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EMS Master Calendar

Installation, Configuration, & User Guides

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Table of Contents

CHAPTER 1: EMS Master Calendar Installation Guide

EMS 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 section 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 installation guide provides information about the following topics:

Contact Customer Support

- **Option 1 (Recommended):** Search the Knowledge Base available at Accruent Access.
- **Option 2:** Submit a case directly via Accruent Access.
- **Option 3:** Email emssupport@accruent.com.
- **Option 4:** Phone (800) 288-4565.

Important!
If you do not have a customer login, register here.

CHAPTER 2: System Requirements and Prerequisites

Master Calendar Database Server

Supported Platforms	Windows® 2016 Server Windows® 2012 Server Windows® 2012 Server R2
Minimum System Requirements	Processor: 2.0 GHz and 4 cores or faster Memory: 8 GB or more Hard-Disk Space: 2 separate physical drives of at least 6 GB; one for data, and the other for transaction logs (SCSI drives w/9ms access or better and RAID strategy for fault tolerance recommended) Software: Microsoft SQL Server 2016 SP1, Microsoft SQL Server 2014, Microsoft SQL Server 2012 Network Card: 100 / 1000 Mbps Ethernet, switched

Master Calendar Web Server

Supported Platforms	Windows® 2016 Server Windows® 2012 Server Windows® 2012 Server R2 IIS 7.0/7.5
Minimum System Requirements	Processor: 2.0 GHz and 4 cores or faster Memory: 8 GB or more Hard-Disk Space: 100 MB Software: Application Pool .Net CLR Version 4.0, .NET Framework 4.6.1 Installed

	Network Card: 100 / 1000 Mbps Ethernet, switched

Master Calendar V8.0 Services

Service	.NET Version	Disk Space
Email Notification Service	4.6.1	10 MB
Data Connector Service	4.6.1	10 MB
Data Import Service	4.6.1	10 MB

Master Calendar V7.0 Services

Service	.NET Version	Disk Space
Email Notification Service	2.0	10 MB
Data Connector Service	2.0	10 MB
Data Import Service	2.0	10 MB

CHAPTER 3: Installation Instructions

To install Master Calendar, you will need to do the following:

1. Verify you have met the system prerequisites and requirements
2. Obtain and download the installation files.
3. Run the Master Calendar Installer
4. Install/upgrade the Database Component in Master Calendar
5. Install/upgrade the Master Calendar Web Service
6. (Optional) Verifying the Master Calendar API

CHAPTER 4: Obtain EMS Master Calendar Installation Files

To obtain and download the EMS Master Calendar installation files:

1. Log into Accruent Access.
2. Click **My Products**.
3. Under **EMS**, click **Downloads**.

   The downloads page opens in a new browser tab.
4. In the **Software Downloads** area, click the link for your version of software, for example, **V44.1 Releases & Patches**.

   A new page opens listing the downloads available based on your license.
5. Under EMS Master Calendar — New Install section, download the files.

EMS Master Calendar - New Install

Name & Description	Build	Published	Documentation	Download
Master Calendar Server Install/Upgrade Utility - *Creates a Master Calendar database for new installs. Upgrades the existing Master Calendar database to the next version.*	8.0.0.106	06/30/2016		Download
Master Calendar Connector Script - *SQL script to be run against the EMS database containing the Master Calendar required data.*		06/30/2016		Download
Master Calendar API		06/30/2016	API Reference Guide API SQL Script	Download

EMS Master Calendar - New Install Window

CHAPTER 5: Run the Master Calendar Installer

To install Master Calendar, you will:

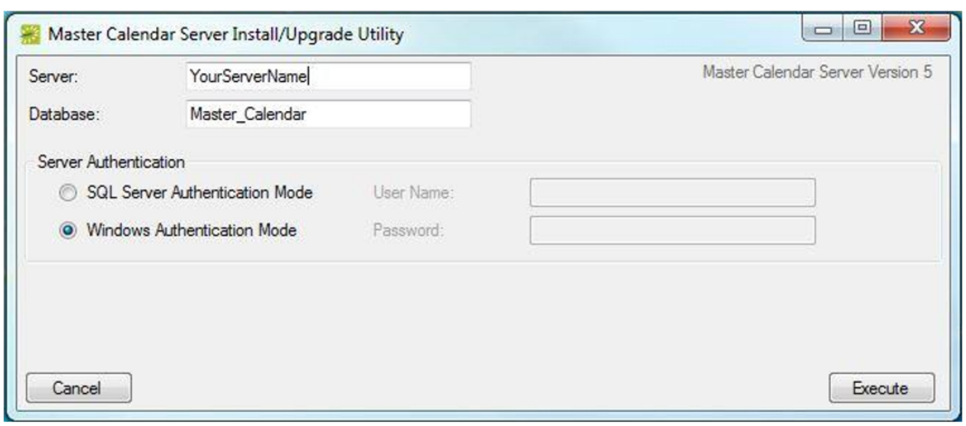
1. Run the DEA.MasterCalendar.Server.Install.exe to install the Master Calendar Database on the database server.
2. Run the DEAMasterCalendarSetup.msi program on the web server to install the Master Calendar website.
3. (Optional) Verify the Master Calendar API.
4. (If Upgrading) Uninstall any optional services on the web server used by the previous version of Master Calendar.
5. Install or re-install any optional services on the web server.

Note:
Be sure to run a backup prior to upgrading your database. It is recommended to upgrade your Master Calendar Database in a test environment prior to upgrading a production database.

Run the DEA.MasterCalendar.Server.Install.exe

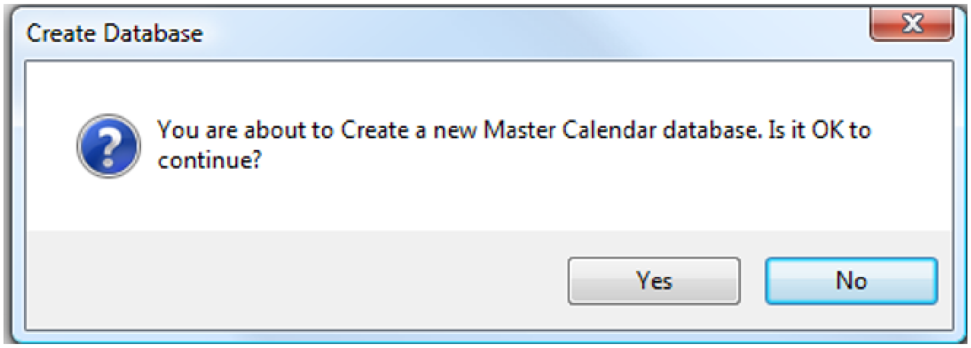
To install the Master Calendar Database on the database server, do the following:

1. Run DEA.MasterCalendar.Server.Install.exe from any PC that has access to the database server.



2. In the Server field, enter the name of the server running MS SQL Server.
3. In the Database field, enter the name for the Master Calendar Database. (It is recommended that you accept the default value of ‘Master_Calendar’.)

4. In the Server Authentication area, specify MS SQL Server authentication credentials. If **SQL Server Authentication Mode** is selected, you must specify a **User Name** and **Password**.
5. Click the **Execute** button.



6. Click **Yes** to initiate the installation.

CHAPTER 6: Install or Upgrade the Database Component in Master Calendar

Once you meet the prerequisites, download the installation files, run the Master Calendar API Installer, you will:

- Install/upgrade the Database Component
- Install/upgrade the API Web Service
- (Optional) Verify the Master Calendar API

Install the MCAPI_Script.sql File

1. Obtain the MCAPI_Script.sql file.
2. Open Microsoft SQL Server Management Studio.
3. Within Microsoft SQL Server Management Studio, select **File** > **Open** > **File** and locate **MCAPI_ Script.sql**.
4. Select your Master Calendar database and execute the query (**Query** > **Execute**). When query execution has completed, a "Command(s) completed successfully’" message will display in the Results section.

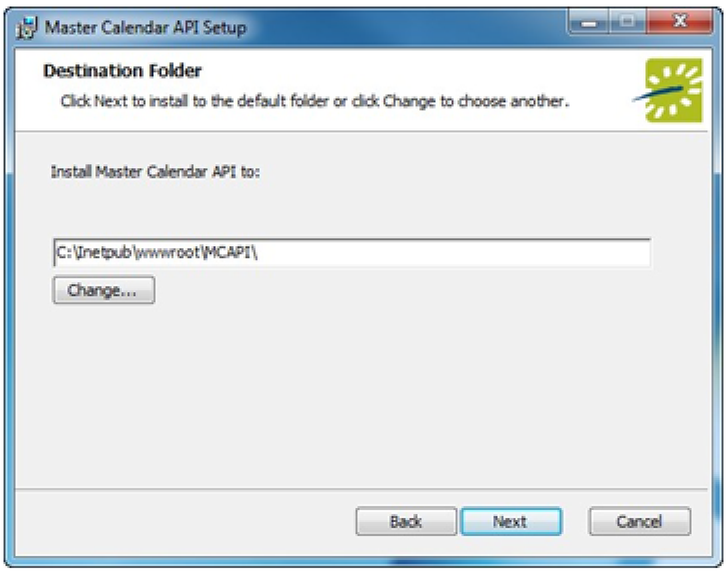
CHAPTER 7: Install or Upgrade the Master Calendar Web Service

Once you meet the prerequisites, download the installation files, run the Master Calendar Installer, and install/upgrade the Database Component, you will need to do the following:

- Install/Upgrade the API Web Service
- (Optional) Verify the Master Calendar API installation

Install/Upgrade the API Web Service

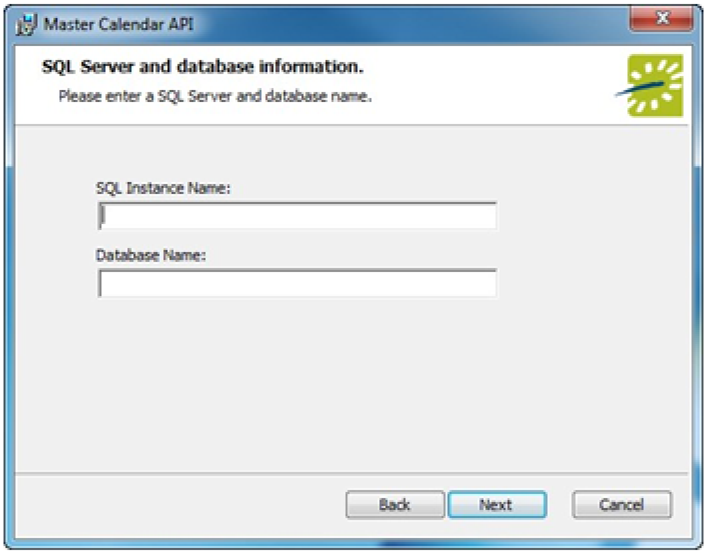
1. Download the MCAPI.msi file onto the web server that will be running the Master Calendar API Web Service (typically the web server that hosts your EMS Master Calendar site).
2. Run **MCAPI.msi**.
3. The first screen welcomes you to the Master Calendar API Setup Wizard. Click **Next** to begin the installation process. The Destination Folder screen will appear.



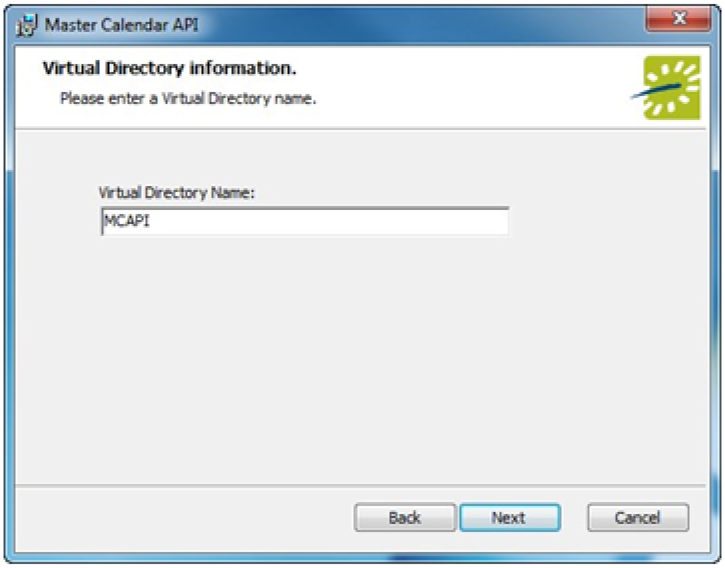
4. Select the destination folder. The installation process will create a new physical directory on your web server based on the destination folder path entered ("MCAPI" in the example above). Click **Next**.

> **Note:**
> The Master Calendar API Web Service should not be installed in the same physical directory as other EMS web-based products OR under a site running another version of Master Calendar or the Master Calendar API.

5. The SQL Server and database information screen will appear.



6. Enter your Master Calendar SQL Instance Name.
7. Enter your Master Calendar Database Name.
8. Click **Next**.
9. The Virtual Directory information screen will appear.



10. The Virtual Directory Name will default to the destination folder specified in Step 4. It is recommended that you keep the default setting. The installation process will create a virtual directory on your web server based on the virtual directory entered (“MCAPI” in the example above). Click **Next**.

Note:

The Master Calendar API Web Service should not be installed in the same virtual directory as other EMS web-based products OR under a site running another version of Master Calendar or the Master Calendar API.

11. The Ready to install Master Calendar API screen will appear. Click **Install** to install the Master Calendar API Web Service.
12. The Completed the Master Calendar API Setup Wizard screen will appear. Click **Finish**.

CHAPTER 8: Install or Upgrade the Master Calendar Email Notification Service

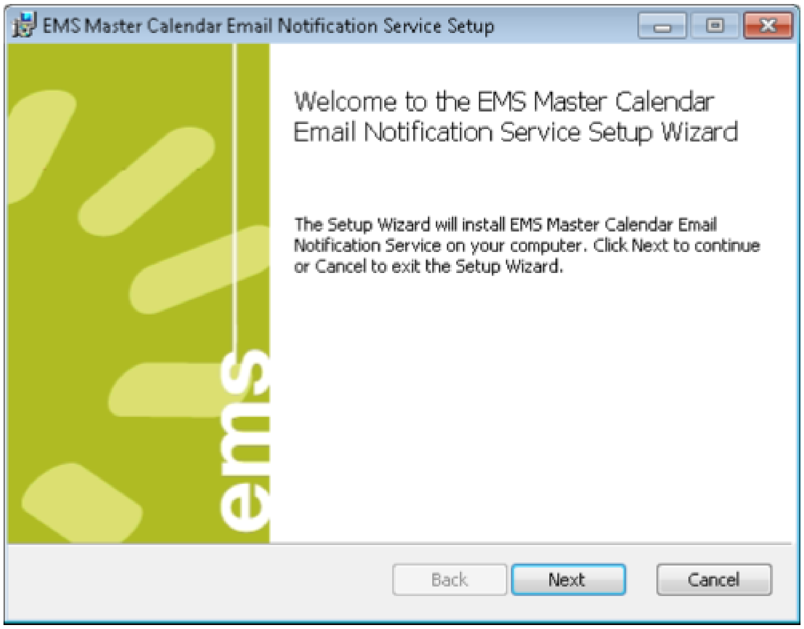
The EMS Master Calendar Email Notification Service must be installed on a computer that is connected to the network and is running 24 hours a day, often the database server.

Important!

Install the EMS Master Calendar Email Notification Service on one computer only, typically installed on a machine that is continuously running.

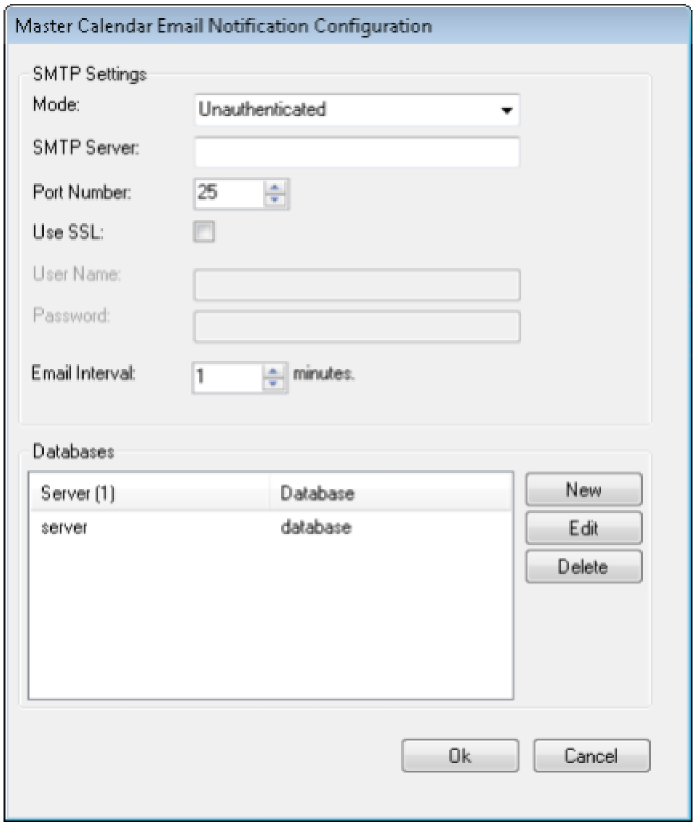
Existing versions of the EMS Master Calendar Email Notification Service must be manually uninstalled through the Add or Remove Programs menu.

1. Download the DeaMasterCalendarEmailNotificationSetup.msi onto the server that will be running the service.
2. Double-click DeaMasterCalendarEmailNotificationSetup.msi. Follow the on-screen prompts. It is recommended that the defaults are accepted.



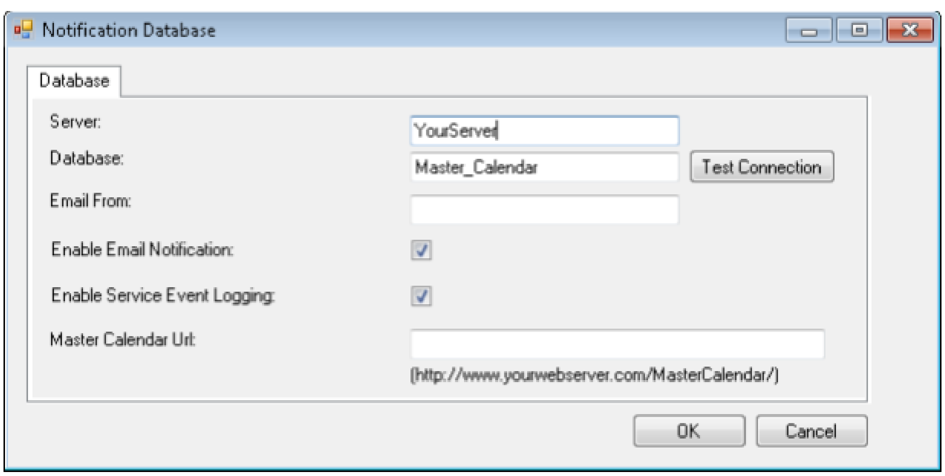
Welcome to the EMS Master Calendar Email Notification Service Setup Wizard

3. In the Microsoft Windows Start menu, locate EMS Master Calendar Email Notification Configuration Service > Email Notification Configuration Settings. The EMS Master Calendar Email Notification screen will appear.



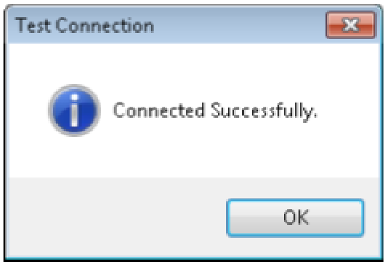
Master Calendar Email Notification Configuration

4. Enter a valid SMTP Server name or IP address that the Email Notification Service can utilize to send notification emails.



Master Calendar Email Notification Configuration

5. In addition to modifying the Server and database name, the following must be configured as well:
   - **Send From**—An active email address that will be displayed in the From Field of the notification emails that are sent out.
   - **Master Calendar URL**—Enter in the Master Calendar URL.
   - **Interval**—Determines how frequently emails are to be sent out.
6. Edit the Server and Database names to reflect the Server and Master Calendar database names.



Database Connection Test

7. Click the **Test Connection** button to verify a successful connection.
8. Select whether Event Logging should be enabled.
9. Click **OK** to save the settings.

Note:
If any issues are encountered starting the service, please visit the Knowledge Base available in Accruent Access for a possible solution.

CHAPTER 9: Execute the EMS Master Calendar Data Connector Script

In order to use the EMS Master Calendar Data Connectors, an organization must be properly licensed. If unsure about whether the EMS Data Connector Module, that allows importing from the current EMS Database, has been purchased; Log into the EMS Master Calendar site, go to the systemcheck.aspx page, click the License Information heading and review the Licensed For list and look for a description to state “EMS Connector”.

If an organization was not previously licensed for the EMS Data Connector Module but is now, update the registration information by logging in to the EMS Master Calendar, going to Admin – Site Administration - Registration, entering the new licenses information then click Save License Data. Please note, the license information is case sensitive and needs to be entered in exactly how it was provide.

After entering the registration information, EMS Master Calendar must re-read the license 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.”

The information in this section is for executing a SQL script against ones existing EMS Database. The EMS Data Connector Scripts create the needed stored procedures to export information from an EMS Database to the EMS Master Calendar Database. To do so, one must run the **DEA.MasterCalendar.DataConnectorScript.sql** against the existing EMS Database(s).

Note:
Be sure that the EMS Data Connector Script is executed against the EMS Database not the Master Calendar Database.

1. On the database server, start the SQL Server tool (Query analyzer\Sql Management Studio) that is used to execute sql scripts.
2. Select the EMS Database, which is going to be the data source for EMS Master Calendar.
3. In the query window, navigate and open up the EMS Data Connector Script.
4. Execute this script against the EMS Database, not the EMS Master Calendar Database.

Important!
If any error messages are generated, be sure to check the settings and permissions. Then try to re-execute the script against the correct database. If error messages continue to be generated, please contact our Customer Support Department.

- In order to use the Data Connectors and exchange data between the EMS database and Master Calendar database, Ad Hoc Remote Queries has to be enabled in order for a Data Connector to work.

- **For Microsoft SQL Server 2005:** To check to see if Ad Hoc Remote Queries are enabled – on the Database Server – find Microsoft Configuration Tools > SQL Server Surface Area Configuration > Surface Area Configuration for Features > Select the server level > Database Engine > be sure "Enable OPENROWSET and OPENDATASOURCE support" is checked. If it is not checked, data connectors will not be able to pull data from the EMS database to the Master Calendar database.
- **For Microsoft SQL Server 2008 and 2012** : To check to see if Ad Hoc Remote Queries are enabled – on the Database Server - go to Management Studio > right click on Server level > Facets > from the drop-down box > Select Surface Area Configuration > Check AdHocRemoteQueriesEnabled > Set to True. (This might require a restart of the SQL Server this is changed on.)

