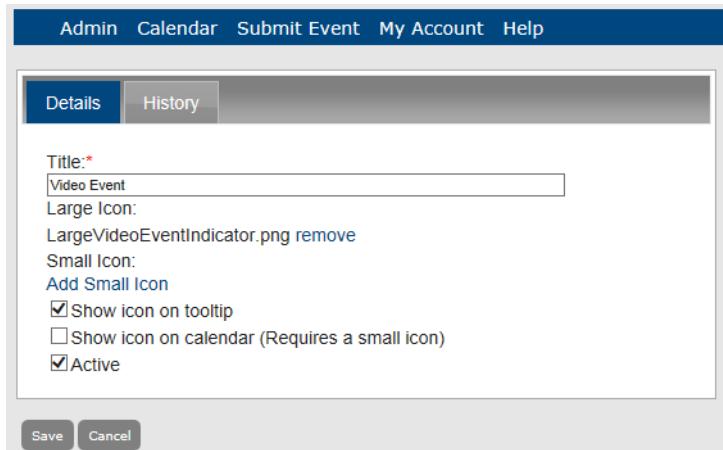
Event Icons			
	Title ^	Large Icon	Small Icon
<input type="checkbox"/>	Accepted Entry		
<input type="checkbox"/>	Skype Available		
<input type="checkbox"/>	Video Event		

2. If needed, open the Inactive tab.
3. Select the event icon that you are editing.

4. Under Actions, click Edit.

The Add Event Icon page opens. The Details tab is the opened tab.

Figure 3-110: Add Event Icon page, Details tab



5. Edit the event icon as needed:

- You can edit the title.
- You can click remove to remove the large icon and replace it with another. (See “[To add a large event icon](#)”.)
- You can click remove to remove the small icon and replace it another. (See “[To add a small event icon](#)”.)
- You can select or clear the Show icon on tooltip option and the Show icon on calendar option.

6. Click Save to save the edited event icon in Master Calendar.

To delete an event icon

You can delete an active or an inactive event icon. If you delete an active event icon, the event icon is deleted for all past and current event; however, the URL remains associated with the events. Going forward, the event icon in its entirety—icon and URL—is not available for use.

1. Under the Admin Panel main menu option, point to Configuration, and then click Event Icons.

The Manage Event Icons page opens. The Active tab is the opened tab. All currently active event icons in Master Calendar are displayed on this tab. See [Figure 3-111](#).

Configuring Optional Information

Figure 3-111: Manage Event Icons page, Active tab

The screenshot shows a web-based application interface titled "Manage Event Icons". At the top, there is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar is a toolbar labeled "Actions" with buttons for Add, Edit, and Delete. A tab bar at the top of the main content area has two tabs: "Active" (which is selected) and "Inactive". The main content area is titled "Event Icons" and contains a table with three columns: "Title", "Large Icon", and "Small Icon". The table lists four event icons:

Title	Large Icon	Small Icon
Accepted Entry	Green checkmark	
Skype Available	Skype icon	
Video Event	Video camera icon	

2. If needed, click the Inactive tab to open it.
3. Select the event icons that you are deleting.



To select all event icons on the currently opened page for deletion in a single step, select Title. If you have multiple pages of event icons to delete, you must repeat this entire process on each page.

4. Under Actions, click Delete.

A message opens asking you if you are sure that you want to delete all the selected event icons.

5. Click OK in the message.

A message opens indicating that all the selected event icons were successfully deleted.

6. Click OK in the message.

The Active tab or Inactive tab is updated to reflect the deletion of the event icons.

To view the history for an event icon

The history for an event icon consists of the original creation date of the event icon, the name of the user who created the event icon, the last date that the event icon was edited, and the name of the user who last edited the event icon. You can view the history for both active or inactive event icons.

1. Under the Admin Panel main menu option, point to Configuration, and then click Event Icons.

The Manage Event Icons page opens. The Active tab is the opened tab. All currently active event icons in Master Calendar are displayed on this tab. See [Figure 3-112](#).

Configuring Optional Information

Figure 3-112: Manage Event Icons page, Active tab

The screenshot shows a web-based application interface for managing event icons. At the top is a blue header bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the header is a toolbar with 'Actions' (Add | Edit | Delete) and tabs for 'Active' and 'Inactive'. The main area is titled 'Event Icons' and contains a table with three columns: 'Title', 'Large Icon', and 'Small Icon'. There are four rows in the table:

Title	Large Icon	Small Icon
Accepted Entry	Green circle icon	
Skype Available	Blue square icon with 'S'	
Video Event	Black square icon with a video camera symbol	

2. If needed, click the Inactive tab to open it.
3. Select the event icon for which you are viewing the history.
4. Under Actions, click Edit.

The Add Event Icon page opens. The Details tab is the opened tab.

Figure 3-113: Details tab

The screenshot shows the 'Details' tab of the Add Event Icon page. The title is 'Video Event'. The 'Large Icon' field contains a link to 'LargeVideoEventIndicator.png' with a 'remove' link next to it. The 'Small Icon' section includes a 'Add Small Icon' button, a checked checkbox for 'Show icon on tooltip', an unchecked checkbox for 'Show icon on calendar (Requires a small icon)', and a checked checkbox for 'Active'. At the bottom are 'Save' and 'Cancel' buttons.

5. Click the History tab to open it and view the history for the selected event icon.

Figure 3-114: Add Event Icon, History tab

The screenshot shows the 'History' tab of the Add Event Icon page. It displays the following information:
Created Date: 7/5/2013 2:47 PM
Created By: Technical Writer
Updated Date: 8/8/2013 10:19 AM
Updated By: Technical Writer
At the bottom are 'Save' and 'Cancel' buttons.

Managing Cultures

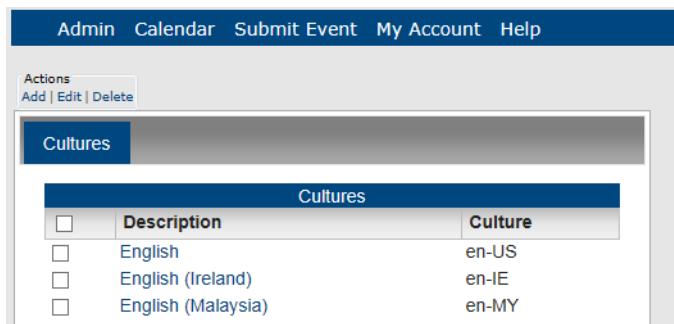
If you need to add language translation capability for your Master Calendar pages (menu text, menu options, field labels, and help text), then you must [configure](#) cultures. Each *culture* represents a foreign language for which you must provide translations in Master Calendar. You can also [edit](#) the description for a culture, and [delete](#) a culture.

To configure a culture

- Under the Admin Panel main menu option, point to Configuration, and then click Cultures.

The Manage Cultures page opens. All the cultures that have been selected for translation in Master Calendar are displayed on this page.

Figure 3-115: Manage Cultures page



The screenshot shows a web-based application interface titled 'Manage Cultures'. At the top, there is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar, there is a button labeled 'Actions' with options: Add | Edit | Delete. The main content area is titled 'Cultures' and contains a table with four rows of data:

	Description	Culture
<input type="checkbox"/>	English	en-US
<input type="checkbox"/>	English (Ireland)	en-IE
<input type="checkbox"/>	English (Malaysia)	en-MY

- Under Actions, click Add.

The Culture dialog box opens. The Details tab is the only tab on this dialog box. You use the options on this tab to name or describe the culture that you are configuring and to select the appropriate culture (the language into which the menu text, menu items, field labels, and help text will be translated). The default value is English (United States).

Figure 3-116: Culture dialog box, Details tab



The screenshot shows a modal dialog box titled 'Culture' with a tabbed interface. The 'Details' tab is selected. It contains two input fields: 'Description:' with a red asterisk (*) indicating it is required, and 'Culture:' with a dropdown menu showing 'English (United States)' as the selected option. At the bottom of the dialog box are two buttons: 'Cancel' and 'Save'.

3. In the Description field, enter a name or a phrase that best describes the culture that is being configured, for example, Spanish (Mexican) for the Spanish (Mexico) culture.
4. On the Cultures dropdown list, select the culture.
5. Click Save.

A message opens indicating that the culture was saved.

6. Click OK in the message.

The message closes and the newly configured culture is displayed on the Manage Cultures page.



After you configure a culture, you must manually enter the translations for menus (main menu text and options, including user-defined options) and help text. See “[To enter translations for menu text and options](#)” and “[To manage help text in Master Calendar](#)”. To enter translations for labels, you must contact support@emssoftware.com. Also, the guest’s or user’s Browser language must be set to the appropriate culture (language) to display these translations.

To edit a culture

You can edit only the description for a culture. If you selected the wrong culture for a culture description, then you must delete the culture, and add it again.

1. Under the Admin Panel main menu option, point to Configuration, and then click Cultures.

The Manage Cultures page opens. All the cultures that have been selected for translation in Master Calendar are displayed on this page.

Figure 3-117: Manage Cultures page

Cultures		
	Description	Culture
<input type="checkbox"/>	English	en-US
<input type="checkbox"/>	English (Ireland)	en-IE
<input type="checkbox"/>	English (Malaysia)	en-MY

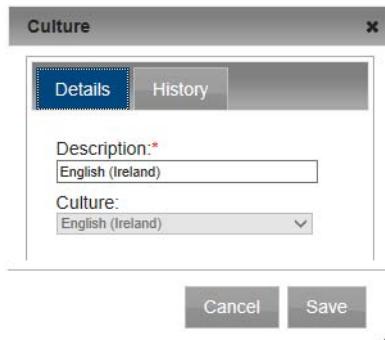
2. Select the culture that you are editing.

Configuring Optional Information

3. Under Actions, click Edit.

The Culture dialog box opens. The Details tab is the opened tab. The tab lists the selected culture and its description. Only the description is editable.

Figure 3-118: Culture dialog box



4. Edit the description for the culture.

5. Click Save.

A message opens indicating that the culture was saved.

6. Click OK in the message.

The message closes and the newly edited culture is displayed on the Manage Cultures page.

To delete a culture

1. Under the Admin Panel main menu option, point to Configuration, and then click Cultures.

The Manage Cultures page opens. All the cultures that have been selected for translation in Master Calendar are displayed on this page.

Figure 3-119: Manage Cultures page

Cultures			
	Description	Culture	
<input type="checkbox"/>	English	en-US	
<input type="checkbox"/>	English (Ireland)	en-IE	
<input type="checkbox"/>	English (Malaysia)	en-MY	

2. Select the culture that you are deleting.



To select all cultures on the currently opened page for deletion in a single step, select Description. If you have multiple pages of cultures to delete, you must repeat this entire process on each page.

3. Under Actions, click Delete.

A message opens asking you if you are sure that you want to delete all the selected cultures.

4. Click OK in the message.

A message opens indicating that all the selected cultures were successfully deleted.

5. Click OK in the message.

The Manage Cultures page is updated to reflect the deletion of the cultures.

To view the history for a culture

The history for a culture consists of the original creation date, the name of the user who created the calendar, the last date that the calendar was edited, and the name of the user who last edited the calendar.

1. Under the Admin Panel main menu option, point to Configuration, and then click Cultures.

The Manage Cultures page opens. All the cultures that have been selected for translation in Master Calendar are displayed on this page.

Figure 3-120: Manage Cultures page

Cultures		
	Description	Culture
<input type="checkbox"/>	English	en-US
<input type="checkbox"/>	English (Ireland)	en-IE
<input type="checkbox"/>	English (Malaysia)	en-MY

2. Select the culture that you are editing.

Configuring Optional Information

3. Under Actions, click Edit.

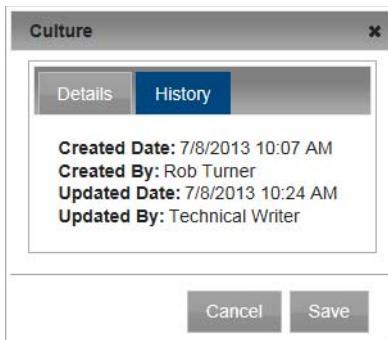
The Culture dialog box opens. The Details tab is the opened tab.

Figure 3-121: Culture dialog box



4. Click the History tab to open it and view the history for the selected culture.

Figure 3-122: History tab



Configuring Special Dates and Announcements

Managing special dates and announcements in Master Calendar consists of a variety of tasks, including adding, editing, and deleting special dates, adding, editing, and deleting announcements, importing and purging events, and deleting old data.

This chapter covers the following topics:

- “[Managing Special Dates](#)”
- “[Managing Announcements](#)”
- “[Importing Events into Master Calendar](#)”

Managing Special Dates

In Master Calendar, a *special date* is a date that has particular significance or importance to an organization. A special date draws attention to a day, rather than to an event that occurs on the day. For example, if you are managing calendars for a university campus, special dates typically include traditional holidays, first and last day of classes, and so on. A special date can be displayed on a single calendar or on multiple calendars. Special dates are highlighted with a gray circle in a List display and marked with a Star icon ★ in the date cell of a Calendar display. Managing special dates consists of [searching](#) for special dates, [adding](#) special dates, [editing](#) special dates, and [deleting](#) special dates. You can also [add](#) more dates to a recurring special date.

To search for a special date

Before you add a special date, you might want to carry out a search and confirm that the date has not already been added. You must also search for any special date that you want to modify or delete.

- Under the Admin Panel main menu option, point to Events & Special Dates, and then click Special Dates.

The Manage Special Dates page opens. The Start Date is set to the current day's date, but you can always change this.

Figure 4-1: Manage Special Dates page

The screenshot shows the 'Manage Special Dates' page with a navigation bar at the top. Below the navigation bar is a 'Filters' section containing fields for 'Start Date' (set to 8/8/2013 Thu), 'End Date', 'Keyword', and 'Calendars' (set to '(Multiple Selected)'). To the right of the filters is a 'Special Dates' table header with columns for 'Actions', 'Add | Delete', and 'Special Dates'. The table body is currently empty, displaying the message 'No filters currently selected.' At the bottom right of the page, there are links for 'Calendar Managers' and 'RSS Feeds', and a 'Powered by' logo for 'ems'.

- Enter the search criteria for the special date.

Option	Description
Start Date/End Date	Search for events that occur on or after the indicated start date, on or before the indicated end date, or within the specified date range. Leave these fields blank to search for all special dates in Master Calendar.
Keyword	The search string. The search is limited to the exact order of the characters in the string; however, the search string is not case-sensitive and the search string can be found anywhere in the search results. For example, the search string "mental" returns notifications that contain either Departmental or Mental Health Department. The keyword is found in the Special Date title.

Configuring Special Dates and Announcements

Option	Description
Calendars	A list of all active calendars in Master Calendar. By default, all calendars to which you have access are selected as the search criteria. You can click the Lookup icon to open a Calendars list and refine the list of calendars to search.

3. Click Search.

A list of all special dates that meets all your search criteria is displayed on the Special Dates page.

Figure 4-2: Special Dates search results

The screenshot shows a web-based application interface for managing special dates. At the top, there's a navigation bar with links for Admin, Calendar, Submit Event, My Account, and Help. To the right of the navigation is a welcome message: "Welcome: Technical Writer". Below the navigation is a "Filters" section containing fields for Start Date (set to 8/8/2013 Thu), End Date, Keyword, and Calendars (set to "(Multiple Selected)". There's also a "Search" button. To the right of the filters is a table titled "Special Dates". The table has columns: First Event, Last Event, Title, Notes, and Calendar. It lists various events such as Chemistry Recitation, First Day of Classes, Fall 2013, Beaver Creek USPCC Stage, USA Pro Cycling Challenge Vail Time Trial, Senior Chemistry Major Project, Senior Chemistry Major Project, Labor Day, OU Texas Football Weekend, and Fall Frenzy Friday. Each event entry includes a brief description and its associated calendar category. At the bottom of the table, there are navigation buttons for back, forward, and page selection.

To add a special date



Rather than creating new special dates, if you are an EMS customer, then you can use the Data Sources function in Master Calendar to import your special dates from your EMS application into Master Calendar. See “[Managing Data Sources](#)”.

1. Under the Admin Panel main menu option, point to Events & Special Dates, and then click Special Dates.

The Manage Special Dates page opens. The Start Date is set to the current day’s date, but you can always change this.

Figure 4-3: Manage Special Dates page

The screenshot shows the "Manage Special Dates" page. At the top, there's a navigation bar with links for Admin, Calendar, Submit Event, My Account, Help, and a user welcome message: "Welcome: Technical Writer". Below the navigation is a "Filters" section with fields for Start Date (8/8/2013 Thu), End Date, Keyword, and Calendars (set to "(Multiple Selected)". There's also a "Search" button. To the right of the filters is a table titled "Special Dates". The table has columns: Start Date, End Date, Title, Notes, and Calendar. It lists various events such as Chemistry Recitation, First Day of Classes, Fall 2013, Beaver Creek USPCC Stage, USA Pro Cycling Challenge Vail Time Trial, Senior Chemistry Major Project, Senior Chemistry Major Project, Labor Day, OU Texas Football Weekend, and Fall Frenzy Friday. Each event entry includes a brief description and its associated calendar category. At the bottom of the table, there are navigation buttons for back, forward, and page selection. A note above the table states "No filters currently selected." and links to "Calendar Managers" and "RSS Feeds".

Configuring Special Dates and Announcements

- Under Actions, click Add.

The Add Special Dates page opens. You use this page to add the information for the special date.

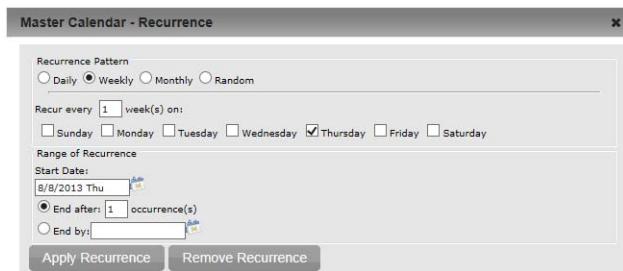
Figure 4-4: Add Special Dates page

The screenshot shows the 'Add Special Dates' page. At the top is a navigation bar with links for Admin, Calendar, Submit Event, My Account, and Help. Below this is a 'General Info' section containing fields for Title, Calendars (with a dropdown menu and a lookup icon), and Notes. Under the 'Dates' section, there is a 'Start Date' field set to 8/8/2013 Thu, a 'Recurrence' button, and buttons for 'Add' and 'Cancel'.

- Add the information for the special date.

Field	Description
Title	The title or name of the special date.
Calendars	A list of all active calendars to which you have access as a Calendar Manager. Click the Lookup icon to open the Calendars dialog box and select the calendars to which you are adding the special date.
Notes	Any special information that you want associated with the special date. Notes are displayed next to the special date title on calendar lists and in calendar date cells.
Dates	<p>The date for the special date. The date can be a one-time date, or the date can be recurring. If the date is recurring, click Recurrence to open the Recurrence dialog box and specify the information for the recurring date.</p> <p>Note: Make sure to click Apply Recurrence in this dialog box after you have completed the recurrence information.</p>

Figure 4-5: Recurrence dialog box



Configuring Special Dates and Announcements

4. Click Add.

The Special Date Summary page opens. The page now has three tabs (All, Current, and Historical) and a Special Date Details section. The All tab is the opened tab. The Special Date Details sections shows the Event ID, title, and font color for the newly added special date.

- The All tab shows all occurrences of the special date that you just added. (The information that is displayed on this tab is the combined information from the Current tab and the Historical tab.)
- The Current tab shows the recurring dates for the special date that you just added going forward from the current day's date.
- The Historical tab shows the recurring dates for the special date that you just added that have already posted.

Figure 4-6: *Special Date Summary page, All tab*

Special Dates				
Actions	Event Date	Title	Notes	Calendar
	11/20/2013 Wed	Thanksgiving 1/2 Day Break		Campus Activities

To edit a special date

You can edit a one time special date, a recurring special date, or a single instance of a recurring special date. To [edit](#) the title and calendars for a special date, you must use the Edit Special Date option. To [edit](#) the title, notes, and the date itself, you must use the Edit icon.

To edit the title and calendar for a special date

1. Under the Admin Panel main menu option, point to Events & Special Dates, and then click Special Dates.

The Manage Special Dates page opens.

Figure 4-7: *Manage Special Dates page*

Filters

Start Date: 8/8/2013 Thu End Date:
Keyword:
Calendars: * (Multiple Selected)

No filters currently selected.

Special Dates

Calendar Managers | RSS Feeds

Powered by

Configuring Special Dates and Announcements

2. Search for the special date. See “[To search for a special date](#)”.
3. Click on the title of the special date that you are editing.

The Special Date Summary page opens. The page now has three tabs (All, Current, and Historical) and a Details section. The All tab is the opened tab.

Figure 4-8: Special Date Summary page, All tab

The screenshot shows a web-based application interface for managing special dates. At the top, there's a navigation bar with links for Admin, Calendar, Submit Event, My Account, and Help. To the right of the Admin link, it says "Welcome: Technical Write". Below the navigation is a "Special Date Details" section with fields for Special Event Id (114), Title (Thanksgiving 1/2 Day Break), and Font Color (#000000). There are also "Edit Special Date" and "Add Special Date" links. Below this is a tabbed section with "All" (selected), "Current", and "Historical" tabs. Underneath is a table titled "Special Dates" with columns for Actions, Event Date, Title, Notes, and Calendar. A single row is shown: Actions (trash/recycle bin icons), Event Date (11/20/2013 Wed), Title (Thanksgiving 1/2 Day Break), Notes (empty), and Calendar (Campus Activities).

4. If needed, click the Current or Historical tab to open it.
5. Click Edit Special Date.

The Edit Special Date page opens.

Figure 4-9: Edit Special Date page (from Edit Special Date option)

The screenshot shows the "Edit Special Date" page. At the top is a navigation bar with Admin, Calendar, Submit Event, My Account, and Help. Below is a "General Info" section with fields for Title (Thanksgiving 1/2 Day Break) and Calendars (Campus Activities). There is also a dropdown menu and a search icon. At the bottom are "Save" and "Cancel" buttons.

6. Edit the title and/or the calendars or any combination of this information for the special date as needed.

Field	Description
Title	The title or name of the special date.
Calendars	A list of all active calendars to which you have access as Calendar Manager. Click the Lookup icon to open the Calendars dialog box and select the calendars to which you are adding the special date.

7. Click Save to save the edited special date in Master Calendar.
8. To return to the Manage Special Dates page, click Back to Manage Special Dates.

Configuring Special Dates and Announcements

To edit the title, notes, and date for a special date

- Under the Admin Panel main menu option, point to Events & Special Dates, and then click Special Dates.

The Manage Special Dates page opens.

Figure 4-10: Manage Special Dates page

This screenshot shows the 'Manage Special Dates' page. At the top, there's a navigation bar with links for Admin, Calendar, Submit Event, My Account, and Help. Below the navigation is a 'Filters' section with fields for Start Date (8/8/2013 Thu), End Date, Keyword, and Calendars (Multiple Selected). To the right of the filters is an 'Actions' section with 'Add | Delete' buttons. A message below the filters says 'No filters currently selected.' On the far right, there are links for 'Calendar Managers | RSS Feeds' and a 'Powered by' logo for 'ems'. The main content area is titled 'Special Dates'.

- Search for the special date. See “[To search for a special date](#)”.

- Click on the title of the special date that you are editing.

The Special Date Summary page opens. The page now has three tabs (All, Current, and Historical) and a Details section. The All tab is the opened tab.

Figure 4-11: Special Date Summary page, All tab

This screenshot shows the 'Special Date Summary' page with the 'All' tab selected. At the top, there's a navigation bar with links for Admin, Calendar, Submit Event, My Account, Help, and a welcome message for 'Technical Write'. Below the navigation is a 'Special Date Details' section showing a Special Event Id of 114, a Title of 'Thanksgiving 1/2 Day Break', and a Font Color of #000000. To the right of the details are 'Edit Special Date' and 'Add Special Date' buttons. Below the details is a tab bar with 'All', 'Current', and 'Historical' tabs. The 'All' tab is selected. Underneath the tabs is a table titled 'Special Dates' with columns for Actions, Event Date, Title, Notes, and Calendar. One row is visible, showing an event for 11/20/2013 Wed titled 'Thanksgiving 1/2 Day Break' with notes about 'Campus Activities'.

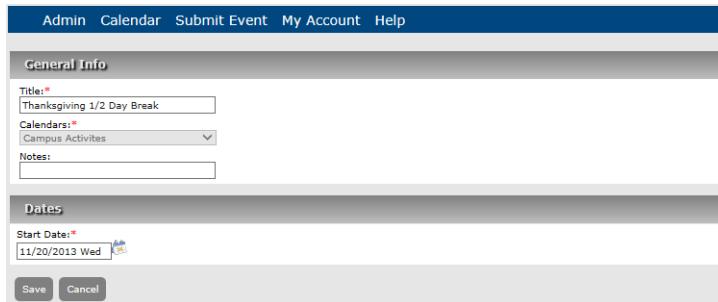
- If needed, open the Current tab or the Historical tab.

Configuring Special Dates and Announcements

5. Click the Edit icon  next to the special date that you are editing.

The Edit Special Date page opens.

Figure 4-12: *Edit Special Date page (from the Edit icon)*



The screenshot shows the 'Edit Special Date' page. At the top is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation is a 'General Info' section containing fields for Title (set to 'Thanksgiving 1/2 Day Break'), Calendars (set to 'Campus Activities'), and Notes. Under the 'Dates' section, the Start Date is set to '11/20/2013 Wed'. At the bottom are 'Save' and 'Cancel' buttons.

6. Edit the title, notes, date, or any combination of this information for the special date as needed.

Field	Description
Title	The title or name of the special date.
Notes	Any special information that you want associated with the special date. Notes can be displayed next to the special date title on calendar lists and in calendar date cells.
Start Date	The start date for the special date.

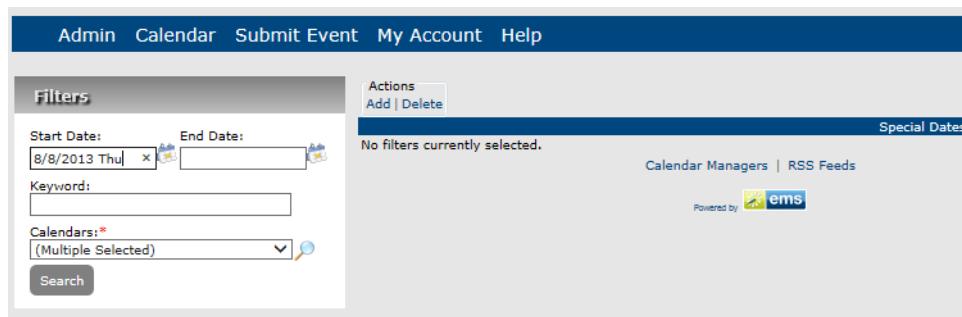
7. Click Save to save the edited occurrence of the special date in Master Calendar.
8. To return to the Manage Special Dates page, click Back to Manage Special Dates.

To add more dates to a special date

1. Under the Admin Panel main menu option, point to Events & Special Dates, and then click Special Dates.

The Manage Special Dates page opens.

Figure 4-13: *Manage Special Dates page*



The screenshot shows the 'Manage Special Dates' page. At the top is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation is a 'Filters' section with fields for Start Date (8/8/2013 Thu), End Date, Keyword, and Calendars (set to '(Multiple Selected)'). To the right of the filters is an 'Actions' section with 'Add | Delete' buttons. A message states 'No filters currently selected.' Below the filters is a table titled 'Special Dates' with columns for Name, Start Date, End Date, and Actions. The table is currently empty. At the bottom are links for 'Calendar Managers' and 'RSS Feeds', and a note 'Powered by ems'.

Configuring Special Dates and Announcements

2. Search for the special date. See “[To search for a special date](#)”.
3. Click on the title of the special date that you are editing.

The Special Date Summary page opens. The page now has three tabs (All, Current, and Historical) and a Details section. The All tab is the opened tab.

Figure 4-14: Special Date Summary page, All tab

The screenshot shows a web-based application interface for managing special dates. At the top, there's a navigation bar with links for Admin, Calendar, Submit Event, My Account, and Help. To the right of the navigation is a welcome message: "Welcome: Technical Writer". Below the navigation is a "Special Date Details" section containing fields for Special Event Id (114), Title (Thanksgiving 1/2 Day Break), and Font Color (#000000). On the right side of this section are links for "Edit Special Date" and "Add Special Dates". Below this is a tabbed menu with "All" (which is selected and highlighted in blue), "Current", and "Historical". Underneath the tabs is a table titled "Special Dates" with columns for Actions, Event Date, Title, Notes, and Calendar. One row is visible, showing an edit icon, the date 11/20/2013 Wed, the title Thanksgiving 1/2 Day Break, and the calendar entry Campus Activities.

4. If needed, open the Current tab or the Historical tab.
5. Click Add Special Dates.

The Add Special Date page opens.

Figure 4-15: Add Special Date page

The screenshot shows the "Add Special Date" form. At the top is a navigation bar with Admin, Calendar, Submit Event, My Account, and Help. Below it is a "General Info" section with fields for Title (Thanksgiving 1/2 Day Break), Calendars (Campus Activities), and Notes. Underneath is a "Dates" section with a Start Date field set to 11/20/2013 Wed. At the bottom are Save and Cancel buttons.

6. Select the new date that is to be added to the existing special date.



Depending on the date that you add, the new date is displayed on either the Current tab or the Historical tab. It is always displayed on the All tab.

7. Optionally, edit the title, the notes, or both as needed for the new dates.

Field	Description
Title	The title or name of the special date.
Dates	The date for the special date.

8. Click Save to save the edited occurrence of the special date in Master Calendar.
9. To return to the Manage Special Dates page, click Back to Manage Special Dates.

To delete a special date

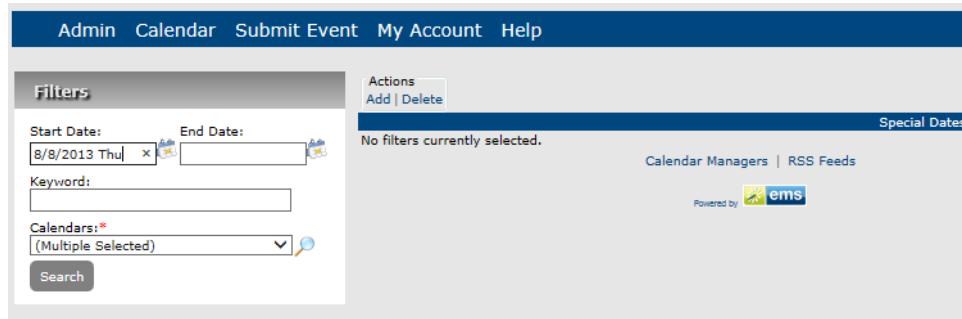
You can [delete](#) a one time special date, or you can delete all instances of a recurring special date in a single step. You can also [delete](#) a single instance of a recurring special date.

To delete a one time special date or a recurring special date (series)

- Under the Admin Panel main menu option, point to Events & Special Dates, and then click Special Dates.

The Manage Special Dates page opens.

Figure 4-16: Manage Special Dates page



- Search for the special date. See "[To search for a special date](#)".
- Select the special dates that you are deleting.



To select all special dates on the currently opened page for deletion in a single step, select First Event. If you have multiple pages of special dates to delete, you must repeat this entire process on each page.

- Under Actions, click Delete.

A message opens asking you if you are sure that you want to delete all selected dates.

- Click OK in the message.

A message opens indicating that all selected dates were deleted.

- Click OK in the message.

The special dates are deleted and the Manage Special Dates page is updated to show the remaining, if any, special dates.

- To return to the Manage Special Dates page, click Back to Manage Special Dates.

Configuring Special Dates and Announcements

To delete a single instance of a recurring special date

- Under the Admin Panel main menu option, point to Events & Special Dates, and then click Special Dates.

The Manage Special Dates page opens.

Figure 4-17: Manage Special Dates page

This screenshot shows the 'Manage Special Dates' page. At the top, there's a navigation bar with links for Admin, Calendar, Submit Event, My Account, and Help. Below the navigation is a 'Filters' section with fields for Start Date (8/8/2013 Thu), End Date, Keyword, and Calendars (Multiple Selected). There are also 'Actions' buttons for Add and Delete, and a note stating 'No filters currently selected.' On the right side, there's a 'Special Dates' section with links for Calendar Managers and RSS Feeds, and a 'Powered by' logo for ems.

- Search for the special date. See “[To search for a special date](#)”.
- Click on the title of the recurring special date for which you are deleting dates.

The Special Date Summary page opens. The All tab is the opened tab.

Figure 4-18: Special Date Summary page, All tab

This screenshot shows the 'Special Date Summary' page. The top navigation bar is identical to Figure 4-17. Below it, the 'Special Date Details' section shows a Special Event Id of 114, a Title of Thanksgiving 1/2 Day Break, and a Font Color of #000000. Below this is a tab navigation bar with 'All' (selected), 'Current', and 'Historical'. A table titled 'Special Dates' lists one instance: an event with an ID of 114, an Event Date of 11/20/2013 Wednesday, and a Title of Thanksgiving 1/2 Day Break. The table includes columns for Actions, Event Date, Title, and Notes.

- If needed, open the Current tab or the Historical tab.
- Click the Delete icon next to the single instance of the recurring date that you are deleting.

A message opens asking you if you are sure that you want to delete the selected date.

- Click OK in the message.

The selected date is deleted and no longer is displayed on its corresponding tab (All, Current, or Historical).

- Click Save to save the deletion of the date instance in Master Calendar.
- To return to the Manage Special Dates page, click Back to Manage Special Dates.

Managing Announcements

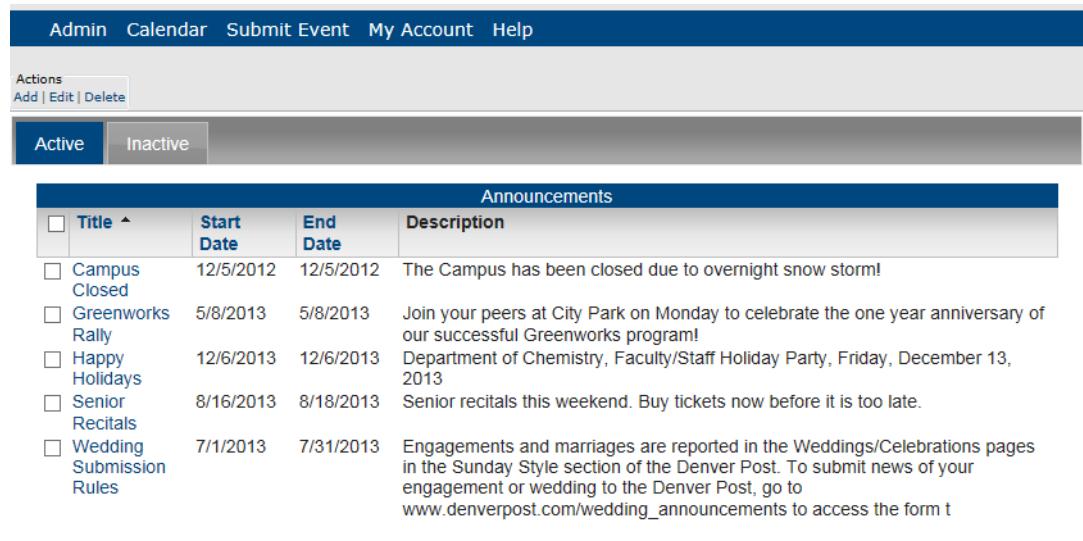
An *announcement* in Master Calendar is a message that is broadcast across the top of the Master Calendar Home page. You might want to use an announcement to call special attention to an event or events on a calendar. For example, if you are managing calendars for a university campus, and one of the calenders is used for invited speaker events, you might want to have an announcement at the top of the Home page that emphasizes when a particularly prominent speaker will be on campus. When you configure an announcement, you can indicate if the announcement is to be displayed as an *alert*. An alert is an announcement that is marked with a special Alert icon  to emphasize the importance or criticality of the announcement. Managing announcements consists of [adding](#) announcements, [activating](#) and [inactivating](#) announcements, [editing](#) announcements, and [deleting](#) announcements. You can also [view](#) the history for an announcement.

To add an announcement

- Under the Admin Panel main menu option, point to Events & Special Dates, and then click Announcements.

The Manage Announcements page opens. The Active tab is the opened tab. All currently active announcements in Master Calendar are displayed on this tab.

Figure 4-19: Manage Announcements page, Active tab



Announcements				
<input type="checkbox"/>	Title	Start Date	End Date	Description
<input type="checkbox"/>	Campus Closed	12/5/2012	12/5/2012	The Campus has been closed due to overnight snow storm!
<input type="checkbox"/>	Greenworks Rally	5/8/2013	5/8/2013	Join your peers at City Park on Monday to celebrate the one year anniversary of our successful Greenworks program!
<input type="checkbox"/>	Happy Holidays	12/6/2013	12/6/2013	Department of Chemistry, Faculty/Staff Holiday Party, Friday, December 13, 2013
<input type="checkbox"/>	Senior Recitals	8/16/2013	8/18/2013	Senior recitals this weekend. Buy tickets now before it is too late.
<input type="checkbox"/>	Wedding Submission Rules	7/1/2013	7/31/2013	Engagements and marriages are reported in the Weddings/Celebrations pages in the Sunday Style section of the Denver Post. To submit news of your engagement or wedding to the Denver Post, go to www.denverpost.com/wedding_announcements to access the form t

Configuring Special Dates and Announcements

2. Under Actions, click Add.

The Add Announcement page opens. The Details tab is the only tab on this page. You use the options on this tab to add the information for the new announcement.

Figure 4-20: Add Announcement page, Details tab

The screenshot shows a web-based application interface for adding an announcement. At the top, there is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar, a tab labeled 'Details' is selected. The main content area contains several input fields:

- Title:** A text input field with a red asterisk indicating it is required.
- Description:** A large text area for entering a detailed description of the event.
- Start Date:** A date input field with a calendar icon.
- End Date:** A date input field with a calendar icon.
- Display as Alert:** A checkbox labeled "Display as Alert".

At the bottom of the form are two buttons: 'Save' and 'Cancel'.

3. Add the information for the announcement.

Field	Description
Title	The title or name of the announcement.
Description	A description of the event.
Start Date/End Date	The first date that you want the announcement to be displayed at the top of the Master Calendar Home page and the last date that you want the announcement to be displayed at the top of the Master Calendar Home page.
Display as Alert	Select this option if the announcement is to be displayed as an alert at the top of the Master Calendar Home page.

4. Click Save.

The announcement is added to Master Calendar as an *active* announcement.

To activate an announcement

- Under the Admin Panel main menu option, point to Events & Special Dates, and then click Announcements.

The Manage Announcements page opens. The Active tab is the opened tab. All currently active announcements in Master Calendar are displayed on this tab.