CHAPTER 10: Install or Upgrade EMS Data Connector Service

Prior to installing or upgrading the EMS Master Calendar Data Connector Service, be sure the EMS Data Connector Script has been executed against the EMS Database(s). (See Executing the EMS Data Connector Script.)

The optional Data Connector Service for the EMS Master Calendar System can be used to create a connection between an EMS Database and a calendar in the Master Calendar system.

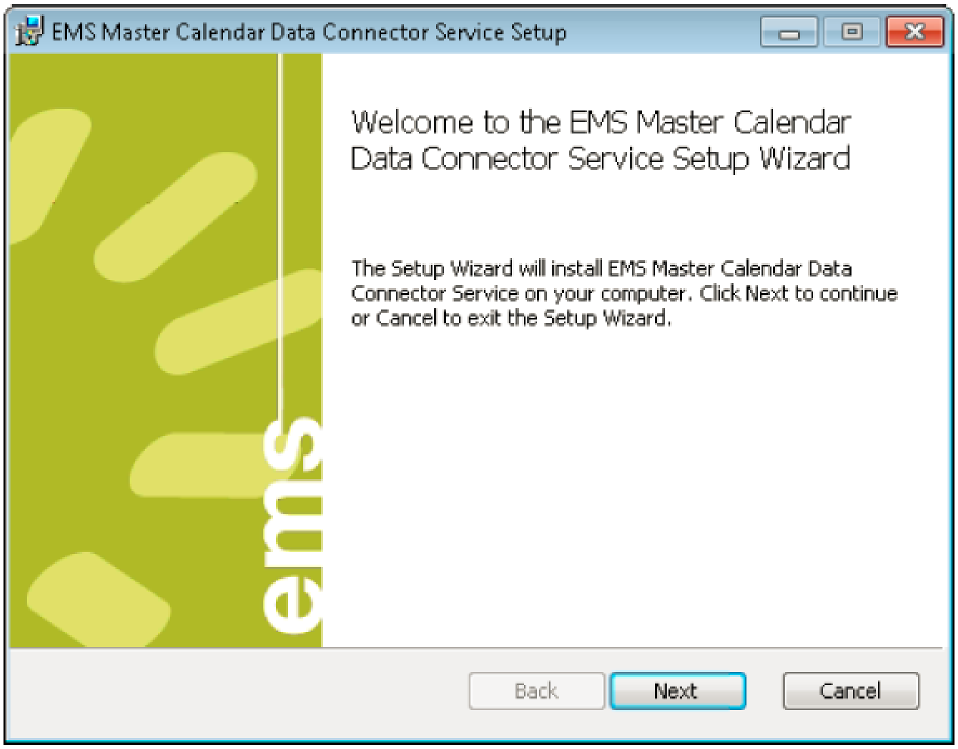
Data Connectors can also be used to import tab delimited and XML files (see "Installing or Upgrading the Master Calendar Import Service"). The Data Connector Service must be installed on a machine that is connected to the network and is running every day. The Data Connector Service is often installed on the database server or the web server.

Install the Master Calendar Data Connector Service

Important!

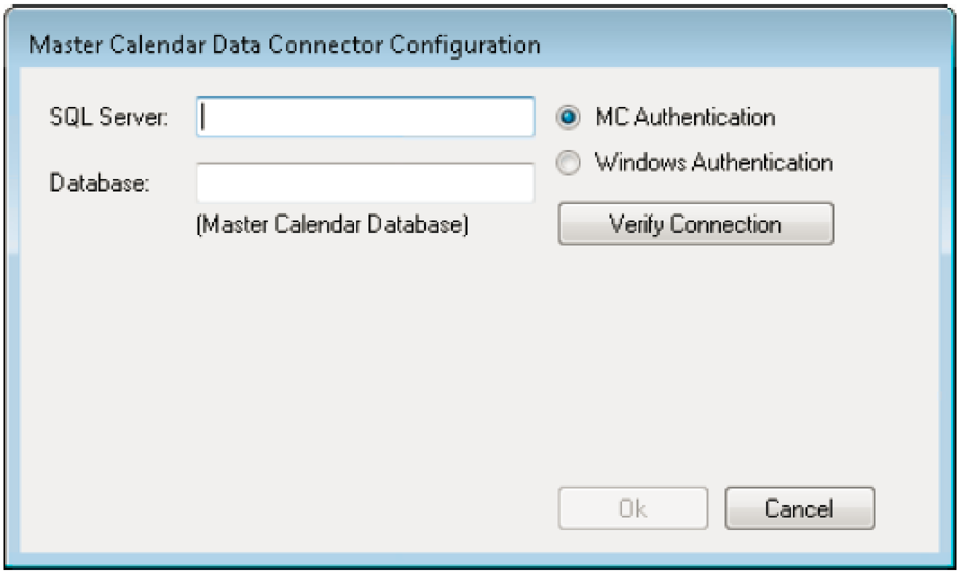
Existing versions of the EMS Master Calendar Data Connector Service must be manually uninstalled, through the **Add or Remove Programs** menu, prior to upgrading the EMS Master Calendar Data Connector Service to a newer version.

1. Download the DEAMasterCalendarDataConnectorSetup.msi onto the server that will be running the service.
2. Double-click DEAMasterCalendarDataConnectorSetup.msi. Follow the on-screen prompts. It is recommended that the defaults are accepted.



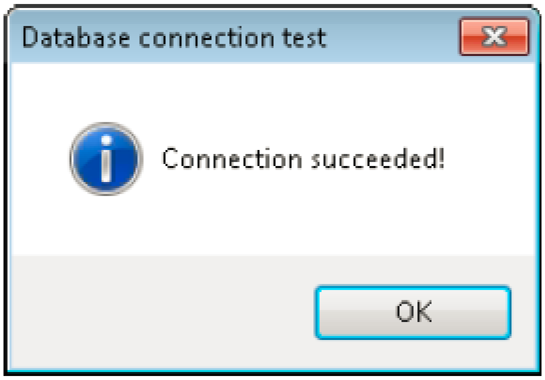
EMS Master Calendar Data Connector Service Setup Wizard

3. Within the Microsoft Windows Start menu, locate EMS Master Calendar Data Connector Service > Data Connector Configuration Setting. The Master Calendar Data Connector Configuration screen will appear.

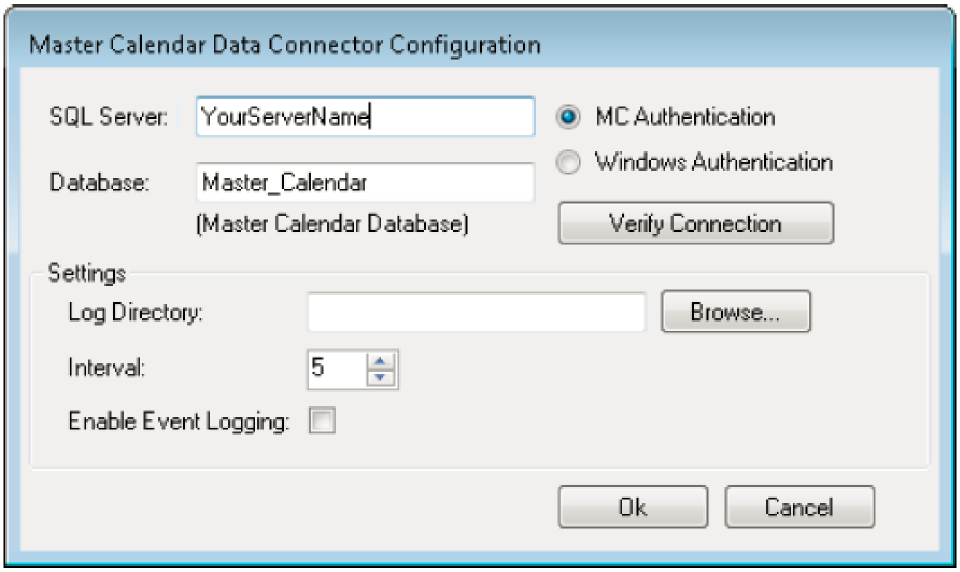


Master Calendar Data Connector Configuration

4. Enter in the SQL Server name of where the Master Calendar Database resides on.
5. Enter in the database name that was provided for the Master Calendar Database during installation/upgrade. By default, the database name should be ‘Master_Calendar’ unless changed during installation.
6. Click Verify Connection to confirm that the Data Connector Service has connected to the EMS Master Calendar Database.



Database Connection Test



EMS Master Calendar Data Connector Configuration

7. Select an Interval which determines how frequently data is pulled from the database. If the interval is set to 0 the service will never run.
8. Select if Error Logging should be enabled.
9. Click **OK** to save the settings.

Note:

If any issues are encountered starting the service, please visit the Knowledge Base available in Accruent Access for a possible solution.

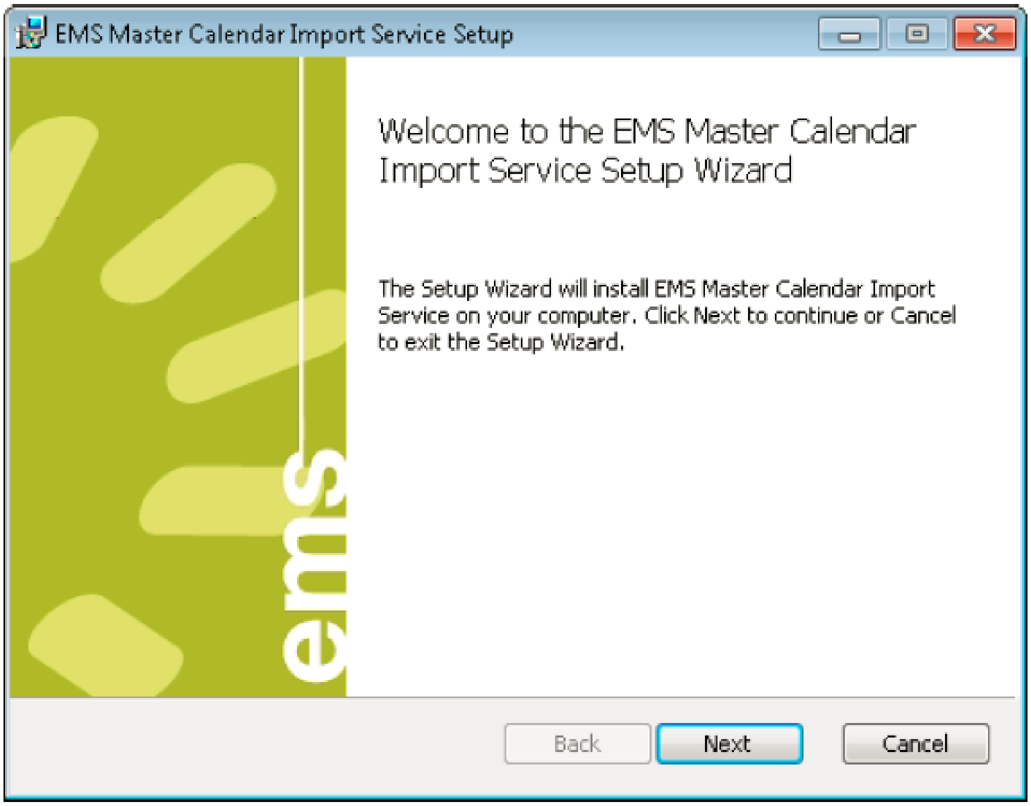
CHAPTER 11: Install or Upgrade the EMS Master Calendar Import Service

If using a data connector to import a tab delimited and/or XML file, one must set the temporary location, and SMTP server information when setting up the data connecter service. This allows for the importing of the file and also the generating of an email to notify the individual, who defined the import, the status and result from the import.

Import file specifications can be found by logging into the EMS Master Calendar system as a site system administrator, navigating to **Admin** > **Events & Special Dates** > **Import Events** > **Add New** > **Import file specifications**.

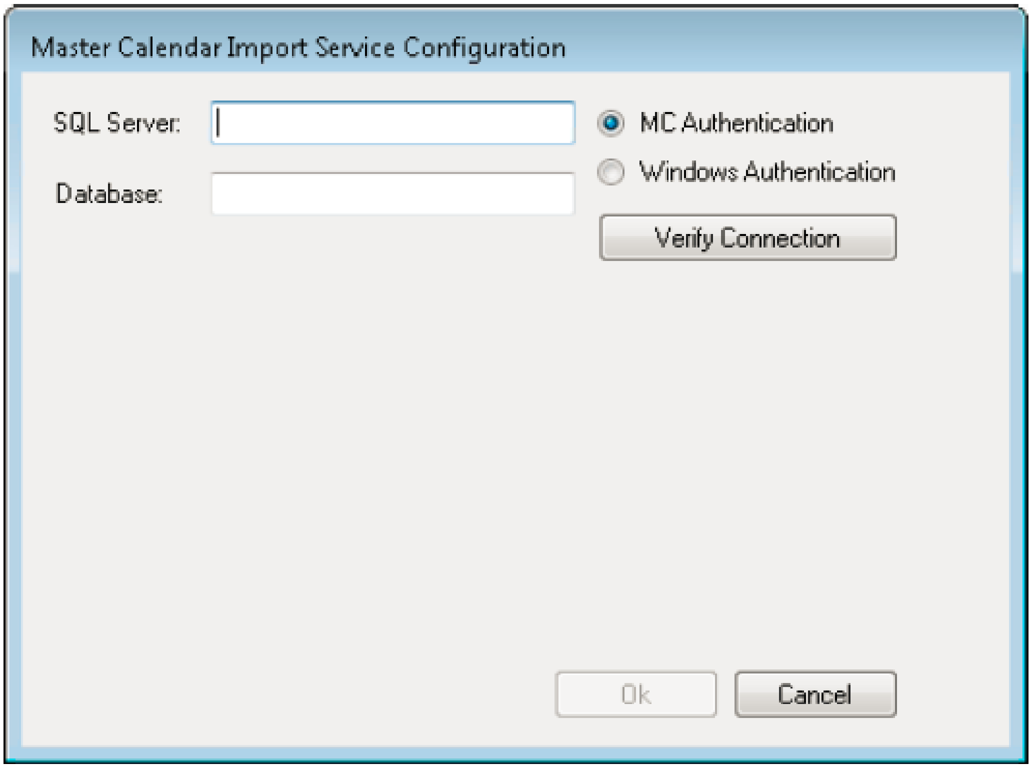
> **Important!**
> Existing versions of the Master Calendar Import Service must be manually uninstalled, through the Add or Remove Programs menu, prior to upgrading the EMS Master Calendar Import Service to a newer version.

1. Download the DEAMasterCalendarImportSetup.msi onto the server that will be running the service.
2. Double-click DEAMasterCalendarImportSetup.msi. Follow the on-screen prompts. It is recommended that the defaults are accepted.



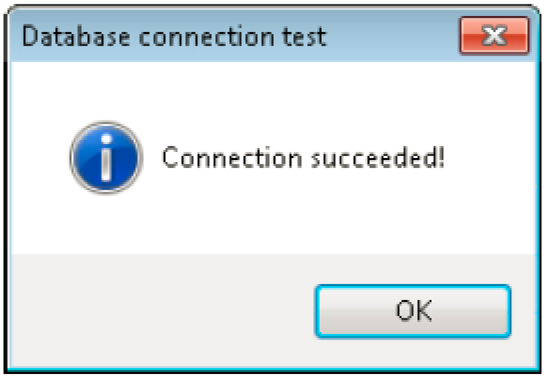
EMS Master Calendar Import Service Setup Wizard

3. Within the Microsoft Windows Start menu, locate EMS Master Calendar Import Service > Import Service Configuration Settings. The Master Calendar Import Service Configuration screen will appear.



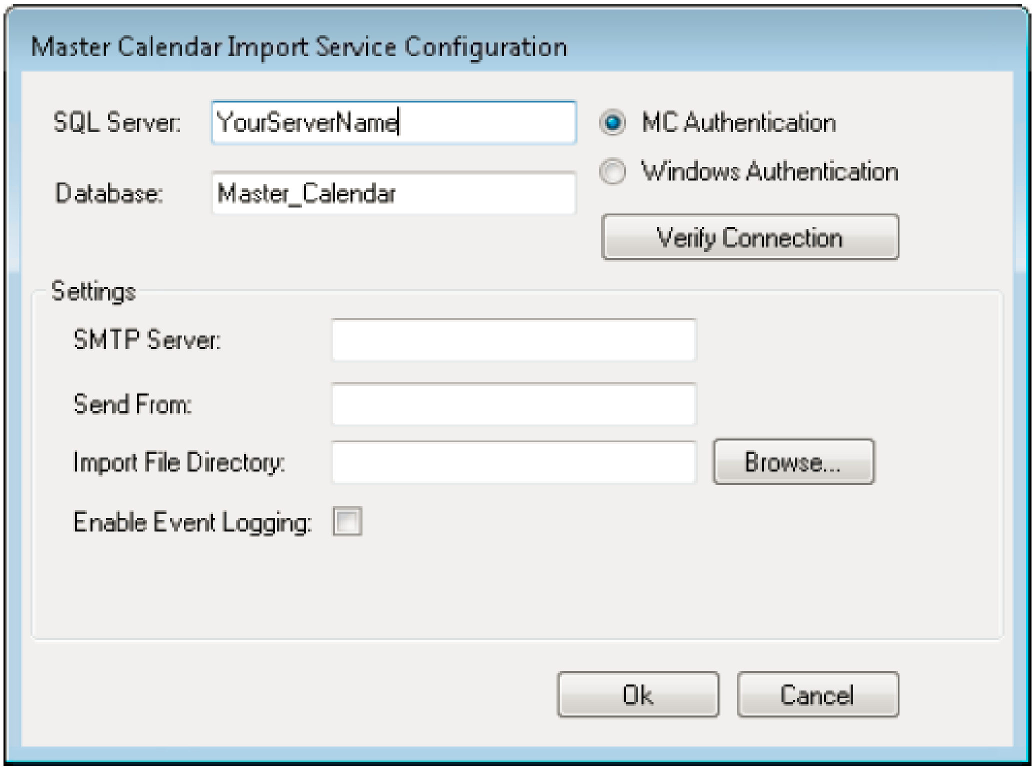
Master Calendar Import Service Configuration

4. Enter in the SQL Server name of where the EMS Master Calendar Database resides on.
5. Enter in the database name that was provided for the Master Calendar Database. By default, the database name should be 'Master_Calendar' unless manually changed.
6. Click Verify Connection to confirm that the Import Service has connected to the EMS Master Calendar Database.



Database Connection Test

7. In addition the following can be configured:
   - SMTP Server–SMTP name or IP Address
   - Send From–An active email address that will be displayed in the Send From field of the notification emails that are sent out.



Master Calendar Import Service Configuration

8. In the Import File Directory field, enter or browse for a physical path of the directory the import files will be downloaded.

> **Note:**
> The path that is entered for the Import File Directory must refer to an existing directory and must end in a backslash. For example: D:\Temp\.

9. Select if Error Logging should be enabled.
10. After filling in the information above, be sure to click **OK** to save the settings.

> **Note:**
> If any issues are encountered starting the service, please visit the Knowledge Base available in Accruent Access for a possible solution.

CHAPTER 12: Launch EMS Master Calendar

After following the installation instructions, verify the EMS Master Calendar installation by opening a new web browser and entering the EMS Master Calendar address:

```
http://[ServerName]/ MasterCalendar/   (replace [ServerName]
with the name of the web server)
```

The first time EMS Master Calendar is launched, it might take a few extra moments for the website to display. If any issues are encountered, please contact Customer Support for assistance.

For information on how to configure Master Calendar, please refer to the EMS Master Calendar Configuration Guide.

Contact Customer Support

- **Option 1 (Recommended):** Search the Knowledge Base available at Accruent Access.
- **Option 2:** Submit a case directly via Accruent Access.
- **Option 3:** Email emssupport@accruent.com.
- **Option 4:** Phone (800) 288-4565.

Important!

If you do not have a customer login, register here.

CHAPTER 13: Integrated Authentication for Master Calendar

Concept: 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.

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 on a portal such as SiteMinder. 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.

See Also: Portal Authentication Methods

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 in the sections 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 commonlysupported 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.

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@dea.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-
n="http://localhost/virtualdirectory/Default.aspx">

    <input type="hidden" id="MCFORM" name="MCFORM"
value="test@dea.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@dea.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@dea.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.

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.

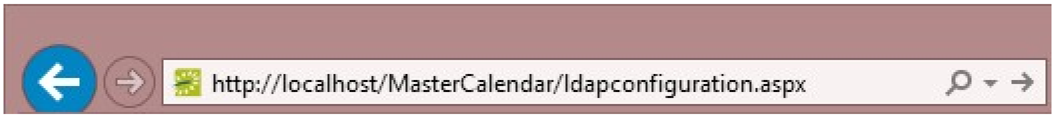
Confirm or Install New License

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**. The license information is case-sensitive and needs to be entered in exactly how it was provided from EMS Software 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

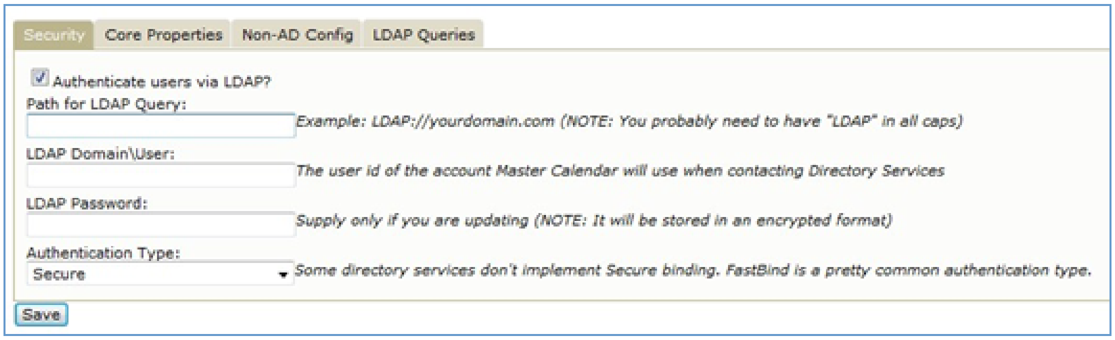
1. Log in to Master Calendar as the site system administrator and click on the Admin menu item. Manually type “LDAPConfiguration.aspx” to the URL in the address bar to access the LDAP Configuration page.



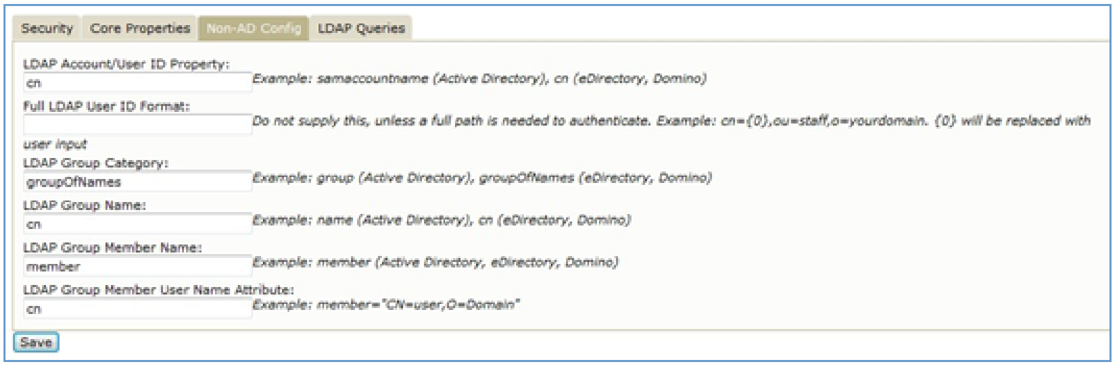
2. Configure your LDAP Settings.

Note:

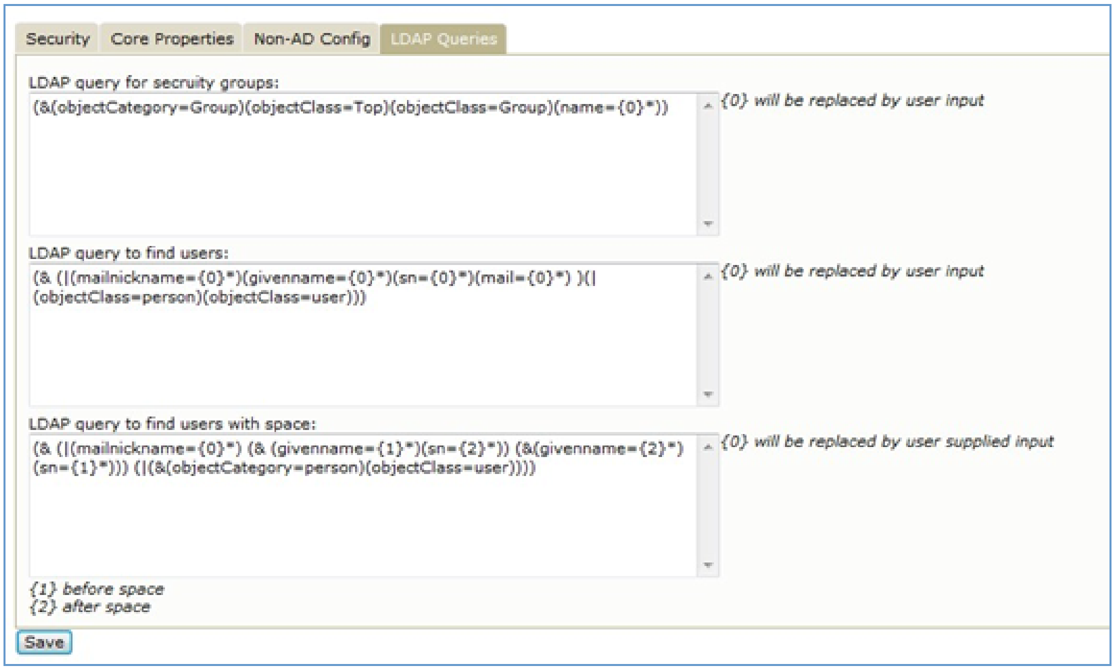
Master Calendar only utilizes read-only queries to the organizations directory services. The Domain\User account does not need to have any special privileges. All that is required is that it be an active account in your directory services. Be aware, in some environments, passwords expire at scheduled 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.



Core Properties



Non-AD Configuration



LDAP Queries

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 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 system administrator and select Admin >– Security > **User Templates**.
2. Click **Assign LDAP Group**s, and then click **Add**.
3. Use the **Search By** field 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 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, that user's 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.

CHAPTER 14: Portal Authentication Methods

This topic provides information about the following:

> **Note:**
> EMS applications do not natively support SAML. You must use our Portal Authentication to use SAML.

Server Variable Method (Header Variable)

Server Variable/Header Variable is a collection of variables that are set by Internet Information Server (IIS).

Applications like SiteMinder create custom server variables for portal site use.

Set the **Portal Authentication Method** parameter to Server Variable and type the appropriate variable for the **Portal Authentication Variable** parameter. Direct users to your EMS Web App Default.aspx page.

Server Variable Method – Federated (SAML)

> **Note:**
> As of Update 23 (March 2018), SAML authentication for the EMS Web App is supported through EMS Platform Services. This is now the recommended method for configuring SAML. See Also: SAML Authentication.

SAML can be leveraged for authentication with your EMS applications by leveraging our portal authentication method and a service provider of your choosing.

Method 1: Locally installed Service Provider

Using this method, you install a service provider of choice on the webserver hosting the EMS web applications. All traffic is routed through that service provider (typically via an ISAPI filter). This service provider will manage all of the authentication for the user. Once the user has successfully authenticated, it will pass an identifier for the user to the EMS application using one of our portal methods. In this scenario typically the Server Variable (Header) method is used.

Method 1 Configuration Steps

1. Install and configure a service provider on the EMS web server
2. Set the service provider to protect the specified EMS web applications
3. Configure the service provider to pass the required user attributes
4. In EMS Desktop Client, configure the EMS Web App parameter “Portal Authentication Method”
5. In EMS Desktop Client configure the applicable Portal Authentication Variables.

Method 2

This method can be common if there is already a server configured with a service provider in your environment, handling authentication for other applications. In EMS Desktop Client, you can configure your application to re-direct any login requests to the other server to be authenticated. Once the user is authenticated, the server with your service provider installed sends the user back to the EMS Desktop Client with an identifier for the user in the header, or within a cookie. The EMS application reads this header, or cookie value, and leverages portal authentication to sign the user in with the matched credentials.

Method 2 Configuration Steps

1. Install and configure a service provider on the EMS web server
2. Set the service provider to protect the specified EMS web applications
3. Configure the service provider to pass the required user attributes
4. In EMS Desktop Client configure the EMS Web App parameter “Portal Authentication Method”
5. In EMS EMS Desktop Client, configure the applicable Portal Authentication Variables.
6. In EMS EMS Desktop Client, change the Login URL under **Configuration** > **Everyday User Applications** > **Web App Menus**.
   a. Select **Login.aspx** and click **Edit**
   b. Enter in the URL to your Remote Service Provider
7. Configure your remote Service provider to send the user back to the default.aspx page of the web application that the request originated from.

EMS Desktop Client Configuration

Please reference our Portal Authentication section for further details around the configuration required within EMS. There are a number of different options available. You will need to know the method that the user identifying value will be passed and the name of that value. Other values can also be passed (ie: email address and phone number) to aid in automatic web user account provisioning as well.

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 parameter to **Session** and type the appropriate variable for the Portal Authentication Variable parameter. 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 EMS Web App root web directory. It must be copied there in order for EMS Web App to read the session variable.

You will need to pass through the user's email address or external reference 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("EMS Web AppSession") =
"test@emssoftware.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 parameter to **Form** and type the appropriate variable for the Portal Authentication Variable parameter. 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 EMS Web App.

Code example in HTML:

```
        <Form name="form1" method="Post" action=" http://[ServerName]/
EMSWebApp/Default.aspx ">

                <input type="hidden" id="EMS Web AppFORM" name="EMS Web AppFORM"
value="test@emssoftware.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 parameter to **Cookie** and type the appropriate variable for the Portal Authentication Cookie Key parameter. 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 your EMS Web App Default.aspx page.

Code example in Active Server Pages 2.0:

```
<%@LANGUAGE="VBSCRIPT" %>

<%

        Response.Expires = -1

        Response.Cookies("EMS Web AppCookie")("CookVal") = "test@emssoftware.com"

        Response.Cookies("EMS Web AppCookie").Path = "/"

        Response.Cookies("EMS Web AppCookie").Expires = DateAdd("m", 3, Now)