Figure 4-21: Manage Announcements page, Active tab

Announcements			
<input type="checkbox"/> Title ^	Start Date	End Date	Description
<input type="checkbox"/> Campus Closed	12/5/2012	12/5/2012	The Campus has been closed due to overnight snow storm!
<input type="checkbox"/> Greenworks Rally	5/8/2013	5/8/2013	Join your peers at City Park on Monday to celebrate the one year anniversary of our successful Greenworks program!
<input type="checkbox"/> Happy Holidays	12/6/2013	12/6/2013	Department of Chemistry, Faculty/Staff Holiday Party, Friday, December 13, 2013
<input type="checkbox"/> Senior Recitals	8/16/2013	8/18/2013	Senior recitals this weekend. Buy tickets now before it is too late.
<input type="checkbox"/> Wedding Submission Rules	7/1/2013	7/31/2013	Engagements and marriages are reported in the Weddings/Celebrations pages in the Sunday Style section of the Denver Post. To submit news of your engagement or wedding to the Denver Post, go to www.denverpost.com/wedding_announcements to access the form t

- Click the Inactive tab to open it.

All currently inactive announcements in Master Calendar are displayed on this tab.

Figure 4-22: Manage Announcements page, Inactive tab

Announcements			
<input type="checkbox"/> Title ^	Start Date	End Date	Description
<input type="checkbox"/> Class Registration	6/26/2013	8/31/2013	Don't forget class registration for the term starts on the 15th.
<input type="checkbox"/> Green Country Soccer Association Spring Sign Up	2/3/2014	7/25/2014	The 30th Annual Green Country Soccer Association sign up for Spring, 2014.
<input type="checkbox"/> Tour De France Watch Party	6/29/2013	7/31/2013	The 17th Annual Team Pump Friction Tour De France Party, nightly 6 to 9 pm. Downtown Breckinridge Brewery, 6-9 pm, Sunday, July 29th through Sunday, July 20th.

- Select the announcement that you are activating.

Configuring Special Dates and Announcements

4. Under Actions, click Edit.

The Add Announcement page open. The Details tab is the opened tab. The tab shows the title, description, and start and end dates for the announcement. The Active option is not selected.

Figure 4-23: Add Announcement page, Details tab, Inactive announcement

Admin Calendar Submit Event My Account Help

Details History

Title: *
Green Country Soccer Association Spring

Description:
The 30th Annual Green Country Soccer Association sign up for Spring, 2014.

Start Date: *
2/3/2014 Mon

End Date: *
7/25/2014 Fri

Display as Alert
 Active

Save Cancel

5. Select Active.

6. Click Save.

The announcement is activated and is displayed on the Active tab on the Manage Announcements page.

Figure 4-24: Manage Announcements page, Active tab

Admin Calendar Submit Event My Account Help

Actions
Add | Edit | Delete

Active Inactive

Announcements				
<input type="checkbox"/>	Title	Start Date	End Date	
<input type="checkbox"/>	Campus Closed	12/5/2012	12/5/2012	The Campus has been closed due to overnight snow storm!
<input checked="" type="checkbox"/>	Green Country Soccer Association	2/3/2014	7/25/2014	The 30th Annual Green Country Soccer Association sign up for Spring, 2014.
<input type="checkbox"/>	Spring Sign Up			
<input type="checkbox"/>	Greenworks Rally	5/8/2013	5/8/2013	Join your peers at City Park on Monday to celebrate the one year anniversary of our successful Greenworks program!
<input type="checkbox"/>	Happy Holidays	12/6/2013	12/6/2013	Department of Chemistry, Faculty/Staff Holiday Party, Friday, December 13, 2013
<input type="checkbox"/>	Senior Recitals	8/16/2013	8/18/2013	Senior recitals this weekend. Buy tickets now before it is too late.
<input type="checkbox"/>	Wedding Submission Rules	7/1/2013	7/31/2013	Engagements and marriages are reported in the Weddings/Celebrations pages in the Sunday Style section of the Denver Post. To submit news of your engagement or wedding to the Denver Post, go to www.denverpost.com/wedding . announcements to access the form t

To inactivate an announcement

- Under the Admin Panel main menu option, point to Events & Special Dates, and then click Announcements.

The Manage Announcements page opens. The Active tab is the opened tab. All currently active announcements in Master Calendar are displayed on this tab.

Figure 4-25: Manage Announcements page, Active tab

Announcements			
<input type="checkbox"/> Title ^	Start Date	End Date	Description
<input type="checkbox"/> Campus Closed	12/5/2012	12/5/2012	The Campus has been closed due to overnight snow storm!
<input type="checkbox"/> Green Country Soccer Association Spring Sign Up	2/3/2014	7/25/2014	The 30th Annual Green Country Soccer Association sign up for Spring, 2014.
<input type="checkbox"/> Greenworks Rally	5/8/2013	5/8/2013	Join your peers at City Park on Monday to celebrate the one year anniversary of our successful Greenworks program!
<input type="checkbox"/> Happy Holidays	12/6/2013	12/6/2013	Department of Chemistry, Faculty/Staff Holiday Party, Friday, December 13, 2013
<input type="checkbox"/> Senior Recitals	8/16/2013	8/18/2013	Senior recitals this weekend. Buy tickets now before it is too late.
<input type="checkbox"/> Wedding Submission Rules	7/1/2013	7/31/2013	Engagements and marriages are reported in the Weddings/Celebrations pages in the Sunday Style section of the Denver Post. To submit news of your engagement or wedding to the Denver Post, go to www.denverpost.com/wedding_announcements to access the form t

- Select the announcement that you are inactivating.
- Under Actions, click Edit.

The Add Manage Announcements page opens. The Details tab is the opened tab.

Figure 4-26: Add Announcement page, Details tab, Active announcement

Title:*
Green Country Soccer Association Spring

Description:
The 30th Annual Green Country Soccer Association sign up for Spring, 2014.

Start Date:*
2/3/2014 Mon

End Date:*
7/25/2014 Fri

Display as Alert
 Active

Configuring Special Dates and Announcements

4. Clear the Active option.
5. Click Save.

The announcement is inactivated and is displayed on the Inactive tab on the Manage Announcements page. The announcement is also removed the Master Calendar Home page.

Figure 4-27: Manage Announcements page, Inactive tab

Announcements				
<input type="checkbox"/>	Title	Start Date	End Date	Description
<input type="checkbox"/>	Class Registration	6/26/2013	8/31/2013	Don't forget class registration for the term starts on the 15th
<input type="checkbox"/>	Green Country Soccer Association Spring Sign Up	2/3/2014	7/25/2014	The 30th Annual Green Country Soccer Association sign up for Spring, 2014.
<input type="checkbox"/>	Tour De France Watch Party	6/29/2013	7/31/2013	The 17th Annual Team Pump Friction Tour De France Watch Party, nightly 6 to 9 pm. Downtown Breckinridge Brewery, 6-9 pm, Sunday, July 29th through Sunday, July 20th.

To edit the information for an announcement

You can edit the title, description, or the start and end dates, or any combination of this information for an announcement. You can edit this information for both active and inactive announcements.

1. Under the Admin Panel main menu option, point to Events & Special Dates, and then click Announcements.

The Manage Announcements page opens. The Active tab is the opened tab. All currently active announcements in Master Calendar are displayed on this tab.

Figure 4-28: Manage Announcements page, Active tab

Announcements				
<input type="checkbox"/>	Title	Start Date	End Date	Description
<input type="checkbox"/>	Campus Closed	12/5/2012	12/5/2012	The Campus has been closed due to overnight snow storm!
<input type="checkbox"/>	Greenworks Rally	5/8/2013	5/8/2013	Join your peers at City Park on Monday to celebrate the one year anniversary of our successful Greenworks program!
<input type="checkbox"/>	Happy Holidays	12/6/2013	12/6/2013	Department of Chemistry, Faculty/Staff Holiday Party, Friday, December 13, 2013
<input type="checkbox"/>	Senior Recitals	8/16/2013	8/18/2013	Senior recitals this weekend. Buy tickets now before it is too late.
<input type="checkbox"/>	Weddings	7/4/2013	7/6/2013	Wedding and marriage are handled in the Weddings Administration section.

Configuring Special Dates and Announcements

2. If needed, click the Inactive tab to open it.
3. Select the announcement for which you are editing the information.
4. Under Actions, click Edit.

The Add Announcements page opens. The Details tab is the opened tab. The tab shows the title, description, and start and end dates for the announcement.

Figure 4-29: Add Announcement page, Details tab

The screenshot shows a web-based application interface for managing announcements. At the top, there is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar, there are two tabs: 'Details' (which is selected and highlighted in blue) and 'History'. The main content area contains the following fields:

- Title:**
- Description:**
- Start Date:** (with a calendar icon)
- End Date:** (with a calendar icon)
- Display as Alert
- Active

At the bottom of the form are two buttons: 'Save' and 'Cancel'.

5. Edit the title, description, or the start and end dates, or any combination of this information for the announcement as needed.
6. Click Save to save the edited announcement in Master Calendar.

To delete an announcement

You can delete both active and inactive announcements.

1. Under the Admin Panel main menu option, point to Events & Special Dates, and then click Announcements.

The Manage Announcements page opens. The Active tab is the opened tab. All currently active announcements in Master Calendar are displayed on this tab. See [Figure 4-30](#).

Configuring Special Dates and Announcements

Figure 4-30: Manage Announcements page, Active tab

Announcements				
<input type="checkbox"/>	Title	Start Date	End Date	Description
<input type="checkbox"/>	Campus Closed	12/5/2012	12/5/2012	The Campus has been closed due to overnight snow storm!
<input type="checkbox"/>	Greenworks Rally	5/8/2013	5/8/2013	Join your peers at City Park on Monday to celebrate the one year anniversary of our successful Greenworks program!
<input type="checkbox"/>	Happy Holidays	12/6/2013	12/6/2013	Department of Chemistry, Faculty/Staff Holiday Party, Friday, December 13, 2013
<input type="checkbox"/>	Senior Recitals	8/16/2013	8/18/2013	Senior recitals this weekend. Buy tickets now before it is too late.
<input type="checkbox"/>	Wedding Submission Rules	7/1/2013	7/31/2013	Engagements and marriages are reported in the Weddings/Celebrations pages in the Sunday Style section of the Denver Post. To submit news of your engagement or wedding to the Denver Post, go to www.denverpost.com/wedding_announcements to access the form

2. If needed, click the Inactive tab to open it.
3. Select the announcement that you are deleting.



To select all announcements on the currently opened page for deletion in a single step, select Title. If you have multiple pages of announcements to delete, you must repeat this entire process on each page.

4. Under Actions, click Delete.
A message opens, asking you if you are sure that you want to delete all the selected announcements.
5. Click OK in the message.
A message opens indicating that all the selected announcements were successfully deleted.
6. Click OK in the message.
The Active tab or Inactive tab is updated to reflect the deletion of the announcements.

To view the history for an announcement

The history for an announcement consists of the original creation date of the announcement, the name of the user who created the announcement, the last date that the announcement was edited, and the name of the user who last edited the announcement. You can view the history for both active and inactive announcements.

- Under the Admin Panel main menu option, point to Events & Special Dates, and then click Announcements.

The Manage Announcements page opens. The Active tab is the opened tab. All currently active announcements in Master Calendar are displayed on this tab.

Figure 4-31: Manage Announcements page, Active tab

	Title	Start Date	End Date	Description
<input type="checkbox"/>	Campus Closed	12/5/2012	12/5/2012	The Campus has been closed due to overnight snow storm!
<input type="checkbox"/>	Greenworks Rally	5/8/2013	5/8/2013	Join your peers at City Park on Monday to celebrate the one year anniversary of our successful Greenworks program!
<input type="checkbox"/>	Happy Holidays	12/6/2013	12/6/2013	Department of Chemistry, Faculty/Staff Holiday Party, Friday, December 13, 2013
<input type="checkbox"/>	Senior Recitals	8/16/2013	8/18/2013	Senior recitals this weekend. Buy tickets now before it is too late.

- If needed, click the Inactive tab to open it.
- Select the announcement for which you are viewing the history.
- Under Actions, click Edit.

The Add Announcements page opens. The Details tab is the opened tab.

Figure 4-32: Add Announcement page, Details tab

Details History

Title:*
Green Country Soccer Association Spring

Description:
The 30th Annual Green Country Soccer Association sign up for Spring, 2014.

Start Date:*
2/3/2014 Mon

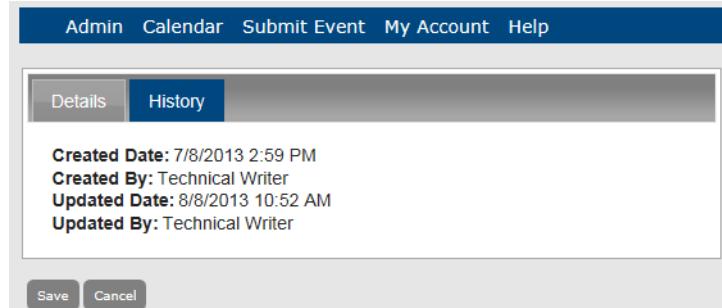
End Date:*
7/25/2014 Fri

Display as Alert
 Active

Configuring Special Dates and Announcements

5. Click the History tab to open it and view the history for the selected announcement.

Figure 4-33: Add Announcement page, History tab



Importing Events into Master Calendar

You use the Import Events function to import events into Master Calendar. The file that contains the events can be a tab-delimited file that has been created in another system such as Microsoft Excel or it can be an XML file. You can import a tab-delimited file or an XML file into Master Calendar only if it adheres to file specifications that EMS Software has defined for Master Calendar.



To obtain file specifications and view examples of allowed files, click the Import file specifications link on the Details tab of the Manage Imports page. To access this link, do one of the following:

- Under the Admin Panel main menu option, point to Event and Special Dates, click Import Events, and then click Add.
- Select an imported event, and then click Edit.

Managing imported events consists of [importing](#) an event, [editing](#) an imported event, [deleting](#) imported events, and [purging](#) imported events. You can also [view](#) the history for an imported event.

To import an event

1. Under the Admin Panel main menu option, point to Events & Special Dates, and then click Import Events.

The Manage Imports page opens. The Saved tab is the opened tab. All imported files that were saved in Master Calendar are displayed on this tab.

Figure 4-34: Manage Imports page, Saved tab

Imports		
<input type="checkbox"/>	Name	Filename
<input type="checkbox"/>	Event Import	MCINDIUM_EventImport.txt
<input type="checkbox"/>	Intramural Activities Import	MC_IntramuralActivitiesImport.txt
<input type="checkbox"/>	Law Event Import	MC_LawEventImport.txt
<input type="checkbox"/>	Test Indium Import Checked 1	MCINDIUM_EventImport.txt
<input type="checkbox"/>	Test Indium Import Checking	MCINDIUM_EventImport.txt

Configuring Special Dates and Announcements

2. Under Actions, click Add.

The Add Import page opens. The Details tab is the only tab on this page. You use the options on this tab to specify the calendar to which you are importing the external events and to select the file that you are importing.

Figure 4-35: Add Import page, Details tab

The screenshot shows a web-based application interface for importing files. At the top, there is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar is a modal window titled 'Details'. Inside the modal, there are several input fields and options:

- 'Description:' field with a placeholder text area.
- 'Calendars:' dropdown menu with a lookup icon.
- 'Import File:' file input field with a 'Browse...' button.
- 'File Type:' dropdown menu set to 'Tab Delimited File'.
- Checkboxes for 'Save Settings' and 'Purge all previous import files'.

At the bottom of the modal are two buttons: 'Import' and 'Cancel'.

3. Enter the information for the imported file.

Field	Description
Description	A description of the file or the information that you are importing.
Calendars	A list of all active calendars to which you have access as a Calendar Manager. Click the Lookup icon to open the Calendars dialog box and select the calendars to which the information is being imported.
Import File	Click Browse to open the Choose File dialog box to browse to and select the file that is to be imported.
File Type	Dropdown list from which you can select one of two options: <ul style="list-style-type: none">• Tab delimited file (the default value)• XML file
Save Settings	Optional. Select this value to save the imported file in Master Calendar.
Purge all previous import file	Optional. Select this value to purge all previously imported events that were saved in Master Calendar.

4. Click Import.

If the import is successful, the information for the import is displayed and if:

- You selected Save Settings, the import is displayed on the Save tab. An automated email from www.emssoftware.com is sent to the address that you used to log in to Master Calendar. The email is titled “Master Calendar File Import Process” and the message states that “The file for the import named < > was successfully imported.”
- You did *not* select Save settings, the import is displayed on the Unsaved tab. An automated email from www.emssoftware.com is sent to the address that you used to log in to Master Calendar. The email is titled “Master Calendar File Import Process” and the message states that “The file for the import named < > was successfully imported.”

Figure 4-36. Manage Imports page, Unsaved tab

Imports		
<input type="checkbox"/>	Name	Filename
		Last Upload Date
<input type="checkbox"/>	Basketball Schedule	MC_BasketballSchedule.txt 7/10/2013 9:24:22 AM
<input type="checkbox"/>	Football Events	MC_FootballSchedule.txt 7/10/2013 9:23:50 AM
<input type="checkbox"/>	Hockey Schedule	MC_HockeySchedule.txt 7/10/2013 9:24:48 AM
<input type="checkbox"/>	Test Indium Import Checked	MCINDIUM_EventImport.txt 7/12/2013 7:00:19 AM

Otherwise, a message is displayed at the top of the Manage Imports page indicating that the import was not successful and details the problems with the file that prevented the import from being successful. You must correct the problems that are indicated for the file and carry out the import process again.

Configuring Special Dates and Announcements

To edit an import file

You can edit an import file only if you saved the file in Master Calendar.

1. Under the Admin Panel main menu option, point to Events & Special Dates, and then click Import Events.

The Manage Imports page opens. The Saved tab is the opened tab. All imported files that were saved in Master Calendar are displayed on this tab.

Figure 4-37: Manage Imports page, Saved tab

A screenshot of the 'Manage Imports' page. At the top, there's a blue header bar with the navigation links: Admin, Calendar, Submit Event, My Account, and Help. Below the header is a toolbar with buttons for Actions (Add, Edit, Delete, Purge). Underneath is a tabs section with 'Saved' (which is selected and highlighted in blue) and 'Unsaved'. The main content area is titled 'Imports' and contains a table with four columns: Name, Filename, and Last Upload Date. There are four rows of data:

Name	Filename	Last Upload Date
Event Import	MCINDIUM_EventImport.txt	7/12/2013 6:59:36 AM
Intramural Activities Import	MC_IntramuralActivitiesImport.txt	7/10/2013 9:13:59 AM
Law Event Import	MC_LawEventImport.txt	7/10/2013 9:14:27 AM
Test Indium Import	MCINDIUM_EventImport.txt	7/12/2013

2. Under Actions, click Edit.

The Add Import page opens. The Details tab is the opened tab. You use the options on this tab to edit the information for the import including its description, the calendars to which you are importing the external events, the file that is to be used for the import, and the file type. You can also indicate whether you want to save this edited import and whether at the time that you are importing this file, you also want to purge all previously imported files that were saved in Master Calendar.

Figure 4-38: Add Import page, Details tab

A screenshot of the 'Add Import' page. At the top, there's a blue header bar with the navigation links: Admin, Calendar, Submit Event, My Account, and Help. Below the header is a tabs section with 'Details' (which is selected and highlighted in blue) and 'History'. The main form area has several input fields and dropdown menus:

- Description:
- Calendars: with a browse icon (blue eye)
- Import File: with a 'Browse...' button
- File Type:
- Checkboxes:
 - Save Settings
 - Purge all previous import files.

3. Click Import.

If the import is successful, the information for the import is displayed and if:

- You selected Save Settings, the import is displayed on the Save tab. An automated email from www.emssoftware.com is sent to the address that you used to log in to Master Calendar. The email is titled “Master Calendar File Import Process” and the message states that “The file for the import named < > was successfully imported.”
- You did *not* select Save settings, the import is displayed on the Unsaved tab. An automated email from www.emssoftware.com is sent to the address that you used to log in to Master Calendar. The email is titled “Master Calendar File Import Process” and the message states that “The file for the import named < > was successfully imported.”

Otherwise, a message is displayed at the top of the Manage Imports page indicating that the import was not successful and details the problems with the file that prevented the import from being successful. You must correct the problems that are indicated for the file and carry out the import process again.

To delete an imported event

You can delete both saved and unsaved import files in Master Calendar. When you delete a saved import file, you are deleting not only the import file, but also, all the events that were added to the calendars as a result of the import. When you delete an unsaved import file, you are not truly deleting a file. Instead, you are simply deleting all the events that were added to the calendars as a result of the import.

1. Under the Admin Panel main menu option, point to Events & Special Dates, and then click Import Events.

The Manage Imports page opens. The Saved tab is the opened tab. All imported files that were saved in Master Calendar are displayed on this tab.

Figure 4-39: Manage Imports page, Saved tab

Imports			
<input type="checkbox"/>	Name	Filename	Last Upload Date
<input type="checkbox"/>	Event Import	MCINDIUM_EventImport.txt	7/12/2013 6:59:36 AM
<input type="checkbox"/>	Intramural Activities Import	MC_IntramuralActivitiesImport.txt	7/10/2013 9:13:59 AM
<input type="checkbox"/>	Law Event Import	MC_LawEventImport.txt	7/10/2013 9:14:27 AM
<input type="checkbox"/>	Test Indium Import Checked 1	MCINDIUM_EventImport.txt	7/12/2013 7:09:00 AM
<input type="checkbox"/>	Test Indium Import Checking	MCINDIUM_EventImport.txt	7/12/2013 7:07:35 AM

Configuring Special Dates and Announcements

2. If needed, click the Unsaved tab to open it.
3. Select the import files that you are deleting.



To select all imports on the currently opened page for deletion in a single step, select Description. If you have multiple pages of imports to delete, you must repeat this entire process on each page.

4. Under Actions, click Delete.

A message opens, asking you if you are sure that you want to delete all the selected imports.

5. Click OK in the message.

A message opens indicating that all the selected imports were successfully deleted.

6. Click OK in the message.

The Active tab or Inactive tab is updated to reflect the deletion of the imports.

To purge an imported event

You can purge an import file only if you saved the file in Master Calendar.

1. Under the Admin Panel main menu option, point to Events & Special Dates, and then click Import Events.

The Manage Imports page opens. The Saved tab is the opened tab. All imported files that were saved in Master Calendar are displayed on this tab.

Figure 4-40: Manage Imports page, Saved tab

Imports		
	Name	Filename
	Last Upload Date	
<input type="checkbox"/>	Event Import	MCINDIUM_EventImport.txt
		7/12/2013 6:59:36 AM
<input type="checkbox"/>	Intramural Activities Import	MC_IntramuralActivitiesImport.txt
		7/10/2013 9:13:59 AM
<input type="checkbox"/>	Law Event Import	MC_LawEventImport.txt
		7/10/2013 9:14:27 AM
<input type="checkbox"/>	Test Indium Import Checked 1	MCINDIUM_EventImport.txt
		7/12/2013 7:09:00 AM
<input type="checkbox"/>	Test Indium Import Checking	MCINDIUM_EventImport.txt
		7/12/2013 7:07:35 AM

2. Select the import files that you are purging.



To select all saved import files on the currently opened page for purging in a single step, select Description. If you have multiple pages of saved import files to purge, you must repeat this entire process on each page.

3. Under Actions, click Purge.

A message opens, asking you if you are sure that you want to purge all the selected imports.

4. Click OK in the message.

A message opens indicating that all the selected imports were successfully purged.

5. Click OK in the message.

The Active tab is updated to reflect the purging of the imports.

To view the history for an import file

The history for an import consists of the original creation date of the import, the name of the user who created the import, the last date that the import was edited, and the name of the user who last edited the import. You can view the history only for *saved* imports.

1. Under the Admin Panel main menu option, point to Events & Special Dates, and then click Import Events.

The Manage Imports page opens. The Saved tab is the opened tab. All imported files that were saved in Master Calendar are displayed on this tab.

Figure 4-41: Manage Imports page, Saved tab

Imports		
	Name	Last Upload Date
<input type="checkbox"/>	Event Import	MCINDIUM_EventImport.txt 7/12/2013 6:59:36 AM
<input type="checkbox"/>	Intramural Activities Import	MC_IntramuralActivitiesImport.txt 7/10/2013 9:13:59 AM
<input type="checkbox"/>	Law Event Import	MC_LawEventImport.txt 7/10/2013 9:14:27 AM
<input type="checkbox"/>	Test Indium Import Checked 1	MCINDIUM_EventImport.txt 7/12/2013 7:09:00 AM
<input type="checkbox"/>	Test Indium Import Checking	MCINDIUM_EventImport.txt 7/12/2013 7:07:35 AM

2. Select the import file for which you are viewing the history.

Configuring Special Dates and Announcements

3. Under Actions, click Edit.

The Add Import page opens. The Details tab is the opened tab.

Figure 4-42: Add Import page, Details tab

The screenshot shows the 'Add Import' page with the 'Details' tab selected. The interface includes a top navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation is a toolbar with 'Import' and 'Cancel' buttons. The main form area contains the following fields:

- Description:
- Calendars: with a dropdown arrow and a help icon.
- Import File: with a 'Browse...' button.
- File Type: with a dropdown arrow.
- Checkboxes:
 - Save Settings
 - Purge all previous import files.

4. Click the History tab to open it and view the history for the selected import.

Figure 4-43: Add Import page, History tab

The screenshot shows the 'Add Import' page with the 'History' tab selected. The interface includes a top navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation is a toolbar with 'Import' and 'Cancel' buttons. The main form area displays historical information for the import:

Created Date: 7/10/2013 9:14 AM
Created By: Technical Writer
Updated Date: 7/10/2013 9:14 AM
Updated By: Technical Writer

Configuring Users and Templates

Managing users and templates in Master Calendar consists of a variety of activities, including searching for, adding, deleting, and adding user record, adding user templates and assigning permissions and users to the templates, and activating and inactivating user templates.

This chapter covers the following topics:

- “[Managing Users](#)”
- “[Managing User Templates](#)”

Managing Users

A *user* in Master Calendar is anyone who can log in to Master Calendar and who has a predefined level of access to specific calendars. For example, User A has requestor access to Calendar A, and view only access to Calendar B, User B has view only access to all calendars in Master Calendar, and so on. The user's record that you define specifies this level of access. Managing users in Master Calendar consists of [searching](#) for users, [adding](#) new users, [editing](#) user accounts, [activating](#) and [inactivating](#) users, and [deleting](#) inactive users. You can also [generate](#) a Users report and you can [view](#) the history for a user account.

To search for a user

When the Users page first opens, the Active tab is the opened tab. *All* currently active users in Master Calendar are displayed on this tab. You can refine this list of users before you carry out any work from either tab by searching for users that meet only specific criteria—User Name, Email, and if applicable, Template Name.

- Under the Admin Panel main menu option, point to Security, and then click Users.

The Users page opens. The Active tab is the opened tab. All currently active users in Master Calendar are displayed on this tab.

Figure 5-1: Users page, Active tab

Name	Email Address	Template Name
Noni Black	Noni@dea.com	Administrator
Peter Kubitz	Peter@dea.com	Administrator
Poornima	poornima.g@indiumsoft.com	Administrator
Rob Turner	Rob@dea.com	Administrator
Roman Peshkov	Roman@dea.com	Administrator
RPStandard	RPStandard@dea.com	Standard
RPStandardCalendarManager	RPStandardCalendarManager@dea.com	Standard
RPStandardCalendarUser	RPStandardCalendarUser@dea.com	Standard
RPStandardRequester	RPStandardRequester@dea.com	Standard
RPStandardViewer	RPStandardViewer@dea.com	Standard

- If needed, click the Inactive tab to open it.

Configuring Users and Templates

3. In the Search fields at the top of the tab (User Name, Email, Template Name), enter partial or complete search criteria, and then click Go.



The search is limited to the exact order of characters in the search string, however, the string is not-case sensitive and it can appear anywhere in the search results.

*For example, if you enter “Rob” as your search string for User Name, search results can include **Robert**, **Rob**, **Robertson**, **Jarrob**, and so on.*

A list of all users that meets the search criteria is displayed on the tab.

To add a user

1. Under the Admin Panel main menu option, point to Security, and then click Users.

The Users page opens. The Active tab is the opened tab. All currently active users in Master Calendar are displayed on this tab.

Figure 5-2: Users page, Active tab

The screenshot shows the 'Users' page with the 'Active' tab selected. At the top, there are search fields for 'User Name', 'Email', and 'Template Name', followed by a 'go' button. Below the search fields is a table titled 'Users' with columns for 'Name', 'Email Address', and 'Template Name'. The table lists ten users:

Name	Email Address	Template Name
Noni Black	Noni@dea.com	Administrator
Peter Kubitz	Peter@dea.com	Administrator
Poomima	poornima.g@indiumsoft.com	Administrator
Rob Turner	Rob@dea.com	Administrator
Roman Peshkov	Roman@dea.com	Administrator
RPStandard	RPStandard@dea.com	Standard
RPStandardCalendarManager	RPStandardCalendarManager@dea.com	Standard
RPStandardCalendarUser	RPStandardCalendarUser@dea.com	Standard
RPStandardRequester	RPStandardRequester@dea.com	Standard
RPStandardViewer	RPStandardViewer@dea.com	Standard

At the bottom of the page, there are navigation links for 'Page' (set to 3 of 5) and icons for previous, next, and last pages.

2. Under Actions, click Add.

The Add User page opens. The Details tab is the opened tab. You use the options on this tab to add the information for the user. See [Figure 5-3](#).

Figure 5-3: Add User page, Details tab

The screenshot shows a web-based application interface for adding a new user. At the top, there's a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar is a tab header with three tabs: Details (which is selected and highlighted in blue), Permissions, and History. The main content area contains several input fields:

- Full Name: A text input field with a small blue magnifying glass icon to its right.
- Email: A text input field.
- Password: A text input field.
- Confirm Password: A text input field.
- Phone: A text input field.
- External Reference: A text input field.
- Account Type: A dropdown menu set to "Standard".
- Template: A dropdown menu.

At the bottom of the form are two buttons: "Save" and "Cancel".

3. Add the information for the new user.



If your organization has purchased the optional Integrated Authentication module, a Lookup icon is displayed next to the Full Name field. Click this icon to open a list of users in your system and automatically populate these fields.

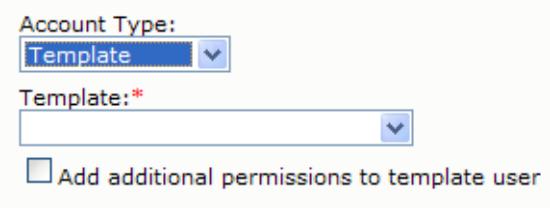
Field	Description
Full Name	The full name for the user.
Email	The email address for the user.
Password	The login password for the user. Note: The password does not have any special rules.
Confirm Password	Re-enter the password exactly as you entered it in the Password field.
Phone	The phone number for the user.
External Reference	Required only if you have LDAP security. Used to enable single sign-on through the separately purchased Integrated Authentication module.



If your organization has purchased the optional Integrated Authentication module, a Lookup icon is displayed next to the Full Name field. Click this icon to open a list of users in your system and automatically populate these fields.

Configuring Users and Templates

4. Select the account type for the user - Standard, Template or Administrator.

User Type	Description
Standard	This is the default value for a user type. You must manually apply permissions for this type of user.
Template	<p>Note: This type of user is available only if you have active templates defined in Master Calendar. See "Managing User Templates".</p> <p>If you select this type of user:</p> <ul style="list-style-type: none">• The Permission tab is initially removed from the page.• A Template dropdown list opens. You use this list to select the correct template for the user's permissions. <p><i>Figure 5-4: Template user options</i></p>  <ul style="list-style-type: none">• Optionally, if you want to add permissions for the user in addition to the ones that are defined by the selected template, select Add additional permissions to template user to make the Permissions tab available again.
Administrator	This type of user (a site administrator) has full access to all calendars in Master Calendar as well as to all system areas and functions.

5. Do one of the following:

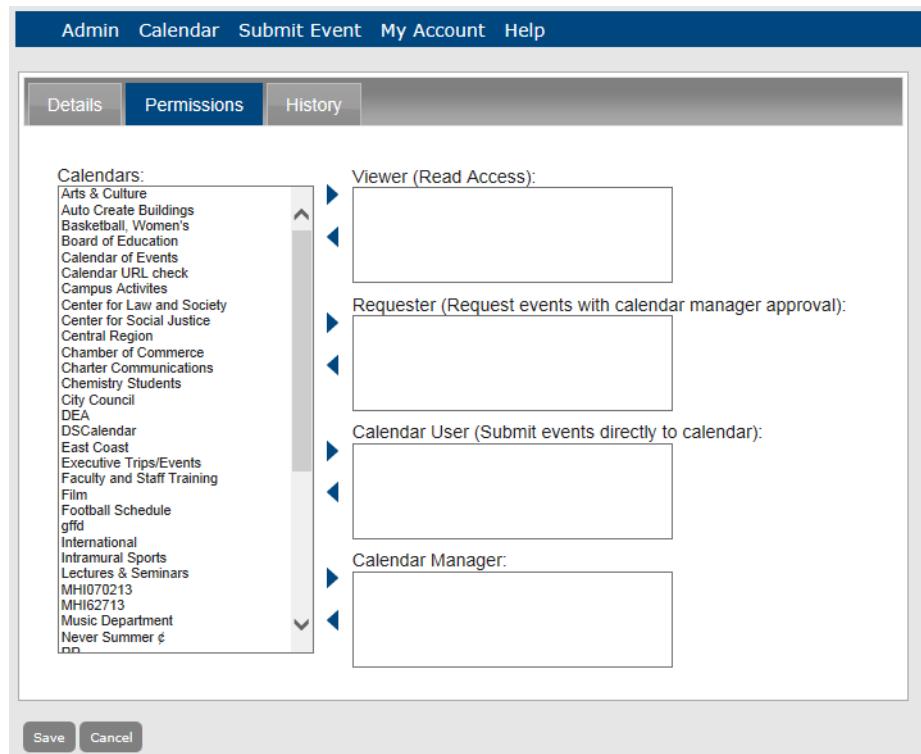
- If the user is an administrator, or a template user who does *not* have additional permissions, click Save.
The user is saved as an *active* user in Master Calendar.
- If the user is a standard user, or a template user to whom you are adding more permissions, continue to "[To define user permissions](#)".

To define user permissions

- Click the Permissions tab to open it.

A list of all currently active calendars in Master Calendar is displayed on this tab.

Figure 5-5: Add User page, Permissions tab



- To indicate the type of access that the user will have to the calendars in Master Calendar, select the calendar (CTRL-click to select multiple calendars), and then click the appropriate Add button ➤ to move the calendars to the access type.

Field	Description
Viewer	The user can only view events on the calendar.
Requester	The user can view events on the calendar and submit events to the calendar; however, the submitted event is posted only if the Calendar Manager approves it.
Calendar User	The user can view events on the calendar and submit events to the calendar and the events are automatically posted without approval by the Calendar Manager.
Calendar Manager	The user can carry out all administration functions for the calendar (edit the calendar, create calendar URLs, submit events to the calendar without approval, add/edit/delete special dates, and so on.)

Configuring Users and Templates



If you do not select a calendar for the user, the calendar is considered to be a private calendar—the user cannot view events on the calendar, submit events to the calendar, and so on.

3. Click Save.

The user is saved as an *active* user in Master Calendar.

To activate a user

1. Under the Admin Panel main menu option, point to Security, and then click Users.

The Users page opens. The Active tab is the opened tab. All currently active users in Master Calendar are displayed on this tab.

Figure 5-6: Users page, Active tab

<input type="checkbox"/>	Name	Email Address	Template Name
<input type="checkbox"/>	Noni Black	Noni@dea.com	Administrator
<input type="checkbox"/>	Peter Kubitz	Peter@dea.com	Administrator
<input type="checkbox"/>	Poomima	poornima.g@indiumsoft.com	Administrator
<input type="checkbox"/>	Rob Turner	Rob@dea.com	Administrator
<input type="checkbox"/>	Roman Peshkov	Roman@dea.com	Administrator
<input type="checkbox"/>	RPStandard	RPStandard@dea.com	Standard
<input type="checkbox"/>	RPStandardCalendarManager	RPStandardCalendarManager@dea.com	Standard
<input type="checkbox"/>	RPStandardCalendarUser	RPStandardCalendarUser@dea.com	Standard
<input type="checkbox"/>	RPStandardRequester	RPStandardRequester@dea.com	Standard

2. Click the Inactive tab to open it.

All currently inactive users in Master Calendar are displayed on this tab.

Figure 5-7: Users page, Inactive tab

<input type="checkbox"/>	Name	Email Address	Template Name
<input type="checkbox"/>	Jane Doe	jane.doe@comcast.net	Standard
<input type="checkbox"/>	John Doe	j.doe@dea.com	Standard
<input type="checkbox"/>	John Q. Public	j.q.public@yahoo.com	Standard

Configuring Users and Templates

3. Select the user that you are activating.
4. Under Actions, click Edit.

The Add User page opens. The Details tab is the opened tab. The Active option is not selected.

Figure 5-8: Add User page, Details tab, Inactive user

The screenshot shows the 'Add User' form with the 'Details' tab selected. The user's full name is 'Jane Doe', email is 'jane.doe@comcast.net', and account type is 'Standard'. The 'Active' checkbox is not checked. Other fields like Password, Confirm Password, and Phone are empty. The 'Save' and 'Cancel' buttons are at the bottom.

Full Name: [*] Jane Doe	Account Type: Standard
Email: [*] jane.doe@comcast.net	Template: [*]
Password:	
Confirm Password:	
Phone:	
External Reference:	
<input type="checkbox"/> Active	

Save Cancel

5. Select Active.
6. Click Save.

The user is activated and is displayed on the Active tab on the Users page.

Figure 5-9: Users page, Active tab

The screenshot shows the 'Users' page with the 'Active' tab selected. There are search fields for User Name, Email, and Template Name, and a 'go' button. The user list table has columns for Name, Email Address, and Template Name. The user 'Jane Doe' is highlighted with a red border.

	Name	Email Address	Template Name
<input type="checkbox"/>	Dustin Smith	dustin@dea.com	Standard
<input type="checkbox"/>	Ed Nowak	ed@dea.com	Administrator
<input type="checkbox"/>	Elizabeth Haas	Elizabeth@dea.com	Administrator
<input checked="" type="checkbox"/>	Jane Doe	jane.doe@comcast.net	Standard
<input type="checkbox"/>	Jason Shank	Jason@dea.com	Administrator

Configuring Users and Templates

To deactivate a user

1. Under the Admin Panel main menu option, point to Security, and then click Users.

The Users page opens. The Active tab is the opened tab. All currently active users in Master Calendar are displayed on this tab.