        Response.Redirect("http://[ServerName]/ EMSWebApp/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://[ServerName]/ EMSWe-
bApp/Default.aspx?MCQS=test@emssoftware.com
```

To use the query string method, set the Portal Authentication Method parameter to **Query String** and type the appropriate variable for the Portal Authentication Variable parameter.

CHAPTER 15: EMS Master Calendar Configuration Guide

Configuring your EMS Master Calendar requires various steps, including selecting the appearance of your EMS Master Calendar site, specifying the default page layout, managing RSS feeds and menu options, updating EMS Master Calendar registration information, building and generating custom reports, and managing data sources, connectors, help text, and subscriptions.

This configuration guide provides information about the following topics:

- Master Calendar API
    - Master Calendar API Requirements and Licensing
    - Configure Master Calendar to Use the Master Calendar API Web Service
    - API Functions
    - Verify the Master Calendar API

Contact Customer Support

- **Option 1 (Recommended):** Search the Knowledge Base available at Accruent Access.
- **Option 2:** Submit a case directly via Accruent Access.
- **Option 3:** Email emssupport@accruent.com.
- **Option 4:** Phone (800) 288-4565.

Important!
If you do not have a customer login, register here.

CHAPTER 16: Authentication Options for EMS Master Calendar

The following authentication options are available for EMS Master Calendar:

- Integrated Windows Authentication
- LDAP
- Portal

Authentication is controlled by three factors. They all must be configured correctly for the authentication to work:

1. **Login Credentials**: This is the location where external LDAP/Windows/Portal credentials need to be entered in our software for each user.
2. **Enabled by**: This is either a parameter or checkbox that needs to be enabled for the authentication to work.
3. **Configuration Page**: This is where configuration and options are set for the authentication.

Integrated Windows Authentication

- **Login Credentials**: External Reference in MC user account settings, **Admin Panel** > **Admin** > **Security** > **Users**.
- **Enabled by**: Within IIS on the Master Calendar site, "Authentication" options, Windows Authentication.
- **Configuration Page**: None.

LDAP

- MC LDAP can be used in two ways:
  - Log into an MC user account with LDAP credentials: External Reference in MC user account settings, **Admin Panel** > **Admin** > **Security** > **Users**.
  - Assign an LDAP group to an MC template, user logs in with LDAP credentials and does not need an MC user account: **Admin Panel** > **Admin** > **Security** > **User Templates**, **LDAP** tab inside template.
- Enabled by: mastercalendar/ldapconfiguration.aspx page, "Authenticate users via LDAP?" checkbox

(Need to be logged in as an administrator and have Integrated Authentication in license).

- Configuration Page: mastercalendar/ldapconfiguration.aspx page, there are multiple tabs.

Portal

- Login Credentials: External Reference in MC user account settings, **Admin Panel** > **Admin** > **Security** > **Users**.
- Enabled by: Always enabled, **Admin Panel** > **Admin** > **Site Administration** > **Default Settings** (Select the appropriate entry from the "Portal Authentication Method" parameter drop-down list).
- Configuration Page: There are multiple different setup items in the Default Settings page under the "Portal Authentication" area.

CHAPTER 17: Integrated Authentication for Master Calendar

Concept: 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.

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 on a portal such as SiteMinder. 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.

See Also: Portal Authentication Methods

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 in the sections 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 commonlysupported 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.

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@dea.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-
n="http://localhost/virtualdirectory/Default.aspx">

    <input type="hidden" id="MCFORM" name="MCFORM"
value="test@dea.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@dea.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@dea.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.

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.

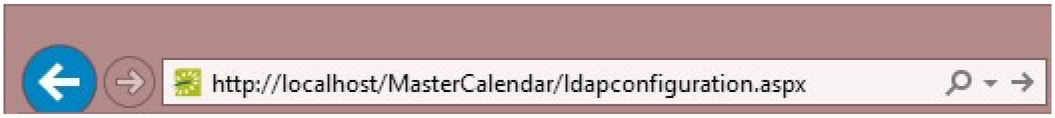
Confirm or Install New License

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**. The license information is case-sensitive and needs to be entered in exactly how it was provided from EMS Software 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

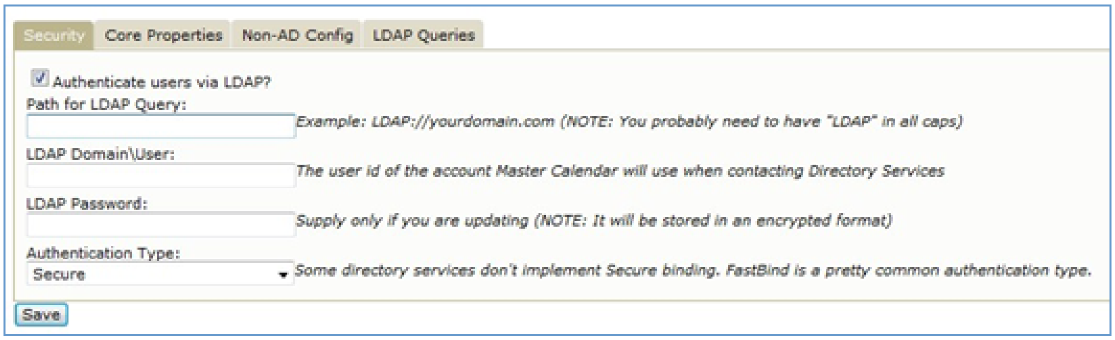
1. Log in to Master Calendar as the site system administrator and click on the Admin menu item. Manually type “LDAPConfiguration.aspx” to the URL in the address bar to access the LDAP Configuration page.



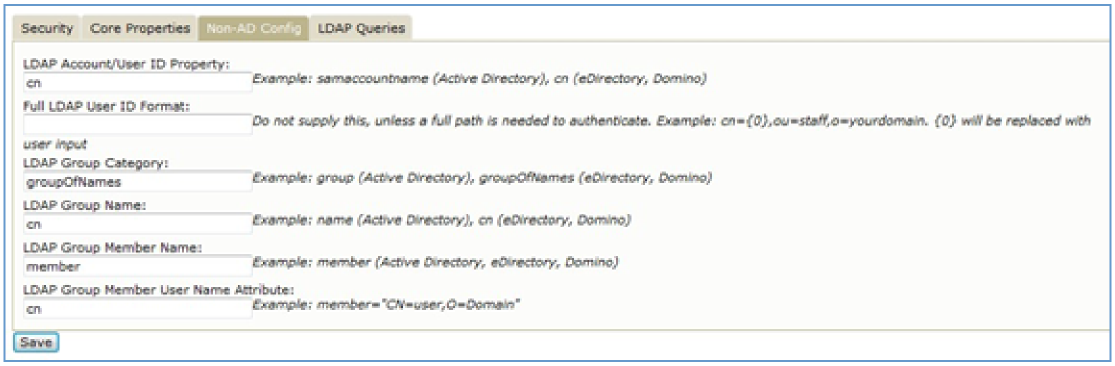
2. Configure your LDAP Settings.

Note:

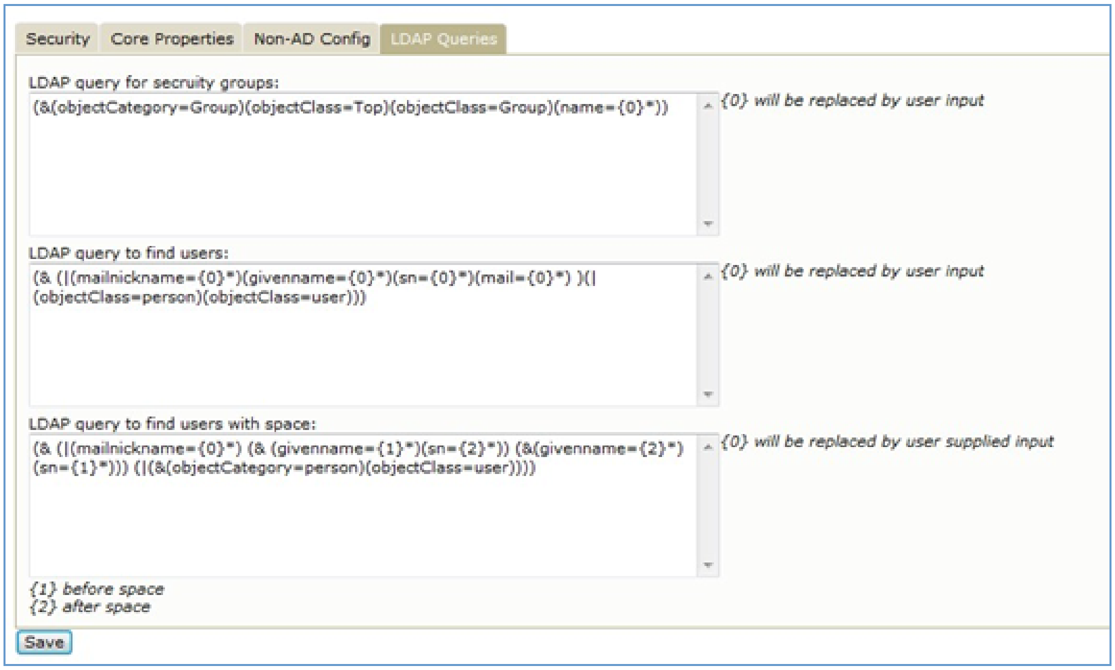
Master Calendar only utilizes read-only queries to the organizations directory services. The Domain\User account does not need to have any special privileges. All that is required is that it be an active account in your directory services. Be aware, in some environments, passwords expire at scheduled 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.



Core Properties



Non-AD Configuration



LDAP Queries

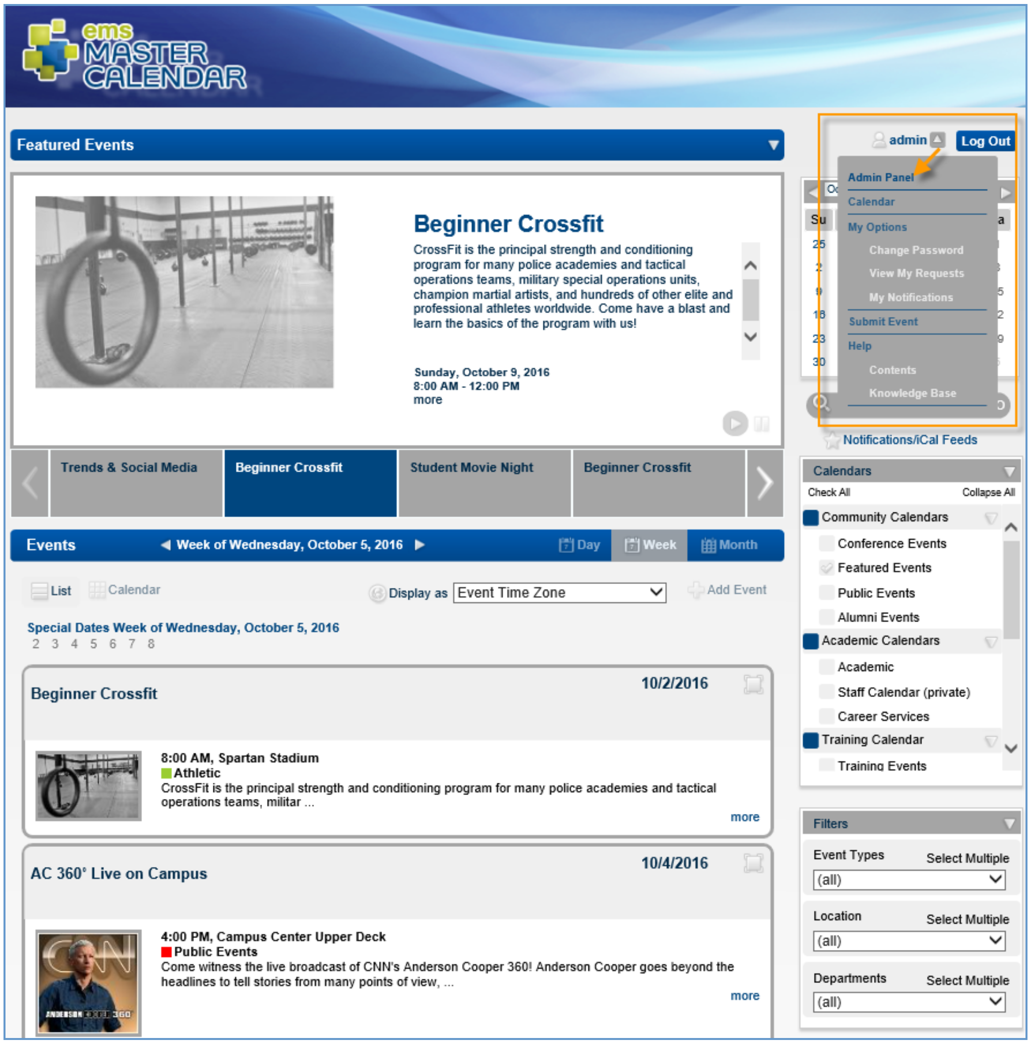
Add LDAP Security Groups to Master Calendar

In the course of setting up LDAP integration within the Master Calendar system, you pair security “templates” defined 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 system administrator and select Admin >– Security > **User Templates**.
2. Click **Assign LDAP Group**s, and then click **Add**.
3. Use the **Search By** field 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 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, that user's 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.

CHAPTER 18: Admin Interface Overview

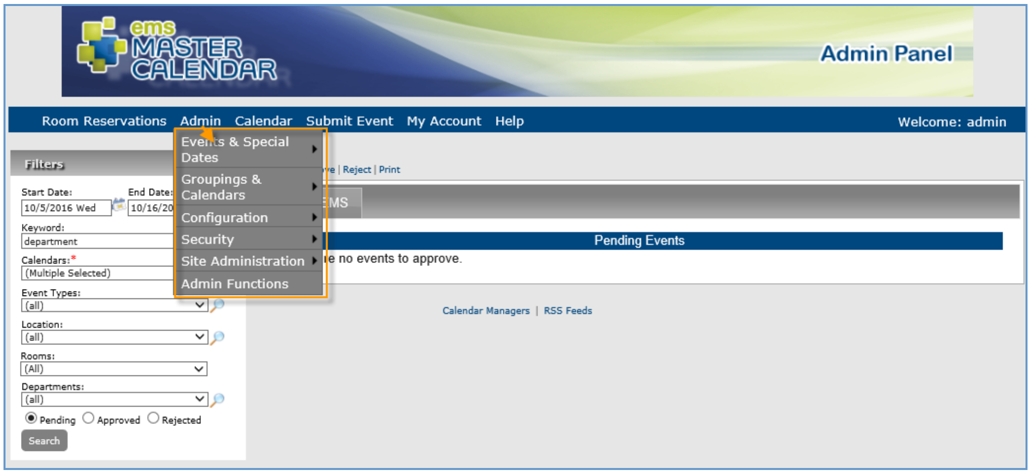
EMS Master Calendar has a special **Admin Panel** for system administration. The EMS Master Calendar Admin Panel controls system behavior for EMS Master Calendar. The **Admin** menu points to many of the settings you will work with during administration and setup.



The Admin dropdown is organized into the following sections:

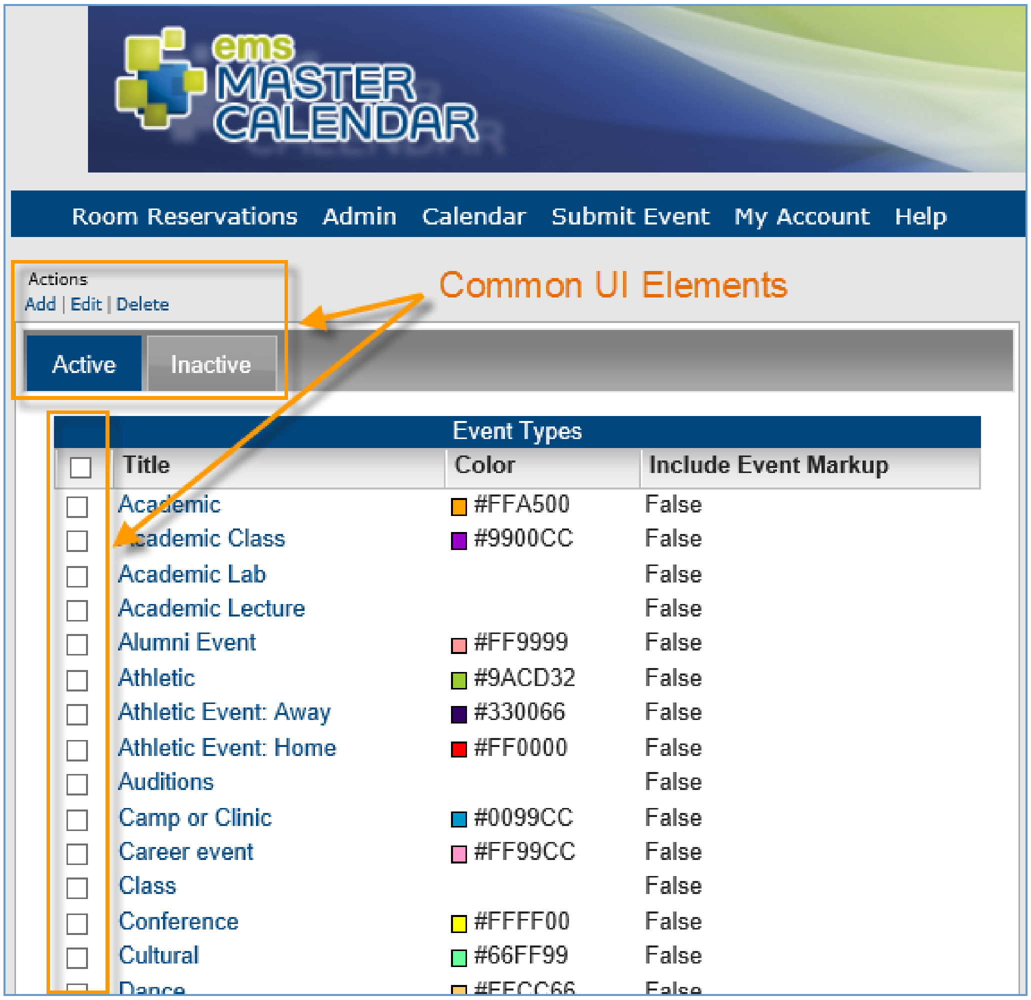
- Events & Special Dates
- Groupings & Calendars
- Configuration
- Security

- Site Administration
- Admin Functions



Note:

On many of the pages that you can access from this Admin menu, you will encounter a list view of predefined settings with basic **Add**, **Edit**, **Delete** options and **Active/Inactive** list tabs.



- **Edit/Save Behavior**: To work with many list items, you will have to select them (individually or all at once) and select an Edit menu option. Once you have made changes, you will have to confirm and finalize by saving the item, after which you will return to the list where the item appears.
- **Add/Remove Options**: In any list view, you will often be able to add or remove list items. Adding a new item will often launch a dialog box where you add detail and definition, and upload associated files. Deleting an existing item will typically remove it from selection lists for further use, but will not remove it from existing records.
- **Activate/De-activate Options**: Many list items can be edited to active or inactive (on separate tabs) using an **Active** checkbox. Inactive items generally will not be in use in Master Calendar and will not appear to users. This method allows you to control the list item without deleting it from your database.

CHAPTER 19: Events and Special Dates in Master Calendar

The Events and Special Dates dropdown in the Admin Panel allows you to:

- Manage Events
- Configure Special Dates
- Broadcast Announcements
- Connect Master Calendar to Your EMS Database (Connectors)
- Import Events
- Customize and Generate Reports

CHAPTER 20: Manage Events

Events can be managed from the Event Summary page or through the Manage Events page.

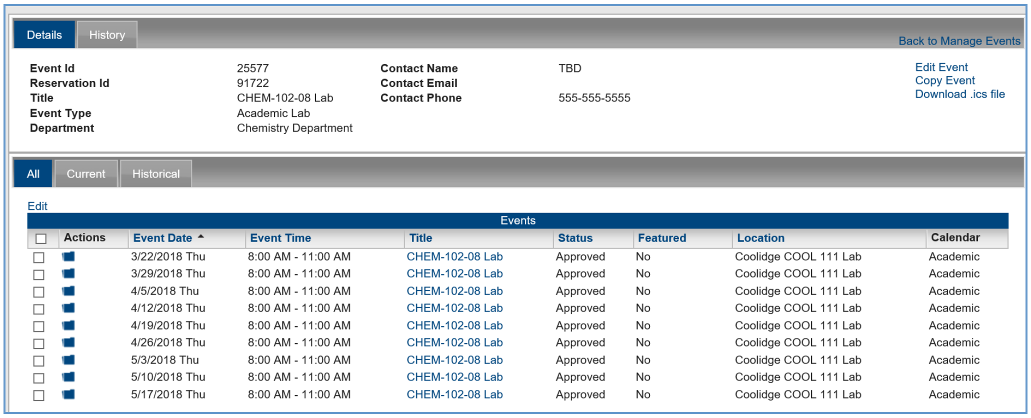
This section will provide information that will allow you to:

- Filter Events on the Manage Events Page
- Approve Pending Event Requests
  - Reject Pending Event Requests
  - Delete Event Requests
  - Move Rejected Event Requests to Approved Status
  - Generate a List of Event Requests
  - Request Additional Information for Event Requests
- Add Events to Your Personal Email Calendar
- Add Event Dates
- Cancel Event Dates
- Copy an Event
- Edit an Event
- Un-Cancel an Event

Manage Events from the Event Summary Page

From the Manage Events page (using the **Edit** icon on the Event Details page), double click on an event to open the Event Summary page. The **Details** tab on this page summarizes the current details for the event. The **History** tab displays the history for the event. In addition, the Event Summary page has three tabs that show the dates that are associated with the event:

- The **All** tab shows all currently active dates for the event in Master Calendar. (The information that appears on this tab is the combined information from the Current tab and the Historical tab.)
- The **Current** tab shows recurring dates for the event going forward from the current day's date.
- The **Historical** tab shows recurring dates that have already posted.



Event Summary page, Details Tab

Manage Events in the Manage Events Page

When a guest or user requests to submit an event to a calendar, as the EMS Master Calendar manager, you are responsible for managing the event in your calendar system. **See Also:** Types of EMS Master Calendar Users

Managing event requests in EMS Master Calendar consists of:

- Filter Events on the Manage Events Page
- Approve Event Requests
- Reject Event Requests
- Delete Event Requests
- Move Rejected Event Requests to Approved Status

You can also:

- Generate a Manage Events List report

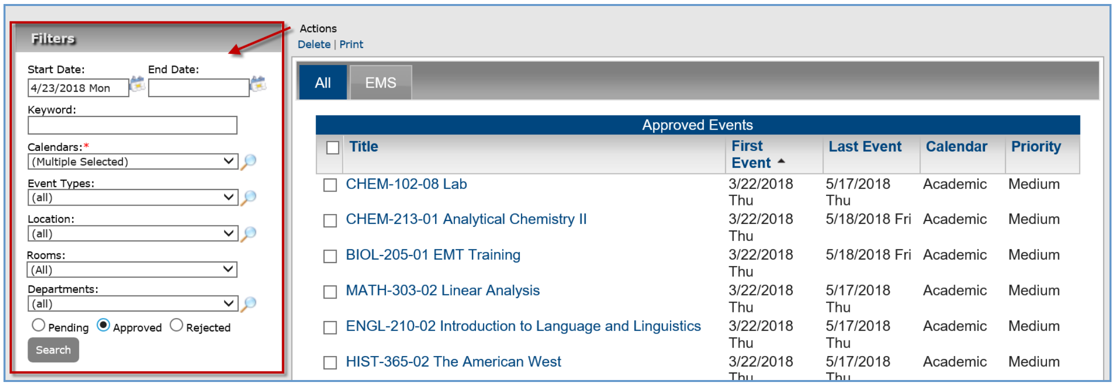
When the Manage Events page first opens, the list of events that appears is a list of *all* pending events for *all* calendars to which you have access as a Master Calendar manager. To manage events with different statuses, you must refine this list by filtering it by specific criteria.

Note:

For all procedures in this section, you must be logged in either as a Calendar Manager or as the site administrator. If you are logged in as the Calendar Manager, or the site administrator, you can always open the event by clicking the event title on the Manage Events page. You can then easily review the event specifics as well as edit the event details. **See Also:** Types of EMS Master Calendar Users

CHAPTER 21: Filtering Events on the Manage Events Page

1. Navigate to the **Admin Panel** > **Events & Special Dates** > **Manage Events**. The Manage Events page opens.
2. Filter the events list using the **Filters** panel.



Master Calendar Filters Panel

Field Name	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 pending event requests in Master Calendar, regardless of the date.
Keyword	The keyword can appear in any information that is associated with the event (e.g., the keyword can appear in the event name, the event description, etc.).
Calendars	A list of all active calendars to which you have access as Calendar Manager. By default, all calendars to which you have access are selected as the search criteria.
Event Types	A list of all currently active event types in Master Calendar. Click the Lookup icon to open the Event Types dialog box and select the event types.
Location	A list of all currently active event locations in Master Calendar. Click the Lookup icon to open the Locations dialog box and select the locations.
Rooms	A list of all currently active sub-locations in Master Calendar. Click the

Field Name	Description
	Lookup icon to open the Rooms dialog box and select the room. **Note:** "Rooms" is the default label for a sub-location. Depending on how your Master Calendar site administrator has configured Master Calendar, you might see this labeled as something else (e.g., "Fields," "Offices," etc.). No options are available on the Rooms list and the Lookup icon is not available unless you have selected a location for which active rooms have been configured.
Departments	A list of all currently active departments in Master Calendar. **Note:** "Department" is a default label. Depending on how your Master Calendar site administrator has configured Master Calendar, you might see this labeled as something else, (e.g., "Business Units").
Pending/Approved/Rejected	The status of the events for which to search. You can select only one value.

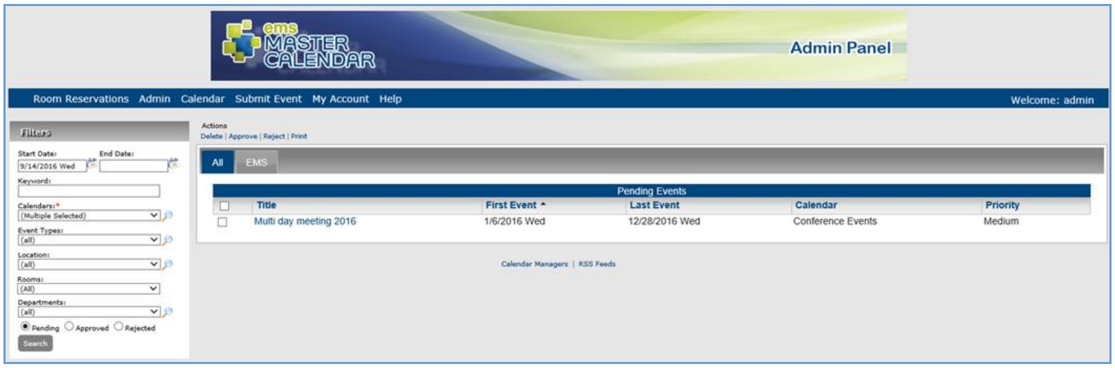
3. Click **Search**. A list of all events that meet your search criteria appears on the Manage Events page.

Note:

A single line runs through any event for which *all the event dates* have been canceled.

CHAPTER 22: Approve Pending Event Requests

1. Navigate to the **Admin Panel** > **Events & Special Dates** > **Manage Events**. The Manage Events page opens. **See Also:** Types of Master Calendar Users.
2. Optionally, filter the pending events that you are approving.
3. Select the pending events that you are approving. To select all pending events on the currently opened page for approval in a single step, select the column heading, **Title**. If you have multiple pages of events to approve, you must repeat this entire process on each page.



Manage Events Page

4. Under Actions, click **Approve**. A message opens asking you if you are sure that you want to approve all selected events.
5. Click **OK** in the message. A message opens indicating that all selected events were approved.
6. Click **OK** in the message. The events are approved and are removed from the Pending Events list. For each approved event, an email is automatically generated and sent to the event requestor informing them that the Calendar Manager has approved their request.

From: Events
Sent: Monday, April 23, 2018 10:24 AM
To: Mindy Bainbridge <mindy@emssoftware.com>
Subject: Event Submission Request Approved

Request for event titled Alumni Meeting - Denver has been approved for the Alumni Events,Featured Events Calendar.
Date approved: 4/23/2018 10:23 AM

Event Url
http://localhost/MC25/EventDetails.aspx?data=hHr80o3M7J783NXFG1vDb2hD8qLrSqugWNJ0QzmZBv3e7H%2b8mPxTZX7lsRdb3MJz

Example of Approved Event Request Email

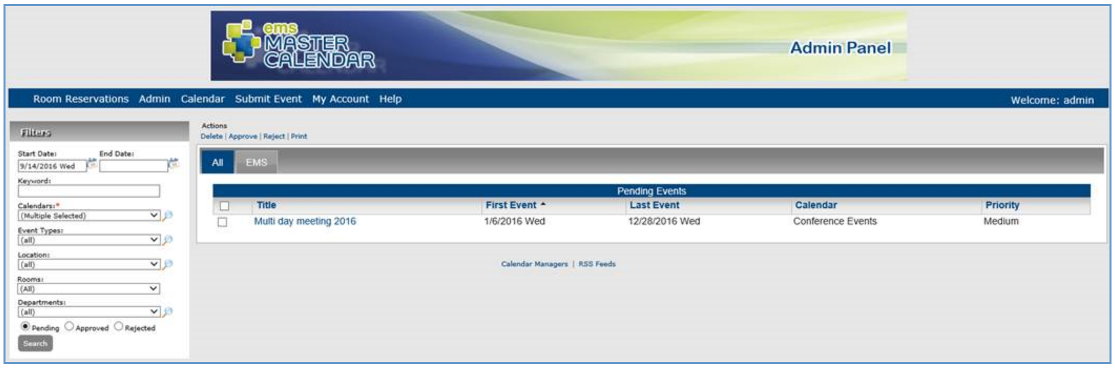
Note:

To have Master Calendar automatically generate and send emails indicating the event status (approved or rejected), your site administrator must have set the default System Configuration settings for email: name of sender, SMTP server, and address of sender. If your system is not automatically sending and generating emails after you approve or reject an event request, work with your site administrator to ensure that the necessary default settings have been specified.

CHAPTER 23: Reject Pending Event Requests

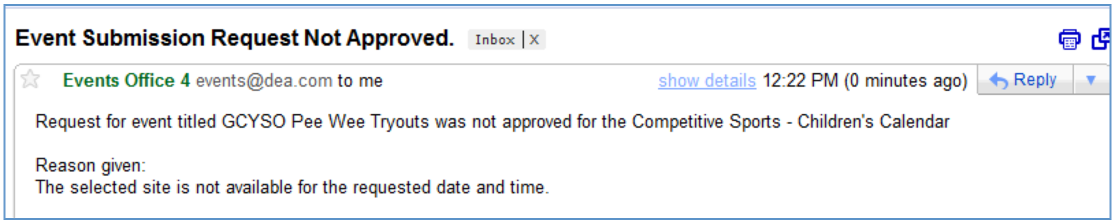
From the Manage Events page, authorized users can reject pending event requests.

1. You can first filter the list of pending events that you are approving.



Manage Events Page

2. Select the pending events you want to reject.
3. Under Actions, click **Reject**. A Master Calendar - Notes dialog box opens. Enter any comments in this dialog box as to why you are rejecting the event request. These comments are sent automatically to the event requestor after you complete the rejection process.
4. After you enter the comments, click **Send**. A dialog box opens asking you if you are sure if you want to reject all the selected events.
5. Click **OK** in the message. A message opens indicating that all selected events were rejected.
6. Click **OK** in the message. The events are rejected and are removed from the Pending events list. For each rejected request, an email is automatically generated and sent to the event requestor informing them that the Calendar Manager has rejected their request as well as the reasons for the rejection. To select all pending events on the currently opened page for rejection in a single step, select the column header, **Title**. If you have multiple pages of events to reject, you must repeat this entire process on each page.

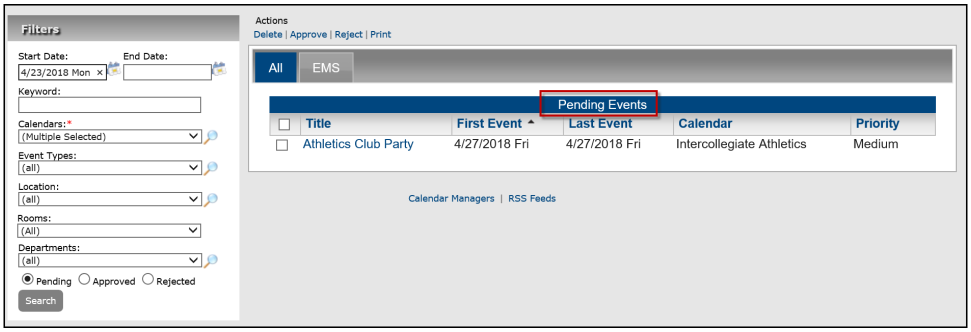


Example of rejected event request email

CHAPTER 24: Delete Event Requests

From the Manage Events page, authorized users can delete an event request of any status: pending, approved, or rejected.

1. Optionally, filter the list of pending events.



Manage Events Page

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

> **Note:**
> To have Master Calendar automatically generate and send emails indicating the event status (approved or rejected), your site administrator must have set the default System Configuration settings for email: name of sender, SMTP server, and address of sender. If your system is not automatically sending and generating emails after you approve or reject an event request, work with your site administrator to ensure that the necessary default settings have been specified.

3. Under Actions, click **Delete**. A message opens asking you if you are sure that you want to delete all selected events.

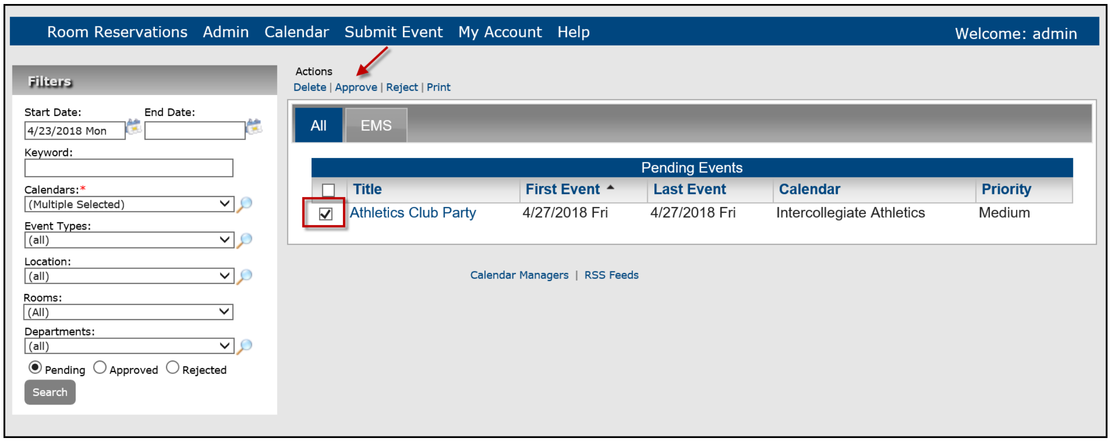
4. Click **OK** in the message. A message opens indicating that all selected events were deleted.

5. Click **OK** in the message. The appropriate tab (Approved, Reject, or Deleted) is updated to reflect the deletion of the event requests.

CHAPTER 25: Move Rejected Event Requests to Approved Status

If you accidentally reject an event request, you can move the rejected request to an approved status.

1. From the Manage Events page select the events that you want to approve.
2. Under Actions, click **Approve**.



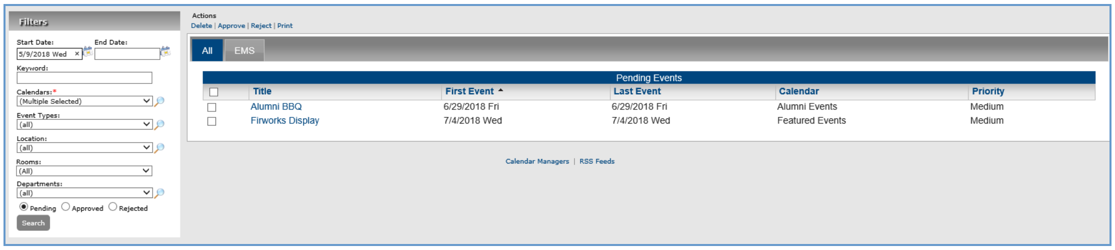
Manage Events Page

3. A message opens asking you if you are sure that you want to approve all selected events. Click **OK** in the message. A message opens indicating that all selected events were approved.
4. Click **OK** in the message. The events are approved and are removed from the Rejected Events list. They are now displayed on the Approved Events list.

CHAPTER 26: Generate a List of Event Requests

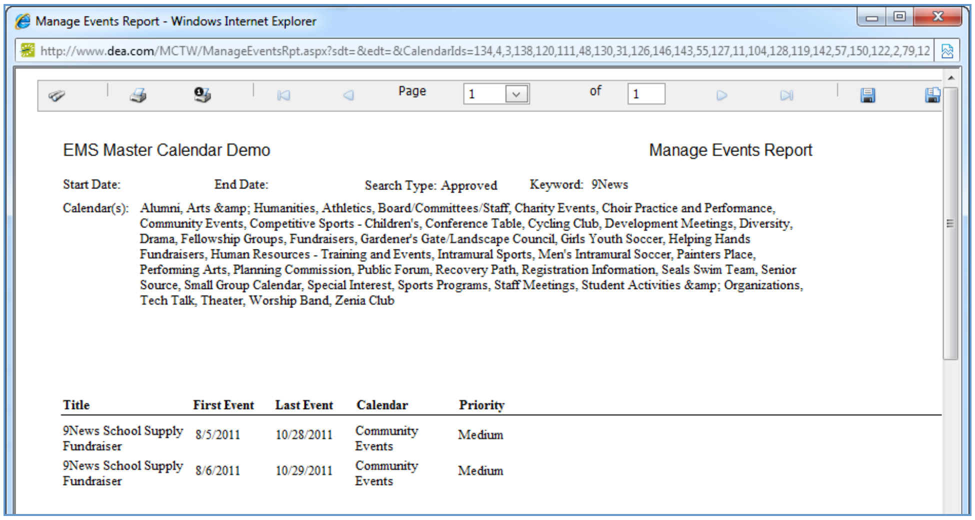
You can generate a Manage Events List report, which lists all the events to which you have access as a Master Calendar manager. You can generate a report that lists all the pending events for all calendars to which you have access as a Master Calendar manager or you can generate a report for events with different statuses.

1. From the Admin Panel, navigate to **Admin** > **Events & Special Dates** > **Manage Events**. The Manage Events page opens. When this page first opens, the list of events that appears is a list of all pending events for all calendars to which you have access as a Master Calendar manager.



Manage Events Page

2. Do one of the following:
   - To generate a Manage Events List report that lists all pending events for all calendars to which you have access as a Master Calendar manager, click Print.
   - To generate a Manage Events List report for events with different statuses, filter for these events and click Print.
   - To generate a Manage Events list report for all EMS events for which you are the Calendar Manager, click the EMS tab to open it, and then click Print.
3. An onscreen preview of the Manage Events 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.

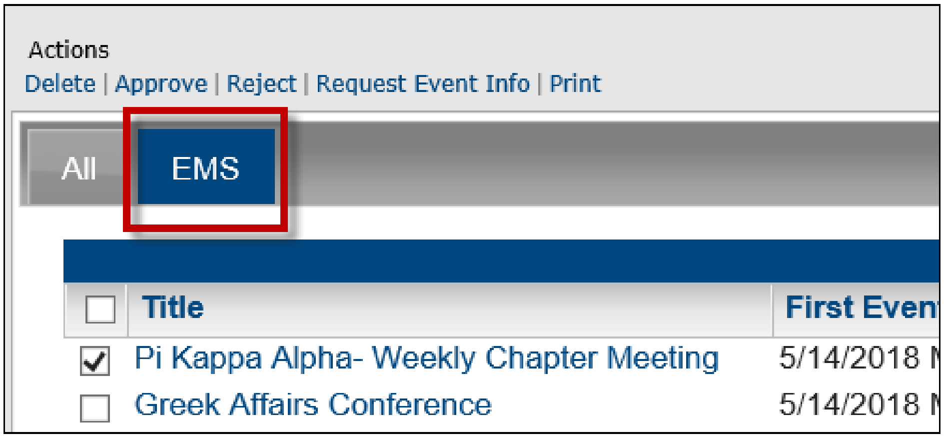


Onscreen Preview for a Manage Events List Report

CHAPTER 27: Request Additional Information for Event Requests

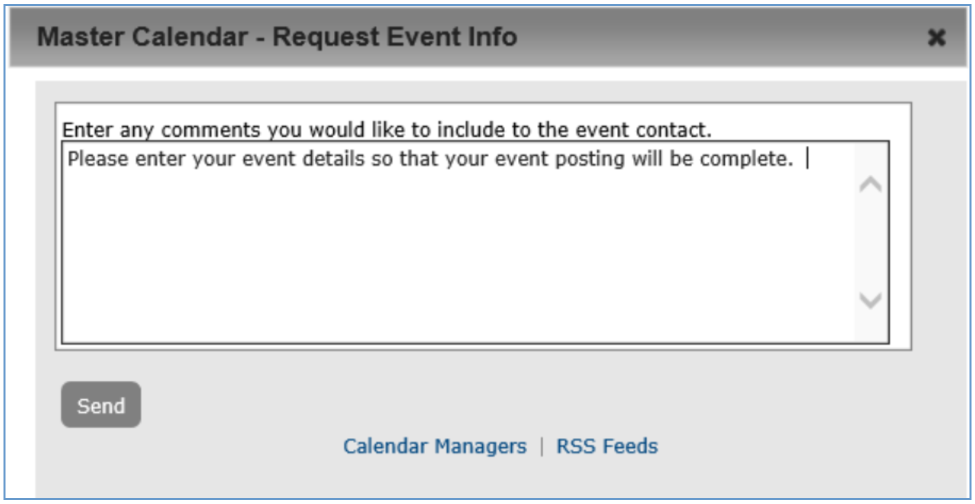
You use the Request Event Info option on the Manage Events page to request information from the EMS Contact for a selected event that has been pulled into Master Calendar from an EMS database.

1. From the Manage Events page, filter for the pending events that you are approving.
2. Click the EMS tab. This tab shows all the events that have been pulled from an EMS database into Master Calendar via a connector.



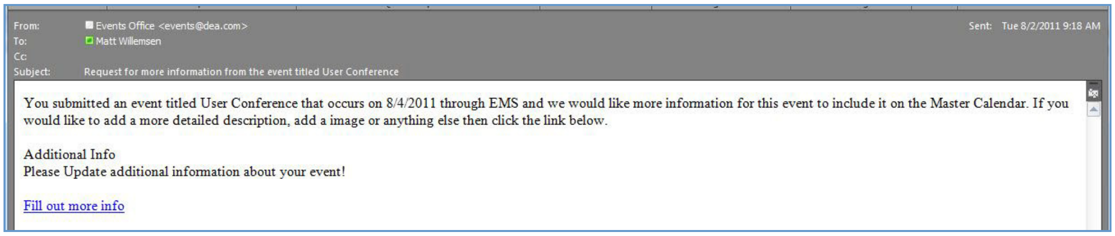
Manage Events Page, EMS Tab

3. Select the event or events for which you need more information from the EMS Contact, and then under Actions, click Request Event Info. The Request Event Info dialog box opens.



Request Event Info Email Content

4. Enter any questions that you would like to request of the EMS Contact, and then click **Send**.
5. Click **OK** in the prompt about sending an email to request more information.
6. Click **OK** in the confirmation message. The email is sent to the EMS Contact for the selected event. The email contains a "**Fill out more info**" link that the EMS Contact can click to open an Additional Info page on which they can enter or edit the requested information and then submit the information. This action essentially allows the EMS contact to work directly with the event in Master Calendar and prevents you from having to manually enter the information that you have requested from the EMS contact.