Figure 5-10: Users page, Active tab

The screenshot shows the 'Users' page with the 'Active' tab selected. At the top, there are search fields for 'User Name', 'Email', and 'Template Name', followed by a 'go' button. Below the search fields is a table titled 'Users' with three columns: 'Name', 'Email Address', and 'Template Name'. The table contains five rows of data:

Name	Email Address	Template Name
Dustin Smith	dustin@dea.com	Standard
Ed Nowak	ed@dea.com	Administrator
Elizabeth Haas	Elizabeth@dea.com	Administrator
Jane Doe	jane.doe@comcast.net	Standard
Jason Shank	Jason@dea.com	Administrator

2. Select the user that you are deactivating.
3. Under Actions, click Edit.

The Add User page opens. The Details tab is the opened tab. The Active option is selected.

Figure 5-11: Add User page, Details tab, Active user

The screenshot shows the 'Add User' page with the 'Details' tab selected. The page includes fields for 'Full Name', 'Email', 'Password', 'Confirm Password', 'Phone', and 'External Reference'. There are dropdown menus for 'Account Type' and 'Template'. A checkbox labeled 'Active' is checked. At the bottom, there are 'Save' and 'Cancel' buttons.

4. Clear the Active option.

5. Click Save.

The user is inactivated and is displayed on the Inactive tab on the Users page.

Figure 5-12: Users page, Inactive tab

<input type="checkbox"/>	Name	Email Address	Template Name
<input type="checkbox"/>	Jane Doe	jane.doe@comcast.net	Standard
<input type="checkbox"/>	John Doe	j.doe@dea.com	Standard
<input type="checkbox"/>	John Q. Public	j.q.public@yahoo.com	Standard

To edit a user

You can edit an account for both active and inactive users. When you edit an account, you can edit the user name, the email address, the user password, the user type, and any optional user information such as the user phone number. You can also edit the user account type and for a standard user or a template user, the user permissions.

1. Under the Admin Panel main menu option, point to Security, and then click Users.

The Users page opens. The Active tab is the opened tab. All currently active users in Master Calendar are displayed on this tab.

Figure 5-13: Users page, Active tab

<input type="checkbox"/>	Name	Email Address	Template Name
<input type="checkbox"/>	Dustin Smith	dustin@dea.com	Standard
<input type="checkbox"/>	Ed Nowak	ed@dea.com	Administrator
<input type="checkbox"/>	Elizabeth Haas	Elizabeth@dea.com	Administrator
<input type="checkbox"/>	Jane Doe	jane.doe@comcast.net	Standard
<input type="checkbox"/>	Jason Shank	Jason@dea.com	Administrator

2. If needed, click the Inactive tab to open it.
3. Select the user whom you are editing.

Configuring Users and Templates

- Under Actions, click Edit.

The Add User page opens. The Details tab is the opened tab. At a minimum, this tab shows the user name, the user email, and the user account type. Although the user has been assigned a password, it does *not* show the password in either the Password field or the Confirm Password field.

Figure 5-14: Add User page, Details tab

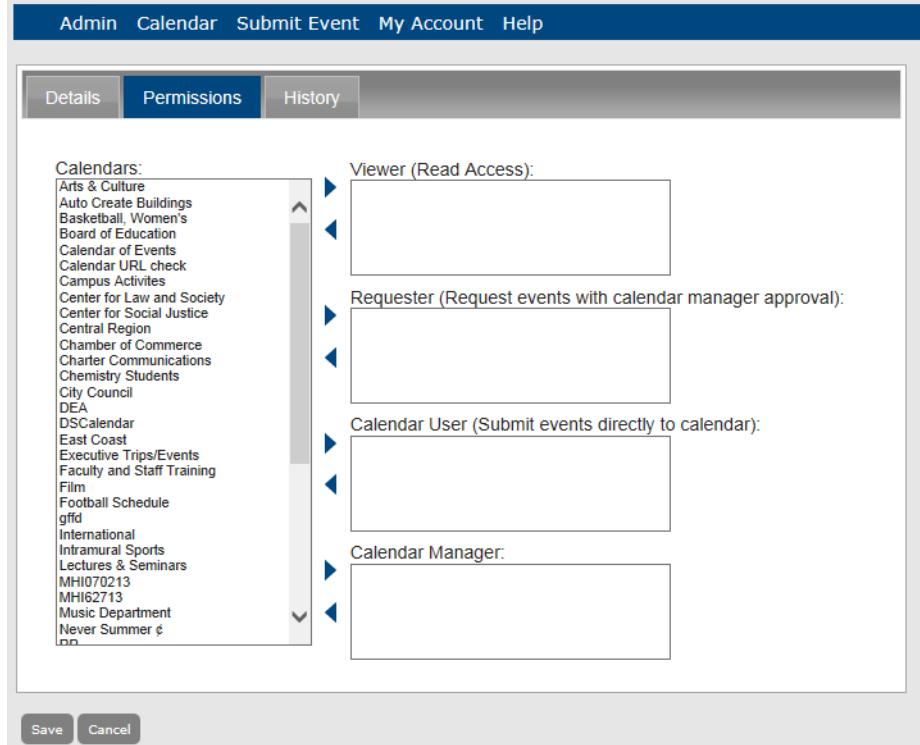
The screenshot shows the 'Add User' interface with the 'Details' tab selected. The top navigation bar includes links for Admin, Calendar, Submit Event, My Account, and Help. The main form contains fields for Full Name, Email, Password, Confirm Password, Phone, External Reference, and Account Type. The 'Full Name' field is populated with 'Jane Doe'. The 'Email' field is populated with 'jane.doe@comcast.net'. The 'Account Type' dropdown is set to 'Standard'. A checked checkbox labeled 'Active' is present at the bottom. Buttons for 'Save' and 'Cancel' are located at the bottom left.

- Edit the information as needed for the user.

Field	Description
Full Name	The full name for the user.
Email	The email address for the user.
Password	The logon password for the user. Note: The password does not have any special rules.
Confirm Password	Re-enter the password exactly as you entered it in the Password field.
Phone	The phone number for the user.
External Reference	Required only if you have LDAP security. Used to enable single sign-on through the separately purchased integrated Authentication module.
Account Type	Standard, Template, or Administrator. Note: For information about account types, see Template .

6. If needed, click the Permissions tab to open it.

Figure 5-15: Add User page, Permissions tab



7. To indicate the type of access that the user will have to the calendars in Master Calendar, select the calendar (CTRL-click to select multiple calendars), and then click the appropriate Add button ➤ to move the calendars to the access type. Alternately, to remove a user's access to a calendar, select the calendar CTRL-click to select multiple calendars), and then click the appropriate Remove button ◀ .

Field	Description
Viewer	The user can only view events on the calendar.
Requester	The user can view events on the calendar and submit events to the calendar; however, the submitted event is posted only if approved by the Calendar Manager.
Calendar User	The user can view events on the calendar and submit events to the calendar and the events are automatically posted without approval by the Calendar Manager.
Calendar Manager	The user can carry out all administration functions for the calendar (edit the calendar, create calendar URLs, submit events to the calendar without approval, add/edit/delete special dates, and so on.)

Configuring Users and Templates



If you do not select a calendar for the user, the calendar is considered to be a private calendar—the user cannot view events on the calendar, submit events to the calendar, and so on.

8. Click Save to save the edited user record in Master Calendar.

To delete a user

You can delete only inactive users. To delete a currently active user, you must first inactivate the user. (See “[To inactivate a user](#)”.) When you delete a user, none of the events that the user has created is deleted.

1. Under the Admin Panel main menu option, point to Security, and then click Users.

The Users page opens. The Active tab is the opened tab. All currently active users in Master Calendar are displayed on this tab.

Figure 5-16: *Users page, Active tab*

Name	Email Address	Template Name
Noni Black	Noni@dea.com	Administrator
Peter Kubitz	Peter@dea.com	Administrator

2. Click the Inactive tab to open it.

All currently inactive users in Master Calendar are displayed on this tab.

Figure 5-17: *Users page, Inactive tab*

Name	Email Address	Template Name
Jane Doe	jane.doe@comcast.net	Standard
John Doe	j.doe@dea.com	Standard
John Q. Public	i.q.public@yahoo.com	Standard



Remember, to refine this list, you can carry out a search for only those users that meet specific search criteria. See “[To search for a user](#)”.

3. Select the user or users whom you are deleting.



To select all users on the currently opened page for deletion in a single step, select Name. If you have multiple pages of users to delete, you must repeat this entire process on each page.

4. Under Actions, click Delete.

A message opens asking you if you are sure that you want to delete all the selected users.

5. Click OK in the message.

A message opens indicating that all the selected users were successfully deleted.

6. Click OK in the message.

The Inactive tab is refreshed to show the remaining, if any, inactive users in Master Calendar.

To generate a Users List report

You can generate a Users List report, which lists all the active or inactive users that are configured in Master Calendar. The report includes the user name, the user email, the user account type, and the user phone. This report also indicates whether the user is an Administrator user and it also lists the templates to which a user has been assigned.

1. Under the Admin Panel main menu option, point to Security, and then click Users.

The Users page opens. The Active tab is the opened tab. All currently active users in Master Calendar are displayed on this tab.

Figure 5-18: Users page, Active tab

Name	Email Address	Template Name
Noni Black	Noni@dea.com	Administrator
Peter Kubitz	Peter@dea.com	Administrator
Poornima	poornima.g@indiumsoft.com	Administrator
Rob Turner	Rob@dea.com	Administrator
Roman Peshkov	Roman@dea.com	Administrator
RPStandard	RPStandard@dea.com	Standard
RPStandardCalendarManager	RPStandardCalendarManager@dea.com	Standard
RPStandardCalendarUser	RPStandardCalendarUser@dea.com	Standard

Configuring Users and Templates

2. Do one of the following:

- If you are generating a Users List report for all *active* users in your Master Calendar, under Actions, click Print.
- If you are generating a Users List report for all *inactive* users in Master Calendar, click the Inactive tab to open it, and then under Actions, click Print.

An onscreen preview of the User List report opens in its own window. A variety of options are available from this preview, including (from left to right at the top of the onscreen preview) the options to search the report results, print the report in its entirety, print the currently displayed report page, and export the report to a file and save the file.



PDF is the default format for exporting to a file. Other allowed formats are Xls, Xlsx, Rtf, Mnt, Text, Image, and Csv.

Figure 5-19: Onscreen preview for a Users List report

Name	Email	AccountType	Administrator	Template	Phone
Admin	Admin@dea.com	Administrator	True		
Andrew Schuetz	andrew@dea.com	Administrator	True		303-740-4854
Bryan Peck	Bryan@dea.com	Administrator	True		x528
Bryan Sorrentino	bryan.sorrentino@dea.co m	Administrator	True		x548
Cadel Evans	cadelevans@BMCRacing .com.au	Template	False	Sports template	

Permission Type: Calendar(s):

Viewer:

Requestor:

Calendar User: Seals Swim Team, Intramural Sports, Cycling Club, Girls Youth Soccer

Calendar Manager:

Chris Meyers	Chris.Meyers@dea.com	Administrator	True	303-740-4842
Christopher R Meyers	gtman12@gmail.com	Administrator	True	gtman12@gmail. com
Dan Hurley	Dan.Hurley@dea.com	Administrator	True	303-850-2628
Eileen Evans	eileen@dea.com	Standard	False	

Permission Type: Calendar(s):

Viewer:

Requestor:

To view the history for a user

The history for a user consists of the original creation date of the user, the name of the user who created the user, the last date that the user was edited, and the name of the user who last edited the user record. You can view the history for both active and inactive users.

- Under the Admin Panel main menu option, point to Security, and then click Users.

The Users page opens. The Active tab is the opened tab. All currently active users in Master Calendar are displayed on this tab.

Figure 5-20: Users page, Active tab

Name	Email Address	Template Name
Noni Black	Noni@dea.com	Administrator
Peter Kubitz	Peter@dea.com	Administrator
Poornima	poornima.g@indiumsoft.com	Administrator

- If needed, click the Inactive tab to open it.
- Select the user for whom you are viewing the history.
- Under Actions, select Edit.

The Add User page opens. The Details tab is the opened tab.

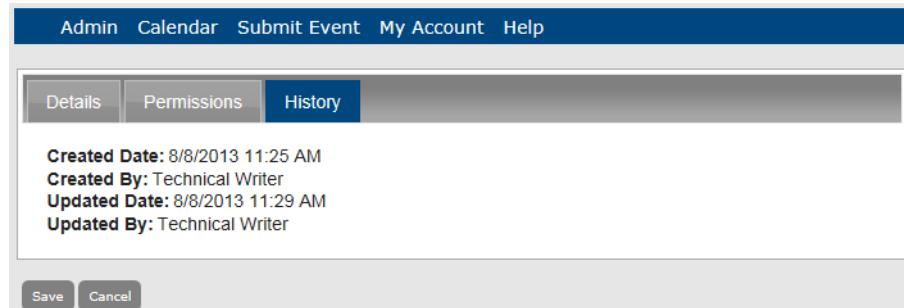
Figure 5-21: Add User page, Details tab

Full Name: <input type="text" value="Jane Doe"/>	Account Type: <input type="text" value="Standard"/>
Email: <input type="text" value="jane.doe@comcast.net"/>	Template: <input type="text"/>
Password: <input type="text"/>	
Confirm Password: <input type="text"/>	
Phone: <input type="text"/>	
External Reference: <input type="text"/>	
<input checked="" type="checkbox"/> Active	

Configuring Users and Templates

5. Click the History tab to open it and view the history for the selected user.

Figure 5-22: Add User page, History tab



Managing User Templates

A user *template* contains a set of calendar permissions. For example, Template A specifies requestor access to Calendar A and view-only access to Calendar B, Template B specifies view-only access to all calendars in Master Calendar, and so on. User templates are always optional. You can apply a template to a group of user accounts in a single step to simplify the setup and maintenance of Master Calendar. Managing user templates consists of [adding](#) user templates, [specifying](#) template permissions, [assigning](#) users to templates, [activating](#) and [inactivating](#) templates, [editing](#) templates, and [deleting](#) templates. You can also [generate](#) a User Templates List report and you can [view](#) the history for a user template. In addition, if your organization has purchased and installed the optional Integrated Authentication module, you can [select](#) LDAP groups for assignment to a user template and you can [add](#) these selected LDAP groups to a user template.

To add a user template

- Under the Admin Panel main menu option, point to Security, and then click User Templates.

The Manage Templates page opens. The Active tab is the opened tab. All currently active user templates in Master Calendar are displayed on this tab.

Figure 5-23: Manage Templates page, Active tab

Templates	
Name	Description
<input type="checkbox"/> Arts and Sciences Calendars Template	Permissions for A&S Calendar users
<input type="checkbox"/> Contract Project Calendar Template	
<input type="checkbox"/> Department of Chemistry Calendars Template	Permissions for Dept. of Chem. calendar users
<input type="checkbox"/> Intramural Calendar Permissions Template	Permissions for Intramural Calendar Event Submitters

- Under Actions, click Add.

The Add Template page opens. The Template tab is the opened tab. You use the options on this tab to name the user template and optionally, provide a description for it. See [Figure 5-24](#).

Configuring Users and Templates

Figure 5-24: Add Template page, Template tab

The screenshot shows a web-based application interface for managing templates. At the top is a blue header bar with white text links: Admin, Calendar, Submit Event, My Account, and Help. Below the header is a navigation bar with four tabs: Template (which is highlighted in blue), Permissions, LDAP, and History. The main content area contains two input fields: 'Name:' with a red asterisk indicating it is required, and 'Description:'. At the bottom of the form are two buttons: 'Save' and 'Cancel'.

3. After you enter the name for the user template, and optionally, a description for the template, do one of the following:
 - If you want to specify the permissions for the user template at a later date, click Save to save the template as an *active* user template in Master Calendar.
 - To specify the permissions for the user template at the time that you are creating the template, continue to Step 3 for “To specify user template permissions” below.

To specify user template permissions

1. Under the Admin Panel main menu option, point to Security, and then click User Templates to open the Manage Templates page.
2. Click on the name of the user template for which you are assigning the permissions.

The Add Template page opens. The Template tab is the opened tab.

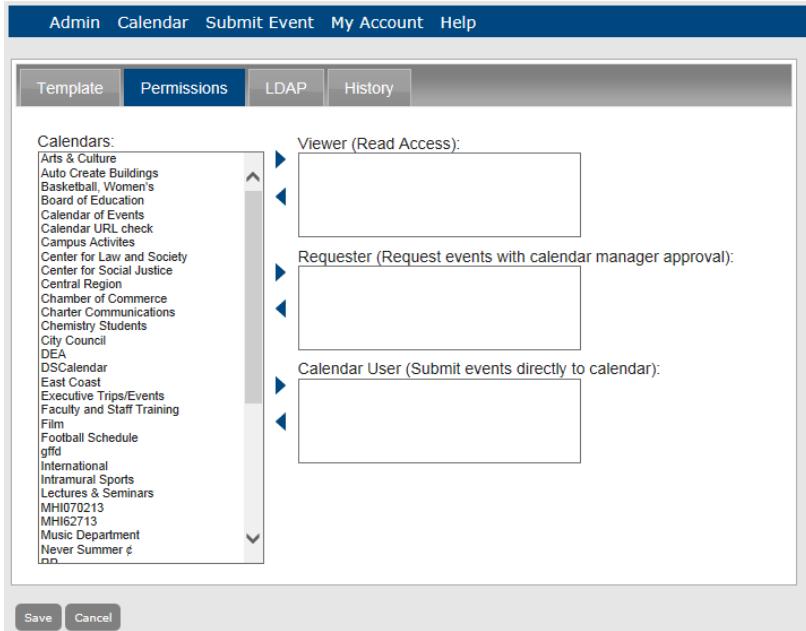
Figure 5-25: Add Template page, Template tab

This screenshot is identical to Figure 5-24, showing the Add Template page with the Template tab selected. It features the same header, navigation bar, input fields for Name and Description, and Save/Cancel buttons.

3. Click the Permissions tab to open it. See Figure 5-26.

Configuring Users and Templates

Figure 5-26: Add Template page, Permissions tab



4. To indicate the type of access that a user with the selected template is to have to the calendars in Master Calendar, select the calendar (CTRL-click to select multiple calendars), and then click appropriate Add button ► to move the calendars to the access type.

Field	Description
Viewer	Users can only view events on the calendar.
Requester	Users can view events on the calendar and submit events to the calendar; however, the submitted event is posted only if approved by the Calendar Manager.
Calendar User	Users can view events on the calendar and submit events to the calendar and the events are automatically posted without approval by the Calendar Manager.



Users assigned to the selected template can still view any calendar that remains in the Available Calendars column, unless the calendar is defined as a private.



Calendar Manager is not an option when you are defining user templates. It is available only when you are adding or editing a user record.

5. Click Save to save the template as an *active* template in Master Calendar.

To assign users to a user template

You can assign users only to an active template.



If your organization has purchased and installed the optional Integrated Authentication module, you can select LDAP groups for assignment to a template. See “[To select LDAP groups for assignment to a user template](#)”.

1. Under the Admin Panel main menu option, point to Security, and then click User Templates.

The Manage Templates page opens. The Active tab is the opened tab. All currently active user templates in Master Calendar are displayed on this tab.

Figure 5-27: Manage Templates page, Active tab

A screenshot of the 'Manage Templates' page. The top navigation bar includes 'Admin', 'Calendar', 'Submit Event', 'My Account', and 'Help'. Below this is a toolbar with 'Actions' (Add | Assign Users | Assign LDAP Groups | Edit | Print). A tab bar shows 'Active' (selected) and 'Inactive'. The main content area is titled 'Templates' and contains a table with columns 'Name' and 'Description'. Three items are listed:

Name	Description
Arts and Sciences Calendars Template	Permissions for A&S Calendar users
Contract Project Calendar Template	
Department of Chemistry Calendar Template	Permissions for Dept. of Chem. calendar users

2. Under Actions, click Assign Users.

The Assign Users page opens.

Figure 5-28: Assign Users page

A screenshot of the 'Assign Users' page. The top navigation bar is identical to Figure 5-27. The main area has search fields for 'Template:' (set to '(all)'), 'Search By:' (User Name), and 'Find:' button. Below are two lists: 'Available' (empty) and 'Assigned' (empty). Between them are left and right arrows for moving users between lists. At the bottom is a dropdown 'Assign to Template:' and 'Save' / 'Cancel' buttons.

3. Enter the search criteria and then click Go to search for the users that you want to assign to a selected template.

Search Criteria	Results
Default Search Criteria: <ul style="list-style-type: none"> • Template Field - (all) • All other fields blank 	All standard users and all template users (whether they are currently assigned to a template) who are in Master Calendar.
<ul style="list-style-type: none"> • Template Field - (unassigned users) • All other fields blank 	All users who are currently defined in Master Calendar as a template user, but are <i>not</i> assigned to a template.
<ul style="list-style-type: none"> • Template Field - A specific template • All other fields left blank 	All users who are currently assigned to the selected template.
<ul style="list-style-type: none"> • Template Field - (all) • Search by User Name or Email Address • Search criteria in the Find field 	All standard users and all template users (whether they are currently assigned to a template) who are in Master Calendar <i>and</i> who match the search criteria.
<ul style="list-style-type: none"> • Template Field - (unassigned users) • Search by User Name or Email Address • Search criteria in the Find field 	All users who are currently defined in Master Calendar as a template user who are not assigned to a template <i>and</i> who match the search criteria.
<ul style="list-style-type: none"> • Template Field - A specific template • Search by User Name or Email address • Search criteria in the Find field 	All users who are currently assigned to the selected template <i>and</i> who match the search criteria.



The search is limited to the exact order of characters in the search string, however, the string is not case-sensitive and it can appear anywhere in the search results. For example, if you enter "Rob" as your search string for User Name, search results can include Robert, Rob, Robertson, Jarrob, and so on.

4. From the search results, select the user whom you are assigning to a user template (CTRL-click to select multiple users), and then click Add button ➤ to move the users to the Assigned list.



To move all the search results in a single step, click the Add All ➤ button.

5. On the Assign to Template dropdown list, select the active template to which you are assigning the selected users.
6. Click Save to assign the users to the selected user template.

Configuring Users and Templates

To select LDAP groups for assignment to a user template

The Assign LDAP Groups option is available only if your organization has purchased and installed the optional Integrated Authentication module. This module allows your organization to use the security group information that is maintained on its own network in conjunction with the templates in Master Calendar to set permissions for its Master Calendar users. Before you can assign LDAP groups to a user template, you must select the LDAP groups that you want to assign.

1. Under the Admin Panel main menu option, point to Security, and then click User Templates.

The Manage Templates page opens. The Active tab is the opened tab. All currently active user templates in Master Calendar are displayed on this tab.

Figure 5-29: Manage Templates page, Active tab

The screenshot shows the 'Manage Templates' page with the 'Active' tab selected. At the top, there's a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation is an 'Actions' section with links: Add, Assign Users, Assign LDAP Groups, Edit, and Print. The main content area has tabs for 'Active' and 'Inactive'. A table titled 'Templates' lists five entries:

Name	Description
Arts and Sciences Calendars Template	Permissions for A&S Calendar users
Contract Project Calendar Template	
Department of Chemistry Calendars Template	Permissions for Dept. of Chem. calendar users
Intramural Calendar Permissions Template	Permissions for Intramural Calendar Event Submitters

2. Under Actions, click Assign LDAP Groups.

The Assign Security Groups page opens. Any security groups that have been selected for assignment to a user template are displayed on this tab.

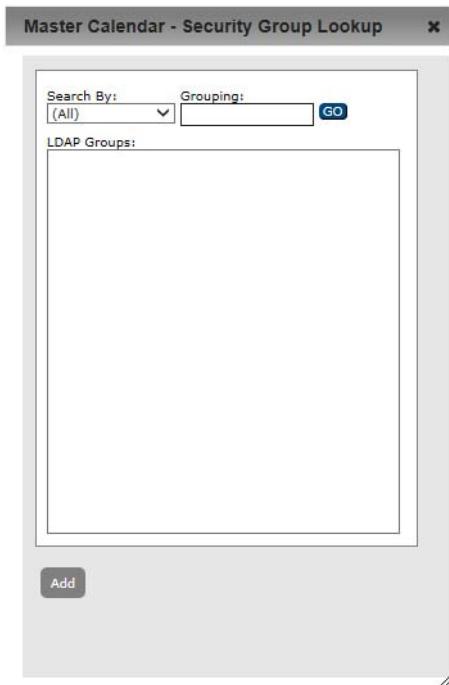
Figure 5-30: Assign Security Groups page

The screenshot shows the 'Assign Security Groups' page. On the left, there's a list box labeled 'Security Groups:' containing three items: Developers, Domain Users, and Consulting. To the right of the list are two buttons: 'Add' and 'Remove'. Below the list is a 'Priority' section with two buttons: 'Move Up ++' and 'Move Down -'. At the very bottom of the page are 'Save' and 'Back' buttons.

3. To select a security group, click Add.

The Security Group Lookup dialog box opens. You use this dialog box to search for the security groups that you want to assign to a user template.

Figure 5-31: Security Group Lookup dialog box



4. Specify the search criteria for the security groups that you want to assign to a template and then click Go.



The search is limited to the exact order of characters in the search string, and the string must begin with the information for which you are searching. The string is not case-sensitive. For example, if you enter “admin” as your search string for All groups, “Administrators” is returned in the search results, but DnsAdmins is not.

Search Criteria	Results
Default Search Criteria: • Search By (All) • All other fields blank	All LDAP groups that are currently on your network.
• Search By (All) • Partial or complete search criteria for grouping name in the grouping field.	All LDAP groups that are currently on your network and that meet the search criteria.
• Search By Global Group or Universal Group • All other fields blank	All LDAP global groups or universal groups, respectively that are currently on your network.

Configuring Users and Templates

Search Criteria	Results
<ul style="list-style-type: none">• Search By Global Group or Universal Group• Partial or complete search criteria for grouping name in the grouping field.	All LDAP global groups or universal groups, respectively that are currently on your network and that meet the search criteria.

5. From the search results, select the security group that is to be assigned to a user template (CTRL-click to select multiple groups), and then click Add to move the groups to the Security Groups page.
6. When you add a security group to the security groups page, they are added in alphabetical order and this becomes the default priority for the groups. Do one of the following:
 - To save the security groups in their default priority order, click Save, click OK in the message that the security groups order was saved, and then click Back to return to the Templates page.
 - To change the priority of the security groups, continue to “[To change the priority of LDAP security groups](#)” below.



To remove security groups, select the group (CTRL-click to select multiple groups), and then click Remove.

7. You can now add the LDAP groups to a user template. See “[To add LDAP groups to a user template](#)”.

To change the priority of LDAP security groups

If a user exists in multiple LDAP security groups, then the user’s security settings are assigned based on the LDAP group with the highest priority. For example, if User A is assigned to both the Billing LDAP group and the Cert Publishers LDAP group, and the Billing group has a higher priority (that is, it is higher up in the list) than the Cert Publishers group, then User A’s access security settings are granted based on the Master Calendar template to which the Cert Publishers group is assigned. To change a group’s priority:

1. Select the group whose priority you want to change.
2. Click Move Up ++ or Move Down -- as necessary to change the order of the group in the list.
3. Click Save, click OK in the message that the security groups order was saved, and then click Back to return to the Templates page.
4. You can now add the LDAP groups to a user template. See “[To add LDAP groups to a user template](#)” below.

To add LDAP groups to a user template



Before you can add an LDAP group to a user template, you must first select the group for assignment to a template. See “[To select LDAP groups for assignment to a user template](#)”.

- Under the Admin Panel main menu option, point to Security, and then click User Templates.

The Manage Templates page opens. The Active tab is the opened tab. All currently active user templates in Master Calendar are displayed on this tab.

Figure 5-32: Manage Templates page, Active tab

Templates	
Name	Description
<input type="checkbox"/> Arts and Sciences Calendars Template	Permissions for A&S Calendar users
<input type="checkbox"/> Contract Project Calendar Template	
<input type="checkbox"/> Department of Chemistry Calendars Template	Permissions for Dept. of Chem. calendar users
<input type="checkbox"/> Intramural Calendar Permissions Template	Permissions for Intramural Calendar Event Submitters

- Under Actions, click Add.

The Add Template page opens. The Template tab is the opened tab.

Figure 5-33: Template tab

Name: <input type="text"/>
Description: <input type="text"/>

Save Cancel

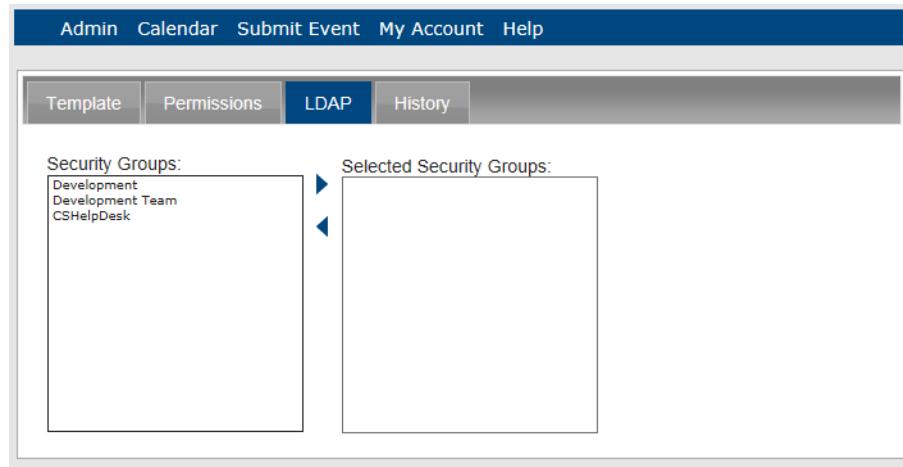
- Enter the name for the user template, and optionally, a description for the template.

Configuring Users and Templates

4. Click the LDAP tab to open it.

The security groups that you selected to be available for assignment to a user template are displayed on this tab.

Figure 5-34: Add Template page, LDAP tab



5. From the Security Groups list, select the security group that you are assigning to the user template that you just added (CTRL-click to select multiple groups), and then click then click the Add button ► to move the selected groups to the Selected Security Groups list.
6. Click Save to assign the selected LDAP security groups to the user template.

To activate a user template

- Under the Admin Panel main menu option, point to Security, and then click User Templates.

The Manage Templates page opens. The Active tab is the opened tab. All currently active user templates in Master Calendar are displayed on this tab.

Figure 5-35: Manage Templates page, Active tab

Templates	
<input type="checkbox"/> Name ^	Description
<input type="checkbox"/> Arts and Sciences Calendars Template	Permissions for A&S Calendar users
<input type="checkbox"/> Contract Project Calendar Template	
<input type="checkbox"/> Department of Chemistry Calendars Template	Permissions for Dept. of Chem. calendar users
<input type="checkbox"/> Intramural Calendar Permissions Template	Permissions for Intramural Calendar Event Submitters

- Click the Inactive tab to open it.

All currently inactive templates in Master Calendar are displayed on this tab.

Figure 5-36: Manage Templates page, Inactive tab

Templates	
<input type="checkbox"/> Name ^	Description
<input type="checkbox"/> Demo Template	Used for potential MC customers
<input type="checkbox"/> Lab Schedule	Testing purposes for setting up lab schedules
<input type="checkbox"/> MHI Test Template	Template used for testing

- Select the user template that you are activating.

Configuring Users and Templates

4. Under Actions, click Edit.

The Add Template page opens. The Template tab is the opened tab. The Active option is not selected.

Figure 5-37: Add Template page, Template tab, Inactive template

The screenshot shows the 'Add Template' form. At the top, there are tabs: 'Template' (which is selected and highlighted in blue), 'Permissions', 'LDAP', and 'History'. Below the tabs, there are input fields for 'Name:' (containing 'Demo Template') and 'Description:' (containing 'Used for potential MC customers'). There is also an unchecked checkbox labeled 'Active'. At the bottom of the form are two buttons: 'Save' and 'Cancel'.

5. Select Active.

6. Click Save.

The user template is activated and is displayed on the Active tab on the Manage Templates page. See [Figure 5-38](#).

Figure 5-38: Manage Templates page, Active tab

Templates	
Name	Description
<input type="checkbox"/> Arts and Sciences Calendars Template	Permissions for A&S Calendar users
<input type="checkbox"/> Contract Project Calendar Template	
<input type="checkbox"/> Demo Template	Used for potential MC customers
<input type="checkbox"/> Department of Biology	For Biology Calendar users
<input type="checkbox"/> Department of Chemistry	Permissions for Dept. of Chem. calendar users

To inactivate a user template

- Under the Admin Panel main menu option, point to Security, and then click Templates.

The Manage Templates page opens. The Active tab is the opened tab. All currently active user templates in Master Calendar are displayed on this tab.

Figure 5-39: Manage Templates page, Active tab

Templates	
Name	Description
<input type="checkbox"/> Arts and Sciences Calendars Template	Permissions for A&S Calendar users
<input type="checkbox"/> Contract Project Calendar Template	
<input type="checkbox"/> Demo Template	Used for potential MC customers
<input type="checkbox"/> Department of Biology	For Biology Calendar users
<input type="checkbox"/> Department of Chemistry Calendars Template	Permissions for Dept. of Chem. calendar users
<input type="checkbox"/> Intramural Calendar Permissions Template	Permissions for Intramural Calendar Event Submitters

- Select the user template that you are inactivating.
- Under Actions, click Edit.

The Add Template page opens. The Template tab is the opened tab. The Active option is selected.

Figure 5-40: Add Template page, Template tab, Active template

Name: <input type="text" value="Demo Template"/>
Description: <input type="text" value="Used for potential MC customers"/>
<input checked="" type="checkbox"/> Active

- Clear the Active option.

Configuring Users and Templates

5. Click Save.

The user template is inactivated and is displayed on the Inactive tab on the Manage Templates page.

Figure 5-41: Manage Templates page, Inactive tab

A screenshot of a web-based application titled "Manage Templates". The top navigation bar includes links for Admin, Calendar, Submit Event, My Account, and Help. Below the navigation is a toolbar with buttons for Actions (Add, Assign Users, Assign LDAP Groups, Edit, Delete, Print), Active, and Inactive tabs. The Inactive tab is selected. A table titled "Templates" lists three entries:

Name	Description
Demo Template	Used for potential MC customers
Lab Schedule	Testing purposes for setting up lab schedules
MHI Test Template	Template used for testing

To edit a user template

You can edit both active and inactive user templates.

1. Under the Admin Panel main menu option, point to Security, and then click Templates.

The Manage Templates page opens. The Active tab is the opened tab. All currently active user templates in Master Calendar are displayed on this tab.

Figure 5-42: Manage Templates page, Active tab

A screenshot of the Manage Templates page with the Active tab selected. The interface is identical to Figure 5-41, showing the same toolbar, tabs, and table of user templates. The table data is as follows:

Name	Description
Arts and Sciences Calendars Template	Permissions for A&S Calendar users
Contract Project Calendar Template	
Demo Template	Used for potential MC customers
Department of Biology	For Biology Calendar users
Department of Chemistry Calendars Template	Permissions for Dept. of Chem. calendar users
Intramural Calendar Permissions Template	Permissions for Intramural Calendar Event Submitters

2. If needed, click the Inactive tab to open it.
3. Select the user template that you are editing.

4. Under Actions, click Edit.

The Add Template page opens. The Template tab is the opened tab.

Figure 5-43: Add Template page, Template tab

The screenshot shows a web-based application interface for managing user templates. At the top, there is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar is a horizontal tab bar with four tabs: Template (which is highlighted in blue), Permissions, LDAP, and History. The main content area contains the following form fields:

- Name:**
- Description:**
- Active:**

5. Edit the information for the user template as needed.

Tab	Information to Edit
Template	<ul style="list-style-type: none"> • Template Name • Template Description
Permissions	The type of access that a user with the selected template will have to the calendars in Master Calendar. See " To specify user template permissions ".
LDAP	The security group information that is maintained on your organization's network in conjunction with the templates in Master Calendar. See " To add LDAP groups to a user template ".

6. Click Save to save the edited template in Master Calendar.

Configuring Users and Templates

To delete a user template

You can delete only inactive user templates. To delete a currently active user template, you must first inactivate the template. (See “[To inactivate a user template](#)”.)

1. Under the Admin Panel main menu option, point to Security, and then click Templates.

The Manage Templates page opens. The Active tab is the opened tab. All currently active user templates in Master Calendar are displayed on this tab.

Figure 5-44: Manage Templates page, Active tab

A screenshot of the 'Manage Templates' page. At the top, there's a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar is a toolbar with buttons for Actions (Add, Assign Users, Assign LDAP Groups), Edit, and Print. There are two tabs at the top of the main content area: 'Active' (which is selected and highlighted in blue) and 'Inactive'. Below the tabs is a table titled 'Templates' with columns for 'Name' and 'Description'. The table contains four rows of data:

Name	Description
Arts and Sciences Calendars Template	Permissions for A&S Calendar users
Contract Project Calendar Template	
Department of Chemistry Calendars Template	Permissions for Dept. of Chem. calendar users
Intramural Calendar Permissions Template	Permissions for Intramural Calendar Event Submitters

2. Click the Inactive tab to open it.

All currently inactive user templates in Master Calendar are displayed on this tab.

Figure 5-45: Manage Templates page, Inactive tab

A screenshot of the 'Manage Templates' page. The 'Inactive' tab is selected and highlighted in blue. Below the tab is a table titled 'Templates' with columns for 'Name' and 'Description'. The table contains three rows of data:

Name	Description
Demo Template	Used for potential MC customers
Lab Schedule	Testing purposes for setting up lab schedules
MHI Test Template	Template used for testing

3. Select the user template or templates that you are deleting.



To select all templates on the currently opened page for deletion in a single step, select Name. If you have multiple pages of templates to delete, you must repeat this entire process on each page.

- Under Actions, click Delete.

A message opens, asking you if you are sure that you want to delete all the selected templates.

- Click OK in the message.

A message opens indicating that all the selected templates were successfully deleted.

- Click OK in the message.

The Inactive tab is refreshed to show the remaining, if any, inactive user templates in Master Calendar.

To generate a User Templates List report

You can generate a User Templates List report, which lists all the active or inactive user templates that are configured in Master Calendar. The report includes the template name and description, and it also details the user permissions for each template.

- Under the Admin Panel main menu option, point to Security, and then click User Templates.

The Manage Templates page opens. The Active tab is the opened tab. All currently active user templates in Master Calendar are displayed on this tab.

Figure 5-46: Manage Templates page, Active tab

Templates	
<input type="checkbox"/> Name	Description
<input type="checkbox"/> Arts and Sciences Calendars Template	Permissions for A&S Calendar users
<input type="checkbox"/> Contract Project Calendar Template	
<input type="checkbox"/> Department of Chemistry Calendars Template	Permissions for Dept. of Chem. calendar users
<input type="checkbox"/> Intramural Calendar Permissions Template	Permissions for Intramural Calendar Event Submitters

Configuring Users and Templates

2. Do one of the following:

- If you are generating a User Templates List report for all *active* user templates in your Master Calendar, under Actions, click Print.
- If you are generating a User Templates List report for all *inactive* user templates in Master Calendar, click the Inactive tab to open it, and then under Actions, click Print.