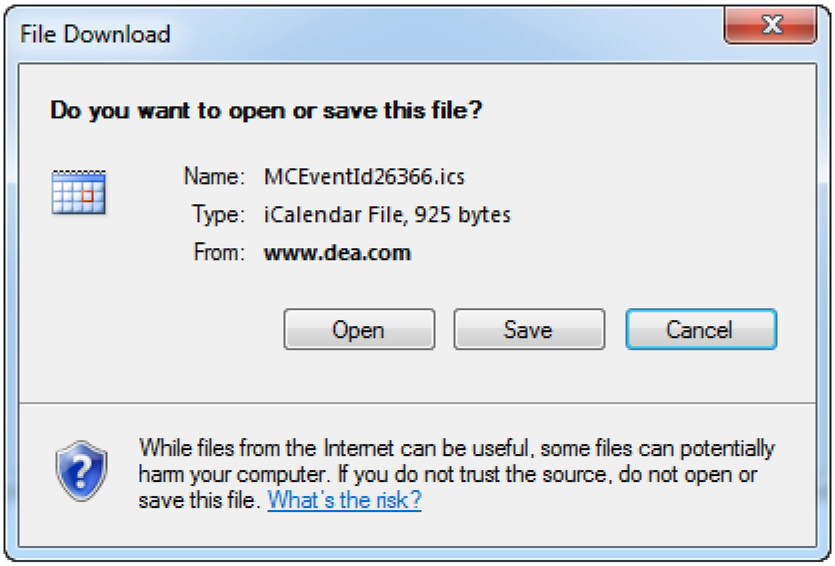


Email sent to EMS Contact

Note:
Depending on how your site administrator has configured Master Calendar, after the EMS Contact modifies the information for the event, the event request might be set to a Pending status. An automated email would then be generated and sent to the Calendar Manager informing the manager of the modifications by the contact and the status change to “Pending” for the event.

CHAPTER 28: Add Events to Your Personal Email Calendar

1. Click an **event title** from the Manage Events page, or click the **Edit** icon on the **Event Details** page. The Event Summary page opens.
2. Click **Download .ics file**. A Download File dialog box opens.



Download File dialog box

3. Indicate in this dialog box whether you want to open or save the file.
   - If you chose to open the downloaded file, after all the data is downloaded, the file opens automatically in the Calendar view of your personal email program.
   - If you chose to save the downloaded file, after all the data is downloaded, you are prompted to save the file with the default name of MCEventId<#>.ics (for example, MCEventId20287.ics) to your desktop. You can save the file to a location of your choice, and then after you open the file, the event opens in the Calendar view of your personal email program.
4. Do one of the following:
   - If you accessed the Event Summary page from the Manage Events page, click **Back to Manage Events** to return to the Manage Events page.
   - If you accessed the Event Summary page from a calendar, click **Back to Calendar** to return to the event's calendar.

CHAPTER 29: Add Event Dates

You use the **Add** function on the Event Summary page to add more dates, including recurring dates, to an existing event, whether the event is a single date event or a multi-date event. When you add more dates to an existing event, you can also modify some, but not all, of the general information for the event, and you can add an image to the event. You can also modify the information for the custom fields.

1. Click an **event title** from the Manage Events page, or click the **Edit** icon on the Event Details page. The Event Summary page opens.
2. For either a single date event or a multi-date event, click **Add**.
3. Modify the information as needed for the event:
   - General Info fields, including images
   - Event Times fields, including adding recurring dates for the event
   - Custom Fields and Attachments
4. Do one of the following:
   - If you accessed the Event Summary page from the Manage Events page, click **Back** to Manage
   - Events to return to the Manage Events page.
   - If you accessed the Event Summary page from a calendar, click **Back to Calendar** to return to the event's calendar.

CHAPTER 30: Cancel Event Dates

You can cancel all dates for an event in a single step, or you can cancel dates on an individual basis. When you cancel an event, the event is no longer active in Master Calendar; however, the entry is not removed from the Manage Events page or the Event Summary page. On the Event Summary page, and on the event's calendar, a single line appears through each event date that was canceled. If you cancel all the dates for an event, then a single line also runs through the event on the Manage Events page.

This topic will provide information that will allow you to do the following:

- Cancel All Event Dates At Once
- Cancel Event Dates Individually

Cancel All Event Dates At Once

1. Click an **event title** from the **Manage Events** page, or click the **Edit** icon on the **Event Details** page. The Event Summary page opens.
2. Click **Cancel Even**t. A message opens asking you if you are sure that you want to cancel all the selected event dates.
3. Click **OK** in the message. A message opens indicating that all the selected event dates were canceled
4. Click **OK** in the message. The Event Summary page is updated to reflect the cancellation of the event dates. None of the entries is removed from the Event Summary page. Instead, a single lineruns through each event date, indicating that it was canceled.
5. Do one of the following:
   - If you accessed the Event Summary page from the Manage Events page, click Back to Manage Events to return to the Manage Events page.
   - If you accessed the Event Summary page from a calendar, click Back to Calendar to return to the event's calendar.

Cancel Event Dates Individually

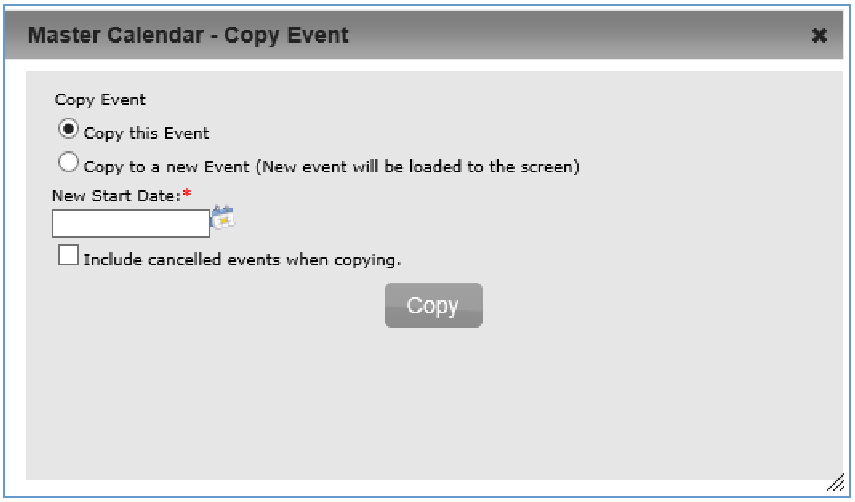
1. Click an **event title** from the **Manage Events** page, or click the **Edit** icon on the **Event Details** page. The Event Summary page opens.
2. Open the tab (**All**, **Current**, or **Historical**) that contains the dates that you are canceling.
3. Select the individual dates that you are canceling.
4. Click **Cancel**. A message prompts you to confirm that you want to cancel all the selected event dates.
5. Click **OK** in the message. A message confirms that the selected event dates were canceled.

6. Click **OK** in the message. The tab on the Event Summary page is updated to reflect the cancellation of the event dates. The entries are not removed from the Event Summary page. Instead, a single line runs through each event date, indicating that it was canceled.
7. Do one of the following:
   - If you accessed the Event Summary page from the Manage Events page, click Back to Manage Events to return to the Manage Events page.
   - If you accessed the Event Summary page from a calendar, click Back to Calendar to return to the event's calendar.

CHAPTER 31: Copy an Event

If you want to duplicate an event to another date, or if a new event contains the same information as a previously existing event, you do not have to enter all the event information "from scratch." Instead, you can use the Copy Event function to copy an existing event.

1. Click an **event title** from the Manage Events page. The Event Summary page opens.
2. From the Details tab, click **Copy Event**. The Copy Event dialog box opens.



3. Do one of the following:
   - **To copy the existing event as is**, enter a new start date, and then click **Copy**. The Copy Event dialog box closes. You return to the Event Summary page. The newly copied event appears on the All tab. (Depending on the new starting date for the copied event, it might also appear on the Current tab, the Historical tab, or both.)
   - **To copy the event to a new event**, select **Copy to a New Event**, enter a new start date, and then click **Copy**. The Copy Event dialog box closes. You return to the Event Summary page. The new event is loaded to the Event Summary page with a new event ID. The newly copied event appears on the **All** tab. (Depending on the new starting date for the copied event, it might also appear on the **Current** tab, the **Historical** tab, or both.)
4. Optionally, to include canceled events when you are copying, select **Include canceled events when copying**.
5. Click **Copy**. The Copy Event dialog box closes. You remain on the Event Summary page with the newly copied event displayed on the page.
6. Do one of the following:
   - If you accessed the Event Summary page from the Manage Events page, click **Back to Manage Events** to return to the Manage Events page.

- If you accessed the Event Summary page from a calendar, click **Back to Calendar** to return to the event's calendar.

CHAPTER 32: Edit an Event

From the Event Summary page, you can use the **Edit Event** option or the **Edit** option. The information you can edit is different for these two options. Also, you must consider whether you are editing a single date event, or a multi-date event.

This topic will provide the information that will allow you to:

- Edit a Single Date Event
- Edit a Multi-Date Event

Edit a Single Date Event

1. Select the **Edit Event** option to edit the general information for the event, add an image to the event, edit additional information for the event, and edit attachments.
2. Select the **event date** on any of the three tabs (**All, Current,** or **Historical**) and then click **Edit**, to edit general information for the event, including canceling the event, add an image to the event, change event times, and edit the custom fields.

Edit a Multi-Date Event

You can edit either the “top-level” event information (the main event), or you can edit individual dates for the event (the event occurrences).

- When you edit the main event option, the same edits are applied to all the event occurrences.
- When you edit an event occurrence, the edits are applicable only for the selected occurrence.

No other event occurrences are affected. Further, any edits that you make to an event occurrence override the edits that you make to the main event. For example, if you attach an image at the main event level, then this image is displayed for all event occurrences; however, you can also attach a unique image for each occurrence of a multi-date event. If you attach a unique image at the event occurrence level, this image overrides any image that is attached at the main event level.

1. At the main event level, you must select the **Edit Event** option. You can change general information for the main event, add an image to the main event, edit additional information for the main event, and edit attachments for the main event.
2. At the event occurrence level, you must select the **event date** on any of the three tabs (**All**, **Current**, or **Historical**), and then click **Edit** to edit general information for the event occurrence, including canceling the occurrence. You can also add an image to the event occurrence, edit event times for the occurrence, and edit custom fields for the event occurrence.

If an event that you are editing was imported into Master Calendar from EMS, any information that was originally entered for the event in EMS is not available for editing. Only the information that was entered for the event in Master Calendar (event description, custom fields, and so on) is available for editing. If you need to edit information for the event that was originally entered in EMS, you must edit this information in EMS, and then re-import the event into Master Calendar from EMS.

CHAPTER 33: Un-Cancel an Event