An onscreen preview of the User Templates List report opens in its own window. A variety of options are available from this preview, including (from left to right at the top of the onscreen preview) the options to search the report results, print the report in its entirety, print the currently displayed report page, and export the report to a file and save the file.



PDF is the default format for exporting to a file. Other allowed formats are Xls, Xlsx, Rtf, Mnt, Text, Image, and Csv.

Figure 5-47: Onscreen preview for a User Templates List report

The screenshot shows a Microsoft Internet Explorer window titled "Template Report - Windows Internet Explorer". The URL in the address bar is "http://www.dea.com/MCTW/TemplateRpt.aspx?IsActive=0". The main content area displays the "EMS Master Calendar Demo" report. It lists three entries:

- Template:** LDAP Template
Description:
Permission Type: Calendar(s)
Viewer:
Requestor:
Calendar User:
- Template:** Requestor
Description: Requestor
Permission Type: Calendar(s)
Viewer:
Requestor:
Calendar User: Choir, Drama, Girls Youth Soccer
- Template:** Sports template
Description: All non-youth sports activities
Permission Type: Calendar(s)
Viewer:
Requestor:
Calendar User: Cycling Club, Girls Youth Soccer, Intramural Sports, Seals Swim Team

At the bottom of the browser window, there are standard navigation buttons (Back, Forward, Stop, Home), a search bar, and a status bar indicating "Internet | Protected Mode: Off" and "100%".

To view the history for a user template

The history for a user template consists of the original creation date of the template, the name of the user who created the template, the last that the template was edited, and the name of the user who last edited the template. You can view the history for both active and inactive user templates.

- Under the Admin Panel main menu option, point to Security, and then click Templates.

The Manage Templates page opens. The Active tab is the opened tab. All currently active user templates in Master Calendar are displayed on this tab.

Figure 5-48: Manage Templates page, Active tab

Templates	
<input type="checkbox"/> Name	Description
<input type="checkbox"/> Arts and Sciences Calendars Template	Permissions for A&S Calendar users
<input type="checkbox"/> Contract Project Calendar Template	
<input type="checkbox"/> Demo Template	Used for potential MC customers
<input type="checkbox"/> Department of Biology	For Biology Calendar users
<input type="checkbox"/> Department of Chemistry Calendars Template	Permissions for Dept. of Chem. calendar users
<input type="checkbox"/> Intramural Calendar Permissions Template	Permissions for Intramural Calendar Event Submitters

- If needed, click the Inactive tab to open it.
- Select the user template for which you are viewing the history.
- Under Actions, select Edit.

The Add Template page opens. The Template tab is the opened tab.

Figure 5-49: Add Template page, Template tab

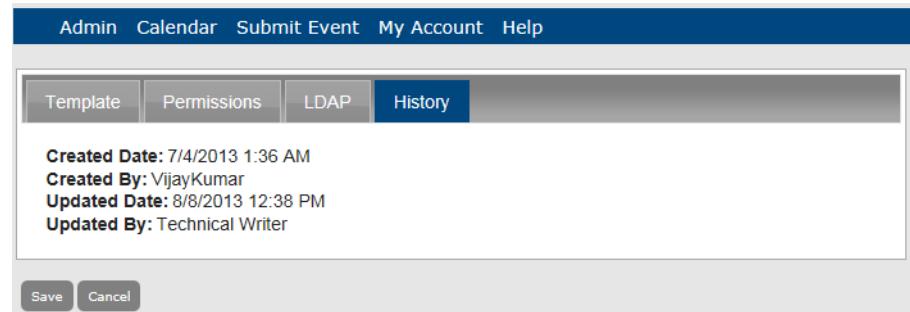
Name: <input type="text" value="Demo Template"/>
Description: <input type="text" value="Used for potential MC customers"/>
<input checked="" type="checkbox"/> Active

Save Cancel

Configuring Users and Templates

5. Click the History tab to open it and view the history for the selected user template.

Figure 5-50: Add Template page, History tab



Administering Master Calendar

Site administration for Master Calendar consists of a variety of activities, including selecting the appearance of your Master Calendar site, specifying the site theme, managing RSS feeds and menu options, updating Master Calendar registration information, building and generating custom reports, and managing data sources, connectors, help text, and subscriptions. Administrator-specific functions are also available for working with and debugging Master Calendar.

This chapter covers the following topics:

- “Specifying a Master Calendar Theme”
- “Managing Default Settings for Master Calendar”
- “Managing RSS Feeds”
- “Managing Menus in your Master Calendar System”
- “Viewing and Updating Master Calendar Registration Information”
- “Managing Data Sources”
- “Managing Connectors in Master Calendar”
- “Managing Custom Reports”
- “Customizing the Header for Automated Emails”
- “Managing Help Text in Master Calendar”
- “Managing Subscriptions”

Specifying a Master Calendar Theme

A Master Calendar *theme* determines the appearance of your Master Calendar site everywhere other than the Admin panel. You can:

- Add or remove a custom banner. See “[To add or remove a custom banner](#)”
- Customize the Sidebar layout. See “[To customize the Sidebar layout](#)”
- Customize the main content for the site. See “[To customize the main content](#)”
- Pick a default theme. See “[To select a default theme](#)”
- Add, edit or delete custom color schemes. See “[To add, edit, or delete a custom color scheme](#)”



The theme for the Admin panel is locked upon delivery and installation of Master Calendar and you cannot edit it.

To specify a Master Calendar site theme

1. Under the Admin Panel main menu option, point to Site Administration, and then click Theme Roller.

The Theme Roller page opens.

2. Click the Theme Roller Settings icon

The Theme Roller Settings list opens. The current settings for the theme are displayed in the list.

Figure 6-1: Theme Roller page

The screenshot shows the Admin Panel's Site Administration section with the "Theme Roller" page open. On the left, there's a "Featured Events" module displaying a "Concert in the Park" event with a large crowd image. Below it is a calendar view for August 2013. On the right, a sidebar titled "Current Settings" lists several theme-related options:

- Custom Banner: No
- Sidebar Position: Right
- Default Calendar: DEA
- Collapse Calendar Groups: Yes
- Display Filters: No
- Display Featured Events: Yes
- Event Date Range: Week
- Event Display Format: Calendar
- Color Scheme: Blue

Below these are links for "Upload Banner", "Customize Sidebar", "Customize Main Content", "Pick a Color Scheme", and "Create Custom Color Scheme".

Administering Master Calendar

3. Continue to one of the following:
 - “[To add or remove a custom banner](#)”
 - “[To customize the Sidebar layout](#)”
 - “[To customize the main content](#)”
 - “[To select a default theme](#)”
 - “[To add, edit, or delete a custom color scheme](#)”

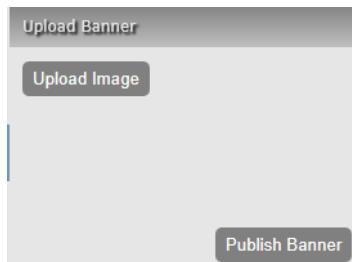
To add or remove a custom banner

A *custom banner* is a graphic image that is displayed at the top of the Master Calendar Home page and the Submit Event page. A custom banner typically announces the name or identity of your Master Calendar site, but you can post any image that fits your organization’s business needs.

1. Click Upload Banner.

The Banner popup opens. If your site currently has a banner displayed, then the name of the image file is displayed along with a Clear Image option and the banner is displayed at the top of the Theme Roller page; otherwise, the popup is blank and only Upload Image and Publish options are displayed.

Figure 6-2: *Banner popup*



2. Do one or both of the following as needed:

- To add a banner to your Master Calendar site, click Upload Image, scroll to and select the image file, and then click Publish Banner.
- To remove a banner from your Master Calendar site, click Clear Image.

A message opens indicating that your changes were applied successfully and that your theme is now live.

3. Click OK.

The message closes. If you added a banner, then the banner is displayed at the top of the Theme Roller page for previewing. If you removed a banner, then the banner is no longer displayed at the top of the Theme Roller page. The banner is also removed from the top of the Master Calendar Home page and the Submit Event page.

4. Continue with any other customizations as needed, or click the Theme Roller Settings icon  to close the Theme Roller Settings list, and then click Back to Admin Panel to go to the Manage Events page or click Calendar to go to the Master Calendar Home page.

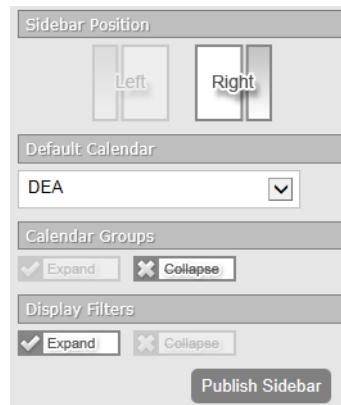
To customize the Sidebar layout

The *Sidebar* consists of a Calendar Tool, a blank keyword Search field, a Calendar Picker, and an Event Filters dialog box. When you customize the Sidebar consists you can specify the following information for it and its components on the Master Calendar Home page—the position of the Sidebar, the default calendar that is to be displayed in the Calendar Display area, whether the calendar display in the Calendar Picker is to be expanded or collapsed by default, and whether the Event Filters dialog box is to be expanded or collapsed by default.

1. Click Customize Side Bar.

The Sidebar popup opens. The popup displays the current settings for the Sidebar.

Figure 6-3: Sidebar popup



2. Do any of the following as needed:
 - Select the Sidebar position.
 - Select the default calendar that is to be displayed in the Calendar Display area on the Master Calendar Home page.
 - Indicate if the calendar groups in the Calendar Picker are to be expanded or collapsed by default on the Master Calendar Home page.
 - Indicate if the Event Filters dialog box is to be expanded or collapsed on the Master Calendar Home page.

After every selection, the Theme Roller page display is dynamically updated for previewing.

3. Click Publish Sidebar.

Administering Master Calendar

A message opens indicating that the changes were applied successfully and your theme is now live.

4. Click OK.

The message closes. The Theme Roller page is dynamically updated with the selected changes for previewing.

5. Continue with any other customizations as needed, or click the Theme Roller Settings icon  to close the Theme Roller Settings list, and then click Back to Admin Panel to go to the Manage Events page or click Calendar to go to the Master Calendar Home page.

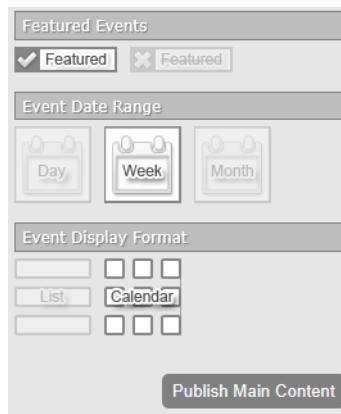
To customize the main content

The main content for your Master Calendar site consists of featured events, the default calendar event range, and the default calendar event type.

1. Click Customize Main Content.

The Featured Events popup opens.

Figure 6-4: Featured Events popup



2. Do any of the following as needed:

- Indicate whether featured events are to be displayed on the Master Calendar Home page.
- Select the date range for events—Day, Week, or Month—in the Calendar Display area.
- Select the display format for events—List or Calendar—in the Calendar Display area.

After every selection, the Theme Roller page display is dynamically updated for previewing.

3. Click Publish Main Content.

A message opens indicating that the changes were applied successfully and your theme is now live.

4. Continue with any other customizations as needed, or click the Theme Roller Settings icon  to close the Theme Roller Settings list, and then click Back to Admin Panel to go to the Manage Events page or click Calendar to go to the Master Calendar Home page.

To select a default theme

Master Calendar is delivered with six default color schemes for the theme. The Dark color scheme is the theme that is in use when Master Calendar is installed.

1. Click Pick a Color Scheme.

The Default Color Scheme popup opens. The six default color schemes are displayed. The default color scheme currently in use, if applicable, is highlighted.

Figure 6-5: Default Color Scheme popup

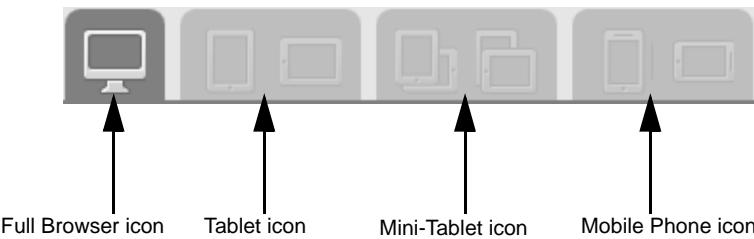


2. Click a default color scheme, and then click Publish Color Scheme.

The Theme Roller page is dynamically updated to reflect the chosen color scheme.

3. Optionally, at the top of the Theme Roller page, click the various Responsive Design icons to see what how the chosen color scheme appears in (from left to right) a full browser display, a tablet (portrait/landscape), a mini-tablet (portrait/landscape), or a mobile phone (portrait/landscape).

Figure 6-6: Responsive Design icons



Administering Master Calendar

4. Click Publish.

A message opens indicating that the changes were applied successfully and your theme is now live.

5. Continue with any other customizations as needed, or click the Theme Roller Settings icon  to close the Theme Roller Settings list, and then click Back to Admin Panel to go to the Manage Events page or click Calendar to go to the Master Calendar Home page.

To add, edit, or delete a custom color scheme

If none of the default color schemes meets your needs, then you can create your own custom color scheme. You can also edit a custom color scheme, or delete a custom color scheme.

1. Click Create Custom Color Scheme.

The Custom Color Scheme popup opens.

Figure 6-7: Custom Color Scheme popup



2. Continue to one of the following:

- [“To add a custom color scheme”](#)
- [“To modify a custom color scheme”](#)
- [“To delete a custom color scheme”](#)

To add custom color scheme

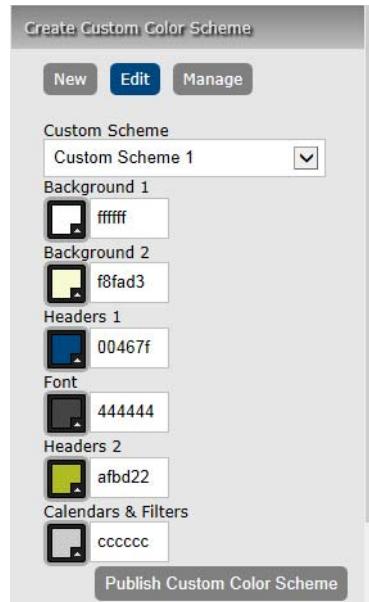
1. Click New.

A blank Color Scheme Name field opens.

2. Enter the name for the new custom color scheme, and then click Create.

The Custom Color Scheme popup is refreshed with a template for specifying a custom color scheme. (See [Figure 6-8](#)). A default color value and a Color icon that displays the default color are provided for every site option for which you can specify a custom color.

Figure 6-8: Custom Color Scheme popup, Custom Scheme template



3. Change the colors for any or all of the site items as needed. Click the Color icon for an item to open the Color Picker popup and use the options on the popup to select a color or define an RGB or HEX color.



As you use the Slider bar option on the Color Picker popup, an expanded range of colors is displayed to the left of the bar. To select a color in this range display, click and hold the left mouse button, and move the mouse over the display. The RGB and HEX values are dynamically updated in the popup as is the HTML color code and the color that is displayed in the Color icon for the item.

Figure 6-9: Color Picker Popup

Slider option. Click and hold the left mouse button to move up and down the color bar.

Expanded range of colors displayed here. To select a color in this range display, click and hold the left mouse button, and move the mouse over the display.



The HTML color code for the site item is dynamically updated as you click and drag your mouse in the expanded color display as is the color that is displayed in the Color icon.

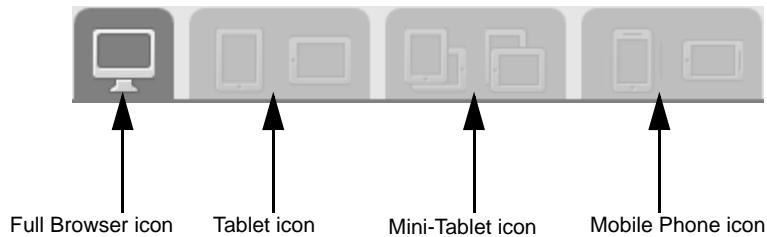
Administering Master Calendar

4. Click Publish Custom Color Scheme.

The Theme Roller page is updated to reflect the custom color scheme. A message opens indicating that the changes were applied successfully and your theme is now live.

5. Optionally, at the top of the Theme Roller page, click the various Responsive Design icons to see what how the chosen color scheme appears in (from left to right) a full browser display, a tablet (portrait/landscape), a mini-tablet (portrait/landscape), or a mobile phone (portrait/landscape).

Figure 6-10: Responsive Design icons



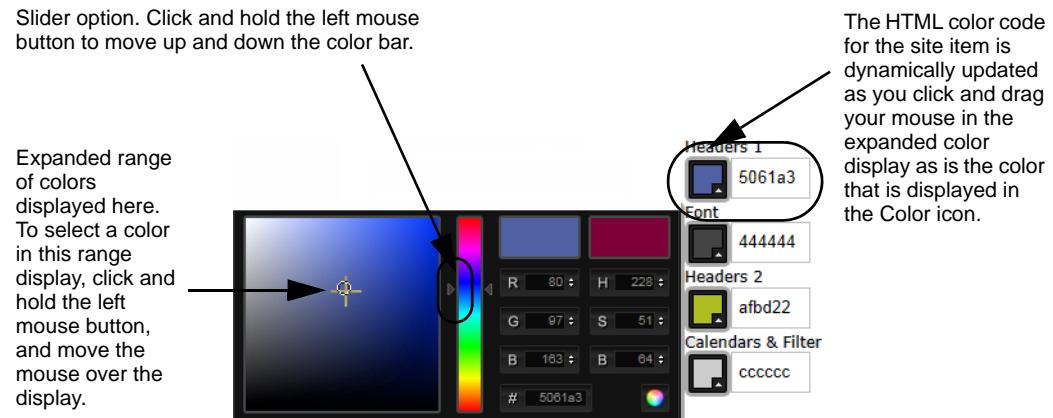
6. Continue with any other customizations as needed, or click the Theme Roller Settings icon to close the Theme Roller Settings list, and then click Back to Admin Panel to go to the Manage Events page or click Calendar to go to the Master Calendar Home page.

To modify a custom color scheme

1. On the Custom Scheme dropdown list, select the custom color scheme that you are editing.
The Custom Color Scheme popup is refreshed with the information for the selected scheme. The current color value and a Color icon that displays the current color are provided for every site option. By default, Edit is already selected.
2. Change the colors for any or all of the site items as needed. Click the Color icon for an item to open the Color Picker popup (see [Figure 6-11](#)) and use the options on the popup to select a color or define an RGB or HEX color.



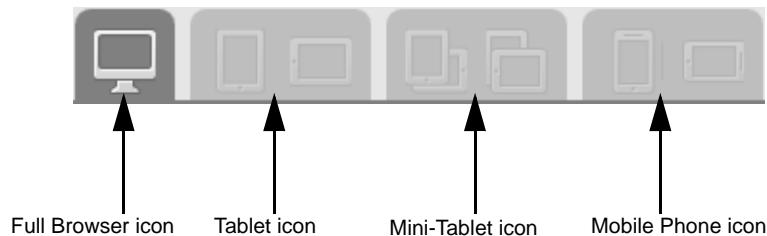
As you use the Slider bar option on the Color Picker popup, an expanded range of colors is displayed to the left of the bar. To select a color in this range display, click and hold the left mouse button, and move the mouse over the display. The RGB and HEX values are dynamically updated in the popup as is the HTML color code and the color that is displayed in the Color icon for the item.

Figure 6-11: Color Picker Popup

3. Click Publish Custom Color Scheme.

The Theme Roller page is updated to reflect the custom color scheme. A message opens indicating that the changes were applied successfully and your theme is now live.

4. Optionally, at the top of the Theme Roller page, click the various Responsive Design icons to see what how the chosen color scheme appears in (from left to right) a full browser display, a tablet (portrait/landscape), a mini-tablet (portrait/landscape), or a mobile phone (portrait/landscape).

Figure 6-12: Responsive Design icons

5. Continue with any other customizations as needed, or click the Theme Roller Settings icon to close the Theme Roller Settings list, and then click Back to Admin Panel to go to the Manage Events page or click Calendar to go to the Master Calendar Home page.

Administering Master Calendar

To delete a custom color scheme

1. On the Custom Color Scheme popup, click Manage.

A list of all the available custom color schemes for your Master Calendar site opens.

2. Click the Delete icon next to the color scheme that you are deleting.
 - If the selected custom color scheme is not in use, the scheme is deleted immediately. Go to [Step 4](#).
 - If the selected custom color scheme is currently in use, then a message opens indicating this and informing you that your site theme will be set back to the default shipped theme. Go to [Step 3](#).
3. Click Yes.

The message closes. The site theme is returned to the default shipped theme and the Theme Roller page is dynamically updated to reflect this.

4. Continue with any other customizations as needed, or click the Theme Roller Settings icon  to close the Theme Roller Settings list, and then click Back to Admin Panel to go to the Manage Events page or click Calendar to go to the Master Calendar Home page.

Managing Default Settings for Master Calendar

When the Master Calendar application is initially installed, it is installed with *default settings*, which determine how the system is to be used. For example, some default settings include Max number of events/day to display in daily view, Max number of events/day to display in monthly view, Default Calendar Display, and so on. As the site administrator, you can [change](#) these settings to better meet your organization's business needs. You can also [generate](#) a Default Settings List report and you can [view](#) the history for a default setting.

To manage default settings for Master Calendar

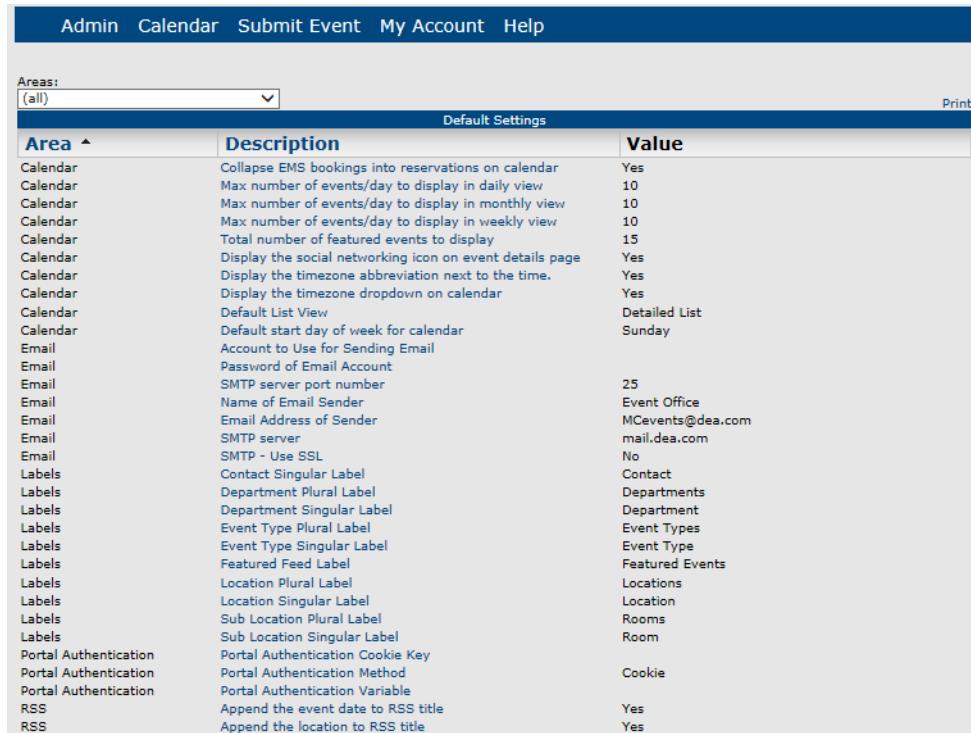
- Under the Admin Panel main menu option, point to Site Administration, and then click Default Settings.

The Default Settings page opens. All the default settings for Master Calendar with their current values are displayed on this tab.



See [Appendix A, "Site Configuration Settings,"](#) for a complete list of default settings, their description, and default values.

Figure 6-13: Default Settings page



The screenshot shows a web-based administration interface for managing default settings. At the top, there is a navigation bar with links for Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar, there is a dropdown menu labeled 'Areas:' with '(all)' selected. To the right of the dropdown is a 'Print' button. The main content area is titled 'Default Settings' and contains a table with three columns: 'Area', 'Description', and 'Value'. The table lists numerous configuration items, such as 'Collapse EMS bookings into reservations on calendar' (Value: Yes), 'Max number of events/day to display in daily view' (Value: 10), and 'Append the event date to RSS title' (Value: Yes). The table is scrollable, and the bottom right corner shows a 'Rooms' entry.

Area	Description	Value
Calendar	Collapse EMS bookings into reservations on calendar	Yes
Calendar	Max number of events/day to display in daily view	10
Calendar	Max number of events/day to display in monthly view	10
Calendar	Max number of events/day to display in weekly view	10
Calendar	Total number of featured events to display	15
Calendar	Display the social networking icon on event details page	Yes
Calendar	Display the timezone abbreviation next to the time.	Yes
Calendar	Display the timezone dropdown on calendar	Yes
Calendar	Default List View	Detailed List
Calendar	Default start day of week for calendar	Sunday
Email	Account to Use for Sending Email	
Email	Password of Email Account	
Email	SMTP server port number	25
Email	Name of Email Sender	Event Office
Email	Email Address of Sender	MCevents@dea.com
Email	SMTP server	mail.dea.com
Email	SMTP - Use SSL	No
Labels	Contact Singular Label	Contact
Labels	Department Plural Label	Departments
Labels	Department Singular Label	Department
Labels	Event Type Plural Label	Event Types
Labels	Event Type Singular Label	Event Type
Labels	Featured Feed Label	Featured Events
Labels	Location Plural Label	Locations
Labels	Location Singular Label	Location
Labels	Sub Location Plural Label	Rooms
Labels	Sub Location Singular Label	Room
Portal Authentication	Portal Authentication Cookie Key	
Portal Authentication	Portal Authentication Method	
Portal Authentication	Portal Authentication Variable	
RSS	Append the event date to RSS title	Yes
RSS	Append the location to RSS title	Yes

Administering Master Calendar

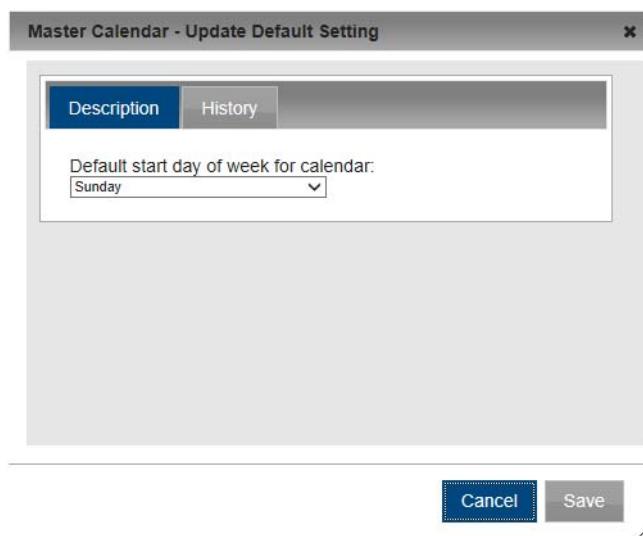
2. Optionally, to refine this list, on the Area dropdown list, select the area in Master Calendar for which you are changing the default settings.

The Default Settings page is refreshed to show only those default settings for the selected area.

3. Click the default setting for which you are changing the value or viewing the history.

The Default Setting dialog box opens. This dialog box has a Description tab, which is open by default, and a History tab. The Description tab shows the description for the default setting and its current value.

Figure 6-14: Update Default Setting dialog box, Description tab



4. Do one of the following:

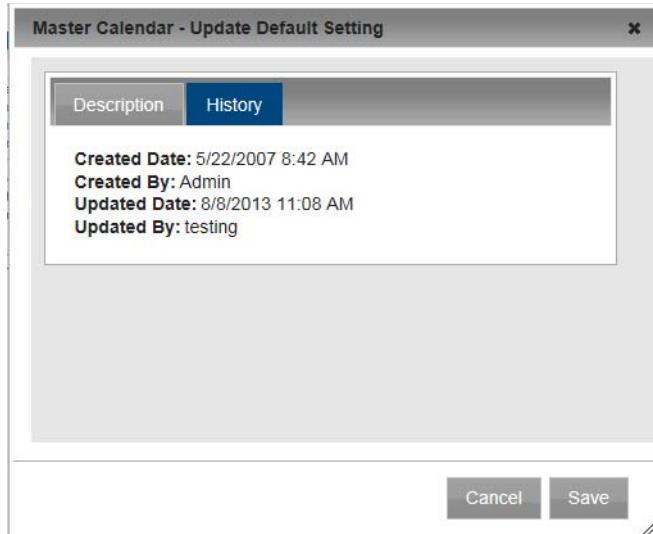
- Edit the value for the setting as needed, and then click Save to save the new value for the default setting.

The dialog box closes and you return to the Default Settings page, with the new value for the default setting appearing on the page.

- To view the history for the default setting, click the History tab to open it.

The history for a default settings consists of the original creation date of the setting, the name of the user who created the setting, the last date that the setting was edited, and the name of the user who last edited the setting. See [Figure 6-15](#).

Figure 6-15: Update Default Setting dialog box, History tab



To generate a Default Settings List report

You can generate a Default Settings List report, which lists the current values for the default settings in Master Calendar. You can generate a report that lists the current values for all your default settings, or you can generate a report that lists the current values for a selected area of default settings (Calendar, Email, Labels, and so on).

1. Under the Admin Panel main menu option, point to Site Administration, and then click Default Settings.

The Default Settings page opens. All the default settings for Master Calendar with their current values are displayed on this tab.

Figure 6-16: Default Settings page

The screenshot shows a table titled "Default Settings" with the following columns: "Area", "Description", and "Value". The table lists numerous settings across different areas, such as "Collapse EMS bookings into reservations on calendar" (Yes), "Max number of events/day to display in daily view" (10), and "Event Type Plural Label" (Event Types). The "Areas" dropdown at the top left is set to "(all)".

Default Settings		
Area	Description	Value
Calendar	Collapse EMS bookings into reservations on calendar	Yes
Calendar	Max number of events/day to display in daily view	10
Calendar	Max number of events/day to display in monthly view	10
Calendar	Max number of events/day to display in weekly view	10
Calendar	Total number of featured events to display	15
Calendar	Display the social networking icon on event details page	Yes
Calendar	Display the timezone abbreviation next to the time.	Yes
Calendar	Display the timezone dropdown on calendar	Yes
Calendar	Default List View	Detailed List
Calendar	Default start day of week for calendar	Sunday
Email	Account to Use for Sending Email	
Email	Password of Email Account	
Email	SMTP server port number	25
Email	Name of Email Sender	Event Office
Email	Email Address of Sender	MCevents@dea.com
Email	SMTP server	mail.dea.com
Email	SMTP - Use SSL	No
Labels	Contact Singular Label	Contact
Labels	Department Plural Label	Departments
Labels	Department Singular Label	Department
Labels	Event Type Plural Label	Event Types

Administering Master Calendar

2. Do one of the following:

- If you are generating a Default Settings List report for all *active* default settings in your Master Calendar, then click Print.
- If you are generating a Default Settings List report for a specific area in Master Calendar, select the area on the Areas dropdown list, and then click Print.

An onscreen preview of the Default Settings List report opens in its own window. A variety of options are available from this preview, including (from left to right at the top of the onscreen preview) the options to search the report results, print the report in its entirety, print the currently displayed report page, and export the report to a file and save the file. See [Figure 6-17](#).



PDF is the default format for exporting to a file. Other allowed formats are Xls, Xlsx, Rtf, Mnt, Text, Image, and Csv.

Figure 6-17: Onscreen preview for a Default Settings List report

The screenshot shows a Microsoft Internet Explorer window titled "Default Settings - Windows Internet Explorer". The URL in the address bar is "http://www.dea.com/MCTW/DefaultSettingsRpt.aspx?Area=Calendar". The main content area displays a table titled "EMS Master Calendar Demo" under the heading "Default Settings". The table has three columns: "Area", "Description", and "Value". The rows list various calendar-related settings, such as "Collapse EMS bookings into reservations on calendar" (Yes), "Default calendar to display on main calendar" (Cycling Club), and "Display the social networking icon on event details page" (Yes). The table continues with many other items, including display preferences for events per day and scroll bars, and various display formats like Grid and Month.

Area	Description	Value
Calendar	Collapse EMS bookings into reservations on calendar	Yes
Calendar	Default calendar to display on main calendar	Cycling Club
Calendar	Display the Event Title using the event type color	No
Calendar	Max number of events/day to display in daily view	25
Calendar	Max number of events/day to display in monthly view	5
Calendar	Max number of events/day to display in weekly view	20
Calendar	Display the social networking icon on event details page	Yes
Calendar	Display the timezone abbreviation next to the time.	Yes
Calendar	Display "Untimed event" label for untimed events on calendar	No
Calendar	Use scroll bar in calendar grid view	No
Calendar	Collapse search filters on calendar page	No
Calendar	Default Calendar Format	Grid
Calendar	Default Calendar Display	Month
Calendar	List style type for calendar	Detailed
Calendar	Show weekends on calendar	Yes
Calendar	Default start day of week for calendar	Sunday

Managing RSS Feeds

A Really Simple Syndication (RSS) feed is a method of distributing links to content in your Master Calendar that you would like guests or users to use. All RSS feeds to which you have access are available through the RSS link at the bottom of every page in Master Calendar. Private RSS feeds are available to users only after they log in to Master Calendar. Managing RSS feeds consists of [adding](#) RSS feeds, [activating](#) and [inactivating](#) RSS feeds, [editing](#) RSS feeds, and [deleting](#) RSS feeds. You can also [view](#) the history for an RSS feed.

To add an RSS feed

1. Under the Admin Panel main menu option, point to Site Administration, and then click RSS Feeds.

The Manage RSS Feeds page opens. The Active tab is the opened tab. All currently active RSS feeds in Master Calendar are displayed on this tab.

Figure 6-18: Manage RSS Feeds page, Active tab

RSS Feeds		
	Name	Status
<input type="checkbox"/>	Arts and Sciences News	Public
<input type="checkbox"/>	CNN News Feed	Public
<input type="checkbox"/>	Demonstration Test Feed	Public
<input type="checkbox"/>	Department of Chemistry Events	Public
<input type="checkbox"/>	Fox News Ticker	Public
<input type="checkbox"/>	Never Summer	Public
<input type="checkbox"/>	RP for Rob	Public
<input type="checkbox"/>	RT Special	Public
<input type="checkbox"/>	Student Organizations Feed	Public
<input type="checkbox"/>	Todays Events	Public
<input type="checkbox"/>	Tour De France News	Public
<input type="checkbox"/>	Velodrome News	Public

Administering Master Calendar

2. Under Actions, click Add.

The Add RSS Feed page opens. The Details tab is the only tab on this page. You use the options on this tab to specify the information for the new RSS feed.

Figure 6-19: Add RSS Feed page, Details tab

The screenshot shows the 'Add RSS Feed' page with the 'Details' tab selected. The interface has a dark blue header with links for Admin, Calendar, Submit Event, My Account, and Help. Below the header is a grey sidebar containing the 'Details' tab. The main content area contains several input fields and dropdown menus:

- Name:
- Calendars: with a lookup icon (blue circle with a magnifying glass)
- Event Types: with a lookup icon (blue circle with a magnifying glass)
- Locations: with a lookup icon (blue circle with a magnifying glass)
- Departments: with a lookup icon (blue circle with a magnifying glass)
- Keyword:
- Priority: (All)
- Feed Access: Public (Allow anyone to view RSS feed) Private
- Days Forward:
- Starting When: Today Tomorrow
- Maximum Returned Events: 0 = unlimited
- Include Cancelled Events

At the bottom are two buttons: 'Save' and 'Back'.

3. Enter the information for the RSS feed.

Field	Description
Name	The name for the RSS feed.
Calendars	A list of all active calendars to which you have access as a Calendar Manager. Click the Lookup icon to open the Calendars dialog box and select the calendar or calendars from which the RSS feed is to pull information.
Event Types	A list of all active event types that are currently configured in Master Calendar. Click the Lookup icon to open the Event Types dialog box and select the event type or types that RSS feed should pull.
Locations	A list of all active event locations that are currently configured in Master Calendar. Click the Lookup icon to open the Locations dialog box and select one or more locations. The RSS feed will pull the events with these specific locations.

Field	Description
Departments	A list of all active departments that are currently configured in Master Calendar. Click the Lookup icon to open the Departments dialog box and select one or more departments. The RSS feed will pull the events with these specific departments. Note: Department is a default label. You can configure this to better suit your organization's business needs, for example, "Business Units."
Keyword	Enter a search string to further filter the events that are pulled by the RSS feed. Note: The search is limited to the exact order of the characters in the string; however, the search string is not case-sensitive and the search string can be found anywhere in the search results. For example, the search string "scout" returns holidays that contain either Scouting Day or Boy Scouts' Day.
Priority	Indicate the priority of the events that the RSS feed should pull. The default value is All. You can leave this value as-is, or select from one of three values—High, Medium, or Low.
Feed Access	<ul style="list-style-type: none"> • Public - Anyone, not just users of Master Calendar, can view the feed. (Default value.) • Private - Only users of Master Calendar can view the feed.
Days Forward	The number of days going forward from the current day's date that the RSS feed should pull information.
Starting When	<ul style="list-style-type: none"> • Today - Display only those events that start today (the current day's date). • Tomorrow - Display only those events that start tomorrow (the day after the current day's date).
Maximum Returned Events	The maximum number of events that the RSS feed should return. The default value is 0, which means that there is no limit to the maximum number of events returned.
Include Cancelled Events	The default value is Yes. To set to No, clear this selection.
Make Featured Feed	The default value is No. To set to Yes, select this option. Note: Remember, only one feed at a time can be the featured feed. If the RSS feed access is set to Private, a user cannot view the featured feed until after they log in to Master Calendar. If the RSS feed access is set to Public, anyone, guest or user, can view the featured feed.

4. Click Save.

An RSS Feed Saved message opens.

Administering Master Calendar

5. Click OK in the RSS Feed Saved message to save your RSS Feed.

Four links are displayed at the bottom of the RSS Feed page.

- Preview Link—Click this link to preview the RSS feed link and determine if it is correct, or if you need to make changes.
- Encrypted Link—The actual physical URL to the RSS feed.
- Friendly Link—A shortened URL to the RSS feed to accommodate smaller viewing screens.
- Custom Link—Includes additional fields (Start Time, End Time, Location and IsAllDayEvent) that are embedded in the RSS document.