If all event dates for a scheduled event have been canceled, you can activate all the event dates in a single step.

1. Click an **event title** from the **Manage Events** page, or click the **Edit** icon on the **Event Details** page. The Event Summary page opens.
2. Click **Activate Event**. A message prompts you to confirm that you want to activate all the event dates.

> **Note:**
> To select all event dates on the currently opened page for cancellation in a single step, select the blank checkbox next to Actions. If you have multiple pages of event dates to cancel, you must repeat this entire process on each page. You cannot activate individual dates. The Activate function is an “either all or nothing” function. Remember, the event that you are selecting must have all its event dates canceled, not just some.

3. Click **OK**. The message closes. All previously canceled event dates are returned to an active state.

CHAPTER 34: Configure Special Dates

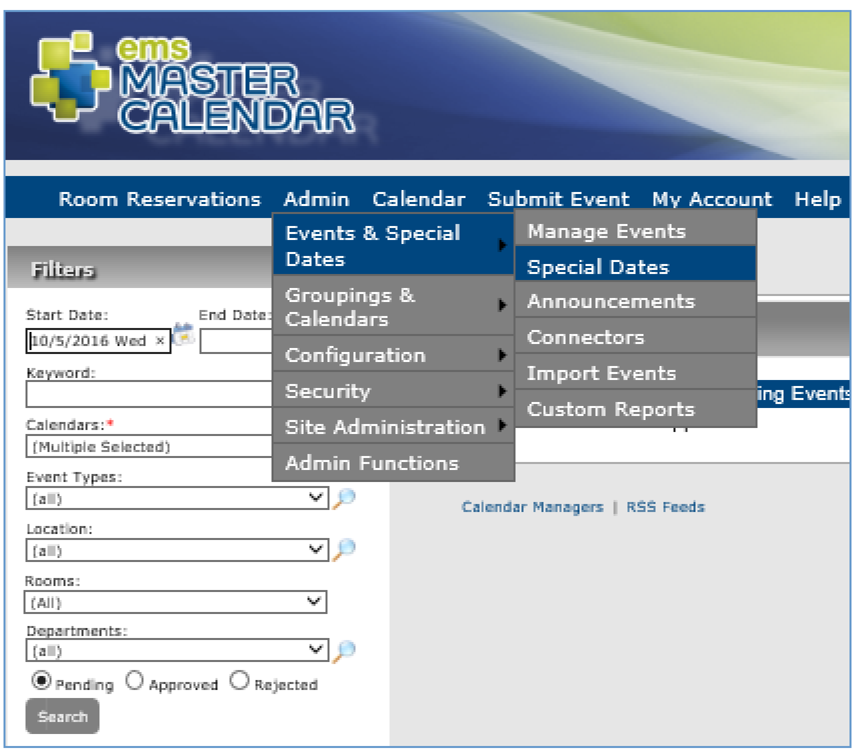
In Master Calendar, a *special date* is a date that has particular significance or importance to an organization. A special date draws attention to a day, rather than to an event that occurs on the day. For example, if you are managing calendars for a university campus, special dates typically include 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 displayed at the top of calendar lists and above all events in a calendar date cell. At the time you are adding a special date, you can select a unique font color for it so that "stands out" even more from any calendar events. This topic guides you in creating new special dates and working with them.

Creating a New Special Date

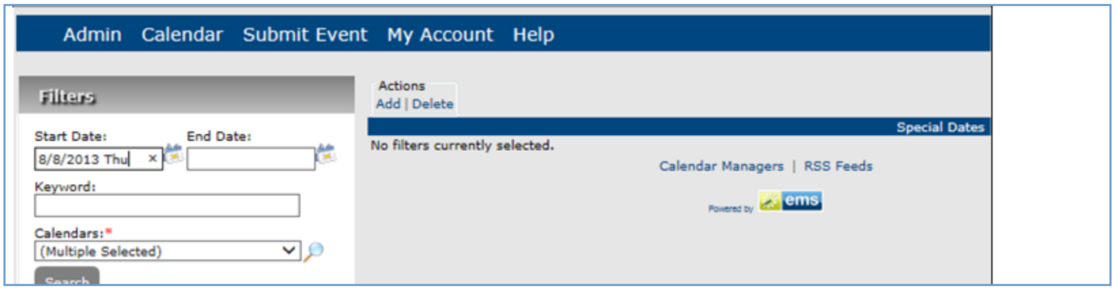
Note:

Rather than creating a special date from scratch, 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 Also: Connect to Data Sources.

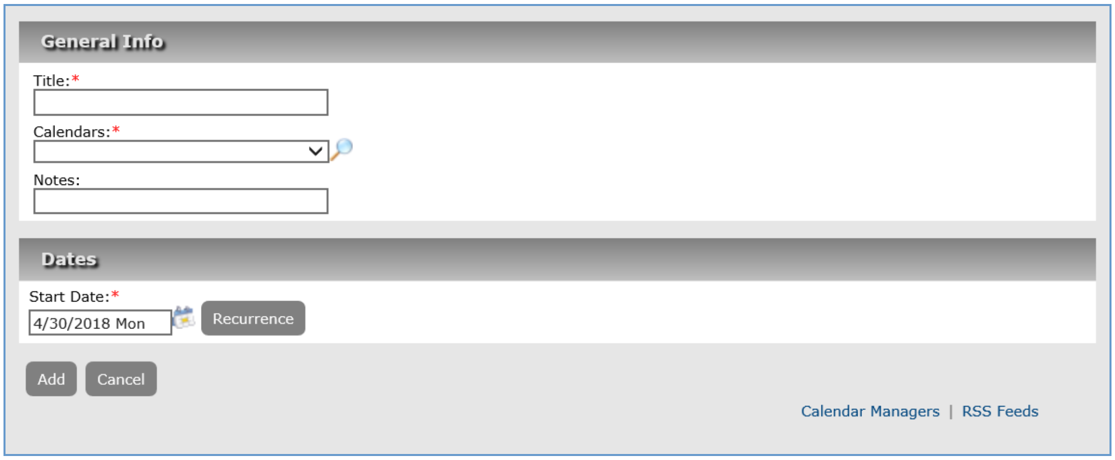
1. From the Admin Panel, navigate to Admin > Events & Special Dates > **Special Dates**.



The Special Dates page opens.



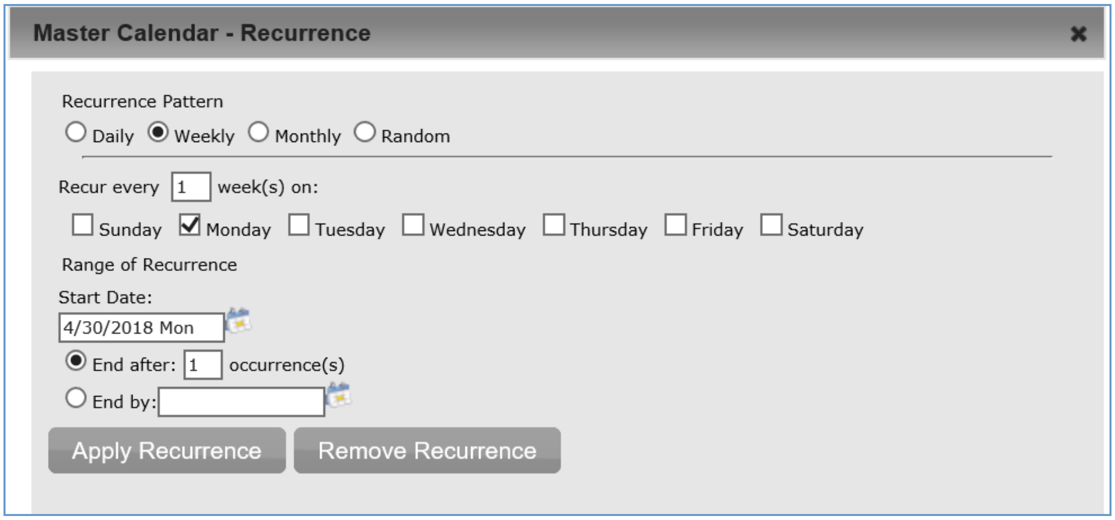
2. Under Actions, click **Add**. A blank General Info page opens. You use this page to add the information for the special date.

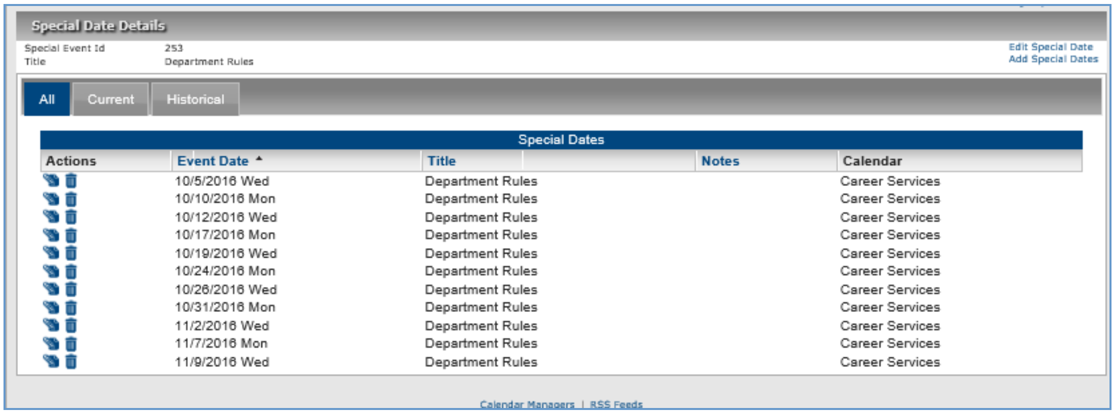


3. Add the information for the special date.

General Info Tab Fields

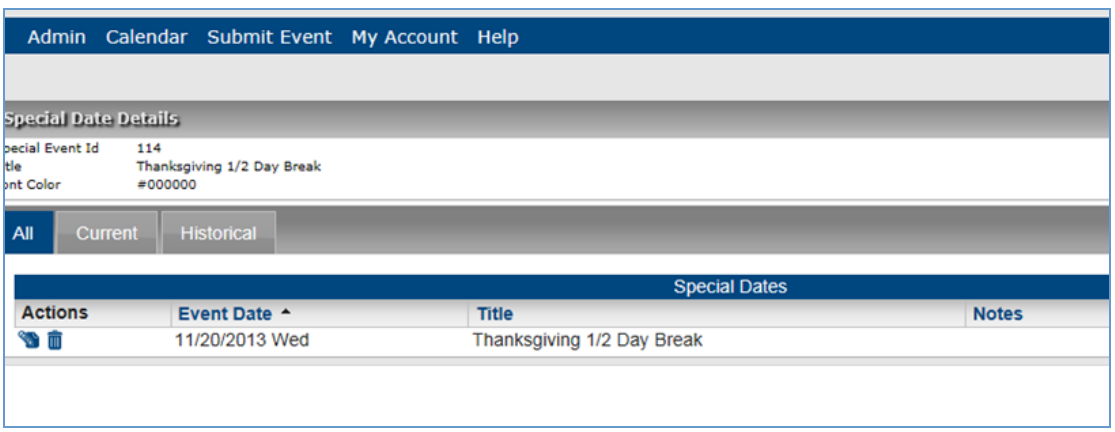
Field	Description
Title	The title or name of the special date.
Calendars	A list of all active calendars to which you have access as a Calendar Manager. Click the Lookup icon to open the Calendars dialog box and select the calendars to which you are adding the special date.
Notes	Any special information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

Field	Description
Font Color	Select another color for the title, and if applicable, notes.
Dates	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 Master Calendar Event Details dialog box and specify the information for the recurring date. **Note:** Make sure to click **Apply Recurrence** in this dialog box after you have completed the recurrence information.  Once you define a recurring special date, each occurrence will be listed on the Special Dates page.

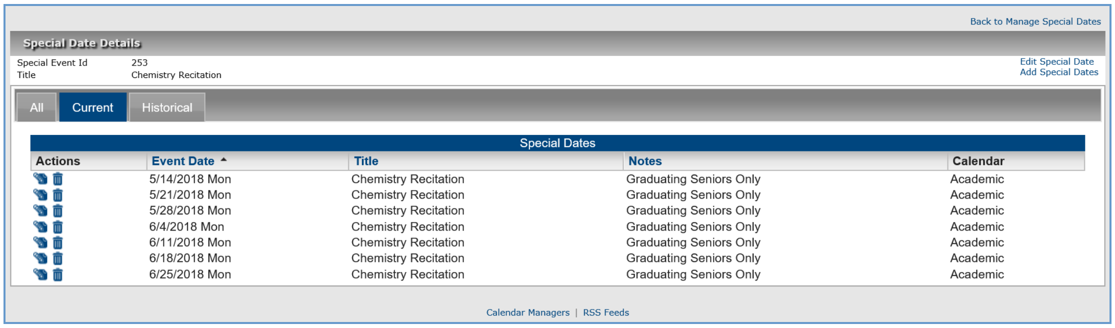
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td></td><td>


</td></tr>
</table>

4. Click **Add**. The Special Dates Details page opens on the All tab. The page now has three tabs (All, Current, and Historical) and a Special Date Details section. The Special Date Details section 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.

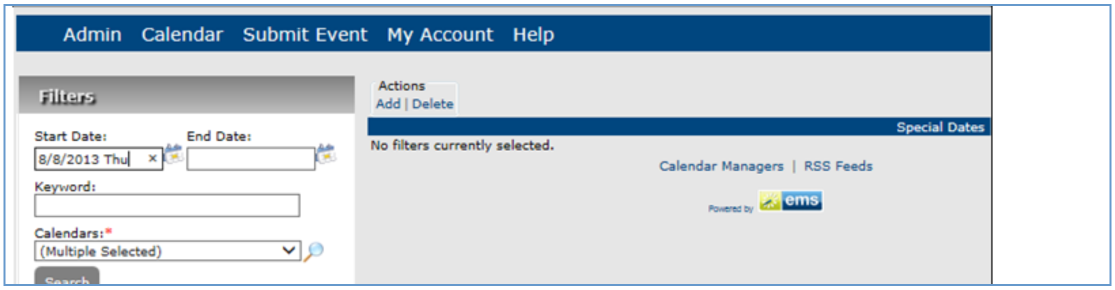


- The **Historical** tab shows the recurring dates for the special date that you just added that have already posted.

Working With Existing Special Dates

For a one-time special date or for a recurring special date, you can edit the title, calendars and color. For a single instance of a recurring special date, you can edit the title, notes, and dates.

1. *To edit a special date,* on the Admin menu, point to Events & Special Dates, and then click **Special Dates**. The Special Dates page opens.



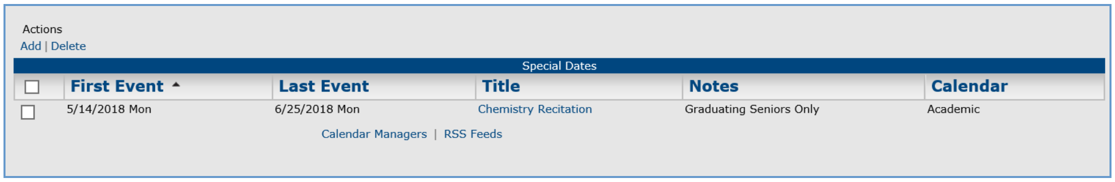
- Use the Filters area to search for the Special Date(s) you want to edit. (See field definitions below)

Special Dates, Search Criteria

Field	Description
Start Date/End Date	Search for special dates 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, regardless of the date.

Field	Description
Keyword	The keyword can be displayed in the special date title or notes.
Calendars	A list of all active calendars to which you have access as Calendar Manager. By default, All calendars to which you have access are selected as the search criterion. To filter this list, click the Lookup icon to open the Calendars dialog box and clear the selections for the calendars that you do *not* want to include in the search.

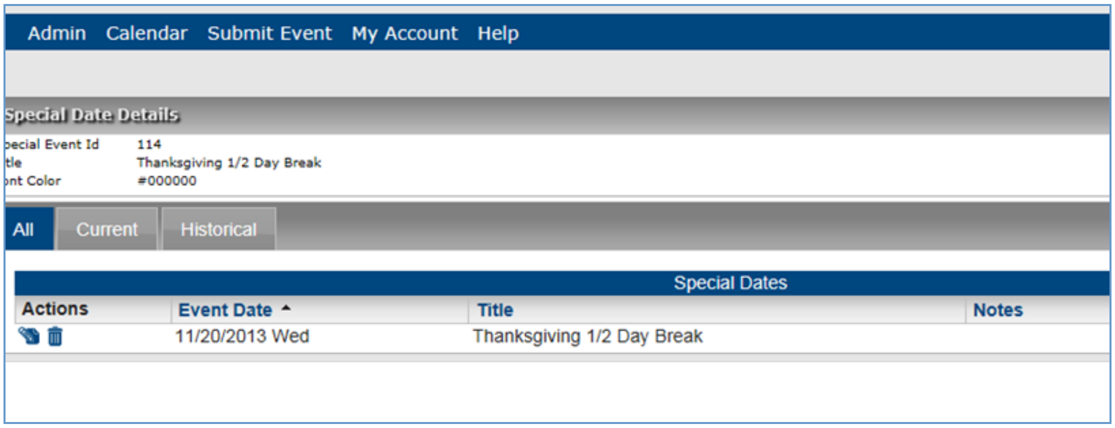
- Click **Search**. The page refreshes to list all special dates that meet your search criteria.



Note:

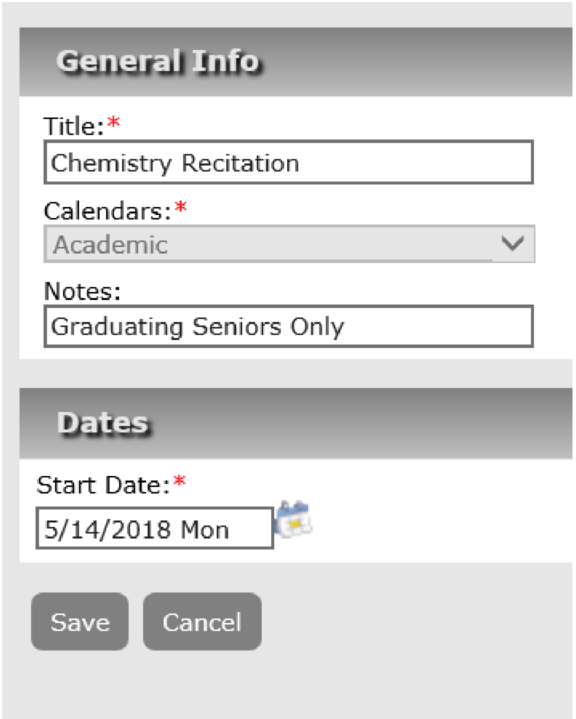
You can delete a Special Date by selecting the checkbox next to it and clicking Actions > Delete. This removes it from the Special Dates page and you will no longer be able to apply this special date.

- Click on the title of the special date that you want to edit. The Special Dates page opens on the All tab. The page now has three tabs (All, Current, and Historical) and a Details section. By default, the All tab is the opened tab.



> **Note:**
> For recurrent special dates, you can add more occurrences by clicking the Add Special Dates option.

- Click the Edit icon next to the selected date to edit existing information. The General Info page opens.



- Edit the information for the special date as needed.

General Info Page Fields

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.
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.

Field	Description
Start Date	The start date for the special date.

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

CHAPTER 35: Broadcasting Announcements

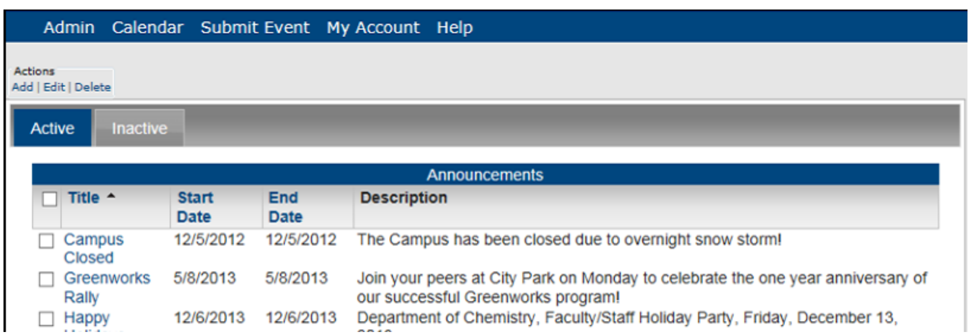
An *announcement* in Master Calendar is a message that displays prominently across the top of the Master Calendar default page, the top of the Master Calendar Home page, and the top of the page when viewing calendars in Master Calendar. You might want to use an announcement to call special attention to an event or events on the 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 launch page that emphasizes when a particularly prominent speaker will be on campus. Depending on the parameters that you have set in Master Calendar, an announcement can either be static or scrolling across the top of the launch page.

See Also: Customize Your Master Calendar Site.

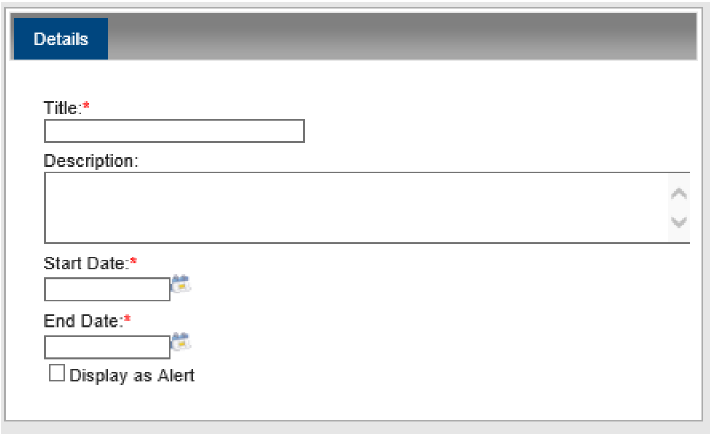
This topic guides you in creating new announcements, viewing announcement history, and editing, deleting, and activating and de-activating announcements.

Creating a New Announcement

1. From the Admin Panel, navigate to **Admin** > **Events & Special Dates** > **Announcements**. The Announcements page opens on the Active tab, which lists all currently active announcements in Master Calendar.



2. Under Actions, click **Add**. A blank Details tab opens. Add the information for the new announcement.



3. Add the information for the announcement.

Details Tab Fields

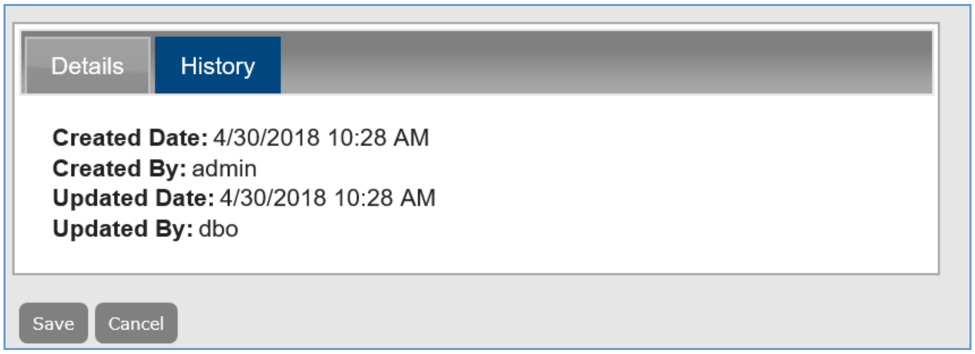
FIELD	DESCRIPTION
Title	The title or name of the announcement.
Description	A description of the event.
Start Date/End Date	The first date that you want the announcement to be displayed at the top of the Master Calendar launch page and the last date that you want the announcement to be displayed at the top of the Master Calendar launch page.
Display as Alert	Checking the **Display as Alert** box adds a caution symbol to the front of the announcement text.  Announcement Text Displayed as Alert

4. Click **Save**. The announcement is added to Master Calendar as an *active* announcement.

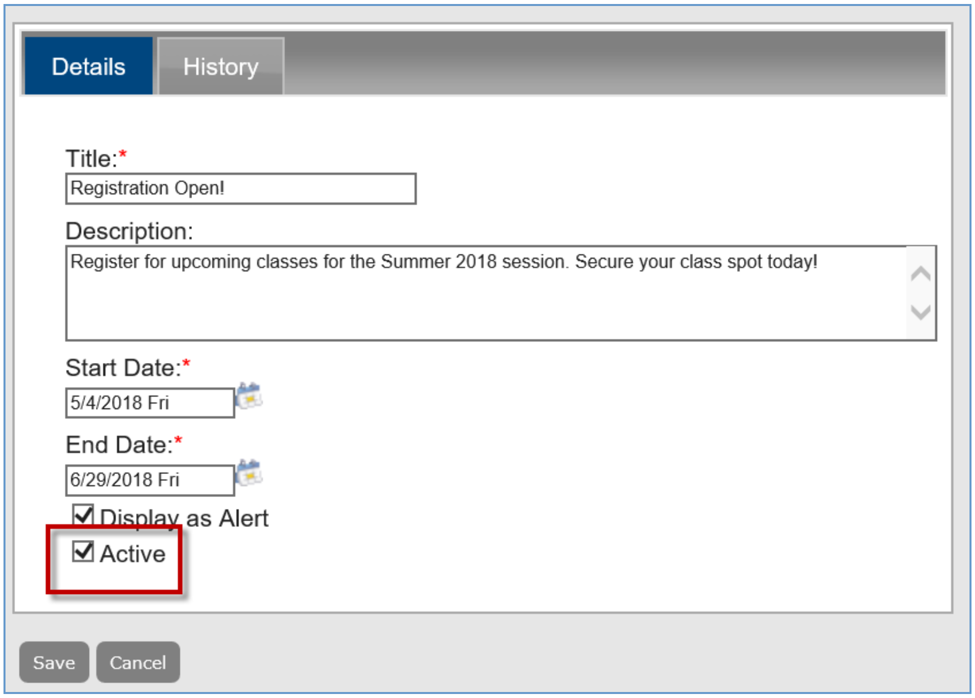
EDIT Existing Announcements

1. From the Announcements page, select the Active or Inactive tab.
2. Select the announcement with which you want to work.

3. Under Actions, click **Edit**. The Details tab opens, showing the title, description, and start and end dates for the announcement.
4. *To view history*, click the History tab. Click the **Details** tab to return to editing the announcement.



5. *To activate/de-activate announcements*, use the Active checkbox. This controls whether the item is listed on the Active tab.



6. *To edit the information for an announcement*, open the item and edit the title, description, or the start and end dates, or any combination of this information for the announcement as needed. 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.
7. *To delete an announcement,* select the item (you can select all items on a page by clicking Title) and

click Actions > **Delete**. A message prompts you to confirm that you want to delete all the selected announcements.

- Click OK. A message confirms the deletion.
- Click OK. The Active tab or Inactive tab is updated to reflect the deletion of the announcements.

8. Click **Save** to finalize your edits and return to the Announcements page.

CHAPTER 36: Connect Master Calendar to Your EMS Database

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. See Also: Connect to Data Sources.

This topic will provide information that will allow you to:

- Confirm and Install New License
- Add a Connector
  - Details Tab Fields
- Filter EMS events
- Specify the Frequency of the Data Import
  - Data Retrieval Tab Fields
- Activate a Connector
- Deactivate a Connector
- Edit a Connector
- Purge a Connector
- Run a Connector
- Delete a Connector
- Generate a Connectors List Report
- View History for a Connector

Managing connectors in EMS 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.

Note:
As with data sources, the Connector function requires that your organization purchase the optional module, Master Calendar Data Connectors.

Confirm and Install New License

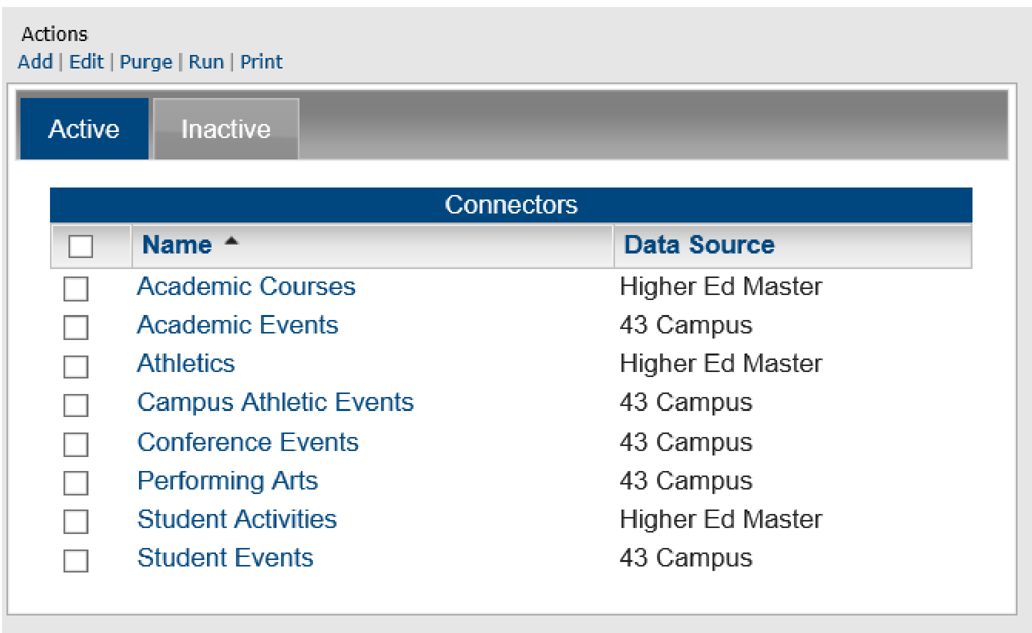
In order to use the Master Calendar Data Connectors, an organization must be properly licensed. If unsure about whether the EMS Data Connector Module has been purchased, log into the Master Calendar site, go to the systemcheck.aspx page, click the License Information heading and review the Licensed For list and look for a description to state “EMS Connector.”