Figure 6-20: RSS Links

Preview Link: <http://www.dea.com/MCTW/RSSFeeds.aspx?data=sxJvQtP%2fyzTQmxjdOL6z884FRtoUqT7NPw6tlkrn4cIxIld8MPN3g%3d%3d>
Encrypted Link: <http://www.dea.com/MCTW/RSSFeeds.aspx?data=sxJvQtP%2fyzTQmxjdOL6z884FRtoUqT7NPw6tlkrn4cIxIld8MPN3g%3d%3d>
Friendly Link: <http://www.dea.com/MCTW/RSSFeeds.aspx?Name=IM%20Cycling%20Club>
Custom Link (Includes additional fields embedded in the rss document): <http://www.dea.com/MCTW/RSSFeeds.aspx?data=sxJvQtP%2fyzTQmxjdOL6z884FRtoUqT7NPw6tlkrn4cIxIld8MPN3g%3d%3d>

Figure 6-21: Previewing an RSS feed



To activate an RSS feed

1. Under the Admin Panel main menu option, point to Site Administration, and then click RSS Feeds.

The Manage RSS Feeds page opens. The Active tab is the opened tab. All currently active RSS feeds in Master Calendar are displayed on this tab.

Figure 6-22: Manage RSS Feeds page, Active tab

RSS Feeds		
	Name	Status
<input type="checkbox"/>	Arts and Sciences News	Public
<input type="checkbox"/>	CNN News Feed	Public
<input type="checkbox"/>	Demonstration Test Feed	Public
<input type="checkbox"/>	Department of Chemistry Events	Public
<input type="checkbox"/>	Fox News Ticker	Public
<input type="checkbox"/>	Never Summer	Public
<input type="checkbox"/>	RP for Rob	Public
<input type="checkbox"/>	RT Special	Public

2. Click the Inactive tab to open it.

All currently inactive RSS feeds in Master Calendar are displayed on this tab.

Figure 6-23: Manage RSS Feeds page, Inactive tab

RSS Feeds		
	Name	Status
<input type="checkbox"/>	Academic Affairs News	Public
<input type="checkbox"/>	Biology Department News	Public
<input type="checkbox"/>	Department of Chemistry Activities	Public

3. Select the RSS Feed that you are activating.
4. Under Actions, click Edit.

The Add RSS Feeds page opens. The Details tab is the opened tab. The Active option is not selected.

Figure 6-24: Add RSS Feeds page, Details tab, Inactive RSS feed

Details

Name:
Academic Affairs News

Calendars:
Calendar of Events

Event Types:

Locations:
Académico - 1

Departments:

Keyword:

Priority:
(All)

Feed Access:
 Public (Allow anyone to view RSS feed) Private

Days Forward:
23

Starting When:
 Today Tomorrow

Maximum Returned Events:
0 0 = unlimited

Include Cancelled Events
 Active

Save **Back**

Preview Link: <http://www.dea.com/VHOU81251501984/RSSFeeds.aspx?data=3p3oPLk3vPIqlgR7GVicJatprYE>
Encrypted Link: <http://www.dea.com/VHOU81251501984/RSSFeeds.aspx?data=3p3oPLk3vPIqlgR7GVicJatpr>
Friendly Link: <http://www.dea.com/VHOU81251501984/RSSFeeds.aspx?Name=Academic Affairs News>
Custom Link (Includes additional fields embedded in the rss document): <http://www.dea.com/VHOU81251502fttAri3NpIZSaLU%3d>

Administering Master Calendar

5. Select Active.
6. Click Save.

An RSS Feed Saved message opens.

7. Click OK in the RSS Feed Saved message to save your RSS Feed.
8. Click Back to return to the Manage RSS Feeds page.

The Active tab is the opened tab. The RSS Feed is now displayed on this tab.

Figure 6-25: Manage RSS Feeds, Active tab

A screenshot of a web-based application interface titled "Manage RSS Feeds". The top navigation bar includes links for Admin, Calendar, Submit Event, My Account, and Help. Below the navigation is a toolbar with "Actions" and "Add | Edit" buttons. A tab bar has "Active" and "Inactive" tabs, with "Active" being the selected tab (indicated by a blue background). The main content area is a table titled "RSS Feeds" with columns for "Name" and "Status". The table lists several RSS feeds, all of which are currently set to "Public". An arrow points to the first row of the table, which contains the entry "Academic Affairs News".

	Name	Status
<input type="checkbox"/>	Academic Affairs News	Public
<input type="checkbox"/>	Arts and Sciences News	Public
<input type="checkbox"/>	CNN News Feed	Public
<input type="checkbox"/>	Demonstration Test Feed	Public
<input type="checkbox"/>	Department of Chemistry Events	Public

To deactivate an RSS Feed

1. Under the Admin Panel main menu option, point to Site Administration, and then click RSS Feeds.

The Manage RSS Feeds page opens. The Active tab is the opened tab. All currently active RSS feeds in Master Calendar are displayed on this tab.

Figure 6-26: Manage RSS Feeds page, Active tab

A screenshot of the "Manage RSS Feeds" page, identical to Figure 6-25 but with one additional entry: "Never Summer" has been added to the list of RSS feeds. This feed is also set to "Public". An arrow points to the "Never Summer" entry in the table.

	Name	Status
<input type="checkbox"/>	Academic Affairs News	Public
<input type="checkbox"/>	Arts and Sciences News	Public
<input type="checkbox"/>	CNN News Feed	Public
<input type="checkbox"/>	Demonstration Test Feed	Public
<input type="checkbox"/>	Department of Chemistry Events	Public
<input type="checkbox"/>	Fox News Ticker	Public
<input type="checkbox"/>	Never Summer	Public

2. Select the RSS Feed that you are inactivating.

3. Under Actions, click Edit.

The Add RSS Feed page opens. The Details tab is the opened tab. The Active option is selected.

Figure 6-27: Add RSS Feed page, Details tab, Active RSS feed

The screenshot shows the 'Add RSS Feed' form with the 'Details' tab selected. The 'Active' checkbox is checked. Other fields include Name (Academic Affairs News), Calendars (Calendar of Events), Event Types, Locations (Académico - 1), Departments, Keyword, Priority (All), Feed Access (Public), Days Forward (23), Starting When (Today), Maximum Returned Events (0), and two checked checkboxes: 'Include Cancelled Events' and 'Active'. At the bottom, there are 'Save' and 'Back' buttons, and preview links for various URLs.

Name:
Academic Affairs News

Calendars:
Calendar of Events

Event Types:

Locations:
Académico - 1

Departments:

Keyword:

Priority:
(All)

Feed Access:
 Public (Allow anyone to view RSS feed) Private

Days Forward:
23

Starting When:
 Today Tomorrow

Maximum Returned Events:
0 0 = unlimited

Include Cancelled Events
 Active

Save Back

Preview Link: <http://www.dea.com/VHOU81251501984/RSSFeeds.aspx?data=3p3oPLk3vPIqlgR7GVicJatprYEC>
Encrypted Link: <http://www.dea.com/VHOU81251501984/RSSFeeds.aspx?data=3p3oPLk3vPIqlgR7GVicJatprY>
Friendly Link: <http://www.dea.com/VHOU81251501984/RSSFeeds.aspx?Name=Academic%20Affairs%20News>
Custom Link (Includes additional fields embedded in the rss document): <http://www.dea.com/VHOU81251501984/RSSFeeds.aspx?data=3p3oPLk3vPIqlgR7GVicJatprY2FTtjAri3NpIZSaLU%3d>

4. Clear the Active option.
 5. Click Save.
- An RSS Feed Saved message opens.
6. Click OK in the RSS Feed Saved message to save your RSS Feed.
 7. Click Back to return to the RSS Feeds page. The Active tab is the opened tab.

Administering Master Calendar

8. Click the Inactive tab to open it.

The inactivated RSS Feed is displayed on this tab.

Figure 6-28: Manage RSS Feeds page, Inactive tab

A screenshot of a web-based application titled "Manage RSS Feeds". The top navigation bar includes links for Admin, Calendar, Submit Event, My Account, and Help. Below the navigation is a toolbar with "Actions" and buttons for "Add | Edit" and "Delete". A horizontal tab bar has two tabs: "Active" and "Inactive", with "Inactive" being the active tab. The main content area is titled "RSS Feeds" and contains a table with three columns: a checkbox column, a "Name" column, and a "Status" column. The table lists three RSS feeds: "Academic Affairs News" (Status: Public), "Biology Department News" (Status: Public), and "Department of Chemistry Activities" (Status: Public). An arrow points from the left margin towards the "Inactive" tab.

	Name	Status
<input type="checkbox"/>	Academic Affairs News	Public
<input type="checkbox"/>	Biology Department News	Public
<input type="checkbox"/>	Department of Chemistry Activities	Public

To edit an RSS feed

You can edit both active and inactive RSS feeds.

1. Under the Admin Panel main menu option, point to Site Administration, and then click RSS Feeds.

The Manage RSS Feeds page opens. The Active tab is the opened tab. All currently active RSS feeds in Master Calendar are displayed on this tab.

Figure 6-29: Manage RSS Feeds page, Active tab

A screenshot of the "Manage RSS Feeds" page with the "Active" tab selected. The interface is identical to Figure 6-28, featuring a top navigation bar, an "Actions" toolbar, and a horizontal tab bar with "Active" and "Inactive" tabs. The "Active" tab is highlighted in blue. The main content area displays a table of RSS feeds. The table has three columns: a checkbox column, a "Name" column, and a "Status" column. The listed feeds include: Arts and Sciences News, CNN News Feed, Demonstration Test Feed, Department of Chemistry Events, Fox News Ticker, Never Summer, RP for Rob, RT Special, Student Organizations Feed, Todays Events, Tour De France News, and Velodrome News. All entries show "Public" as the status.

	Name	Status
<input type="checkbox"/>	Arts and Sciences News	Public
<input type="checkbox"/>	CNN News Feed	Public
<input type="checkbox"/>	Demonstration Test Feed	Public
<input type="checkbox"/>	Department of Chemistry Events	Public
<input type="checkbox"/>	Fox News Ticker	Public
<input type="checkbox"/>	Never Summer	Public
<input type="checkbox"/>	RP for Rob	Public
<input type="checkbox"/>	RT Special	Public
<input type="checkbox"/>	Student Organizations Feed	Public
<input type="checkbox"/>	Todays Events	Public
<input type="checkbox"/>	Tour De France News	Public
<input type="checkbox"/>	Velodrome News	Public

2. If needed, click the Inactive tab to open it.
3. Select the RSS Feed that you are editing.

4. Under Actions, click Edit.

The Add RSS Feeds page opens. The Details tab is the opened tab.

Figure 6-30: Add RSS Feeds page, Details tab

The screenshot shows the 'Add RSS Feeds' page with the 'Details' tab selected. The form contains the following fields:

- Name:** Academic Affairs News
- Calendars:** Calendar of Events
- Event Types:** (dropdown menu)
- Locations:** Académico - 1
- Departments:** (dropdown menu)
- Keyword:** (text input)
- Priority:** (dropdown menu) (All)
- Feed Access:** (radio buttons) Public (Allow anyone to view RSS feed) is selected.
- Days Forward:** 23
- Starting When:** Today is selected.
- Maximum Returned Events:** 0 (checkbox) 0 = unlimited
- Checkboxes:** Include Cancelled Events (checked), Active (unchecked)

Below the form, there are several preview links:

- Preview Link: <http://www.dea.com/VHOU81251501984/RSSFeeds.aspx?data=3p3oPLk3vPiqlgR7GVicJatprYE>
- Encrypted Link: <http://www.dea.com/VHOU81251501984/RSSFeeds.aspx?data=3p3oPLk3vPiqlgR7GVicJatpr>
- Friendly Link: <http://www.dea.com/VHOU81251501984/RSSFeeds.aspx?Name=Academic Affairs News>
- Custom Link (Includes additional fields embedded in the rss document): <http://www.dea.com/VHOU81251502fTtJArI3NpIZSaLU%3d>

5. Edit any and all the information as needed for the feed.

Field	Description
Name	The name for the RSS feed.
Calendars	A list of all active calendars to which you have access as a Calendar Manager. Click the Lookup icon to open the Calendars dialog box and select the calendar or calendars from which the RSS feed is to pull information.
Event Types	A list of all active event types that are currently configured in Master Calendar. Click the Lookup icon to open the Event Types dialog box and select the event type or types that RSS feed should pull.

Administering Master Calendar

Field	Description
Locations	A list of all active event locations that are currently configured in Master Calendar. Click the Lookup icon to open the Locations dialog box and select the location or locations to select the events with the specific locations that the RSS feed should pull.
Priority	Indicate the priority of the events that the RSS feed should pull. The default value is All. You can change this to one of three values - High, Medium, or Low.
Feed Access	<ul style="list-style-type: none">Public - Anyone, not just users of Master Calendar, can view the feed. (Default value.)Private - Only users of Master Calendar can view the feed.
Days Forward	The number of days going forward from the current day's date that the RSS feed should pull information.
Maximum Returned Events	The maximum number of events that the RSS feed should return. The default value is 0, which means that there is no limit to the maximum number of events returned.
Include Cancelled Events	The default value is Yes. To set to No, clear this selection.
Make Featured Feed	The default value is No. To set to Yes, select this option. Note: Remember, only one feed at a time can be the featured feed. If the RSS feed access is set to Private, a user cannot view the featured feed until after they log in to Master Calendar. If the RSS feed access is set to Public, anyone, guest or user, can view the featured feed.

6. Click Save.

An RSS Feed Saved message opens.

7. Click OK in the RSS Feed Saved message to save your edited RSS Feed.

To delete an RSS feed

You can delete only inactive RSS feeds. To delete an active RSS feed, you must first inactivate it. (See “[To inactivate an RSS Feed](#)”.)

- Under the Admin Panel main menu option, point to Site Administration, and then click RSS Feeds.

The RSS Feeds page opens. The Active tab is the opened tab. All currently active RSS feeds in Master Calendar are displayed on this tab.

Figure 6-31: Manage RSS Feeds page, Active tab

RSS Feeds		
	Name	Status
<input type="checkbox"/>	Arts and Sciences News	Public
<input type="checkbox"/>	CNN News Feed	Public
<input type="checkbox"/>	Demonstration Test Feed	Public
<input type="checkbox"/>	Department of Chemistry Events	Public
<input type="checkbox"/>	Fox News Ticker	Public
<input type="checkbox"/>	Never Summer	Public
<input type="checkbox"/>	RP for Rob	Public
<input type="checkbox"/>	RT Special	Public
<input type="checkbox"/>	Student Organizations Feed	Public

- Click the Inactive tab to open it.

All currently inactive RSS feeds in Master Calendar are displayed on this tab.

Figure 6-32: Manage RSS Feeds page, Inactive tab

RSS Feeds		
	Name	Status
<input type="checkbox"/>	Academic Affairs News	Public
<input type="checkbox"/>	Biology Department News	Public
<input type="checkbox"/>	Department of Chemistry Activities	Public

- Select the RSS feed that you are deleting.



To select all RSS feeds on the currently opened page for deletion in a single step, select Name. If you have multiple pages of feeds to delete, you must repeat this entire process on each page.

Administering Master Calendar

4. Under Actions, click Delete.

A message opens, asking you if you are sure that you want to delete all the selected RSS feeds.

5. Click OK in the message.

A message opens indicating that all the selected RSS feeds were successfully deleted.

6. Click OK in the message.

The Inactive tab is refreshed to show the remaining, if any, inactive RSS feeds in Master Calendar.

To view the history for an RSS feed

The history for an RSS feed consists of the original creation date of the feed, the name of the user who created the feed, the last date that the feed was edited, and the name of the user who last edited the feed. You can view the history for both active and inactive feeds.

1. Under the Admin Panel main menu option, point to Site Administration, and then click RSS Feeds.

The Manage RSS Feeds page opens. The Active tab is the opened tab. All currently active RSS feeds in Master Calendar are displayed on this tab.

Figure 6-33: Manage RSS Feeds page, Active tab

The screenshot shows a web-based application interface for managing RSS feeds. At the top, there is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar, there is a toolbar with buttons for Actions, Add | Edit, and a search field. A horizontal tab bar has two tabs: Active (which is highlighted in blue) and Inactive. Below the tab bar is a table titled "RSS Feeds". The table has three columns: a checkbox column, a "Name" column, and a "Status" column. The "Name" column is sorted by clicking the "Name" header. The table lists twelve RSS feeds, all of which are marked as "Public".

RSS Feeds		
<input type="checkbox"/>	Name	Status
<input type="checkbox"/>	Arts and Sciences News	Public
<input type="checkbox"/>	CNN News Feed	Public
<input type="checkbox"/>	Demonstration Test Feed	Public
<input type="checkbox"/>	Department of Chemistry Events	Public
<input type="checkbox"/>	Fox News Ticker	Public
<input type="checkbox"/>	Never Summer	Public
<input type="checkbox"/>	RP for Rob	Public
<input type="checkbox"/>	RT Special	Public
<input type="checkbox"/>	Student Organizations Feed	Public
<input type="checkbox"/>	Todays Events	Public
<input type="checkbox"/>	Tour De France News	Public
<input type="checkbox"/>	Velodrome News	Public

2. If needed, click the Inactive tab to open it.
3. Select the RSS Feed for which you are viewing the history.

- Under Actions, click Edit.

The Add RSS Feed page opens. The Details tab is the opened tab.

Figure 6-34: Add RSS Feeds page, Details tab

The screenshot shows the 'Add RSS Feeds page' with the 'Details' tab selected. The form includes fields for Name (Academic Affairs News), Calendars (Calendar of Events), Event Types, Locations (Académico - 1), Departments, Keyword, Priority (All), Feed Access (Public), Days Forward (23), Starting When (Today), Maximum Returned Events (0 = unlimited), and checkboxes for Include Cancelled Events and Active. At the bottom are 'Save' and 'Back' buttons, and preview links for Preview Link, Encrypted Link, Friendly Link, and Custom Link.

Name:
Academic Affairs News

Calendars:
Calendar of Events

Event Types:

Locations:
Académico - 1

Departments:

Keyword:

Priority:
(All)

Feed Access:
 Public (Allow anyone to view RSS feed) Private

Days Forward:
23

Starting When:
 Today Tomorrow

Maximum Returned Events:
0 = unlimited

Include Cancelled Events
 Active

Save Back

Preview Link: <http://www.dea.com/VHOU81251501984/RSSFeeds.aspx?data=3p3oPLk3vPIqlgR7GVicJatprYE%2fF>
Encrypted Link: <http://www.dea.com/VHOU81251501984/RSSFeeds.aspx?data=3p3oPLk3vPIqlgR7GVicJatprYEG%2>
Friendly Link: <http://www.dea.com/VHOU81251501984/RSSFeeds.aspx?Name=Academic Affairs News>
Custom Link (Includes additional fields embedded in the rss document): <http://www.dea.com/VHOU81251501984/R2fttJari3NpIZSaLU%3d>

- Click the History tab to open it and view the history for the selected feed.

The tab also shows the four links for the RSS feed.

Figure 6-35: Add RSS Feed page, History tab

The screenshot shows the 'Add RSS Feed page' with the 'History' tab selected. It displays the creation and update details for the feed.

Created Date: 7/12/2013 3:55 AM
Created By: VijayKumar
Updated Date: 8/8/2013 1:02 PM
Updated By: Technical Writer

Save Back

Preview Link: <http://www.dea.com/VHOU81251501984/RSSFeeds.aspx?data=3p3oPLk3vPIqlgR7GVicJatprYE%2fF>
Encrypted Link: <http://www.dea.com/VHOU81251501984/RSSFeeds.aspx?data=3p3oPLk3vPIqlgR7GVicJatprYEG%2>
Friendly Link: <http://www.dea.com/VHOU81251501984/RSSFeeds.aspx?Name=Academic Affairs News>
Custom Link (Includes additional fields embedded in the rss document): <http://www.dea.com/VHOU81251501984/R2fttJari3NpIZSaLU%3d>

Managing Menus in your Master Calendar System

When Master Calendar is first installed, the *main menu*, or *system menu*, has a default layout as shown [Figure 6-36](#). This default layout includes not only the wording that is used for the main menu options, or *parent* options, but also, the order of the child options on each of the parent menus.

Figure 6-36: Main Menu, default layout

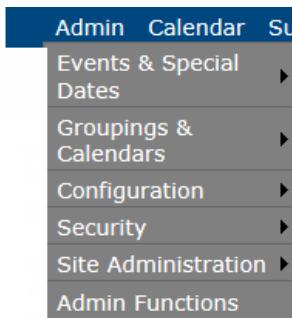


Figure 6-37: Main Menu, default layout with Links parent menu activated



When you first log in to Master Calendar, [Figure 6-36](#) shows what the main menu looks like; however, there is another Parent option that is available for the main menu—the *Links* option as shown in [Figure 6-37](#). The *Links* option is displayed on the main menu after you add user-defined child options for it.

Figure 6-38: Example of the default Admin menu showing child menu options



You can edit the main menu by doing one or more of the following:

- Editing the text that is used for the main menu options, or *system* options.
- Editing the order of the options on the main menu.
- Editing the text that is used for child menu options, or *system* options.
- Editing the order of child menu options.

You can also add your own options, or *user-defined options*, to the main menu.

Managing menu options consists of [editing](#) main menu options and child menu options, [adding](#) user-defined options, [editing](#) user-defined menu options, [entering](#) translations for menu text and menu options, and [deleting](#) user-defined menu options. You can also [view](#) the history for a menu option.

To edit a menu option

- Under the Admin Panel main menu option, point to Site Administration, and then click Menus.

The Manage Menus page opens. The System tab is the opened tab. All the current main menu options are displayed on this tab. This tab also lists all the child menu options that you can edit.

Figure 6-39: Manage Menus page, System tab

Menus			
<input type="checkbox"/>	Description	Url	Parent
<input type="checkbox"/>	Admin		
<input type="checkbox"/>	Calendar	default.aspx	
<input type="checkbox"/>	Change Password	ChangePass.aspx	My Options
<input type="checkbox"/>	Contents	empty	Help
<input type="checkbox"/>	Help		
<input type="checkbox"/>	Knowledge Base	empty	Help
<input type="checkbox"/>	Links		
<input type="checkbox"/>	Log In	Login.aspx	My Account
<input type="checkbox"/>	Log Out	Logout.aspx	My Account
<input type="checkbox"/>	My Account		
<input type="checkbox"/>	My Notifications	ManageSubscription.aspx	My Options
<input type="checkbox"/>	My Options		
<input type="checkbox"/>	View My Requests	BrowseRequests.aspx	My Options

- Select the main menu option or child menu option that you are editing.
- Under Actions, click Edit.

The Add Menu page opens. The Details tab is the opened tab. You use the options on this tab to change the description of the menu option, its position (Sequence) on the menu, or both.

Administering Master Calendar

Figure 6-40: Add Menu page, Details tab

The screenshot shows a web-based administration interface for a menu item. The top navigation bar includes links for Admin, Calendar, Submit Event, My Account, and Help. Below this is a tabbed panel with 'Details' selected. The 'Details' panel contains the following fields:

- Description:
- Sequence:
- Link:
- Parent:
- New Window
- Authenticated Users Only

At the bottom of the panel are 'Save' and 'Cancel' buttons.

4. After you make the changes to the menu option, click Save.
5. To see your change, log out of Master Calendar, then log back in to Master Calendar.

Figure 6-41: Example of main menu with edited option



To add a user-defined option to the main menu

A *user-defined* option links to a website that is outside of Master Calendar. When you add this option to the main menu, you can indicate if the website to which you are linking is to open in a new window, and if only users who log in to Master Calendar can see the option on the menu.

1. Under the Admin Panel main menu option, point to Site Administration, and then click Menus.

The Manage Menus page opens. The System tab is the opened tab. All the current main menu options are displayed on this tab. This tab also lists all the child menu options that you can edit.

Figure 6-42: Manage Menus page, System tab

The screenshot shows a web-based application interface titled 'Manage Menus'. At the top, there is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar, there is a toolbar with buttons for Actions (Edit) and a tab navigation bar with three tabs: System (selected), Admin, and User Defined.

The main content area is a table titled 'Menus' with the following columns: Description, Url, and Parent. The table lists various menu items:

	Description	Url	Parent
<input type="checkbox"/>	Admin		
<input type="checkbox"/>	Calendar	default.aspx	
<input type="checkbox"/>	Change Password	ChangePass.aspx	My Options
<input type="checkbox"/>	Contents	empty	Help
<input type="checkbox"/>	Help		
<input type="checkbox"/>	Knowledge Base	empty	Help
<input type="checkbox"/>	Links		
<input type="checkbox"/>	Log In	Login.aspx	My Account
<input type="checkbox"/>	Log Out	Logout.aspx	My Account
<input type="checkbox"/>	My Account		
<input type="checkbox"/>	My Notifications	ManageSubscription.aspx	My Options
<input type="checkbox"/>	My Options		
<input type="checkbox"/>	View My Requests	BrowseRequests.aspx	My Options

Administering Master Calendar

2. Click the User Defined tab to open it.

All currently active user-defined options in Master Calendar are displayed on this tab.

Figure 6-43: Manage Menus page, User Defined tab

The screenshot shows a web-based application interface. At the top is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar is a toolbar with an 'Actions' button containing 'Add | Edit | Delete' options. A main content area has three tabs at the top: System, Admin, and User Defined, with 'User Defined' being the active tab. Underneath is a table titled 'Menus' with columns: Description, Url, and Parent. There are two rows: one for 'Submit Event' with 'AddEvent.aspx' in the Url column, and another row that is partially visible.

3. Under Actions, click Add.

The Add Menu page opens. The Details tab is the opened tab. You use the options on this tab to specify the information for the user-defined menu option.

Figure 6-44: Add Menu page, Details tab

The screenshot shows the 'Add Menu' form. At the top is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below is a tab bar with 'Details' and 'Translations', where 'Details' is selected. The main form contains fields: 'Description:' with a required asterisk, 'Sequence:' with a required asterisk, 'Link:' with a required asterisk, and a dropdown 'Parent' set to '(none)'. Below these are two checkboxes: 'New Window' and 'Authenticated Users Only'. At the bottom are 'Save' and 'Cancel' buttons.

4. Enter the information for the user-defined menu option.

Field	Description
Description	The wording for the menu option.
Sequence	The order of the option on the menu.
Link	A link to an outside website.
Parent	The main menu option under which you are placing the user-defined option.
New Window	Select this option to have the website to which you are linking the option open in a new window (leaving the Master Calendar window open.)
Authenticated Users Only	Select this option to have only those users who have logged into Master Calendar see the link.

5. Click Save.

The Details tab closes and you return to the System tab of the Manage Menus page.

6. Click the User Defined tab to open it and view the newly added user-defined link.

Figure 6-45: Manage Menus page, User Defined tab

Menus			
	Description	Url	Parent
<input type="checkbox"/>	Main Campus Homepage	www.ou.edu	
<input type="checkbox"/>	Submit Event	AddEvent.aspx	

7. To see your user-defined menu option, log out of Master Calendar, and then log back in to Master Calendar.

Figure 6-46: Example of User-Defined menu option added to Admin menu



To edit a user-defined menu option

1. Under the Admin Panel main menu option, point to Site Administration, and then click Menus.

The Manage Menus page opens. The System tab is the opened tab. All the current main menu options are displayed on this tab. This tab also lists all the child menu options that you can edit.

Figure 6-47: Manage Menus page, System tab

Menus			
	Description	Url	Parent
<input type="checkbox"/>	Admin		
<input type="checkbox"/>	Calendar	default.aspx	
<input type="checkbox"/>	Change Password	ChangePass.aspx	My Options
<input type="checkbox"/>	Contents	empty	Help
<input type="checkbox"/>	Help		
<input type="checkbox"/>	Knowledge Base	empty	Help
<input type="checkbox"/>	Links		
<input type="checkbox"/>	Log In	Login.aspx	My Account
<input type="checkbox"/>	Log Out	Logout.aspx	My Account
<input type="checkbox"/>	My Account		

Administering Master Calendar

2. Click the User Defined tab to open it.

Figure 6-48: Manage Menus page, User Defined tab

The screenshot shows a web-based application interface titled "Manage Menus". At the top, there is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar, there is a toolbar with buttons for Actions, Add, Edit, and Delete. A tab bar below the toolbar has three tabs: System, Admin, and User Defined. The User Defined tab is currently selected and highlighted in blue. Below the tab bar is a table titled "Menus". The table has columns for a checkbox, Description, Url, and Parent. There are two menu items listed:

	Description	Url	Parent
<input type="checkbox"/>	Main Campus Homepage	www.ou.edu	
<input type="checkbox"/>	Submit Event	AddEvent.aspx	

3. Select the menu option that you are editing.
4. Under Actions, click Edit.

The Add Menu page opens. The Details tab is the opened tab.

Figure 6-49: Add Menu page, Details tab

The screenshot shows the "Add Menu" page with the "Details" tab selected. The page has a header with links: Admin, Calendar, Submit Event, My Account, and Help. Below the header is a toolbar with buttons for Details and Translations. The main content area contains several input fields:

- Description:
- Sequence:
- Link:
- Parent: (A dropdown menu is visible next to the input field)
- New Window
- Authenticated Users Only

At the bottom of the form are two buttons: "Save" and "Cancel".

5. Edit any and all of the associated information as needed.

Field	Description
Description	The wording for the menu option.
Sequence	The order of the option on the menu.
Link	A link to an outside website.
Parent	The main menu option under which you are placing this user-defined option.
New Window	Select this option to have the website to which you are linking the option be displayed in a new window (leaving the Master Calendar window open.)
Authenticated Users Only	Select this option to have only those users who have logged into Master Calendar see the link.

6. Click Save.

The Details tab closes and you return to the System tab of the Menus page.

7. To see your edited menu option, log off the system, then log back in to the system and open the User Defined tab.

To enter translations for menu text and options

If you have configured one or more cultures for Master Calendar, then you must manually enter the corresponding translations for the main menu text and menu options, including user-defined menu options.

1. Under the Admin Panel main menu option, point to Site Administration, and then click Menus.

The Manage Menus page opens. The System tab is the opened tab. All the current main menu options are displayed on this tab. This tab also lists all the child menu options for all menus other than the Admin menu for which you can enter translations.

Figure 6-50: Manage Menus page, System tab

Menus			
	Description	Url	Parent
<input type="checkbox"/>	Admin		
<input type="checkbox"/>	Calendar	default.aspx	
<input type="checkbox"/>	Change Password	ChangePass.aspx	My Options
<input type="checkbox"/>	Contents	empty	Help
<input type="checkbox"/>	Help		
<input type="checkbox"/>	Knowledge Base	empty	Help
<input type="checkbox"/>	Links		
<input type="checkbox"/>	Log In	Login.aspx	My Account
<input type="checkbox"/>	Log Out	Logout.aspx	My Account
<input type="checkbox"/>	My Account		
<input type="checkbox"/>	My Notifications	ManageSubscription.aspx	My Options
<input type="checkbox"/>	My Options		
<input type="checkbox"/>	View My Requests	BrowseRequests.aspx	My Options

2. If needed, open the Admin tab or User Defined tab.



The Admin tab lists all the Admin menu options for which you can enter translations.

Administering Master Calendar

3. Select the main menu text or menu option for which you are entering a translation, and then click Edit.

The Add Menu page opens. The Details tab is the opened tab.

Figure 6-51: Add Menu page, Details tab

The screenshot shows the 'Add Menu' interface with the 'Details' tab selected. The form contains the following fields:

- Description: Main Campus Webpage
- Sequence: 5
- Link: www.ou.edu
- Parent: (none)
- New Window
- Authenticated Users Only

At the bottom are 'Save' and 'Cancel' buttons.

4. Click the Translations tab to open it.

All the cultures that you have configured for Master Calendar are displayed on this page.

Figure 6-52: Add Menu page, Translations tab

The screenshot shows the 'Add Menu' interface with the 'Translations' tab selected. The interface includes a table for entering translations:

Translations	
Culture	Text
English	[Empty Text Area]
English (Ireland)	[Empty Text Area]
English (Malaysia)	[Empty Text Area]

At the bottom are 'Save' and 'Cancel' buttons.

5. Enter the appropriate translation for every culture that is displayed on the page.

6. Click Save.

The Translations tab closes. You return to the opened tab for the selected menu text or menu option.



A user's or guest's Browser language must be set to the appropriate culture (language) to display these translations after opening and/or logging in to Master Calendar.

To delete a user-defined menu option

You can delete only user-defined menu options. You cannot delete a system menu option.

- Under the Admin Panel main menu option, point to Site Administration, and then click Menus.

The Manage Menus page opens. The System tab is the opened tab. All the current main menu options are displayed on this tab.

Figure 6-53: Manage Menus page, System tab

The screenshot shows a web-based application interface for managing menus. At the top is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below this is a toolbar with 'Actions' and 'Edit' buttons. A tab bar has three tabs: System (selected), Admin, and User Defined. The main content area is a table titled 'Menus' with columns: Description, Url, and Parent. The table lists various menu items:

	Description	Url	Parent
<input type="checkbox"/>	Admin		
<input type="checkbox"/>	Calendar	default.aspx	
<input type="checkbox"/>	Change Password	ChangePass.aspx	My Options
<input type="checkbox"/>	Contents	empty	Help
<input type="checkbox"/>	Help		
<input type="checkbox"/>	Knowledge Base	empty	Help
<input type="checkbox"/>	Links		
<input type="checkbox"/>	Log In	Login.aspx	My Account
<input type="checkbox"/>	Log Out	Logout.aspx	My Account
<input type="checkbox"/>	My Account		
<input type="checkbox"/>	My Notifications	ManageSubscription.aspx	My Options
<input type="checkbox"/>	My Options		
<input type="checkbox"/>	View My Requests	BrowseRequests.aspx	My Options

- Click the User Defined tab to open it.
- Select the menu option that you are deleting.



To select all user-defined menu options on the currently opened page for deletion in a single step, select Description. If you have multiple pages of options to delete, you must repeat this entire process on each page.

- Under Actions, click Delete.

A message opens, asking you if you are sure that you want to delete all the selected menu options.

- Click OK in the message.

A message opens indicating that all the selected menu options were successfully deleted.

- Click OK in the message.

The User Defined tab is refreshed to show the remaining, if any, user-defined menu options in Master Calendar.

To view the history for a menu option

The history for an menu option consists of the original creation date of the option, the name of the user who created the option, the last date that the option was edited, and the name of the user who last edited the option. You can view the history for both system menu options and user-defined menu options.

1. Under the Admin Panel main menu option, point to Site Administration, and then click Menus.

The Manage Menus page opens. The System tab is the opened tab.

Figure 6-54: Manage Menus page, System tab

Menus			
	Description	Url	Parent
<input type="checkbox"/>	Admin		
<input type="checkbox"/>	Calendar	default.aspx	
<input type="checkbox"/>	Change Password	ChangePass.aspx	My Options
<input type="checkbox"/>	Contents	empty	Help
<input type="checkbox"/>	Help		
<input type="checkbox"/>	Knowledge Base	empty	Help
<input type="checkbox"/>	Links		

2. If needed, click the Admin tab or the User Defined tab to open it.
3. Select the menu option for which you are viewing the history.
4. Under Actions, click Edit.

The Add Menu page opens. The Details tab is the opened tab.

Figure 6-55: Add Menu page, Details tab

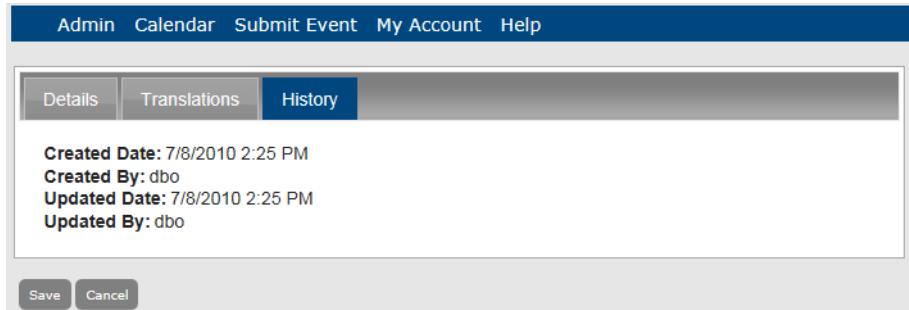
The screenshot shows the Add Menu page with the Details tab selected. The form fields are as follows:

- Description:
- Sequence:
- Link:
- Parent:
- New Window
- Authenticated Users Only

At the bottom are Save and Cancel buttons.

5. Click the History tab to open it and view the history for the menu option.

Figure 6-56: Add Menu page, History tab



Viewing and Updating Master Calendar Registration Information

As the Master Calendar site administrator, you can use the Registration function to [view](#), and if needed, [update](#) your Master Calendar registration information. This information, which is provided to your organization by EMS Software includes your company name, address, calendar limit, the expiration date for your registration, the products licensed, and a unique key code to activate the registration.

To view and update Master Calendar registration information

1. Under the Admin Panel main menu option, point to Site Administration, and then click Registration.

The Registration page opens. The page lists all your current Master Calendar registration information.

Figure 6-57: Master Calendar Registration page

The screenshot shows a web-based registration form. At the top, a navigation bar includes links for Admin, Calendar, Submit Event, My Account, and Help. A message 'License information is correct.' is displayed above the form area. The form itself contains the following fields:

- CompanyName: EMS Master Calendar Demo
- Address1: For DEA Use Only
- Address2:
- Address3:
- Address4:
- Calendar Limit: 100
- Expiration Date:
MM: DD: YYYY:
12 31 2013
- Products Licensed: M100,M101,M102,M103
- Key Code:*

A 'Save License Data' button is located at the bottom left of the form area.

2. If needed, you can update this information.



Do not edit any information on this page unless you receive new information from EMS Software. The information is case-sensitive. You must enter the information exactly as EMS Software provides it to your organization, or you cannot save the updated information. EMS Software recommends that instead of manually entering any modifications, that you copy and paste the new information line by line on this page.

Managing Data Sources

In Master Calendar, as the site administrator, you have the option of setting up new event types and holidays (special dates); however, if you are an existing EMS customer who uses any of the EMS products—Campus, Enterprise, Professional, Legal, and so on—this means that you have already configured this information for your EMS application. Rather than creating new items, if your organization has purchased the optional module, Master Calendar Data Connectors, you can use the data sources function in Master Calendar to carry out a one time import of event types and holidays from your EMS application into Master Calendar. You can import event types and holidays from one or more EMS databases to one or more calendars in Master Calendar. Also, at the data source level, you can select a high-level view of your user-defined fields (UDFs) in your EMS database, and you can then run a connector to import one or more selected UDFs and their associated answers into your Master Calendar database. Managing data sources in Master Calendar consists of [adding](#) data sources, [deleting](#) data sources, [importing](#) the event types, [importing](#) the holidays, and [selecting](#) the UDFs that are to be imported. You can also [view](#) the history of event type mapping between your EMS database and your Master Calendar database.



For setting up new event types, see “[Managing Event Types](#)”. For setting up new holidays (special dates), see “[Managing Special Dates](#)”.

To add a data source



For an EMS database to be used as a data source, you must first execute the Master Calendar Data Connector script against the EMS database. This is REQUIRED to be able to connect the EMS database to the Master Calendar database. Refer to the EMS Master Calendar Installation Instructions document for more information.

- Under the Admin Panel main menu option, point to Site Administration, and then click Data Sources.

The Manage Data Sources page opens. This page lists all the currently available data sources in Master Calendar.

Figure 6-58: Manage Data Sources page

Data Sources					
<input type="checkbox"/>	Description ^	Database Server Name	Database Name	Created By	Created Date
<input type="checkbox"/>	A & S Datasource	devdb	43test	Technical Writer	7/11/2013 1:35:36 PM
<input type="checkbox"/>	BH & G Datasource	devdb	43test	Technical Writer	7/12/2013 10:09:34 AM
<input type="checkbox"/>	Connector test	devdb	43test	Michael Ingoglia	6/26/2013 5:04:55 PM
<input type="checkbox"/>	Department of Chemistry	devdb	43test	Technical Writer	7/12/2013 10:08:30

2. Under Actions, click Add.

The Add Data Source page opens.

Figure 6-59: Add Data Source page

The screenshot shows the 'Add Data Source' page. The top navigation bar includes 'Admin', 'Calendar', 'Submit Event', 'My Account', and 'Help'. The main content area contains three required fields: 'Description:' (empty), 'Database Server Name:' (empty), and 'Database Name:' (empty). Below these is a checkbox labeled 'EMS database is on the same server or you are using a linked server.' (unchecked). At the bottom are three buttons: 'Test Data Source' (disabled), 'Save', and 'Cancel'.

3. Add the information for the data source.

- Description—The name of the database into which you are importing the event types and/or holidays
 - Database Server Name—The name for the database server on which the EMS database resides. (The EMS database from which you are importing the information.)
 - Database Name—The name of the EMS database from which you are importing the event types and/or holidays.
4. If appropriate, select the option “EMS database resides on the same server or you are using a linked server.”



You can obtain the database server name and the database name by logging in to the EMS client and then choosing Select File > Change Database, or you can work with your local Database Administrator to obtain the correct server name and database name.

5. Click Test Data Source.

If Master Calendar can connect to the specified EMS database, a message opens indicating that the “Connection succeeded.” Otherwise, the message indicates that the “Connection failed,” and provides a reason for the failure. You must make the necessary changes to the data connector, and test the connection again.

6. After the message indicates that the “Connection succeeded,” click Save.

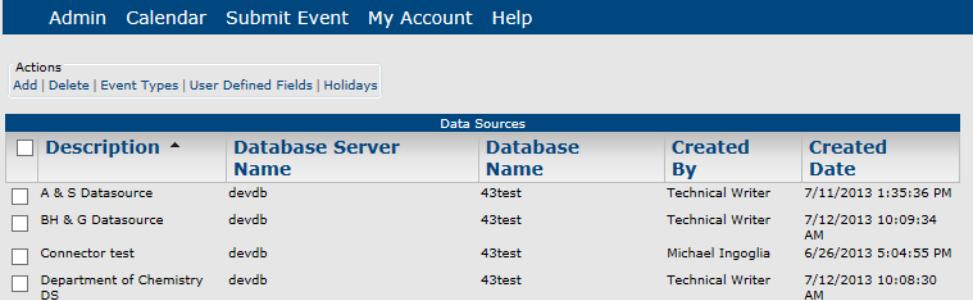
To delete a data source

When you delete a data source, all the connectors that use this data source and the associated events are deleted.

- Under the Admin Panel main menu option, point to Site Administration, and then click Data Sources.

The Manage Data Sources page opens. This page lists all the currently available data sources in Master Calendar.

Figure 6-60: Manage Data Sources page



The screenshot shows a table titled "Data Sources" with columns: Description, Database Server Name, Database Name, Created By, and Created Date. The data is as follows:

Description	Database Server Name	Database Name	Created By	Created Date
A & S Datasource	devdb	43test	Technical Writer	7/11/2013 1:35:36 PM
BH & G Datasource	devdb	43test	Technical Writer	7/12/2013 10:09:34 AM
Connector test	devdb	43test	Michael Ingoglia	6/26/2013 5:04:55 PM
Department of Chemistry DS	devdb	43test	Technical Writer	7/12/2013 10:08:30 AM

- Select the data sources that you are deleting.



To select all data sources on the currently opened page for deletion in a single step, select Description. If you have multiple pages of data sources to delete, you must repeat this entire process on each page.

- Under Actions, click Delete.

A message opens, informing you that all connectors that use this data source and associated events are deleted and asking you if you want to continue.

- Click OK in the message.

A message opens indicating that all the selected data sources were successfully deleted.

- Click OK in the message.

The Data Sources page is refreshed to show the remaining, if any, data sources in Master Calendar.

To import the EMS event types

When you are importing event types from EMS into Master Calendar, you have three options. You can:

- Map an EMS event type to an existing Master Calendar event type.
 - Create an EMS event type in Master Calendar if it does not already exist.
 - Indicate that you do not want to import the EMS event type.
1. Under the Admin Panel main menu option, point to Site Administration, and then click Data Sources.

The Manage Data Sources page opens. This page lists all the currently available data sources in Master Calendar.

Figure 6-61: Manage Data Sources page

Data Sources					
<input type="checkbox"/>	Description	Database Server Name	Database Name	Created By	Created Date
<input type="checkbox"/>	A & S Datasource	devdb	43test	Technical Writer	7/11/2013 1:35:36 PM
<input type="checkbox"/>	BH & G Datasource	devdb	43test	Technical Writer	7/12/2013 10:09:34 AM
<input type="checkbox"/>	Connector test	devdb	43test	Michael Ingoglia	6/26/2013 5:04:55 PM
<input type="checkbox"/>	Department of Chemistry DS	devdb	43test	Technical Writer	7/12/2013 10:08:30 AM

2. Select the data source from which you are importing the event types and then, under Actions, click Event Types.

The Data Source Event Types page opens. This page lists all the currently defined event types for the selected data source. It also shows the mapping for each event type, or whether it has been set to “Do Not Use.” If an EMS event type has *not* been mapped to a Master Calendar event type, and it has *not* been set to “Do Not Use,” then the “Create” option is displayed for it in the Master Calendar Event Type list.

Figure 6-62: Event Types page

Event Types	
EMS Event Type	MC Event Type
Académico - 1	<Create>
Académico - 2	<Create>
Académico - 3	<Create>
Académico - 4	<Create>
Academic	Academic
Athletic	Athletic
Class	Class
Concert	Concert
Conference	Conference
Dinner	Dinner
Class	Class
Concert	Concert
Conference	Conference
Dinner	Dinner

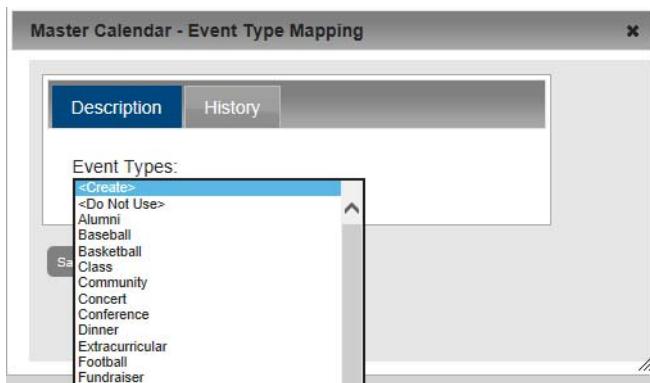
Administering Master Calendar

3. For any of the unmapped EMS event types, click Create to open the Event Type Mapping dialog box. The Description tab on this dialog box lists all the currently active Master Calendar event types. The “Do Not Use” option is also displayed on this list.



If you do not see the Master Calendar event type to which you want to map the EMS event type, either it has not been created, or it is currently inactive in Master Calendar. To add a new event type, or to activate a currently inactive event type, see “[To add an event type](#)” or “[To activate an event type](#)”, respectively.

Figure 6-63: Event Type Mapping dialog box



4. On the list, select the Master Calendar event type to which you are mapping the EMS event type, or select Do Not Use.
5. Optionally, for any of the currently mapped EMS event types, change the mapping, or set the mapping to “Do Not Use.”



All EMS event types that you leave in a '<Create>' status will be created in Master Calendar when you save your event type mappings. On the Master Calendar main menu, select Admin > Configuration > Event Types to view a global list of all the event types that are being stored in your Master Calendar database, regardless of their data source.

6. Click Save on the Master Calendar dialog box.

The Master Calendar dialog box opens. You return to the Event Types page.

7. Click Save on the Event Types page.

A message opens asking you if you are sure that you want to save all the event types.

8. Click OK in the message.

The message closes. The page is refreshed to show the newly selected mapping for the EMS event type.

To view the history for an event type mapping

The history for an event type mapping consists of the original creation date of the mapping, the name of the user who created the mapping, the last date that the mapping was edited, and the name of the user who last edited the mapping.

- Under the Admin Panel main menu option, point to Site Administration, and then click Data Sources.

The Manage Data Sources page opens. This page lists all the currently available data sources in Master Calendar.

Figure 6-64: Manage Data Sources page

Data Sources					
	Description	Database Server Name	Database Name	Created By	Created Date
<input type="checkbox"/>	A & S Datasource	devdb	43test	Technical Writer	7/11/2013 1:35:36 PM
<input type="checkbox"/>	BH & G Datasource	devdb	43test	Technical Writer	7/12/2013 10:09:34 AM
<input type="checkbox"/>	Connector test	devdb	43test	Michael Ingoglia	6/26/2013 5:04:55 PM
<input type="checkbox"/>	Department of Chemistry DS	devdb	43test	Technical Writer	7/12/2013 10:08:30 AM

- Select the data source from which you are viewing the history of the event mappings.
- Under Actions, click Event Types.

The Event Types page opens. This page lists all the currently defined event types for the selected data source.

Figure 6-65: Event Types page

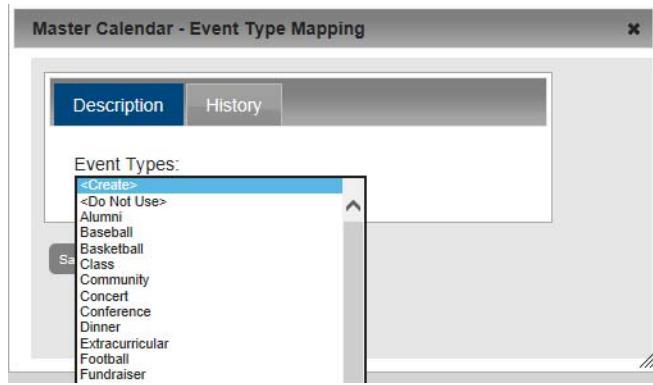
Event Types	
EMS Event Type	MC Event Type
Académico - 1	<Create>
Académico - 2	<Create>
Académico - 3	<Create>
Académico - 4	<Create>
Academic	Academic
Athletic	Athletic
Class	Class
Concert	Concert
Conference	Conference
Dinner	Dinner
Class	Class
Concert	Concert
Conference	Conference
Dinner	Dinner

Administering Master Calendar

4. Click the MC Event Type link for the mapping for which you are viewing the history.

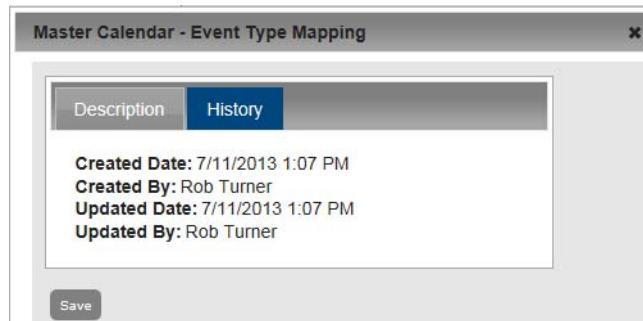
The Event Type Mapping dialog box opens. The Description tab is the opened tab.

Figure 6-66: Event Type Mapping dialog box, Description tab



5. Click the History tab to open it and view the history for the selected mapping.

Figure 6-67: Event Type Mapping dialog box, History tab



To import the EMS holidays



The EMS term “holiday” is equivalent to the Master Calendar term “special date.”

- Under the Admin Panel main menu option, point to Site Administration, and then click Data Sources.

The Manage Data Sources page opens. This page lists all the currently available data sources in Master Calendar.

Figure 6-68: Manage Data Sources page

Data Sources					
<input type="checkbox"/>	Description	Database Server Name	Database Name	Created By	Created Date
<input type="checkbox"/>	A & S Datasource	devdb	43test	Technical Writer	7/1/2013 1:35:36 PM
<input type="checkbox"/>	BH & G Datasource	devdb	43test	Technical Writer	7/12/2013 10:09:34 AM
<input type="checkbox"/>	Connector test	devdb	43test	Michael Ingoglia	6/26/2013 5:04:55 PM
<input type="checkbox"/>	Department of Chemistry DS	devdb	43test	Technical Writer	7/12/2013 10:08:30 AM

- Select the data source from which you are importing the holidays.
- Under Actions, click Holidays.

The Holidays page open. The New tab is the opened tab. This tab lists the records for up to the first 50 holidays that are defined in the selected data source and that have a date greater than or equal to the current day’s date.

Figure 6-69: Holidays page, New tab

Holidays					
<input type="checkbox"/>	Description	Date	Notes	Color	Building
<input type="checkbox"/>	Spring 2014 First Day of Classes	1/20/2014	Mon	#000000	
<input type="checkbox"/>	Sadie Hawkin's Dance	2/14/2014	Fri	#000000	
<input type="checkbox"/>	Children's Hospital Easter Egg Roll	4/9/2014	Wed	#000000	

Administering Master Calendar

4. Optionally, to refine this list, do one or both of the following:
 - In the Start Date field, enter a different start date.
 - In the Title field, enter partial or complete search criteria for the holiday description.



The search is limited to the exact order of the characters in the string; however, the search string is not case-sensitive and the search string can be found anywhere in the search results. For example, the search string “scout” returns holidays that contain either Scouting Day or Boy Scouts’ Day.

5. Click Go.
- The page is refreshed to show the Holidays that meet your search criteria.
6. Select the holidays that are to be imported from the selected data source, and then Add.



To select all holidays on the currently opened page for importing in a single step, select Description. If you have multiple pages of holidays to import, you must repeat this entire process on each page.

A message opens asking you if you are sure that you want to add all the selected holidays.

7. Click OK in the message.
- The message closes. You remain on the Holidays page.



When you import EMS holidays into your Master Calendar database, all the imported holidays are added to all the calendars in Master Calendar. You must manually delete the dates from the calendars on which you do not want the holidays to be displayed. See “[To delete a special date](#)”.

8. Optionally, click the Existing tab to open it and view the list of all the holidays that you have imported into Master Calendar.

To select the EMS user-defined fields (UDFs) for importing

- Under the Admin Panel main menu option, point to Site Administration, and then click Data Sources.

The Manage Data Sources page opens. This page lists all the currently available data sources in Master Calendar.

Figure 6-70: Manage Data Sources page

Data Sources					
<input type="checkbox"/>	Description	Database Server Name	Database Name	Created By	Created Date
<input type="checkbox"/>	A & S Datasource	devdb	43test	Technical Writer	7/11/2013 1:35:36 PM
<input type="checkbox"/>	BH & G Datasource	devdb	43test	Technical Writer	7/12/2013 10:09:34 AM
<input type="checkbox"/>	Connector test	devdb	43test	Michael Ingoglia	6/26/2013 5:04:55 PM
<input type="checkbox"/>	Department of Chemistry DS	devdb	43test	Technical Writer	7/12/2013 10:08:30 AM

- Select the data source from which you are importing the UDFs.
- Under Actions, click User Defined Fields.

The EMS UDFs page opens. Only those UDFs that have the Field Applies To: Reservation configured within the EMS database are displayed on the page.

Figure 6-71: EMS UDFs page

The screenshot shows the EMS UDFs page. At the top, there is a dropdown menu labeled "Data Sources:" with "Tammy's DS" selected. Below this, there are two lists: "User Defined Fields:" on the left and "Selected User Defined Fields:" on the right. A vertical scrollbar is visible between the two lists. At the bottom of the page are two buttons: "Save" and "Back".



You can find those UDFs that have the Field Applies To: Reservation configured within the EMS database in the EMS client under Configuration > Other > User Defined Fields.

Administering Master Calendar

4. On the User Defined Fields list, select the UDF that is to be imported from the selected data source (CTRL-click to select multiple UDFs), and then click the Add button ➤ to move the UDFs to the Assigned list.



To move all the UDFs in a single step, click the Add All button ➤.

5. Click Save.
6. You must now run a connector to import the selected UDFs and their associated answers into your Master Calendar database. See “[To run a connector](#)” in “[Managing Connectors in Master Calendar](#).”

Managing Connectors in Master Calendar

A *connector* is a direct feed from your EMS database to your Master Calendar database. If you are an EMS customer and a Master Calendar customer, a connector prevents you from having to carry out double entry of your events. You can enter all your events once into your EMS system, then use a connector to import one or more, or all your EMS events into Master Calendar. To import EMS events into Master Calendar, you must indicate the data source that you want to use to connect to the EMS database and the calendars to which to import the events. You can define the connector as broad or as narrow as you need it to best meet your organization's business needs. For example, if you have an academic calendar in Master Calendar, you might want to import all EMS events with an event type of "Class" to the Academic calendar. You must also use a connector to import selected UDFs into your Master Calendar database. Managing connectors in Master Calendar consists of [adding](#) a connector, [filtering](#) the events to import, [setting](#) the frequency of the import, [activating](#) and [inactivating](#) connectors, [editing](#) a connector, [running](#) a connector, [purging](#) a connector, and [deleting](#) a connector. You can also [generate](#) a Connectors List report and you can [view](#) the history for a connector.



As with data sources, the Connector function requires that your organization purchase the optional module, Master Calendar Data Connectors.

To add a connector

- Under the Admin Panel main menu option, point to Events & Special Dates, and then click Connectors.

The Manage Connectors page opens. The Active tab is the opened tab. All the currently active connectors in Master Calendar are displayed on this tab.

Figure 6-72: Manage Connectors page, Active tab

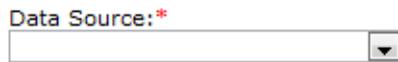
Connectors		
<input type="checkbox"/>	Name ^	Data Source
<input type="checkbox"/>	Arts and Sciences	RP
<input type="checkbox"/>	Biology UDFs	BH & G Datasource
<input type="checkbox"/>	Education UDFs	Connector test
<input type="checkbox"/>	Field Services Events	Connector test

Administering Master Calendar

2. Under Actions, click Add.

A Data Source list is displayed.

Figure 6-73: Data Source List



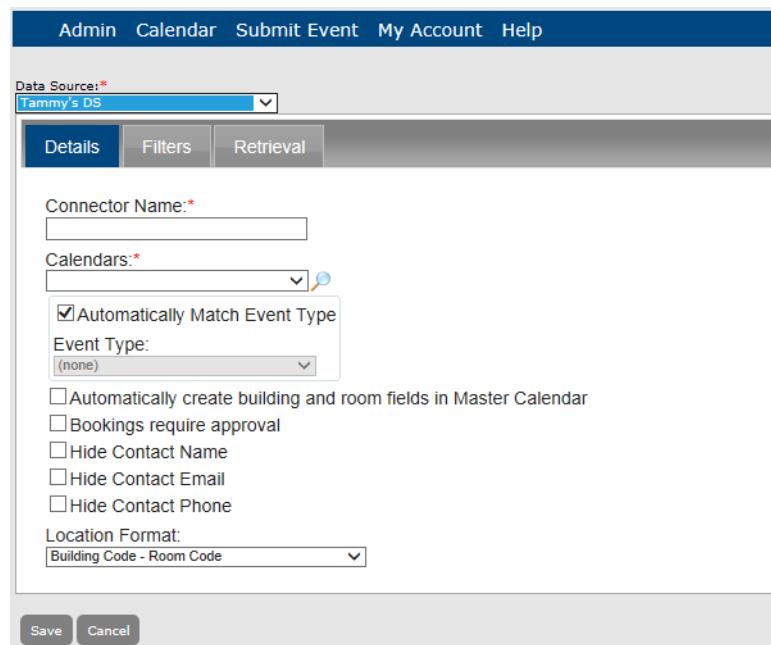
3. Select the data source that you want to use for the connector.



Remember, the data source is for the connection to the EMS database. If you do not see the data source that you want to use for the connector, then it has not been created. To add a data source, see “[To add a data source](#)”.

The Add Connector page opens. The Details tab is the opened tab. You use the options on this tab to add the basic information for the connector.

Figure 6-74: Add Connector page, Details tab



4. Enter the information for the connector.

Field	Description
Connector Name	The title or the name for the connector.
Calendars	A list of all active calendars to which you have access as a Calendar Manager. Click the Lookup icon to open the Calendars dialog box and select the calendar or calendars to which you are importing the EMS events.
Automatically Match Event Type	Selected by default. If you leave this option selected, then every event type in the selected data source is mapped according to the event type mapping that you carried out for the data source. (See “ To add a data source ”.) If you clear this option, then the Event Type dropdown list becomes available.
Event Type	Available only if you clear the Automatically Match Event Type option. Every event type in the selected data source will be mapped to the Master Calendar event type that you select on this dropdown list.
Automatically create building and room fields in Master Calendar	If you select this option, then all the buildings and rooms for all the imported events are also imported into Master Calendar. The imported buildings are displayed as locations. (See “ Managing Event Locations ”.) The imported rooms are displayed as sub-locations. See “ Managing Event Sub-Locations ”.)
Bookings Require Approval	If you select this option, the imported events will follow the approval workflow for the Manage Events option. See <i>Managing Events</i> in the <i>Master Calendar User’s Manual</i> .
Hide Contact Name	If you select this option, the name of the event’s contact person does not show on the calendars to which the event is imported.
Hide Contact Email	If you select this option, the contact email for the event does not show on the calendars to which the event is imported.
Hide Contact Phone Number	If you select this option, the contact phone number for the event does not show on the calendars to which the event is imported.
Location Format	Determines the location format that is imported from EMS. For example, if one of the buildings for an event type is the Strong building, you can indicate whether you want to import the EMS Building Description (STRONG) or the EMS Building Code (STR). Eight options are available: <ul style="list-style-type: none"> • Building Code - Room Code • Building Code - Room Description • Building Description - Room Code • Building Description - Room Description • Building Code • Building Description • Room Code • Room Description

5. Continue to “[To filter the EMS events](#)”.

To filter the EMS events

When you filter the EMS events, you must select at least one event type, one status, and one group type, or no events are pulled from your EMS database into your Master Calendar database.

1. Click the Filters tab to open it.



The Buildings label, Rooms label, Group Types label, and Group label that you see on the Filters tab are brought over from the EMS data source. You configure these labels in the EMS Database under System Administration > Settings > Parameters. Asterisks next to Event Types, Statuses, and Group Types indicate that the EMS Display on Web setting is enabled for the item.

2. Select at least one event type, one status, and one group type. CTRL-click to select multiple event types, statuses, and group types.
3. If you do not select any specific groups for a group type, then EMS events tied to all groups are pulled. Optionally, to filter the connector based on the EMS events for a specific group:
 - Click Add to open an EMS Group Lookup dialog box.
 - In the Filter field, specify the search criteria for the group, and then click Go.



The search is limited to the exact order of characters in the search string, and the string must begin with the information for which you are searching. The string is not case-sensitive. For example, if you enter “admin” as your search string for All groups, “Administrators” is returned in the search results, but DnsAdmins is not.

- From the search results, select the group that you are using as a filter (CTRL-click to select multiple groups), and then click Add to move the groups to the Groups list.



To remove groups, select the department (CTRL-click to select multiple groups), and then click Remove.

4. Optionally, do one or both of the following:

- Select (All) to pull all EMS events booked in all EMS buildings, or pick a specific building. If you pick a specific building, you must also select the building rooms.



To select all rooms for a building a single step, click the Move All (>>) button.

- To filter the EMS events based on a specific response to a specific UDF, select the UDF on the User Defined Fields dropdown list, and select the answer on the Answer dropdown list.

5. Continue to [“To specify the frequency of the data import”](#).

To specify the frequency of the data import

The frequency of the data import means how often are you querying the EMS database. The greater the frequency, the more current is the “synch up” between your EMS database and your Master Calendar database.

1. Click the Retrieval tab to open it.

Figure 6-75: Add Connector page, Retrieval tab

The screenshot shows a web-based application interface for managing data connectors. At the top, there's a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below this, a dropdown menu labeled "Data Source: * Tammy's DS" is visible. The main content area has three tabs: Details, Filters, and Retrieval. The Retrieval tab is currently active. It contains several configuration fields: "Date Range", "Time Period" (with a dropdown menu showing "Range of Days" as the selected option), "Days Forward: *", "Frequency" (with radio buttons for Daily, Weekly, and Minutes, where Daily is selected), and "Run Time" (with a dropdown menu showing a specific time). At the bottom of the form are two buttons: "Save" and "Cancel".

2. Specify the information for the frequency of the data retrieval.

Field	Description
Time Period	<p>The time frame for which the events are to be imported. Two values are available:</p> <ul style="list-style-type: none"> • Range of Days (default value)—If you select this value, you must also specify a Days Forward value. • Specific Dates—If you select this value, the Days Forward field is removed from the tab. Fields for specific dates (Start Date/End Date/No End Date) are displayed instead.
Days Forward	Available only if you select Range of Days for the Time Period. Indicates the number of days into the future from the current day's date that the event types are to be imported from the EMS database.
Start Date/End Date/No End Date	<p>Available only if you select Specific Dates for the Time Period. You must enter a start date. You must enter an end date, or you must select No End Date.</p> <p>Note: If you select No End Date, then all future events are pulled.</p>

Administering Master Calendar

Field	Description
Frequency	<p>Indicates how often you are querying the EMS database.</p> <ul style="list-style-type: none">• Daily—if you select this option, you must also indicate the run time for the data import. (For example, daily at 1:30 a.m.)• Weekly—if you select this option, you must also indicate the day of the week and the run time for the data import. (For example, every Wednesday at 2:00 p.m.)• Minutes—if you select this option, you must indicate the intervals (in minutes) of the data import. (For example, every 15 minutes.)

3. Click Save.

The connector is saved as an *active* connector in Master Calendar.

To activate a connector

1. Under the Admin Panel main menu option, point to Events & Special Dates, and then click Connectors.

The Manage Connectors page opens. The Active tab is the opened tab. All the currently active connectors in Master Calendar are displayed on this tab.

Figure 6-76: Manage Connectors page, Active tab

This screenshot shows the 'Manage Connectors' page with the 'Active' tab selected. The top navigation bar includes 'Admin', 'Calendar', 'Submit Event', 'My Account', and 'Help'. Below the navigation is a toolbar with 'Actions' (Add | Edit | Purge | Run | Print). A tab bar has 'Active' and 'Inactive' tabs, with 'Active' being the current tab. The main area is titled 'Connectors' and contains a table with columns for a checkbox, 'Name', and 'Data Source'. The table lists three connectors: 'Arts and Sciences' (Data Source: RP), 'Biology UDFs' (Data Source: BH & G Datasource), and 'Education UDFs' (Data Source: Connector test).

	Name	Data Source
<input type="checkbox"/>	Arts and Sciences	RP
<input type="checkbox"/>	Biology UDFs	BH & G Datasource
<input type="checkbox"/>	Education UDFs	Connector test

2. Click the Inactive tab to open.

All currently inactive connectors in Master Calendar are displayed on this tab.

Figure 6-77: Connectors page, Inactive tab

This screenshot shows the 'Connectors' page with the 'Inactive' tab selected. The top navigation bar and toolbar are identical to Figure 6-76. The main area is titled 'Connectors' and contains a table with columns for a checkbox, 'Name', and 'Data Source'. The table lists four connectors: 'Auto Create Buildings' (Data Source: Connector test), 'Indium Test Connector Edited' (Data Source: Test indium), 'Indium testing' (Data Source: Test indium), and 'MHI Connect' (Data Source: Connector test).

	Name	Data Source
<input type="checkbox"/>	Auto Create Buildings	Connector test
<input type="checkbox"/>	Indium Test Connector Edited	Test indium
<input type="checkbox"/>	Indium testing	Test indium
<input type="checkbox"/>	MHI Connect	Connector test

3. Select the connector that you are activating.
4. Under Actions, click Edit.

The Add Connector page opens. The Details tab is the opened tab. The Inactive option is selected.

Figure 6-78: Add Connector page, Details tab, Inactive connector

Connector Name:
Auto Create Buildings

Status:
 Active Inactive

Calendars:
Auto Create Buildings

Automatically Match Event Type

Event Type:
(none)

Automatically create building and room fields in Master Calendar

Bookings require approval

Hide Contact Name

Hide Contact Email

Hide Contact Phone

Location Format:
Room Description

Save Cancel

5. Select Active.

6. Click Save.

The connector is saved and is displayed on the Active tab on the Connectors page.

Figure 6-79: Manage Connectors page, Active tab

Actions		
Add Edit Purge Run Print		
	Name	Data Source
<input type="checkbox"/>	Arts and Sciences	RP
<input type="checkbox"/>	Auto Create Buildings	Connector test
<input type="checkbox"/>	Biology UDFs	BH & G Datasource

To inactivate a connector

1. Under the Admin Panel main menu option, point to Events & Special Dates, and then click Connectors.

The Manage Connectors page opens. The Active tab is the opened tab. All the currently active connectors in Master Calendar are displayed on this tab.

Figure 6-80: Manage Connectors page, Active tab

Name	Data Source
Arts and Sciences	RP
Auto Create Buildings	Connector test
Biology UDFs	BH & G Datasource

2. Select the connector that you inactivating.
3. Under Actions, click Edit.

The Add Connector page opens. The Details tab is the opened tab. The Active option is selected.

Figure 6-81: Add Connector page, Details tab, Active connector

Connector Name:

Status: Active Inactive

Calendars:

Automatically Match Event Type

Event Type:

Automatically create building and room fields in Master Calendar

Bookings require approval

Hide Contact Name

Hide Contact Email

Hide Contact Phone

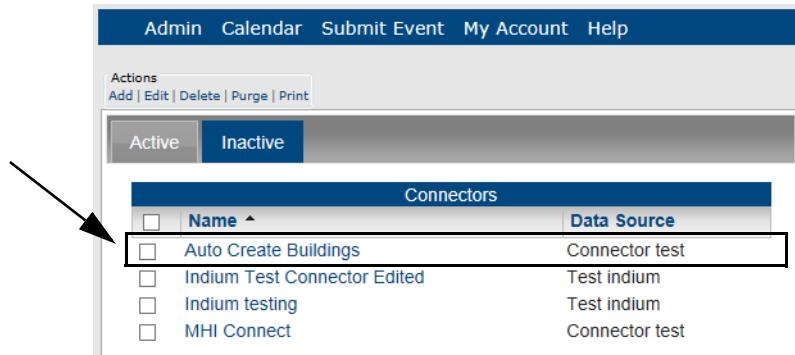
Location Format:

4. Select Inactive.

5. Click Save.

The connector is saved and is displayed on the Inactive tab on the Manage Connectors page.

Figure 6-82: Manage Connectors page, Inactive tab



Connectors		
<input type="checkbox"/>	Name	Data Source
<input type="checkbox"/>	Auto Create Buildings	Connector test
<input type="checkbox"/>	Indium Test Connector Edited	Test indium
<input type="checkbox"/>	Indium testing	Test indium
<input type="checkbox"/>	MHI Connect	Connector test

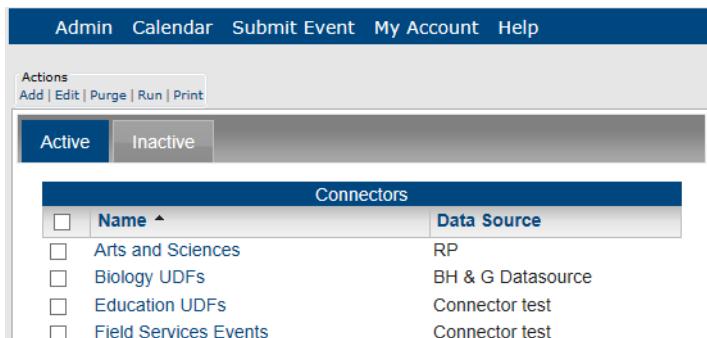
To edit a connector

You can edit both active and inactive connectors.

1. Under the Admin Panel main menu option, point to Events & Special Dates, and then click Connectors.

The Manage Connectors page opens. The Active tab is the opened tab. All the currently active connectors in Master Calendar are displayed on this tab.

Figure 6-83: Manage Connectors page, Active tab



Connectors		
<input type="checkbox"/>	Name	Data Source
<input type="checkbox"/>	Arts and Sciences	RP
<input type="checkbox"/>	Biology UDFs	BH & G Datasource
<input type="checkbox"/>	Education UDFs	Connector test
<input type="checkbox"/>	Field Services Events	Connector test

2. If needed, click the Inactive tab to open it.
3. Select the connector that you are editing.

Administering Master Calendar

4. Under Actions, click Edit.

The Add Connector page opens. The Details tab is the opened tab.

Figure 6-84: Add Connector page, Details tab

The screenshot shows the 'Add Connector' page with the 'Details' tab selected. The interface has a dark blue header with tabs: Admin, Calendar, Submit Event, My Account, and Help. Below the header is a navigation bar with tabs: Details, Filters, Retrieval, and History. The main content area contains the following fields:

- Connector Name:** Auto Create Buildings
- Status:** Active (radio button selected)
- Calendars:** Auto Create Buildings
- Event Type:** (none)
- Automatically Match Event Type:** Checked
- Automatically create building and room fields in Master Calendar:** Checked
- Bookings require approval:** Checked
- Hide Contact Name:** Checked
- Hide Contact Email:** Unchecked
- Hide Contact Phone:** Unchecked
- Location Format:** Room Description

At the bottom are two buttons: Save and Cancel.

5. Edit the information as needed for the connector.

- For the Details tab, see [Step 4 of “To edit a connector”](#)
- For the Filters tab, see [“To filter the EMS events”](#)
- For the Data Retrieval tab, see [Step 2 of “To specify the frequency of the data import”](#)

6. Click Save.

The edited connector is saved in Master Calendar.

To purge a connector

You can purge both active and inactive connectors. When you purge a connector, all the *events* that you imported into Master Calendar using the selected connector are deleted. The connector itself is not deleted. It remains available either on the Active or Inactive tab of the Connectors page.

- Under the Admin Panel main menu option, point to Events & Special Dates, and then click Connectors.

The Manage Connectors page opens. The Active tab is the opened tab. All the currently active connectors in Master Calendar are displayed on this tab.

Figure 6-85: Manage Connectors page, Active tab

	Name	Data Source
<input type="checkbox"/>	Arts and Sciences	RP
<input type="checkbox"/>	Biology UDFs	BH & G Datasource
<input type="checkbox"/>	Education UDFs	Connector test
<input type="checkbox"/>	Field Services Events	Connector test

- If needed, click the Inactive tab to open it.
- Select the connector that you are purging.
- Under Actions, click Purge.

A message opens asking you if you are sure that you want to purge all the selected connectors.

- Click OK in the message.

A message opens indicating that all the selected connectors were purged.

- Click OK in the message.

All the *events* that you imported into Master Calendar using the selected connector are deleted. The connector itself is not deleted. It remains available either on the Active or Inactive tab of the Connectors page.

To run a connector

To manually override the frequency setting for a connector, you run a connector. After you run a connector, the connector continues to run at its regularly scheduled times.

1. Under the Admin Panel main menu option, point to Events & Special Dates, and then click Connectors.

The Manage Connectors page opens. The Active tab is the opened tab. All the currently active connectors in Master Calendar are displayed on this tab.

Figure 6-86: Manage Connectors page, Active tab

2. Select the connector that you are running.
3. Under Actions, click Run.

After the connector runs, a message opens indicating that the run was successful. It also indicates the number of records that were inserted, the number of records that were updated, and the number of records that were deleted.

To delete a connector

You can delete only inactive connectors. To delete a currently active connector, you must first deactivate the connector. (See “[To deactivate a connector](#)”.)



When you delete a connector, none of the events that were imported through the connector is deleted. To delete the events, you purge the data first (see “[To purge a connector](#)”), and then delete the connector.

1. Under the Admin Panel main menu option, point to Events & Special Dates, and then click Connectors.

The Manage Connectors page opens. The Active tab is the opened tab. All the currently active connectors in Master Calendar are displayed on this tab. See [Figure 6-87](#).

Figure 6-87: Manage Connectors page, Active tab

The screenshot shows a web-based application interface for managing connectors. At the top is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar is a toolbar with actions: Add, Edit, Purge, Run, and Print. A secondary toolbar below it has tabs for Active and Inactive, with Active selected. The main content area is titled 'Connectors' and contains a table with three columns: a checkbox column, a 'Name' column, and a 'Data Source' column. The table lists three connector entries:

	Name	Data Source
<input type="checkbox"/>	Arts and Sciences	RP
<input type="checkbox"/>	Auto Create Buildings	Connector test
<input type="checkbox"/>	Biology UDFs	BH & G Datasource

- Click the Inactive tab to open.

All currently inactive connectors in Master Calendar are displayed on this tab.

Figure 6-88: Manage Connectors page, Inactive tab

The screenshot shows the same web-based application interface as Figure 6-87, but with the Inactive tab selected. The main content area is titled 'Connectors' and contains a table with three columns: a checkbox column, a 'Name' column, and a 'Data Source' column. The table lists four connector entries:

	Name	Data Source
<input type="checkbox"/>	Auto Create Buildings	Connector test
<input type="checkbox"/>	Indium Test Connector Edited	Test indium
<input type="checkbox"/>	Indium testing	Test indium
<input type="checkbox"/>	MHI Connect	Connector test

- Under Actions, click Delete.

A message opens asking you if you are sure that you want to delete all the selected connectors.

- Click OK in the message.

A message opens indicating that all the selected connectors were successfully deleted.

- Click OK in the message.

The Inactive tab is refreshed to show the remaining, if any, inactive connectors in Master Calendar.

To generate a Connectors List report

You can generate a Connectors List report, which lists all the active or inactive connectors that are configured in Master Calendar. The report includes the connector name and data source, the connector filters, the event types that imported by the connector, and the calendars to which the event types are imported. It also indicates whether auto-matching for the imported event types has been selected.

1. Under the Admin Panel main menu option, point to Events & Special Dates, and then click Connectors.

The Manage Connectors page opens. The Active tab is the opened tab. All the currently active connectors in Master Calendar are displayed on this tab.

Figure 6-89: Manage Connectors page, Active tab

Name	Data Source
Arts and Sciences	RP
Auto Create Buildings	Connector test
Biology UDFs	BH & G Datasource

2. Do one of the following:

- If you are generating a Connectors List report for all *active* connectors in your Master Calendar, under Actions, click Print.
- If you are generating a Connectors List report for all *inactive* connectors in Master Calendar, click the Inactive tab to open it, and then under Actions, click Print. An onscreen preview of the Connectors List report opens in its own window. A variety of options are available from this preview, including (from left to right at the top of the onscreen preview) the options to search the report results, print the report in its entirety, print the currently displayed report page, and export the report to a file and save the file. See [Figure 6-90](#).



PDF is the default format for exporting to a file. Other allowed formats are Xls, Xlsx, Rtf, Mnt, Text, Image, and Csv.

Figure 6-90: Onscreen preview for a Connectors List report

The screenshot shows a web browser window titled 'Connector Settings - Windows Internet Explorer'. The URL is 'http://www.dea.com/MCTW/ConnectorSettingRpt.aspx?IsActive=0'. The page content is a report titled 'EMS Master Calendar Demo'. It contains two main sections of connector settings, each with several fields and filters.

Connector Settings

Connector Name::	Class UDFs	Datasource::	Chris 42
Needs Approval::	True	Automatch	True
Calendar(s)::	Arts & Humanities	EventTypes::	

Filters
* Display on web = false

Rooms	Meeting Room 301 - Corporate Center East, Meeting Room 302 - Corporate Center East, Video Conference Room 310 - Corporate Center East
Event Types	Athletic Event
Status	Confirmed
Udfs:	Sponsor = Lunch

Connector Name::	EMS Connector 1	Datasource::	Chris 42
Needs Approval::	True	Automatch	True
Calendar(s)::	Fundraisers	EventTypes::	

Filters
* Display on web = false

To view the history for a connector

The history for a connector consists of the original creation date of the connector, the name of the user who created the connector, and the last date that the connector was edited as well as the name of the user who last edited the connector. You can view the history for both active and inactive connectors.

- Under the Admin Panel main menu option, point to Events & Special Dates, and then click Connectors.

The Manage Connectors page opens. The Active tab is the opened tab. All the currently active connectors in Master Calendar are displayed on this tab.

Figure 6-91: Manage Connectors page, Active tab

The screenshot shows a web-based application with a dark blue header bar containing 'Admin', 'Calendar', 'Submit Event', 'My Account', and 'Help' links. Below the header is a toolbar with 'Actions' and buttons for 'Add', 'Edit', 'Purge', 'Run', and 'Print'. A navigation bar at the top has tabs for 'Active' and 'Inactive', with 'Active' being the selected tab. The main content area is a table titled 'Connectors' with columns for 'Name' and 'Data Source'.

Name	Data Source
Arts and Sciences	RP
Auto Create Buildings	Connector test
Biology UDFs	BH & G Datasource

- If needed, click the Inactive tab to open it.
- Select the connector for which you are viewing the history.

Administering Master Calendar

4. Under Actions, click Edit.

The Add Connector page opens. The Details tab is the opened tab.

Figure 6-92: Add Connector page, Details tab

The screenshot shows the 'Add Connector' page with the 'Details' tab selected. The interface includes a top navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation is a tab bar with four tabs: Details, Filters, Retrieval, and History. The 'Details' tab is highlighted with a blue background. The main content area contains the following fields:

- Connector Name:** Auto Create Buildings
- Calendars:** Auto Create Buildings
- Status:** Active (radio button selected)
- Event Type:** (none)
- Automatically Match Event Type:** Checked
- Automatically create building and room fields in Master Calendar:** Checked
- Bookings require approval:** Checked
- Hide Contact Name:** Checked
- Hide Contact Email:** Unchecked
- Hide Contact Phone:** Unchecked
- Location Format:** Room Description

At the bottom of the form are two buttons: 'Save' and 'Cancel'.

5. Click the History tab to open it and view the history for the selected connector.

Figure 6-93: Add Connector page, History tab

The screenshot shows the 'Add Connector' page with the 'History' tab selected. The interface includes a top navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation is a tab bar with four tabs: Details, Filters, Retrieval, and History. The 'History' tab is highlighted with a blue background. The main content area displays the following history information:

- Created Date:** 7/8/2013 1:14 PM
- Created By:** Michael Inlia
- Updated Date:** 8/8/2013 2:04 PM
- Updated By:** Technical Writer

At the bottom of the form are two buttons: 'Save' and 'Cancel'.

Managing Custom Reports

A Custom Reports function is available from the Admin menu. You use this function to create *custom reports* for retrieving information from your Master Calendar database. When you create a custom report, you can name and save the custom report so that you can [run](#) the custom report at any time that you choose. You can [create](#) a new custom report, or you can [create](#) a custom report by copying an existing custom report and editing the copied custom report as needed. You can also [edit](#) a custom report, [delete](#) a custom report, [print](#) a custom report, and [export](#) custom report results to a PDF, XLS, or CSV file.

To create a new custom report

- Under the Admin Panel main menu option, point to Events & Special Dates, and then click Custom Reports.

The Manage Custom Reports page opens. This page always contains the Add Custom Reports option. It also displays a list of custom reports that have been previously defined in your Master Calendar database.

Figure 6-94: Manage Custom Reports page

The screenshot shows a web-based application interface for managing custom reports. At the top, there is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below this is a header bar with the title "Custom Reports". Underneath is a section titled "Add Custom Report" with a plus sign icon. A table lists five existing reports, each with an "Actions" column containing three icons: a magnifying glass, a pencil, and a trash can. The reports listed are: Featured Events, Generic Attendance Template, Intramural Revenue Generation - Spring 2013, Never Summer Calendar, and Physics Bowl Registrants.

Reports	
Title	Actions
Featured Events	
Generic Attendance Template	
Intramural Revenue Generation - Spring 2013	
Never Summer Calendar	
Physics Bowl Registrants	

- Click Add Custom Reports.

The Report Builder dialog box opens. The Details tab is the opened tab. You use the options on the different tabs of this dialog box to name and define the custom report.

- Enter the information for the custom report. See:

- “Details tab”
- “Display Fields tab”
- “Filter tab”
- “Sort tab”

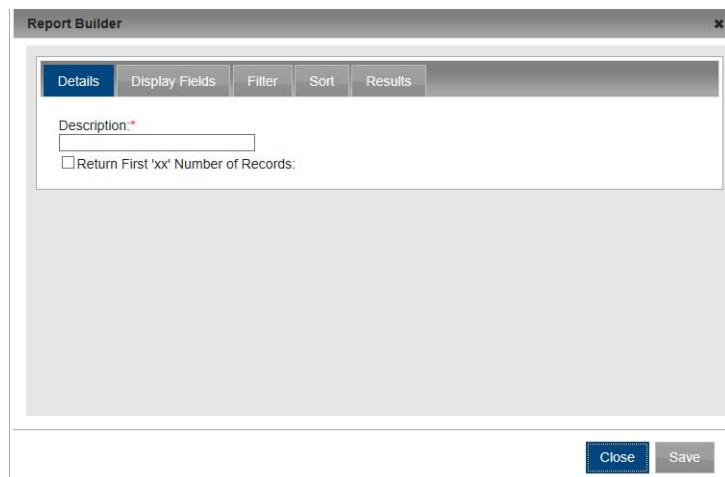
Administering Master Calendar

4. Do one of the following:

- Click Save to close the Report Builder dialog box and save the named custom report. The named custom report is displayed on the Custom Reports page. You can run this custom report at any later date when needed.
- Open the Results tab, and then click Preview to run the custom report immediately and view the results on the tab. You can then click Save to save the named custom report and close the Report Builder dialog box. The named custom report is displayed on the Custom Reports page. You can run this custom report at any later date when needed.

Details tab

Figure 6-95: Report Builder dialog box, Details tab



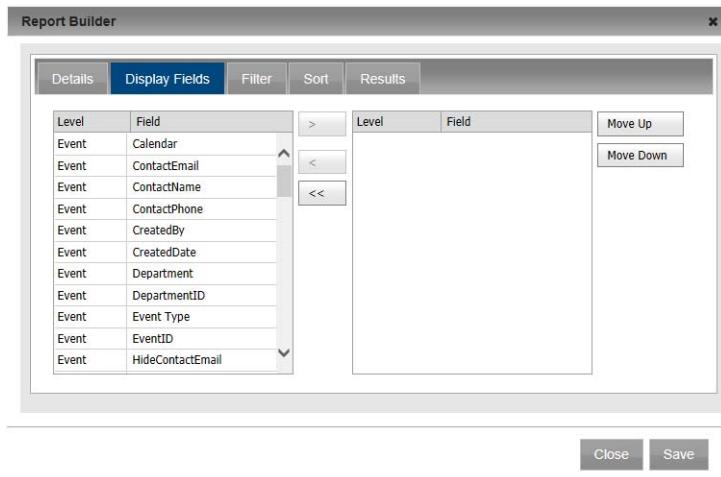
1. On the Details tab, name and define the custom report.

Option	Description
Description	Required. Name or title for the custom report. Note: The name can be a maximum of 50 characters, including spaces.
Return First "xx" Number of Records	To limit the number of records that the custom report returns, select this option, and then enter the number of records in the field.

2. Continue with any other configuration for the custom report as needed, or if the configuration is complete, do one of the following:
 - Click Save to close the Report Builder dialog box and save the named custom report. The named custom report is displayed on the Custom Reports page. You can run this custom report at any later date when needed.
 - Open the Results tab, and then click Preview to run the custom report immediately and view the results on the tab. You can then click Save to save the named custom report and close the Report Builder dialog box. The named custom report is displayed on the Custom Reports page. You can run this custom report at any later date when needed.

Display Fields tab

Figure 6-96: Report Builder dialog box, Display Fields tab



1. Open the Display Fields tab and select the fields (CTRL-click to select multiple fields) that are to be displayed in the custom report results, and then click the Add button (>) to move the selected fields to the Selected list.

The fields are displayed in the custom report results in the order in which they are listed in the Selected list.



If you are copying an existing custom report, then when the Display Fields tab opens, the Selected list is already populated with a list of fields. You can select one or more of these fields in the Selected list and then click the Remove button (<) to move these fields back to the Available list. To remove all fields in a single step, click the Remove All (<<) button.

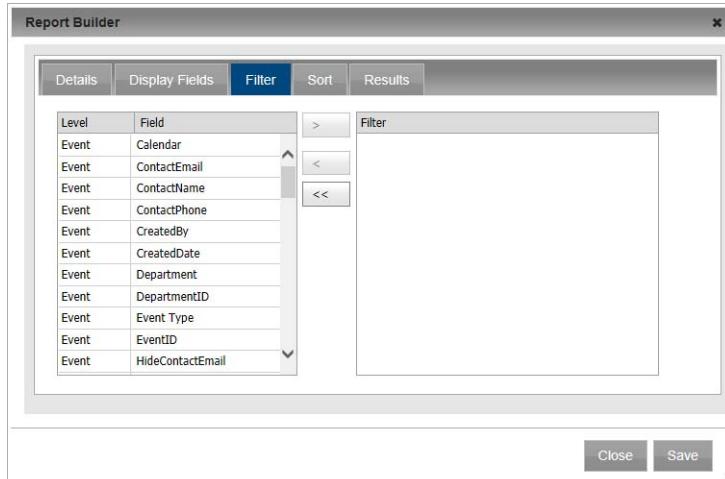
2. Optionally, to change the order of the fields, select a field and then click Move Up/Move Down as needed.

Administering Master Calendar

3. Continue with any other configuration for the custom report as needed, or if the configuration is complete, do one of the following:
 - Click Save to close the Report Builder dialog box and save the named custom report. The named custom report is displayed on the Custom Reports page. You can run this custom report at any later date when needed.
 - Open the Results tab, and then click Preview to run the custom report immediately and view the results on the tab. You can then click Save to save the named custom report and close the Report Builder dialog box. The named custom report is displayed on the Custom Reports page. You can run this custom report at any later date when needed.

Filter tab

Figure 6-97: Report Builder dialog box, Filter tab



1. Open the Filter Fields tab, and for each field that is to define the custom report, select the field, and then click the Add button (>).
2. For each field that you select, a dialog box opens in which you must specify the allowed values for the field. After you specify the allowed values and click OK, the dialog box closes, and the selected field is moved to the Filter list.

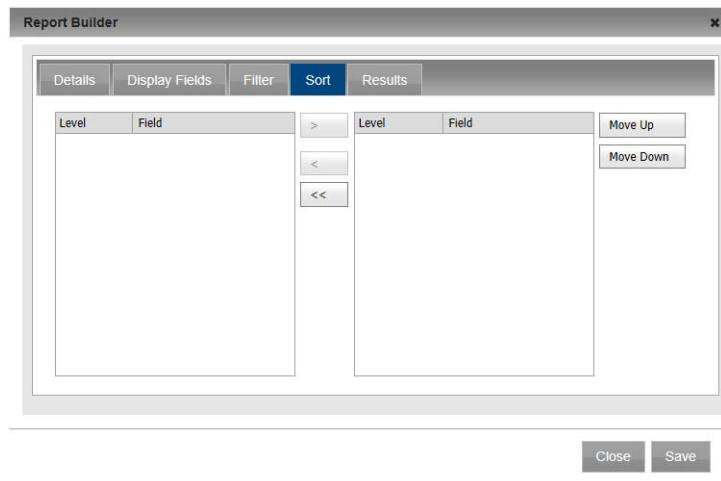


If you are copying an existing custom report, then when the Filter tab opens, the Filter list is already populated. You can select one or more of the fields in the Filter Summary list and then click the Remove button (<) to move these fields back to the Available list. If you want to use the same Filter fields in the “new” custom report, but with different values, you cannot change the values directly. You must move the appropriate fields back to the Available list, then select the fields again to change their values.

3. Continue with any other configuration for the custom report as needed, or if the configuration is complete, do one of the following:
 - Click Save to close the Report Builder dialog box and save the named custom report. The named custom report is displayed on the Custom Reports page. You can run this custom report at any later date when needed.
 - Open the Results tab, and then click Preview to run the custom report immediately and view the results on the tab. You can then click Save to save the named custom report and close the Report Builder dialog box. The named custom report is displayed on the Custom Reports page. You can run this custom report at any later date when needed.

Sort tab

Figure 6-98: Report Builder dialog box, Sort tab



1. Open the Sort tab, select the field or CTRL-click to select the multiple fields by which the custom report results are to be sorted and then click the Add button (>) to move the fields to the Selected list.



If you are copying an existing custom report, then when the Sort tab opens, the Selected list is already populated with a list of fields. You can select one or more of these fields in the Selected list and then click the Remove button (<) to move these fields back to the Available list. To remove all fields in a single step, click the Remove All (<<) button.

Administering Master Calendar

2. Continue with any other configuration for the custom report as needed, or if the configuration is complete, do one of the following:
 - Click Save to close the Report Builder dialog box and save the named custom report. The named custom report is displayed on the Custom Reports page. You can run this custom report at any later date when needed.
 - Open the Results tab, and then click Preview to run the custom report immediately and view the results on the tab. You can then click Save to save the named custom report and close the Report Builder dialog box. The named custom report is displayed on the Custom Reports page. You can run this custom report at any later date when needed.

To create a custom report by copying an existing custom report

1. Under the Admin Panel main menu option, point to Events & Special Dates, and then click Custom Reports.

The Manage Custom Reports page opens. This page always contains the Add Custom Reports option. It also displays a list of custom reports that have been previously defined in your Master Calendar database.

Figure 6-99: Manage Custom Reports page

The screenshot shows a web-based application interface for managing custom reports. At the top, there is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar, a header bar has the title "Custom Reports". In the center, there is a button labeled "+ Add Custom Report". Below this, there is a table titled "Reports". The table has two columns: "Title" and "Actions". The "Title" column lists five report names: "Featured Events", "Generic Attendance Template", "Intramural Revenue Generation - Spring 2013", "Never Summer Calendar", and "Physics Bowl Registrants". The "Actions" column for each row contains three icons: a copy icon (highlighted in the description), a preview icon, and a delete icon.

Title	Actions
Featured Events	
Generic Attendance Template	
Intramural Revenue Generation - Spring 2013	
Never Summer Calendar	
Physics Bowl Registrants	

2. Click the Copy icon  for the custom report that you are copying.

A message opens indicating that the selected report was copied.

3. Click OK to close the message and return to the Custom Reports page.

An entry for the copied custom report is displayed on the Custom Reports page as <custom report Name> Copy.

Figure 6-100: Custom Reports page with a copied custom report

The screenshot shows a web-based application interface for managing custom reports. At the top, there is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar is a header titled "Custom Reports". Underneath the header, there is a section titled "Add Custom Report" with a "Reports" button. A table lists several custom reports, each with a "Title" and an "Actions" column containing icons for edit, preview, and delete. One row is highlighted with a red border: "Featured Events Copy". An arrow points from the text in the previous step to this highlighted row.

Title	Actions
Featured Events	
Featured Events Copy	
Generic Attendance Template	
Intramural Revenue Generation - Spring 2013	
Never Summer Calendar	
Physics Bowl Registrants	

4. Click the Edit icon next to the copied custom report that you are editing.
- The Report Builder dialog box opens. All the tabs are populated with the information for the selected custom report.
5. Edit the custom report as necessary, including one or more of the following:
 - Renaming the custom report. See “[Details tab](#)”
 - Changing the fields that are to be displayed in the custom report results. See “[Display Fields tab](#)”
 - Changing the fields that define the custom report. See “[Filter tab](#)”
 - Changing the sort order of the custom report results. See “[Sort tab](#)”
 6. Do one of the following:
 - Click Save to close the Report Builder dialog box and save the named custom report. The named custom report is displayed on the Custom Reports page. You can run this custom report at any later date when needed.
 - Open the Results tab, and then click Preview to run the custom report immediately and view the results on the tab. You can then click Save to save the named custom report and close the Report Builder dialog box. The named custom report is displayed on the Custom Reports page. You can run this custom report at any later date when needed.

To edit a custom report

1. Under the Admin Panel main menu option, point to Events & Special Dates, and then click Custom Reports.

The Manage Custom Reports page opens. This page always contains the Add Custom Reports option. It also displays a list of custom reports that have been previously defined in your Master Calendar database.

Figure 6-101: Manage Custom Reports page

The screenshot shows a web-based application interface for managing custom reports. At the top, there is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar is a header titled "Custom Reports". A blue button labeled "+ Add Custom Report" is visible. The main content area is a table titled "Reports". The table has two columns: "Title" and "Actions". The "Title" column lists five report names: "Featured Events", "Generic Attendance Template", "Intramural Revenue Generation - Spring 2013", "Never Summer Calendar", and "Physics Bowl Registrants". The "Actions" column for each row contains three icons: a pencil (Edit), a magnifying glass (Preview), and a trash can (Delete).

Title	Actions
Featured Events	
Generic Attendance Template	
Intramural Revenue Generation - Spring 2013	
Never Summer Calendar	
Physics Bowl Registrants	

2. Click the Edit icon next to the custom report that you are editing.
The Report Builder dialog box opens. All the tabs are populated with the information for the selected custom report.
3. Edit the custom report as necessary including one or more of the following:
 - Renaming the custom report. See “[Details tab](#)”
 - Changing the fields that are to be displayed in the custom report results. See “[Display Fields tab](#)”
 - Changing the fields that define the custom report. See “[Filter tab](#)”
 - Changing the sort order of the custom report results. See “[Sort tab](#)”
4. Do one of the following:
 - Click Save to close the Report Builder dialog box and save the named custom report. The named custom report is displayed on the Custom Reports page. You can run this custom report at any later date when needed.
 - Open the Results tab, and then click Preview to run the custom report immediately and view the results on the tab. You can then click Save to save the named custom report and close the Report Builder dialog box. The named custom report is displayed on the Custom Reports page. You can run this custom report at any later date when needed.

To delete a custom report

1. Under the Admin Panel main menu option, point to Events & Special Dates, and then click Custom Reports.

The Manage Custom Reports page opens. This page always contains the Add Custom Reports option. It also displays a list of custom reports that have been previously defined in your Master Calendar database.

Figure 6-102: Manage Custom Reports page

The screenshot shows a web-based application interface for managing custom reports. At the top, there is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below the navigation bar is a header titled "Custom Reports". In the center, there is a section titled "Add Custom Report" with a plus sign icon. Below this, there is a table titled "Reports" with two columns: "Title" and "Actions". The "Title" column lists five report names, and the "Actions" column for each row contains three icons: a magnifying glass, a pencil, and a trash can. The report titles listed are: Featured Events, Generic Attendance Template, Intramural Revenue Generation - Spring 2013, Never Summer Calendar, and Physics Bowl Registrants.

Title	Actions
Featured Events	🔍 🖊️ 🗑️
Generic Attendance Template	🔍 🖊️ 🗑️
Intramural Revenue Generation - Spring 2013	🔍 🖊️ 🗑️
Never Summer Calendar	🔍 🖊️ 🗑️
Physics Bowl Registrants	🔍 🖊️ 🗑️

2. Click the Delete icon next to the custom report that you are deleting.
3. Select the custom report that is to be deleted, and then click Delete.

A message opens, asking you if it is OK to delete the selected report.

4. Click Yes.

The message closes. The custom report is deleted, and another message opens indicating that the report was successfully deleted.

Administering Master Calendar

To run, print, and export a custom report

1. Under the Admin Panel main menu option, point to Events & Special Dates, and then click Custom Reports.

The Manage Custom Reports page opens. This page always contains the Add Custom Reports option. It also displays a list of custom reports that have been previously defined in your Master Calendar database.

Figure 6-103: Manage Custom Reports page

The screenshot shows a web-based application interface. At the top is a navigation bar with links: Admin, Calendar, Submit Event, My Account, and Help. Below this is a header bar with a blue background and white text that reads "Custom Reports". Underneath is a sub-header with a blue background and white text that reads "+ Add Custom Report". The main content area is titled "Reports" and contains a table with the following data:

Title	Actions
Featured Events	[Edit] [View] [Delete]
Generic Attendance Template	[Edit] [View] [Delete]
Intramural Revenue Generation - Spring 2013	[Edit] [View] [Delete]
Never Summer Calendar	[Edit] [View] [Delete]
Physics Bowl Registrants	[Edit] [View] [Delete]

2. Click on the name/title of the custom report that you are running.

An onscreen preview of the selected custom report opens in the Master Calendar application.

Figure 6-104: Example of an onscreen preview of a custom report

The screenshot shows a data grid with the following columns: EventDetailID, ContactName, Calendar, Title, EventDate, and Attendance. The data grid contains the following rows:

EventDetailID(358)	ContactName	Calendar	Title	EventDate	Attendance
88209	Chris Meyers	Arts & Humanities	Test UDQs Insert	1/30/2006 12:00 AM	56
88219	Chris Meyers	Performing Arts	Updated Layout Event 2	3/6/2006 12:00 AM	86
88220	Chris Meyers	Performing Arts	Updated Layout Event 2	3/13/2006 12:00 AM	86
88221	Chris Meyers	Performing Arts	Updated Layout Event 2	3/20/2006 12:00 AM	86
88222	Chris Meyers	Performing Arts	Updated Layout Event 2	3/27/2006 12:00 AM	86
88223	Chris Meyers	Performing Arts	Updated Layout Event 2	4/3/2006 12:00 AM	86

3. Optionally, do one or more or all the following:

- To group the report by a column header, drag the column to the indicated location at the top of the onscreen preview of the report.
- To change the sort order of the custom report results, click on a column header. Click on the column header again to reverse the sort order.
- To filter the custom report results, click on the Dropdown arrow next to a column header to open a list of all available values for the column, and select a specific value.

Figure 6-105: Filtering a custom report by column values

EventDetailID(139)	ContactName	Title	Event1
155611	Tester 1	(All)	
		(Blanks)	
		(Non blanks)	
		Andy	
		Bob Anderson	
180133	dsaf		
167612	Contact Name		

- To export the custom report to a PDF file or a Microsoft Excel file (CSV or XLS), under Format, select the appropriate Export option, and then click Export. A message opens, asking you if you want to open or save the file.
 - If you click Open, then the file is opened in the appropriate application (Adobe Acrobat or Reader for a PDF or Microsoft Excel for a CSV or XLS file) and you can use the options that area available in these applications to name and/or save the file.
 - If you click Save, then you are prompted to name the file (the default name is ReportGrid.pdf, ReportGrid.csv, or ReportGrid.xls) and you must select a location for saving the file. (The default location is your client's Desktop.)
- To print the custom report, click Print. An onscreen preview of the selected custom report opens in its own window. A variety of options are available from this preview, including (from left to right at the top of the onscreen preview) the options to search the custom report results, print the custom report in its entirety, print the currently displayed custom report page and export the custom report to a file and save the file. See [Figure 6-106](#).



PDF is the default format for exporting to a file. Other allowed formats are Xls, Xlsx, Rtf, Mnt, Text, Image, and Csv.

Administering Master Calendar

Figure 6-106: Print preview for a custom report

EventDetailID	ContactName	Title	EventTypeID	EventDate	DepartmentID
155611	Tester 1	Test Event (TT) 240 month recurrence		6/1/2011 12:00 AM	
167612	Contact Name	Test Import Event 1		6/5/2011 12:00 AM	
176284	Chris	Winter Park Hill Climb Race #1		6/11/2011 12:00 AM	
176302	Chris Meyers	test untimed 2		5/31/2011 12:00 AM	
176303	Chris Meyers	test untimed 2		6/21/2011 12:00 AM	
176304	Chris Meyers	test untimed 2		6/22/2011 12:00 AM	
176305	Chris Meyers	test untimed 2		6/27/2011 12:00 AM	
176306	Chris Meyers	Test Multiple Connectors		6/16/2011 12:00 AM	
176307	Chris Meyers	Test this		6/22/2011 12:00 AM	
176313	Bob Anderson	chartwell 3		6/11/2011 12:00 AM	
176316	Andy	as-event		6/7/2011 12:00 AM	
176317	Andy	as-event		6/8/2011 12:00 AM	
176318	Andy	as-event		6/12/2011 12:00 AM	
176319	Andy	as-event		6/13/2011 12:00 AM	
176320	Andy	as-event		6/14/2011 12:00 AM	
176321	Andy	as-event		6/15/2011 12:00 AM	

Customizing the Header for Automated Emails

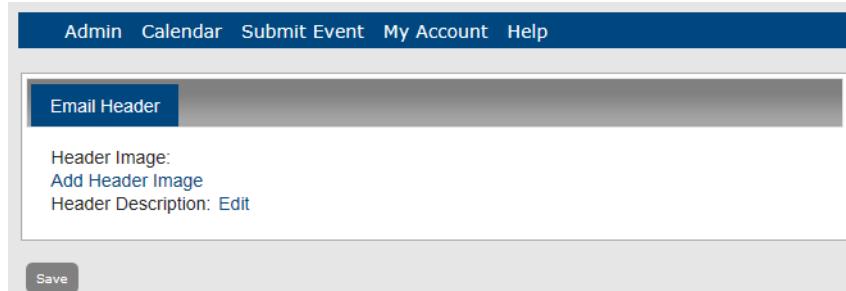
Automated emails can be sent from many areas within Master Calendar, including subscriptions, reminders, and change notifications. You can [customize](#) the header for these automated emails, and you can also select a logo for these automated emails that is displayed in the upper right hand corner of the automated emails.

To customize the header for automated emails

1. Under the Admin Panel main menu option, point to Site Administration, and then click Email Header.

The Email Header page opens.

Figure 6-107: Email Header page



2. Do one or both of the following:

- To select an image—Click Add Header Image to browse to and select the image that is be used for the logo in all automated emails.



The new logo must be an image in one of the following formats —.jpg, .gif, .png, .bmp, and .ico.

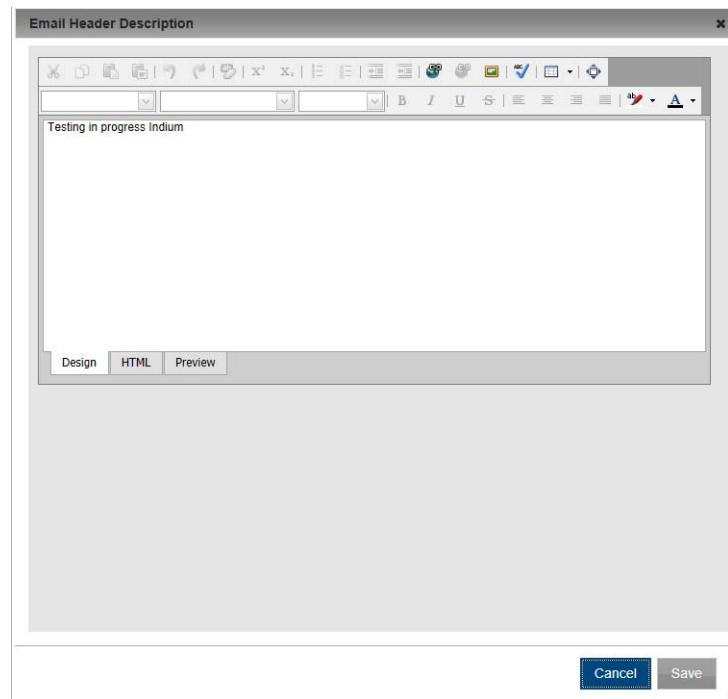


After you select a logo, the name of the logo is displayed and a “Remove” option is displayed next to the logo. To remove the logo from all automated emails, simply click Remove.

- To edit the email header—Next to Header Description, click Edit to open the Email Header Description dialog box. (See [Figure 6-108](#).) On the Design tab, in the blank header description field, enter the needed text for the email header. Use the formatting options that are available to select the paragraph style (Normal, Heading 1, and so on), font, font color, and font size for the header, insert links, and so on.

Administering Master Calendar

Figure 6-108: Email Header Description dialog box



3. Optionally, do one or both of the following:
 - Click HTML to open the HTML tab and view the HTML code for the email header.
 - Click Preview to open the Preview tab and view the email header as it will be displayed in your Master Calender system.
4. Click Save.
An Saved message opens.
5. Click OK.
The message closes. The settings are saved for the customized heading.

Managing Help Text in Master Calendar

As the Master Calendar site administrator, you can customize messages in key areas of your system that provides organization-specific information or hints to your users about how to use Master Calendar. For example, you might want to place help text above a calendar that explains what type of events that a user should and should not post to the calendar. You have two options for managing help text in Master Calendar—from the Help Text function on the Admin Panel menu, or by clicking an Edit link, which is displayed above the help text on any page other than the Login page in the Admin Panel area.

To manage help text in Master Calendar

1. Under the Admin Panel main menu option, point to Site Administration, and then click Help Text.

The Manage Help Text page opens. By default, when the page first opens, Help Text Edit mode is disabled.

Figure 6-109: Manage Help Text page

The screenshot shows a web-based application interface titled "Manage Help Text". At the top, there is a navigation bar with links: Admin Panel, Calendar, Submit Event, My Account, and Help. Below the navigation bar, a button labeled "Enable Help Text Edit" is visible with a tooltip: "- Use this option to edit the help text records at the location at which they appear in Master Calendar. Click this button to enable edit mode." The main content area contains a table titled "Help Text". The table has three columns: "WebTextId", "Lookup Key", and "Description". The "Lookup Key" column is currently sorted in ascending order. The table lists 16 rows of help text records, each with a unique WebTextId, a specific Lookup Key, and a corresponding Description. For example, WebTextId 63 corresponds to the Lookup Key "AddEventGeneralHelp" and the Description "Add Event General Info".

Help Text		
WebTextId	Lookup Key	Description
63	AddEventGeneralHelp	Add Event General Info
69	CalManagersHelp	Calendar Managers Help
67	ChangePasswordHelp	Change Password Help
214	ConnectorEventInfoGeneralHelp	Connector Event Info Request
165	DefaultCalendarHelp	Calendar Help
211	EditEventGeneralHelp	Edit Event General Help
209	EventSummaryHelp	Event Summary Help Page
205	ExpectedError	ExpectedError.aspx
204	ExpectedErrorHelp	Expected Error Help Page
181	LDAPHelp	LDAP Help
182	LoginHelp	Login Help
118	RSSHelp	RSS Help
106	ViewRequestsHelp	View Requests Help

Administering Master Calendar

2. Click the appropriate Lookup Key link to open the page for editing the help text.

A page opens for editing the help text in the selected area of Master Calendar that has the following characteristics:

- The option Collapse Help Text is not selected.



If this option is not selected, then the help text for a page is displayed explicitly at the top of the page.

- If you have configured cultures for Master Calendar, then these cultures are displayed in a Culture dropdown list.

Figure 6-110: Page that opens for editing help text in a selected area of Master Calendar

The screenshot shows two windows related to editing help text in a Master Calendar.

The top window is a grid titled "Help Text" with columns: WebTextId, Lookup Key, and Description. The "Lookup Key" column is sorted. A row for "ChangePasswordHelp" is selected, highlighted with a red box. A black arrow points from this row down to the bottom window.

WebTextId	Lookup Key	Description
63	AddEventGeneralHelp	Add Event General Info
69	CalManagersHelp	Calendar Managers Help
67	ChangePasswordHelp	Change Password Help
214	ConnectorEventInfoGeneralHelp	Connector Event Info Request
165	DefaultCalendarHelp	Calendar Help
211	EditEventGeneralHelp	Edit Event General Help
209	EventSummaryHelp	Event Summary Help Page
205	ExpectedError	ExpectedError.aspx
204	ExpectedErrorHelp	Expected Error Help Page
181	LDAPHelp	LDAP Help
182	LoginHelp	Login Help
118	RSSHelp	RSS Help
106	ViewRequestsHelp	View Requests Help

The bottom window is a detailed edit view for the "Change Password Help" record. It includes a toolbar with various icons, a culture selection dropdown, and a rich text editor. The text area contains instructions: "Please type your old password. Then type and retype your new password before clicking Update. Update will be successful". At the bottom are buttons for "Save" and "Back To Page".

3. Optionally, do one or both of the following:
 - Select Collapse Help Text.



If this option is selected, then the help text for a page is collapsed behind a Help icon [?] on the page. A user must click this icon to display the help text.

- Select a different culture (language) in which the help text is to be displayed.



The guest's or user's Browser language must be set to the appropriate culture (language) to display these translations.

4. Enter the help text in the blank Design tab. Use the available formatting options to select the font size, style, color, and so on.
5. Optionally, do one or both of the following:
 - Click Preview to open the Preview tab and view the Help text as it will be displayed in your Master Calender system.
 - Click HTML to open the HTML tab and view the HTML code for the help text.
6. Click Save.
7. Toggle Enable Help Text. The message “Help Text Mode is now enabled” is displayed above the toggle, and the toggle now reads “Disable Help Text Edit.”

Figure 6-111: Enable Help Text toggle - Help Text Mode enabled

Help Text Edit Mode is now enabled

Disable Help Text Edit - This option will allow you to edit link show next to all help text records for the current session.

An Edit link is displayed next to all the Help Text records on all Admin Panel pages for the current Master Calendar session. You can click this Edit link to open the page for editing the help text at the location at which it is displayed in Master Calendar. See [Figure 6-113](#) and [Figure 6-114](#).



As the site administrator, if you enable Help Text mode, and then log out of Master Calendar, Help Text mode is disabled when you log back into Master Calendar. You must enable Help Text mode again.

8. Optionally, to disable Help Text mode, toggle Disable Help Text Edit.

The message “Help Text Mode is now disabled” is displayed above the toggle, and the toggle now reads “Enable Help Text Edit.”

Figure 6-112: Help Text Mode enabled

Help Text Edit Mode is now enabled

Disable Help Text Edit - This option will allow you to edit link show next to all help text records for the current session.

Administering Master Calendar

Figure 6-113: Edit link for collapsed help text

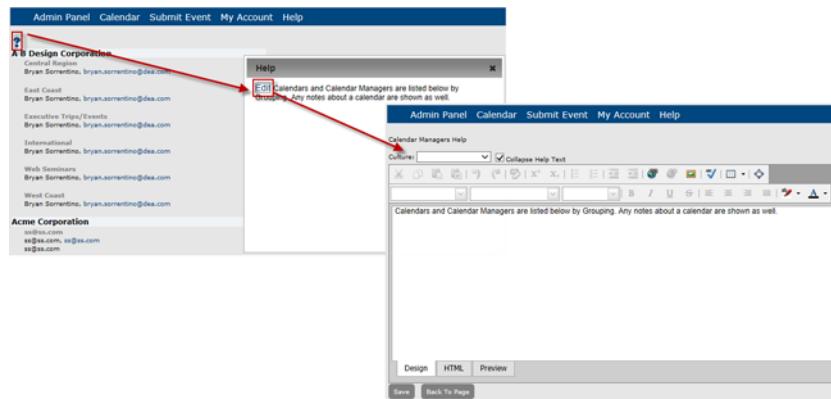
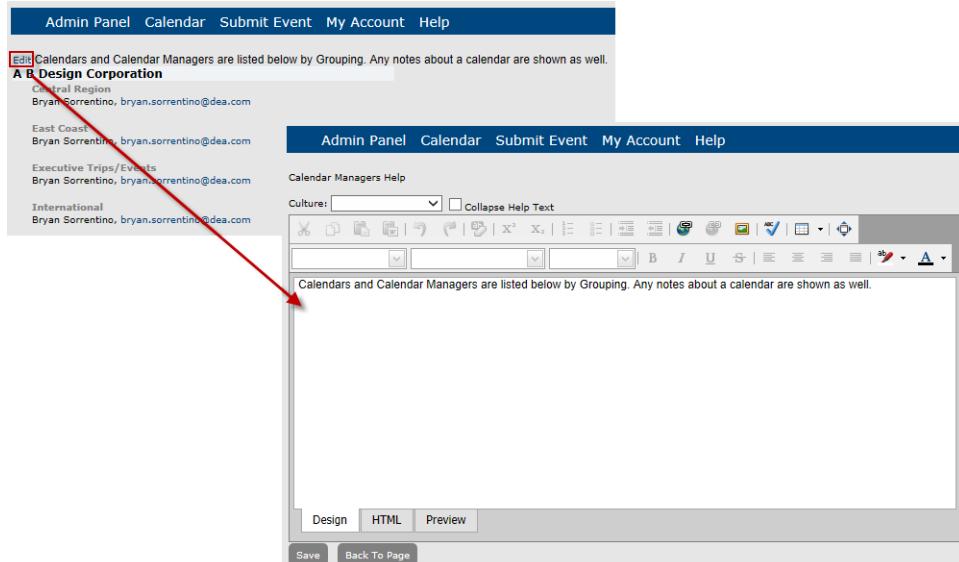


Figure 6-114: Edit link for help text explicitly displayed on a Master Calendar page



Managing Subscriptions

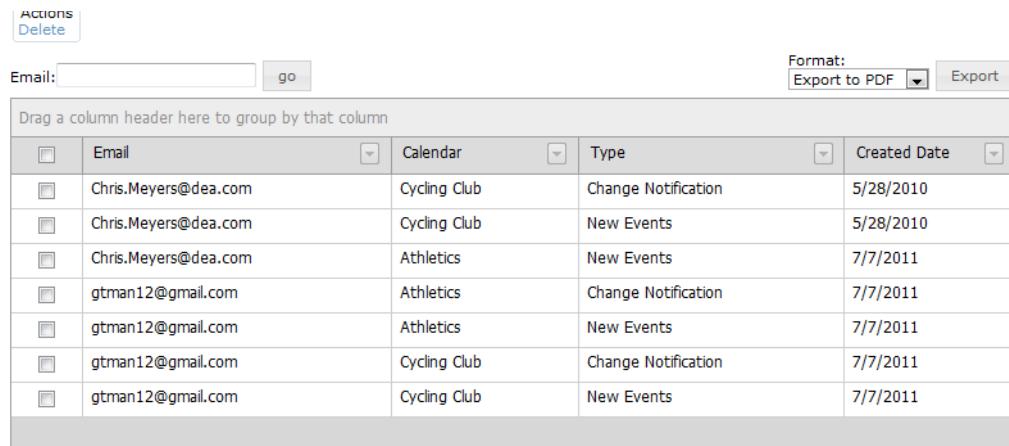
You use the functions in the Subscriptions area to manage all active subscriptions to the calendars in Master Calendar. Managing subscriptions consists of [searching for](#) and [viewing](#) all active subscriptions, [exporting](#) all active subscriptions to a file, and [deleting](#) active subscriptions.

To view, search for, and export active subscriptions

- Under the Admin Panel main menu option, point to Site Administration, and then click Subscriptions.

The Subscriptions page opens. All the currently active subscriptions to all calendars in Master Calendar are displayed on this page.

Figure 6-115: Subscriptions page



The screenshot shows a web-based administrative interface for managing subscriptions. At the top, there are buttons for 'Actions' (with 'Delete') and 'Email:' (with a search field and 'go' button). To the right are 'Format:' dropdowns for 'Export to PDF' and 'Export'. A message 'Drag a column header here to group by that column' is displayed above the table. The table has columns: a checkbox column, 'Email', 'Calendar', 'Type', and 'Created Date'. The data in the table is as follows:

<input type="checkbox"/>	Email	Calendar	Type	Created Date
<input type="checkbox"/>	Chris.Meyers@dea.com	Cycling Club	Change Notification	5/28/2010
<input type="checkbox"/>	Chris.Meyers@dea.com	Cycling Club	New Events	5/28/2010
<input type="checkbox"/>	Chris.Meyers@dea.com	Athletics	New Events	7/7/2011
<input type="checkbox"/>	gtman12@gmail.com	Athletics	Change Notification	7/7/2011
<input type="checkbox"/>	gtman12@gmail.com	Athletics	New Events	7/7/2011
<input type="checkbox"/>	gtman12@gmail.com	Cycling Club	Change Notification	7/7/2011
<input type="checkbox"/>	gtman12@gmail.com	Cycling Club	New Events	7/7/2011

- Optionally, do one or more of the following:

- To search for specific subscriptions by the subscriber's email address, enter a partial or complete search string in the Email field, and then click Go.



The search is limited to the exact order of characters in the search string, however,

the string is not-case sensitive and it can appear anywhere in the search results.

For example, if you enter "Rob" as your search string, search results can include Robert.Smith@ems.com, MRobertson@gmail.com, and so on.

All the subscriptions that meet your search criteria are displayed on the Subscriptions page.

- To group the display by a column header, drag the column to the indicated location at the top of the Subscriptions page.

Administering Master Calendar

- To change the sort order of the display, click on a column header. Click on the column header again to reverse the sort order.
- To filter the display, click on the Dropdown arrow next to a column header to open a list of all available values for the column, and select a specific value.

Figure 6-116: Filtering the subscription display by column values

Email	Calendar
Chris.Meyers@dea.com	(All)
Chris.Meyers@dea.com	(Blanks)
Chris.Meyers@dea.com	(Non blanks)
Chris.Meyers@dea.com	Chris.Meyers@dea.com
gtman12@gmail.com	gtman12@gmail.com

- To export the subscriptions to a PDF file or a Microsoft Excel file (CSV or XLS), under Format, select the appropriate Export option, and then click Export. A message opens, asking you if you want to open or save the file.
- If you click Open, then the file is opened in the appropriate application (Adobe Acrobat or Reader for a PDF or Microsoft Excel for a CSV or XLS file) and you can use the options that are available in these applications to name and/or save the file.
- If you click Save, then you are prompted to name the file (the default name is subscriptionsGrid.pdf, subscriptionsGrid.csv, or subscriptionsGrid.xls) and you must select a location for saving the file. (The default location is your client's Desktop.)

To delete active subscriptions



When you delete an active subscription, the deletion is for a subscription to a specific calendar. A user's subscriptions to other calendars is not affected in any way.

1. Under the Admin Panel main menu option, point to Site Administration, and then click Subscriptions.

The Subscriptions page opens. All the currently active subscriptions to all calendars in Master Calendar are displayed on this page.

Figure 6-117: Subscriptions page

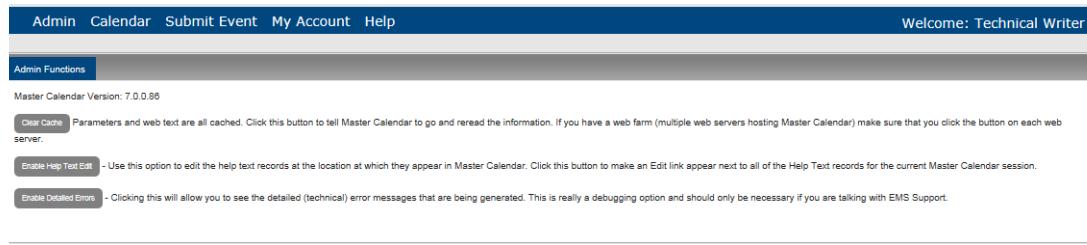
Actions		Format:			
Delete		Export to PDF Export			
Drag a column header here to group by that column					
<input type="checkbox"/>	Email	Calendar	Type	Created Date	
<input type="checkbox"/>	Chris.Meyers@dea.com	Cycling Club	Change Notification	5/28/2010	
<input type="checkbox"/>	Chris.Meyers@dea.com	Cycling Club	New Events	5/28/2010	
<input type="checkbox"/>	Chris.Meyers@dea.com	Athletics	New Events	7/7/2011	

2. Optionally, search for the specific subscriptions that you are deleting. (See “[To view, search for, and export active subscriptions](#)”.)
3. Select the subscriptions that you are deleting.
4. Under Actions, click Delete.
A message opens, asking you if you are sure that you want to delete all the selected RSS feeds.
5. Click OK in the message.
A message opens indicating that all the selected subscriptions were successfully deleted.
6. Click OK in the message.
The Subscriptions page is refreshed to show the remaining, if any, active subscriptions in Master Calendar.

Master Calendar Administrator-Specific Functions

Several administrator-specific functions are available to assist you in making sure that Master Calendar is operating efficiently and effectively as well as debugging the application. All the options are available under the Admin Functions option on the Admin menu.

Figure 6-118: Admin-specific functions



Function	Description
Clear Cache	Clears the cache for the web server that is hosting Master Calendar.
Enable Help Text Edit	Allows for the editing of the help text directly on the pages in Master Calendar. Note: This option is also available from the Help Text function on the Admin menu. See " Managing Help Text in Master Calendar ".
Enable Detailed Errors	Makes the detailed (technical) error messages that are being generated visible. Note: This is really a debugging option and should be necessary only if you are talking with EMS support.

Appendix A

Site Configuration Settings

This appendix details the Master Calendar site configuration settings.

- “Area: Calendar”
- “Area: Email”
- “Area: Labels”
- “Area: Portal Authentication”
- “Area: RSS”
- “Area: Submit”
- “Area: System Configuration”
- “Area: Tooltip”

If you need assistance in understanding the definitions for any of these settings, or need assistance in setting any of these values, contact EMS Software, LLC, at:

*EMS Software, LLC, an Accruent Company
6465 Greenwood Plaza Blvd
#600
Centennial, CO 80111
800-440-3994 (Phone)
303-796-7429 (Fax)
support@emssoftware.com
www.emssoftware.com*

Area: Calendar

Parameter Description	Default Value	Function
Collapse EMS Bookings into reservations on calendar	Yes	For events that are pulled from EMS into Master Calendar, collapse the bookings and display only the reservation-level information.
Max number of events/day to display in daily view	20	In the Daily view, select the number of events that are to be displayed.
Max number of events/day to display in monthly view	5	In the Monthly view, select the number of events that are to be displayed.
Max number of events/day to display in weekly view	10	In the Weekly view, select the number of events that are to be displayed.
Total number of featured events to display	15	Total number of featured events to display in the Featured Events section at the top of the Master Calendar Home page.
Display the social networking icon on Event Details page	Yes	Display the Social Networking icon on the Event Details page, which allows users to add the event to various social network sites (Facebook, Twitter, and so on).
Display the time zone abbreviation next to the time	Yes	Display the time zone abbreviation (for example EST) next to the event time on the calendar.
Display the timezone dropdown on the Master Calendar Home page to allow adjusting of the event display times	Yes	Allows adjustment of the event display times based on the selected timezone in the Calendar Display area on the Master Calendar Home page.
Default List View	Detailed List	Indicate the style type for the calendar List view.
Default start day of week for calendar	Sunday	Select the day of the week on which a calendar week should begin.

Appendix A
Site Configuration Settings

Area: Email

Parameter Description	Default Value	Function
Account to Use for Sending Email		Enter a value if your SMTP server requires authentication.
Password of Email Account		Enter a value if your SMTP server requires authentication.
SMTP server port number	25	The default port to use for the SMTP server.
Name of Email Sender	Events Office	Enter the name that is to be displayed on system-generated emails.
Email Address of Sender	events@yourdomain.com	Enter the email address that is to be displayed on system-generated emails.
SMTP Server		Enter the name of the organization's SMTP Server.
SMTP - Use SSL	No	Create a secure encrypted connection between the email client application and the email server.

Area: Labels

Parameter Description	Default Value	Function
Contact Singular Label	Contact	Indicate the wording that should show for the Contact Label singular.
Department Plural Label	Departments	Indicate the wording that should show for the Department Label plural.
Department Singular Label	Department	Indicate the wording that should show for the Department Label singular.
Event Type Plural Label	Event Types	Indicate the wording that should show for the Event Type Label plural.
Event Type Singular Label	Event Type	Indicate the wording that should show for the Event Type Label singular.
Featured Feed Label	Featured Events	Indicate the wording that should show for the Featured Feed Label.
Location Plural Label	Locations	Indicate the wording that should show for the Location Label plural.
Location Singular Label	Location	Indicate the wording that should show for the Location Label singular.
Sub Location Plural Label	SubLocations	Indicate the wording that should show for the Sub Location Label plural.
Sub Location Singular Label	SubLocation	Indicate the wording that should show for the Sub Location Label singular.

Area: Portal Authentication

Parameter Description	Default Value	Function
Portal Authentication Cookie Key		For portal authentication, enter in your organization's portal authentication cookie key.
Portal Authentication Method	QueryString	For portal authentication, select a portal authentication method.
Portal Authentication Variable	MCQuery	For portal authentication, enter your organizations portal authentication variable.

Area: RSS

Parameter Description	Default Value	Function
Append the event data to RSS title	Yes	Show the date of an event in the RSS title.
Append the location to RSS title	No	Show the location of an event in the RSS title.
Append the start and end time to RSS title	Yes	Show the start and end event time in the RSS title.
Insert the location to RSS description	Yes	Show the Location in the RSS description.
Insert the start and end time to RSS description	Yes	Show the start and end time in the RSS description.

Area: Submit

Parameter Description	Default Value	Function
Allow users to add attachments	Yes	Indicate if users are allowed to add attachments on the Submit an Event page.
Allow custom fields	Yes	Indicate if users are allowed to use the custom fields on the Add Event page.
Allow invitee emails	Yes	Indicate if users are allowed to invitee attendees on the Add Event page.
Acceptable attachment extensions	.csv,.doc,.gif,.jpg,.pdf,.ppt,.txt,.xls,.xlsx,.tif	Indicate the acceptable types of attachments that can be added to the Add Event page.
Check Hide Contact Boxes by default	No	Hide the checkbox for Contact Name and Contact Email when submitting an event.
Force users to choose from pre-existing departments created in the system	No	Do not require a user to select from a list of pre-existing departments when submitting an event. (User can manually enter any value for a department in the Department field.)
Require department field	No	Indicate if the Department field should be required on the Add Event page.
Default end time of submit page	5:00 pm	Indicate a default end time for submitting an event.
Require event type field	No	Indicate if the Event Type field should be required on the Add Event page.
User groups allowed to use HTML editor	Users	Indicate which level of users should be allowed to use the HTML editor from within the Event Description box on the Add Event page.
Force users to choose from pre-existing locations created in the system	No	Do not require a user to select from a list of pre-existing locations when submitting an event. (User can manually enter any value for a location in the Location field.)
Require location field	Yes	Indicate if the Location field should be required on the Add Event page.

Appendix A
Site Configuration Settings

Parameter Description	Default Value	Function
Max number of attachments allowed per event	3	Indicate the maximum number of attachments that can be added to a single event.
Max size of a single attachment (in megabytes)	20	Indicate the maximum size (in megabytes) of an attachment for the Add Event page.
Minute increment drop down	15	Select 5, 15, 30, or 60 as the way time fields are incremented.
Allow requestors to edit their events after they have been approved?	Yes - No approval required	Allow requestors to edit their events after the Calendar Manager has approved the events. Two options for Yes: <ul style="list-style-type: none"> • Yes - No approval required. (After a user edits the event, the event remains in an approved status.) • Yes - Approval required. (After a user edits the event, the event is returned to a pending status, and the Calendar Manager must either approve or deny the request.)
Display department field	Yes	Indicate if the department field should be displayed on the Add Event page.
Display priority field	No	Indicate if the priority field should be displayed on the Add Event page and for RSS Feeds.
Show timezone dropdown on submit page	No	Show the Timezone dropdown list on the Add Event page.
Default start time of submit page	9:00 am	Indicate a default start time for submitting an event.
Enable CAPTCHA. This feature requires users to enter a distorted phrase before submitting an event.	No	Enables additional protection from malicious programs that automatically submit events by having a user enter a specific distorted phrase on the Add Event page that must be verified before the event can be submitted.
Number of months forward that a user can submit an event	36	Select a number of months in the future that a user can submit an event to a calendar.

Area: System Configuration

Parameter Description	Default Value	Function
Show email me my password link	Yes	Show the Email Me My Password Link on the Master Calendar Login page.
Updates to Connector Events by the EMS Contact require approval?	No	Updates by the EMS Contact to events that have been imported from your EMS database into Master Calendar require approval by the Calendar Manager.
Max length of event title (0-255)	50	Indicate the maximum character length for an event title.
Max results displayed before pagination is used	30	Enter the number of items that are shown in any list (other than those on the Calendar page) before pagination.
Show Calendar Managers link	Yes	Indicate if the link to show the list of Calendar Managers should show on the site.
This determines whether to show the login menu link.	Yes	Display the Login menu link under My Account on the Master Calendar main menu.
Show timezone preference on the login page.	Yes	Display a Timezone dropdown list on the Login page from which a user can select a preferred timezone.
Show weekends on calendar	No	Show Saturday and Sunday on calendars in the Calendar Display area.
Suspend sending of subscription emails	No	Indicate if the subscription emails should be suspended.
Height of thumbnail image (in pixels)	200	Enter the number (in pixels) for the height of a thumbnail image.
Width of thumbnail image (in pixels)	200	Enter the number (in pixels) for the width of a thumbnail image.
Application Time zone	(GMT -07:00) Mountain Time	Select the time zone for the application.
Use secondary location field	Yes	Display the Sub-Location field on the Submit Event page.
Max length of special dates title (0-255)	50	Indicate the maximum character length for a special date.

Appendix A
Site Configuration Settings

Parameter Description	Default Value	Function
Time to send out email subscriptions	2:00 am	Indicate the time in which email subscriptions are to be sent out.
Delay between text change on dynamic feeds (in seconds)	5	Indicate (in seconds) the delay between text change for the dynamic feeds.

Appendix A
Site Configuration Settings

Area: Tooltip

Parameter Description	Default Value	Function
Show tooltip on calendar	Yes	Indicate if the calendars should show on the tooltip.

Index

A

admin-specific functions
 Clear Cache 292
 Enable Detailed Errors 292
 Enable Help Text Edit 292
alert
 defined 145
announcement
 activating 147
 adding 145
 defined 145
 deleting 151
 editing 150
 inactivating 149
 viewing the history for 153
Assumptions for the manual 14

B

banner
 adding or removing for your Master Calendar site 203

C

calendar
 adding 38
 adding a UDQ to
 adding event types to 44
 adding users to 41
 defined 38
 deleting 48
 editing 45
 viewing the history for 50
Calendar Picker icon 26

calendar URL
 adding or editing 52
 defined 52
Calendars List report
 generating 49
child menu
 editing the options for 231
Clear Cache option 292
Color Picker icon 27
color scheme
 specifying for your Master Calendar site 203
connector
 activating 260
 adding 255
 defined 255
 deleting 266
 editing 263
 inactivating 262
 purging 265
 running at a time other than its regularly scheduled time 266
 specifying the frequency of the data import for 259
 viewing the history for 269
Connectors List report
 generating 268
Conventions used in the manual 13
Copyright 3
culture
 configuring 128
 defined 128
 deleting 130
 editing 129
 viewing the history for 131

custom color scheme
 adding, modifying or deleting for your Master Calendar site 203

custom field
 defined 97
custom field hint
 activating 98
 adding 97
 defined 97
 deleting 102
 editing the name 101
 inactivating 100
custom report

 creating by copying and editing an existing custom report 276
 creating new 271
 deleting 279
 editing 278
 exporting to a file 280
 printing 280
 running 280
 viewing 280

D

data import
 specifying the frequency for 259
data source
 adding 244
 defined 244
 deleting 246
dates
 adding more to a special date 141
default settings
 defined 213

generating a report for	215	inactivating	123	inactivating	69
setting for Master Calendar.....	213	viewing the history for	126	viewing the history for.....	72
viewing the history for	214				
D					
Default Settings List report		event location		F	
generating	215	activating	76	file	
department		adding	74	exporting a custom report to... 280	
activating	91	defined	74	exporting subscriptions to..... 289	
adding	90	deleting.....	80		
defined	90	editing.....	79	frequency	
deleting	95	inactivating	78	specifying for a data import 259	
editing the name for	94	event sub-location		G	
inactivating	93	activating	84	grouping	
E		adding	82	adding.....	31
email		defined	82	defined.....	31
customizing the header for.....	283	deleting.....	88	deleting.....	35
EMS events		editing.....	87	editing.....	34
filtering for a connector	258	inactivating	85	ordering	33
Enable Detailed Errors option	292	event type		viewing the history for.....	36
Enable Help Text Edit option	292	activating	59	H	
event		adding	57	header	
allowed file formats when importing using a flat file	155	adding to a calendar.....	44	customizing for automated emails 283	
importing from a flat file.....	155	defined	57	help text	
importing from an EMS database using a connector.....	255	deleting.....	63	managing in your Master Calendar system	285
event icon		editing.....	62	history	
activating.....	121	importing from an EMS database using a data source.....	247	viewing for a calendar	50
adding a large icon for	116	inactivating	61	viewing for a connector	269
adding a small icon for	118	event type mapping		viewing for a culture	131
allowed sizes.....	116	viewing the history for	249	viewing for a default setting....	214
defined	116	event type view		viewing for a grouping	36
deleting	125	activating	67	viewing for a menu option	240
editing	124	adding	65	viewing for a UDQ	114

viewing for a user.....	179
viewing for a user template.....	199
viewing for an announcement.	153
viewing for an event icon	126
viewing for an event type	72
viewing for an event type mapping	
249	
viewing for an import file	161
viewing for an RSS feed	228
holiday	
importing from an EMS database	
using a data source	251
hyperlinks on a Master Calendar	
page.....	23

I

icons	
see also event icon	
Calendar Picker	26
Color Picker	27
Lookup	26
Time Picker.....	27
import file	
deleting	159
editing	158
purging.....	160
viewing the history for	161

L

LDAP group	
adding to a user template	189
changing the priority of	188
selecting for assignment to a user	
template	186
Lookup icon	26

M

main menu	
adding a user-defined option to....	232
default layout.....	230
defined	230
editing the options for.....	231
menu option	
entering a translation for	237
viewing the history for	240
menu text	
entering translations for	237

O

Organization of the manual.....	14
---------------------------------	----

P

permissions	
specifying for a user template .	182
priority	
changing for an LDAP security	
group.....	188

R

registration information	
viewing and updating	242
reports	
Calendars List	49
Connectors List	268
Default Settings List	215
User Templates List	197
Users List	177
required fields for entering data	25

RSS feed

activating	220
adding	217
defined	217
deleting.....	227
editing.....	224
inactivating	222
viewing the history for	228

S

special date	
adding	136
adding more dates to	141
defined	135
deleting.....	143
editing.....	138
importing from an EMS database	
see holiday	
searching for	135
Special information about the	
manual	13
subscriptions	

deleting.....	290
exporting to a file.....	289
searching for	289
viewing	289

system menu	
defined	230
system menu option	
defined	230

T

theme	
defined	203

Master Calendar Integrated Authentication Configuration Instructions

EMS Software LLC, an Accruent Company



Integrated Authentication is *Optional* Functionality

The Integrated Authentication module (which includes Integrated Windows Authentication, Portal Authentication and LDAP Integration) is a separately licensed component for the EMS Master Calendar system. ***You must be licensed for Master Calendar and Integrated Authentication in order to configure and use this module.***

If you are unsure whether your organization is properly licensed, or if you would like to learn more about the Integrated Authentication module, please contact your EMS Software Account Executive ([800-440-3994](tel:800-440-3994)).

Compatible EMS Systems

Integrated Windows Authentication and Portal Authentication are supported on the following Master Calendar versions:

- EMS Master Calendar 1.5 (Build 2.0.40) or later

LDAP integration is supported on the following Master Calendar versions:

- EMS Master Calendar 2.0 or later

You can determine your Master Calendar version by accessing your system and, at the main (i.e., Calendar Selection) window, adding systemcheck.aspx to the end of the website address. For example:

[http://\[ServerName\]/MasterCalendar/systemcheck.aspx](http://[ServerName]/MasterCalendar/systemcheck.aspx)
(replace [ServerName] with the name of your web server)

The version number is displayed at the top of the page and can also be found by clicking the Assembly heading.

If you would like to utilize integrated authentication or LDAP integration but are not running a Master Calendar version that supports it, you can (if you have a current Annual Service Agreement) download the latest version of the software from our website (www.emssoftware.com). Click Customer Login, provide your email address and password (or request a password), click on the appropriate download(s) and follow the instructions.

Portal Authentication

The Master Calendar system can, with proper licensing, be configured so that users are automatically signed on when they access your network. This process is sometimes referred to as “single sign-on” since users have already signed on to the network through some other means – usually a portal such as SiteMinder, Plumtree or uPortal.

Using one of several methods, Master Calendar can compare a unique variable captured by your portal/sign-on page (email address, employee ID, network credential, etc.) to a value that has been stored for the user in your database. If the credentials match, the system automatically logs the user into the Master Calendar application.

Configuration Steps

In order to configure portal authentication you must perform the following steps:

1. Confirm or install new license
2. Select portal authentication method
3. Verify portal redirect

These steps are described in detail below.

Confirm or Install New License

In order to use Portal Authentication, your organization must be properly licensed. If you are unsure about whether you have purchased the Integrated Authentication module that enables Portal Authentication, log in to Master Calendar, go to the systemcheck.aspx page (as described under Compatible Systems), click the License Information heading and review the Licensed For list.

If you were not previously licensed for Integrated Authentication but are now, update your registration information by logging in to the Master Calendar, going to Admin – Registration, entering the new information and clicking Save License Data.

After you have entered the registration information, you must have Master Calendar re-read it by going to the systemcheck.aspx page, clicking the License Information heading and then clicking Read License.

Select Portal Authentication Method

To select the portal authentication method to be used, log in to Master Calendar and go to Admin – Default Settings. Select the appropriate entry from the Portal Authentication Method drop-down list. Since almost every “single sign-on” environment and strategy is different, we have provided you with five commonly-supported methods of authentication: server variable, session, form, cookie and query string. The first two methods are the most widely used.

Server Variable Method (Header Variable)

Server Variable/Header Variable is a collection of variables that are set by the Internet Information Server (IIS). Applications like SiteMinder create custom server variables for portal site use.

Code example:

Set the Portal Authentication Method field to Server Variable and type the appropriate entry in the Portal Authentication Variable field. Then redirect users to the Default.aspx page (or to *any* page in the system for Master Calendar) and the server variable will be read.

Session Method

A session is a way to provide/maintain user state information in an inherently stateless environment. It provides access to a session-wide cache you can use to store information.

In order to use the session method, set the Portal Authentication Method field to Session and type the appropriate variable in the Portal Authentication Variable field. Then you must create an asp.net web page and name it with the .aspx extension similar to the example below. The asp.net web page created must be copied into the Master Calendar root web directory. It must be put there in order for Master Calendar to read the session variable.

You will need to pass the user's email address or external reference through to your asp.net web page.

Code example in vb.net:

```
<%@ Import Namespace="System" %>
<script runat="server" language="vb">
    Sub Page_Load(ByVal sender As System.Object, ByVal e As System.EventArgs)
        Session.Item("MCSession") = "test@ems.com"
        Response.Redirect("Default.aspx")
    End Sub
</script>
```

Form Method

Forms enable client-side users to submit data to a server in a standardized format via HTML. The creator of a form designs the form to collect the required data using a variety of controls, such as INPUT or SELECT. Users viewing the form fill in the data and then click Submit to send the data to the server.

To use the form method, set the Portal Authentication Method field to Form and type the appropriate variable in the Portal Authentication Variable field. To create portals through a form, create a web page with a form similar to below. Once the user logs on through the portal, the form below can be submitted to log the user on to the application.

Code example in HTML:

```
<Form name="form1" method="Post" action="http://localhost/virtualdirectory/Default.aspx">
    <input type="hidden" id="MCFORM" name="MCFORM" value="test@ems.com">
    <input type="submit" value="submit">
</form>
```

Cookie Method

A cookie is a small piece of information stored by the browser. Each cookie is stored in a name/value pair called a crumb—that is, if the cookie name is "id" and you want to save the ID's value as "this", the cookie would be saved as id=this.

You can store up to 20 name/value pairs in a cookie, and the cookie is always returned as a string of all the cookies that apply to the page. This means that you must parse the string returned to find the values of individual cookies. Cookies accumulate each time the property is set. If you try to set more than one cookie with a single call to the property, only the first cookie in the list will be retained.

To use the cookie method, set the Portal Authentication Method field to Cookie and type the appropriate variable in the Portal Authentication Cookie Key field. Then create a web page with code similar to below. Once the user logs on through the portal, take their user logon information and create a cookie. After the cookie is created, send the user to the Default.aspx page of the application.

Code example in Active Server Pages 2.0:

```
<%@LANGUAGE="VBSCRIPT" %>
<%
    Response.Expires = -1
    Response.Cookies("MCCookie")("CookVal") = "test@ems.com"
    Response.Cookies("MCCookie").Path = "/"
    Response.Cookies("MCCookie").Expires = DateAdd("m", 3, Now)
    Response.Redirect("http://localhost/virtualdirectory/Default.aspx")
%>
```

Query String Method

A query string is information appended to the end of a page's URL. An example using portal authentication is below

Code example:

<http://localhost/virtualdirectory/Default.aspx?MCQS=test@ems.com>

To use the query string method, set the Portal Authentication Method field to Query String and type the appropriate variable in the Portal Authentication Variable field.

Verify Portal Redirect

The portal authentication entry page is the page within Master Calendar that processes the portal request. The name of the page is Default.aspx and it is the page where all portal authentication requests should be sent. This page is already installed and included with your Master Calendar software. The location will be the same folder as the EMS product's root web folder. For example,
<http://localhost/virtualdirectory/Default.aspx>

Integrated Windows Authentication

Integrated Windows Authentication is another form of “single sign-on” available as an option with Master Calendar systems.

Configuration Steps

In order to configure Integrated Windows Authentication for Master Calendar, you must perform the following steps *after* installing and configuring Master Calendar:

1. Confirm or install new license
2. Add domain/user account information to user records
3. Configure IIS for authenticated access

These steps are described in detail below.

Confirm or Install New License

In order to use Integrated Windows Authentication, your organization must be properly licensed. If you are unsure about whether you have purchased the Integrated Authentication module that enables Integrated Windows Authentication, log in to Master Calendar, go to the systemcheck.aspx page (as described under Compatible Systems), click the License Information heading and review the Licensed For list and look for a description to state “Integrated Authentication”.

If you were not previously licensed for Integrated Authentication but are now, update your registration information by logging in to the Master Calendar, going to Admin – Site Administration - Registration, entering the new licenses information then click Save License Data. Please note, the licenses information is case sensitive and needs to be entered in exactly how it was provided from EMS Software, LLC, an Accruent Company. If the information that was provided is incorrect, please contact EMS Software.

After you have entered the registration information, you must have Master Calendar re-read it by going to the systemcheck.aspx page, clicking the License Information heading and then clicking Read License. At the very top of the page, it should state “License read successfully”.

Add Domain/User Account Information to User Records

Integrated Windows Authentication functions by comparing the domain/user account used when logging in to your network workstations with the corresponding domain/user account information recorded on your Master Calendar user records.

There are three ways to add the domain/user information to user records. The first method, manually entering information through the Master Calendar interface, is less technical and can be managed with little knowledge of SQL. The second method while more efficient assumes some degree of experience with SQL and database administration. The third method has your Master Calendar users enter the appropriate information when they first use the application.

Manually entering information through the Master Calendar

1. Log on to EMS Master Calendar and navigate to Admin – Security - Users.
2. Click the icon in the Update column for the user record that you want to edit.
3. In the External Reference field, type the domain\user account used by this person to log in to your network.



In a single domain environment, only the user account is necessary.

4. Click Update to save your entry.

5. After editing all users, continue to the Configuring IIS step below.

Configure IIS for Authenticated Access

To configure IIS for authenticated access, do the following:

1. Open the Microsoft Internet Information Services (IIS) Manager.
2. Navigate to the appropriate virtual directory and right-click to reach Properties.
3. Go to the Directory Security tab and edit the Anonymous Access and Authenticated Access sections as follows: Clear the Anonymous Access check box and check the Integrated Windows Authentication box.

Figure 1-1: The Authentication Methods Window (IIS 6.0)



Figure 1-2: The Authentication Methods Window (IIS 7.0)

The screenshot shows the 'Authentication' section of the IIS Manager. At the top, there is a 'Group by:' dropdown set to 'No Grouping'. Below is a table with columns 'Name', 'Status', and 'Response Type'.

Name	Status	Response Type
Anonymous Authentication	Disabled	
ASP.NET Impersonation	Disabled	
Basic Authentication	Disabled	HTTP 401 Challenge
Digest Authentication	Disabled	HTTP 401 Challenge
Forms Authentication	Disabled	HTTP 302 Login/Redirect
Windows Authentication	Enabled	HTTP 401 Challenge

4. Click OK. Integrated Windows Authentication is now enabled.

Frequently Asked Questions

- *Why is it necessary to put account information into tblUser to authenticate a user?*

We need to know the Master Calendar security template assignment (among other preferences) for the user to authenticate. For licensing purposes we also need to know how many users are active in the system.

- *Why do we need to put account information in the External Reference field for a user?*

Integrated Windows Authentication works by comparing credentials on the user record to those being supplied by Windows authentication. Without the account information, there is no way to cross reference a Master Calendar user with their Windows credentials.

- *We also need our non Windows-authenticated users to access Master Calendar. What can we do?*

You can install another Master Calendar anonymous access directory to your web server and point that installation to the same database. Public users may access the database via this second directory.

LDAP Integration

LDAP integration allows the system to use security group information maintained on your network to determine the appropriate permissions for Master Calendar users.

Configuration Steps

In order to configure LDAP integration for the Master Calendar system, you must perform the following steps *after* installing and configuring Master Calendar:

1. Confirm or install new license
2. Configure Master Calendar to call your LDAP Server
3. Add LDAP security groups to Master Calendar

These steps are described in detail below.

Confirm or Install New License

In order to use LDAP Integration, your organization must be properly licensed. If you are unsure about whether you have purchased the Integrated Authentication module that enables LDAP Integration, log in to Master Calendar, go to the systemcheck.aspx page (as described under Compatible Systems), click the

License Information heading and review the Licensed For list and look for a description to state “Integrated Authentication”.

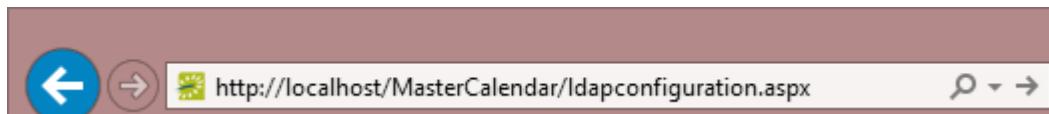
If you were not previously licensed for Integrated Authentication but are now, update your registration information by logging in to the Master Calendar, going to Admin – Site Administration - Registration, entering the new licenses information then click Save License Data. Please note, the licenses information is case sensitive and needs to be entered in exactly how it was provided from EMS Software, LLC, an Accruent Company. If the information that was provided is incorrect, please contact EMS Software.

After you have entered the registration information, you must have Master Calendar re-read it by going to the systemcheck.aspx page, clicking the License Information heading and then clicking Read License. At the very top of the page, it should state “License read successfully”.

Configure Master Calendar to call your LDAP server.

1. Log in to Master Calendar as the site system administrator and click on the Admin menu item. Manually type “LDAPConfiguration.aspx” to the URL in the address bar to access the LDAP Configuration page.

Figure 1-3: Accessing the LDAP configuration page



2. Configure your LDAP Settings. Please note:

- Master Calendar only utilizes read-only queries to the organizations directory services.
- The Domain\User account does not need to have any special privileges. All that is required is that it be an active account in your directory services.
- Be aware, in some environments, passwords expire at scheduled intervals. If the password in LDAP settings is not updated when this occurs, Master Calendar/LDAP connectivity will be lost until the new password has been re-entered. It is recommended to consider using a generic account and a password that does not expire.

Figure 1-4: LDAP Security Settings

A screenshot of a configuration page titled "Core Properties". The "Security" tab is selected. The page contains the following fields:

- Authenticate users via LDAP?**: A checked checkbox.
- Path for LDAP Query:** A text input field with the placeholder "Example: LDAP://yourdomain.com (NOTE: You probably need to have "LDAP" in all caps)".
- LDAP Domain\User:** A text input field with the placeholder "The user id of the account Master Calendar will use when contacting Directory Services".
- LDAP Password:** A text input field with the placeholder "Supply only if you are updating (NOTE: It will be stored in an encrypted format)".
- Authentication Type:** A dropdown menu set to "Secure" with the note "Some directory services don't implement Secure binding. FastBind is a pretty common authentication type".
- Save**: A blue "Save" button at the bottom left.

Figure 1-5: Core Properties

Master Calendar Integrated Authentication Configuration Instructions

Security Core Properties Non-AD Config LDAP Queries

Using Active Directory If checked, instructs Master Calendar to use Active Directory attributes during queries

LDAP Name Property:
displayname Examples: displayname, distinguishedname, name, givenname

LDAP Phone Property:
telephonenumber Examples: telephonenumber, homephone, facsimiletelephonenumber

Domain to append to users:
Supply only if necessary (may be necessary if your web server is in a different domain than your users).

Figure 1-6: Non-AD Configuration

Security Core Properties Non-AD Config LDAP Queries

LDAP Account/User ID Property:
cn Example: samaccountname (Active Directory), cn (eDirectory, Domino)

Full LDAP User ID Format:
user input Do not supply this, unless a full path is needed to authenticate. Example: cn={0},ou=staff,o=yourdomain. {0} will be replaced with user input

LDAP Group Category:
groupOfNames Example: group (Active Directory), groupOfNames (eDirectory, Domino)

LDAP Group Name:
cn Example: name (Active Directory), cn (eDirectory, Domino)

LDAP Group Member Name:
member Example: member (Active Directory, eDirectory, Domino)

LDAP Group Member User Name Attribute:
cn Example: member="CN=user,O=Domain"

Figure 1-7: LDAP Queries

The screenshot shows the 'LDAP Queries' tab of the Master Calendar configuration. It contains three sections:

- LDAP query for security groups:**
`(&(objectCategory=Group)(objectClass=Top)(objectClass=Group)(name={0}*))`
Note: {0} will be replaced by user input
- LDAP query to find users:**
`(&(|(mailnickname={0}*)(givenname={0}*)(sn={0}*)(mail={0}*))|(|(objectClass=person)(objectClass=user)))`
Note: {0} will be replaced by user input
- LDAP query to find users with space:**
`(&(|(mailnickname={0}*)(&(givenname={1}*)(sn={2}*))(&(givenname={2}*)(sn={1}*))|(|(&(objectCategory=person)(objectClass=user))))`
Note: {0} will be replaced by user supplied input
{1} before space
{2} after space

A 'Save' button is located at the bottom left.

Add LDAP Security Groups to Master Calendar

In the course of setting up LDAP integration within the Master Calendar system, you pair security “templates” defined there with security groups from your network. In order to make groups available for this pairing, you must “add” them to the Master Calendar. To do so, perform the following steps (which are also covered in the *Master Calendar Setup Guide*):

1. Log in to the Master Calendar site as the sites system administrator and select under Admin – Security - User Templates.
2. Click Assign LDAP Groups, and then click Add.
3. Use the Search By to search all LDAP groups or filter by Global Group or Universal Groups. Use the Grouping text box to search a particular string of characters from the list.
4. From the list of LDAP Groups, feel free to use Microsoft Windows multi-select function to highlight group(s). All of the LDAP Groups that are highlighted from the list will be added to Master Calendar once “Add” is selected on the bottom of the Security Group Lookup screen.
5. If a user is in multiple groups, their Master Calendar permissions are based on the template associated with the highest priority group that is assigned. Highlight one or more of the security groups that are listed and use the Move Up ++ / Move Down -- buttons to order the groups in a top – down order.
6. Click Save to save the Security Groups order.

Customer Support

Customer support is available to customers who have a current Annual Service Agreement (ASA). If after reading this document you have questions about configuring your system, contact us at:

Email: support@emssoftware.com

Web: www.emssoftware.com

Phone: (800) 288-4565

Fax: (303) 771-0110

Please have the following information available:

- Name of the organization to which the software is licensed (typically your company).
- Information on any recent problems with, or changes to, your computer or network.

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