If an organization was not previously licensed for the EMS Data Connector Module but is now, update the registration information by logging in to the Master Calendar, navigate to **Admin** > **Site Administration** > **Registration**, entering the new licenses information then click **Save License Data**. Please note, the license information is case sensitive and needs to be entered in exactly how it was provide from EMS Software.

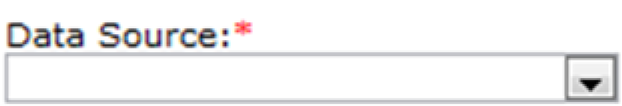
After entering the registration information, Master Calendar must re-read the license by going to the systemcheck.aspx page, clicking the License Information heading and then clicking Read License. At the very top of the page, it should state "License read successfully."

Add a Connector

1. From the Admin Panel, navigate to **Admin** > **Events & Special Dates** > **Connectors**. The Connectors page opens. By default, the Active tab is the opened tab. All the currently active connectors in Master Calendar are displayed on this tab.

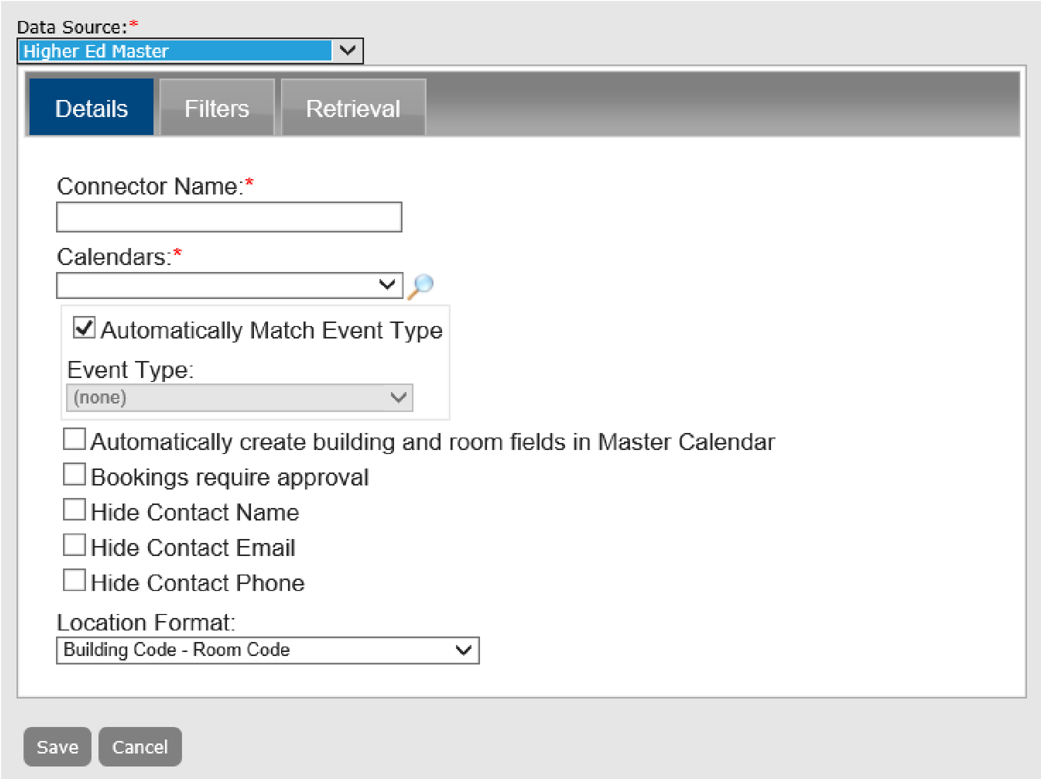


2. Under Actions, click **Add**. A Data Source list is displayed.



3. Select the data source that you want to use for the connector. The Details tab opens. You use the options on this tab to add the basic information for the connector.

> **Note:**
> Remember, the data source is for the connection to the EMS database, and you must also use a connector to import UDFs into your Master Calendar database. If you do not see the data source that you want to use for the connector, then it has not been created.



4. Enter the information for the connector.

Details Field Tab

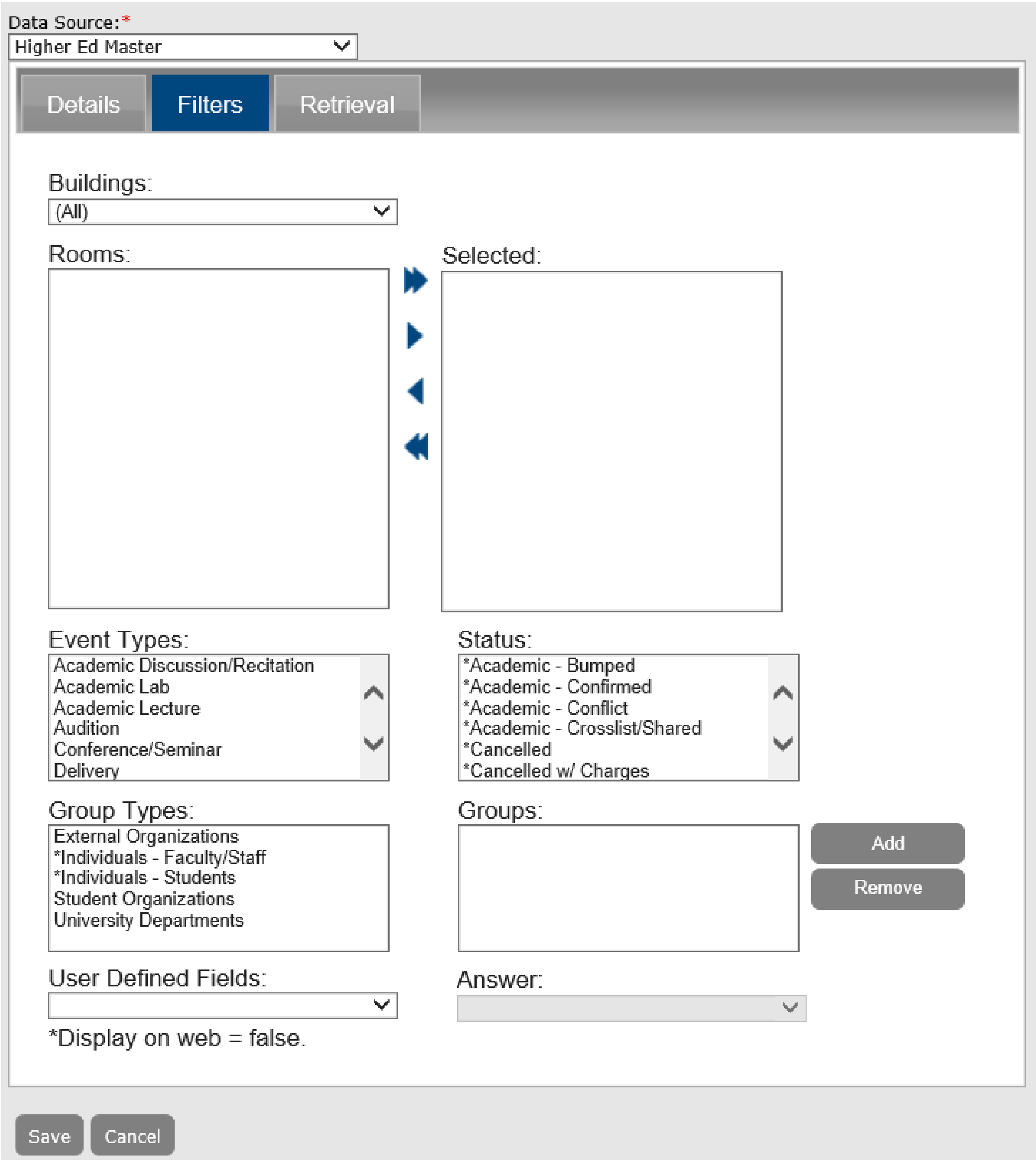
Field	Description
Connector Name	The title or the name for the connector.
Calendars	A list of all active calendars to which you have access as a Calendar Manager. Click the Lookup icon to open the Calendars dialog box and select the calendar or calendars to which you are importing the EMS events.
Automatically Match Event Type	Selected by default. If you leave this option selected, then every event

Field	Description
	type in the selected data source is mapped according to the event type mapping that you carried out for the data source. If you clear this option, then the Event Types 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 MC event type that you select on this dropdown list.
Bookings Require Approval	If you select this option, the imported events will follow the approval workflow for the Manage Events option. See Also: Managing Events.
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 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.
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.
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: • Building Code - Room Code • Building Code - Room Description • Building Description - Room Code • Building Description - Room Description • Building Code • Building Description • Room Code • Room Description

Filter 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 the EMS Display on Web setting 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:

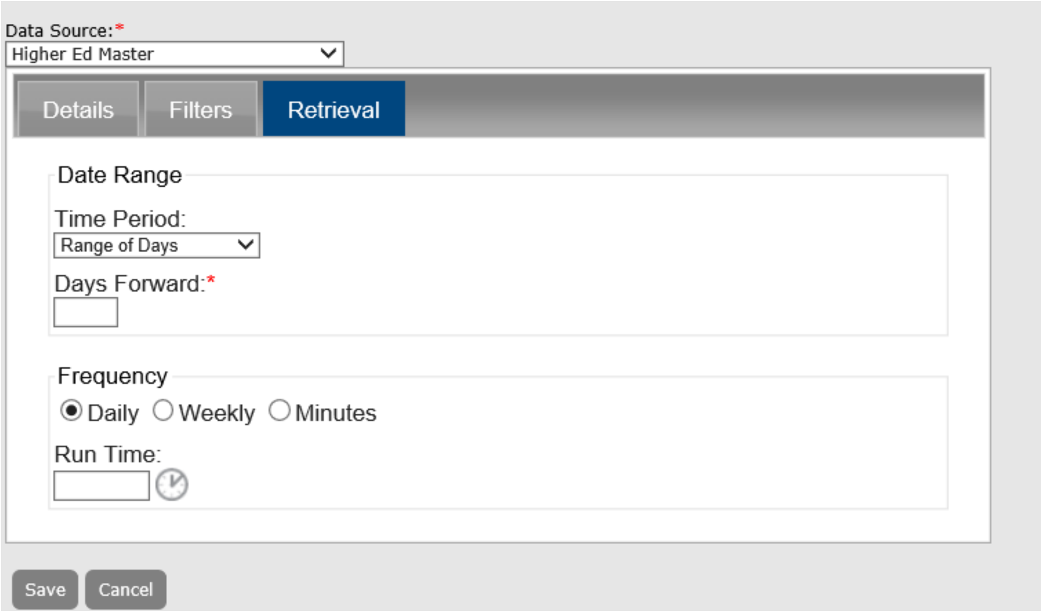
- Click **Add** to open an EMS Master Calendar Group Lookup dialog box.
- In the Filter field, specify the search criteria for the group, and then click Go. The search is limited to the exact order of characters in the search string, and the string must begin with the information for which you are searching. 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 is to be used 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, select (All) to pull 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.
5. Optionally, 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.

Specify the Frequency of the Data Import

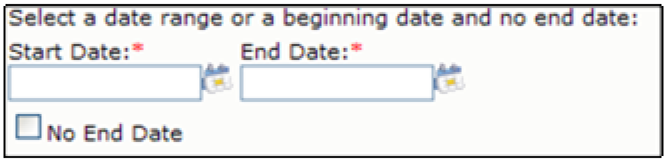
The frequency of the data import means how often are you querying the EMS database. The greater the frequency, the more current is the “synch up” between your EMS database and your Master Calendar database.

1. Click the **Retrieval** tab to open it.



2. Specify the information for the frequency of the data retrieval.

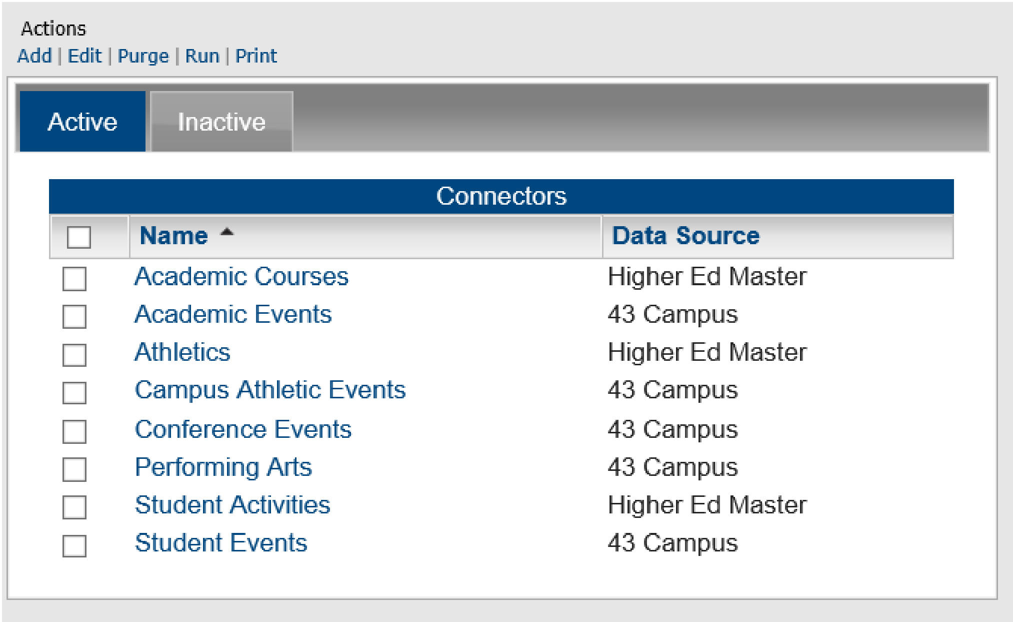
Data Retrieval Tab Fields

Field	Description
Time Period	The time frame for which the events are to be imported. Two values are available: • **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 appear instead. Specific Dates options 
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	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. **Note:** If you select No End Date, then all future events are pulled.
Frequency	Indicates how often you are querying the EMS database. • 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.)

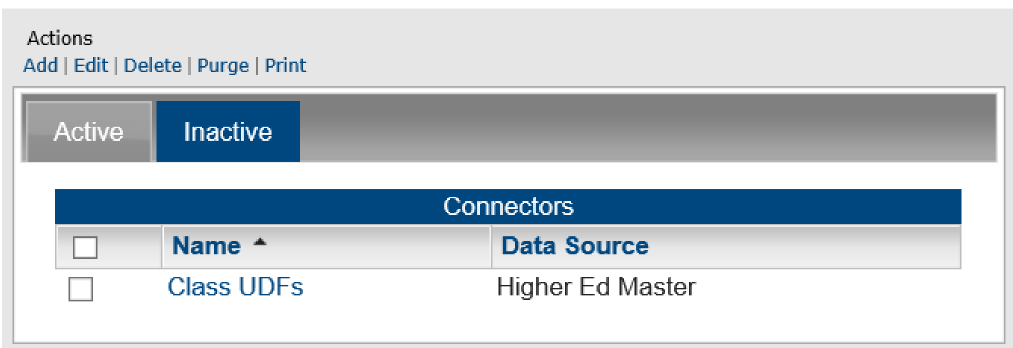
3. Click **Save**. The connector is saved as an *active* connector in Master Calendar.

Activate a Connector

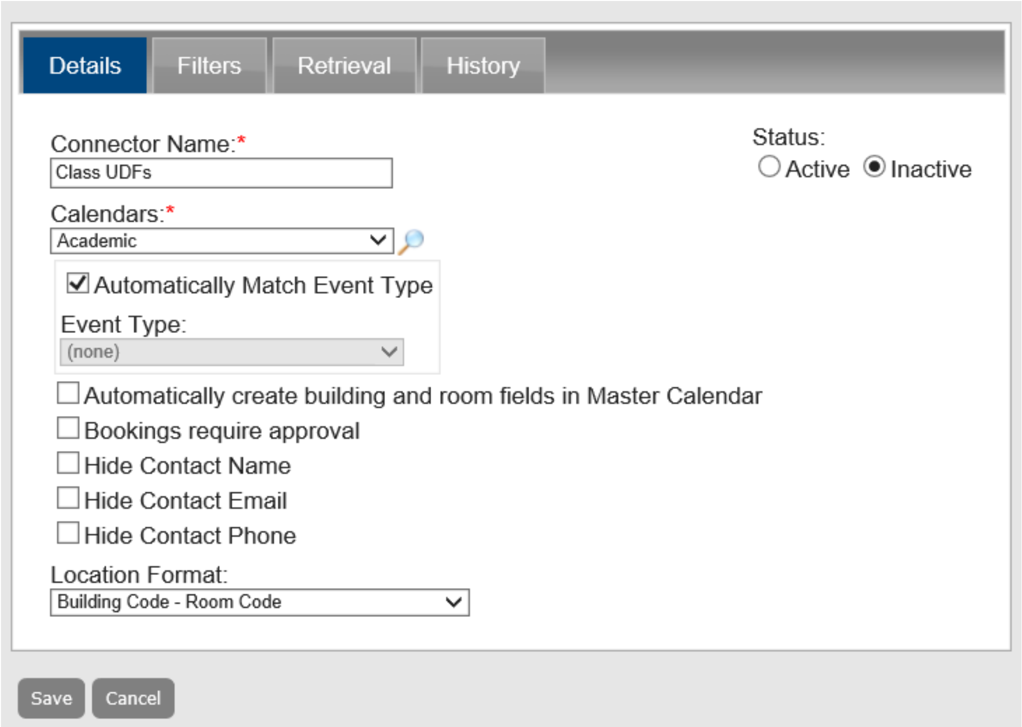
1. From the Admin Panel, navigate to **Admin** > **Events & Special Dates** > **Connectors**. The Connectors page opens. By default, the Active tab is the opened tab. All the currently active connectors in Master Calendar are displayed on this tab.



2. Click the Inactive tab to open. All currently inactive connectors in Master Calendar are displayed on this tab.



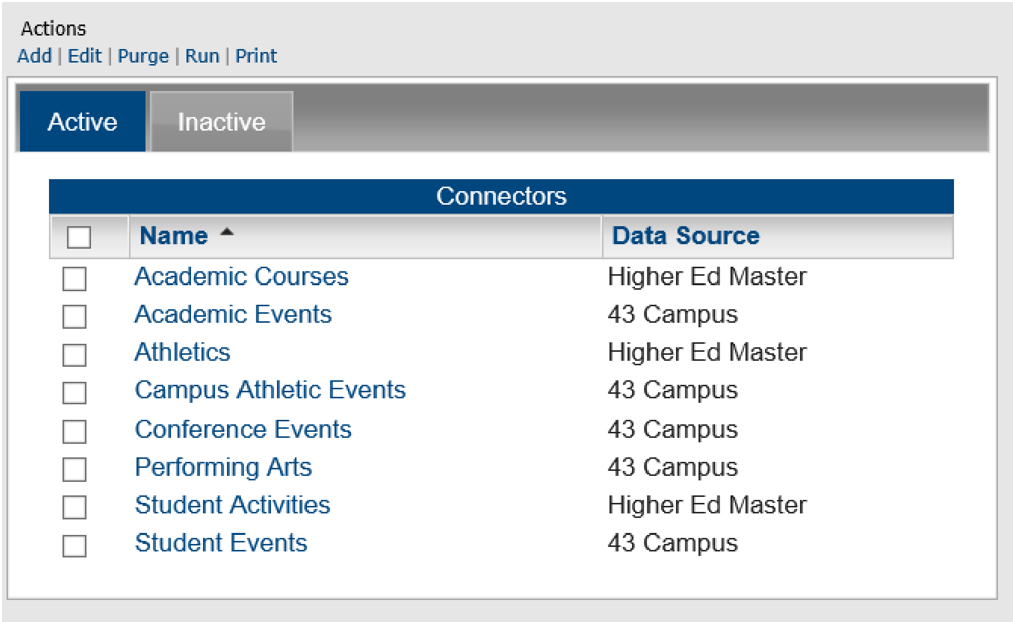
3. Select the connector that you are activating.
4. Under Actions, click **Edit**. The Details tab opens. The Inactive option is selected.



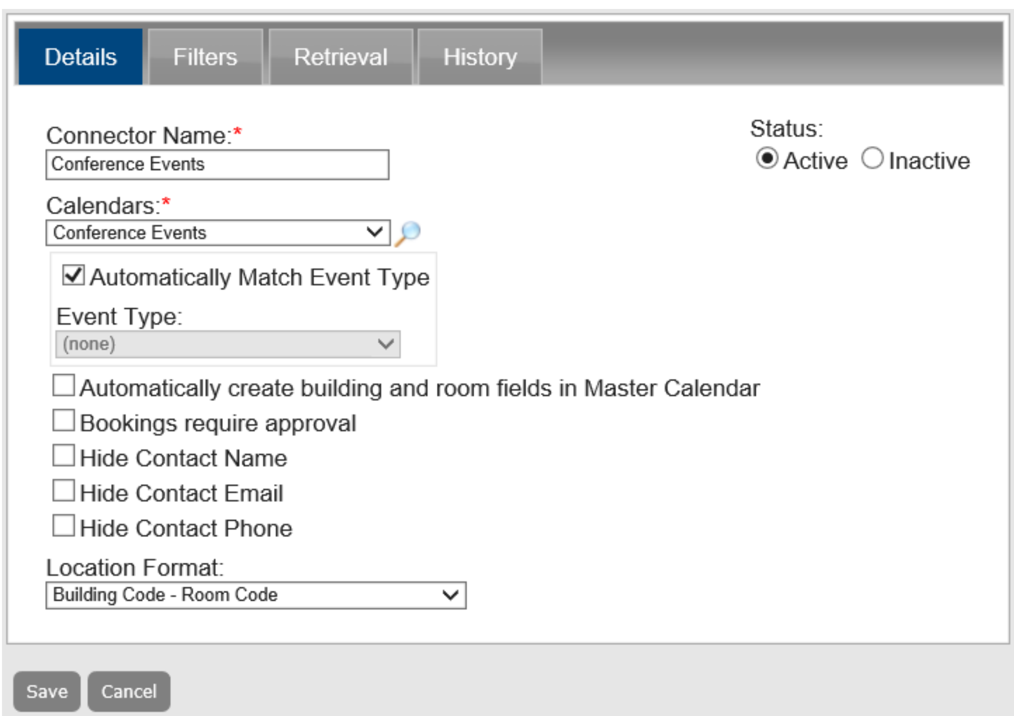
5. Select **Active**.
6. Click **Save**. The connector is saved and is displayed on the Active tab on the Connectors page.

Deactivate a Connector

1. From the Admin Panel, navigate to **Admin** > **Events & Special Dates** > **Connectors**. The Connectors page opens. By default, the Active tab is the opened tab. All the currently active connectors in Master Calendar are displayed on this tab.



2. Select the connector that you want to de-activate.
3. Under Actions, click **Edit**. The Details tab opens. The Active option is selected.

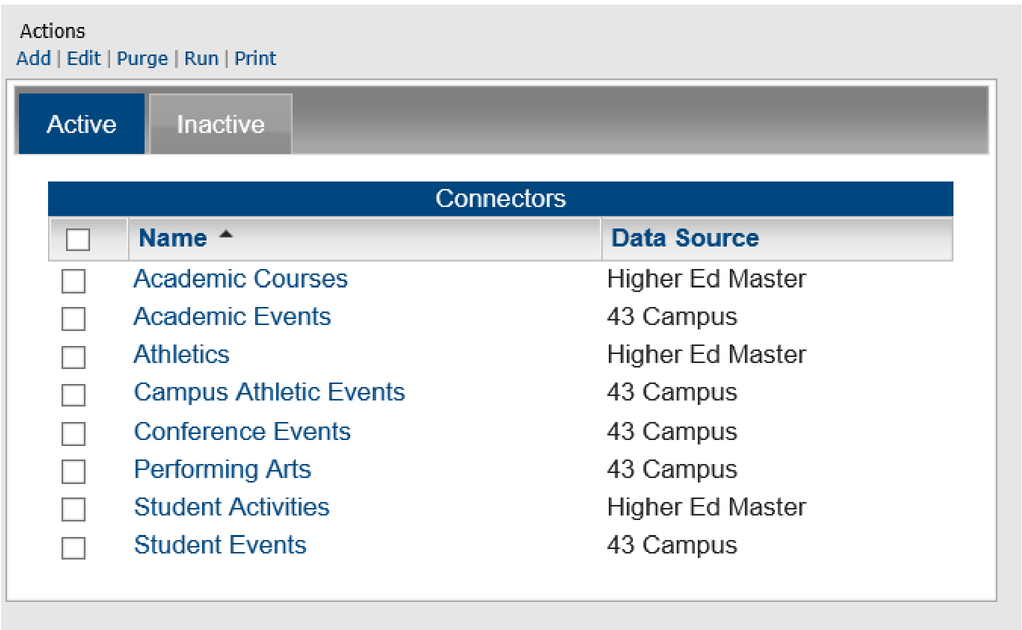


4. Select **Inactive**.
5. Click **Save**. The connector is saved and is displayed on the Inactive tab on the Connectors page.

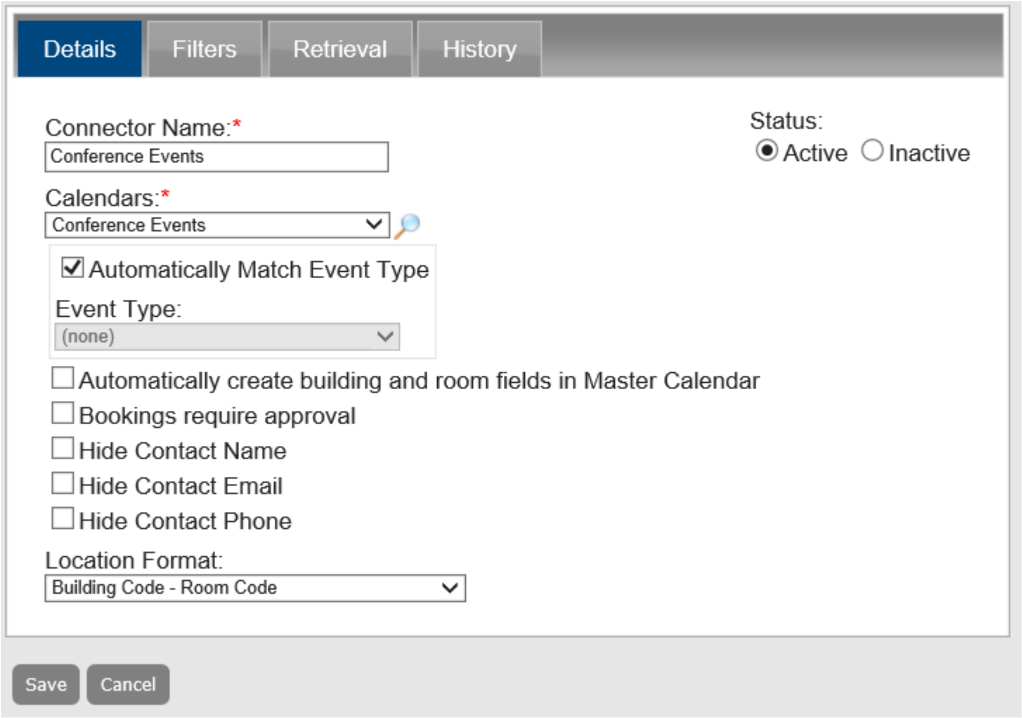
Edit a Connector

You can edit both active and inactive connectors.

1. From the Admin Panel, navigate to **Admin** > **Events & Special Dates** > **Connectors**. The Connectors page opens. By default, the Active tab is the opened tab. All the currently active connectors in Master Calendar are displayed on this tab.



2. If needed, click the Inactive tab to open it.
3. Select the connector that you are editing.
4. Under Actions, click **Edit**. The Details tab opens.



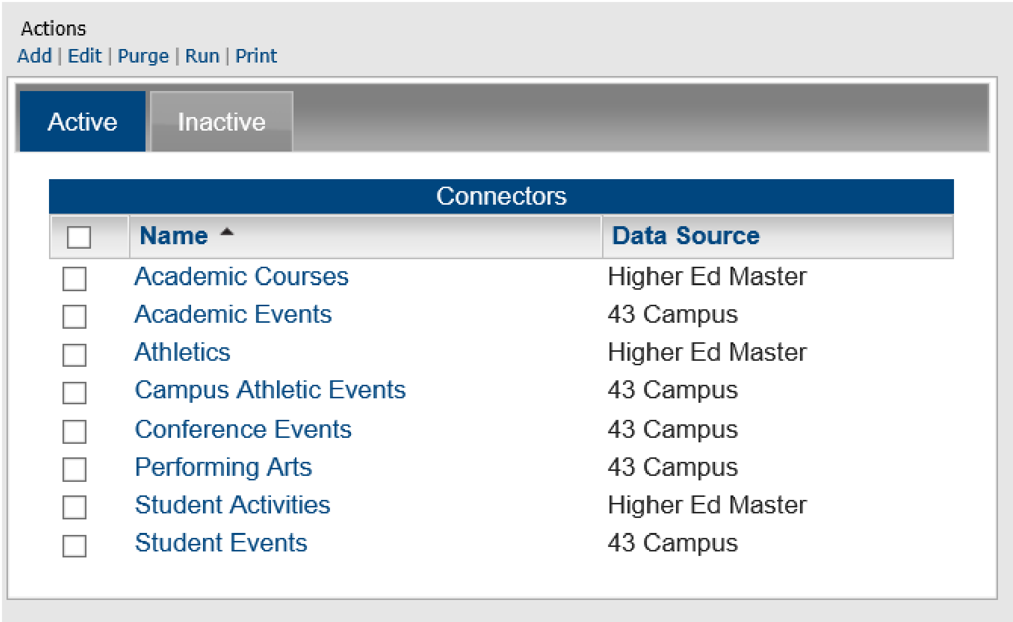
5. Edit the information as needed for the connector. See Data Retrieval Fields Tab.

6. Click **Save**. The edited connector is saved in EMS Master Calendar.

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.

1. From the Admin Panel, navigate to **Admin** > **Events & Special Dates** > **Connectors**. The Connectors page opens. By default, the Active tab is the opened tab. All the currently active connectors in Master Calendar are displayed on this tab.

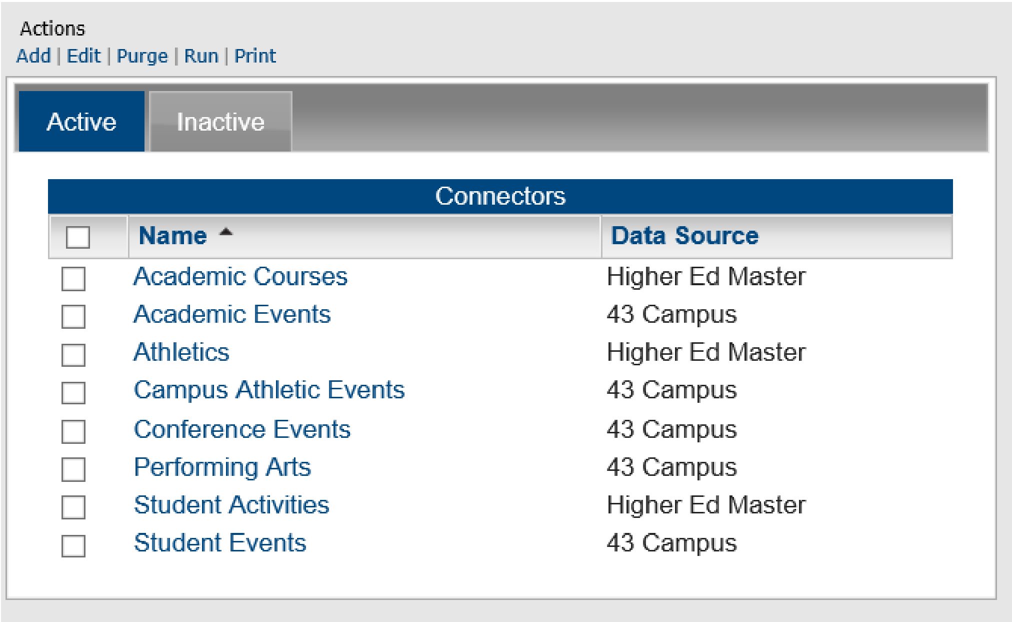


2. If needed, click the **Inactive** tab to open it.
3. Select the connector that you are purging.
4. Under Actions, click **Purge**. A message opens asking you if you are sure that you want to purge all the selected connectors.
5. Click **OK** in the message. A message opens indicating that all the selected connectors were purged.
6. 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.

Run a Connector

To manually override the frequency setting for a connector, you run a connector. After you run a connector, the connector will continue to run at its regularly scheduled times.

1. From the Admin Panel, navigate to **Admin** > **Events & Special Dates** > **Connectors**. The Connectors page opens. By default, the Active tab is the opened tab. All the currently active connectors in Master Calendar are displayed on this tab.

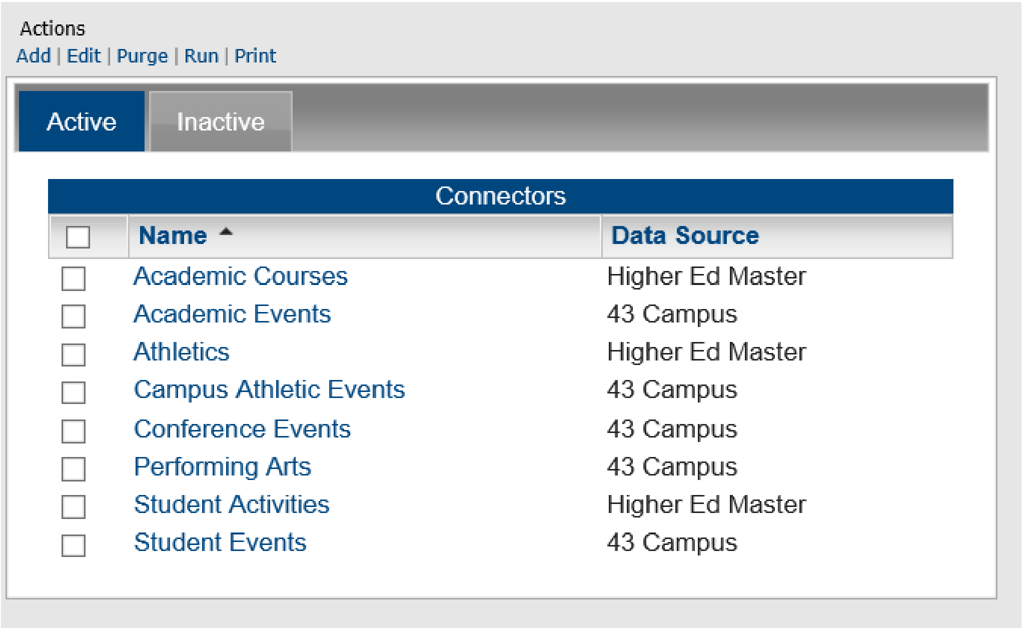


2. Select the connector that you are running.
3. Under Actions, click **Run**. After the connector runs, a message opens indicating that the run was successful. It also indicates the number of records that were inserted, the number of records that were updated, and the number of records that were deleted.

Delete a Connector

You can only delete inactive connectors. To delete a currently active connector, you must first de-activate the connector. When you delete a connector, none of the events that were imported through the connector are deleted. To delete the events, purge the data first.

1. From the Admin Panel, navigate to **Admin** > **Events & Special Dates** > **Connectors**. The Connectors page opens. By default, the Active tab is the opened tab. All the currently active connectors in Master Calendar are displayed on this tab.



2. Click the **Inactive** tab to open. All currently inactive connectors in Master Calendar are displayed on this tab.

3. Under Actions, click **Delete**. A message opens asking you if you are sure that you want to delete all the selected connectors.
4. Click **OK** in the message. A message opens indicating that all the selected connectors were successfully deleted.
5. Click **OK** in the message. The Inactive tab is refreshed to show the remaining, if any, inactive connectors in Master Calendar.

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 automatching for the imported event types has been selected.

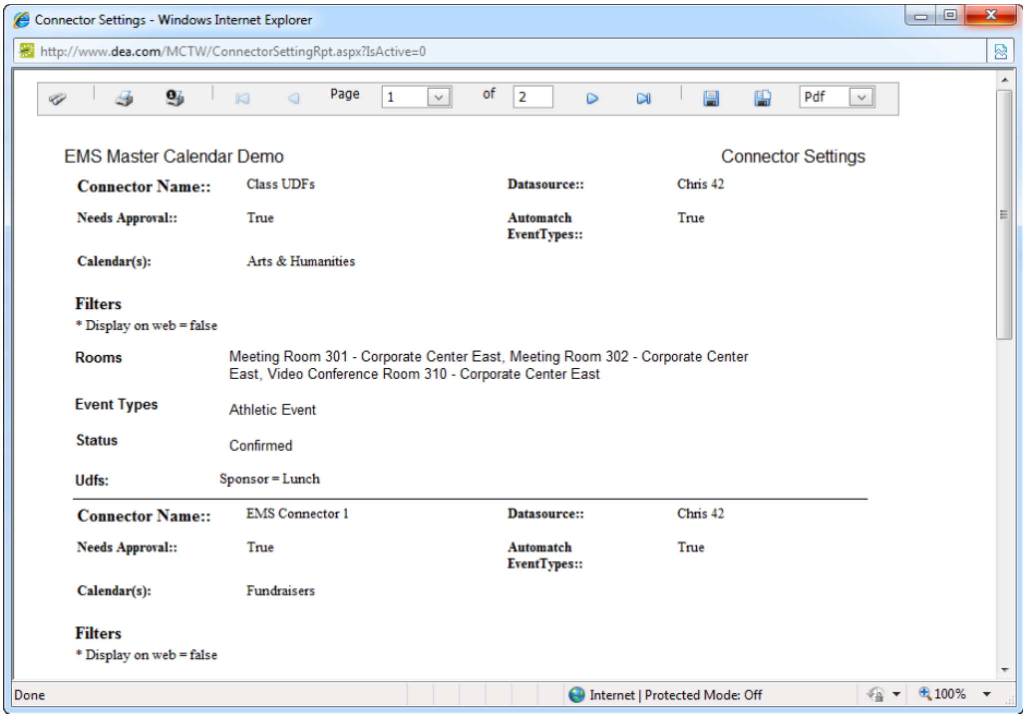
1. From the Admin Panel, navigate to **Admin** > **Events & Special Dates** > **Connectors**. The Connectors page opens. By default, the Active tab is the opened tab. All the currently active connectors in Master Calendar are displayed on this tab.

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**.

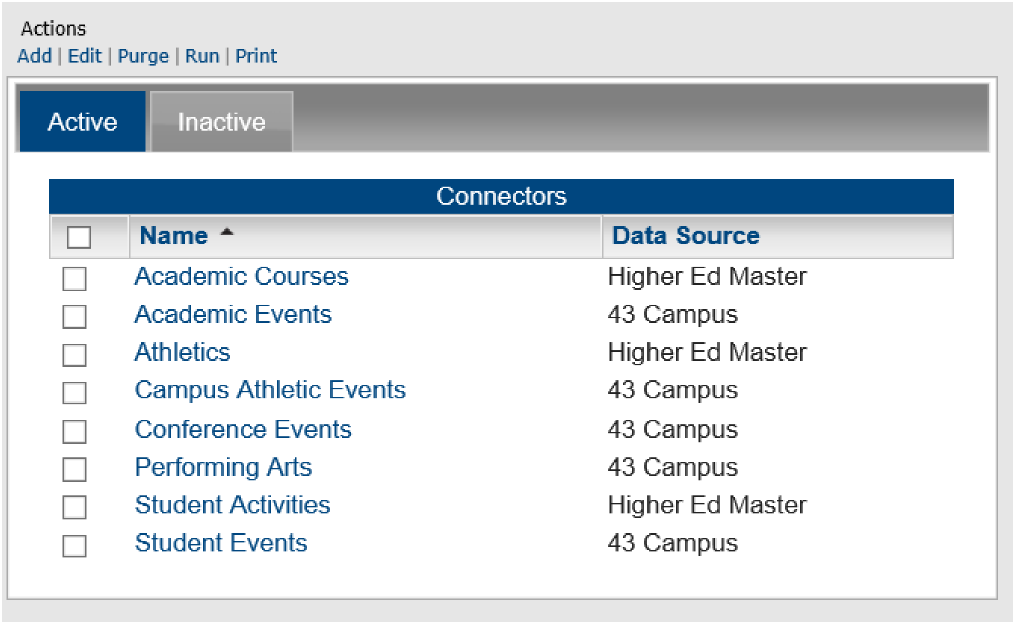
An onscreen preview of the Connectors List report opens in its own window. A variety of options are available from this preview, including (from left to right at the top of the onscreen preview) the options to search the report results, print the report in its entirety, print the currently displayed report page, and export the report to a file and save the file.



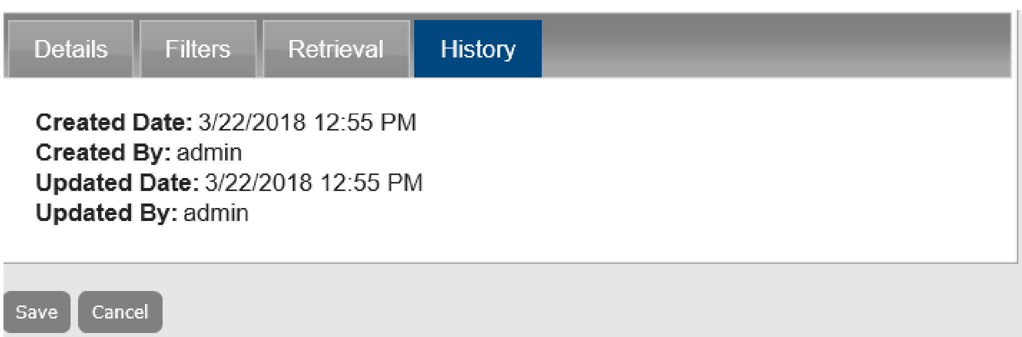
View History for a Connector

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.

1. From the Admin Panel, navigate to **Admin** > **Events & Special Dates** > **Connectors**. The Connectors page opens. By default, the Active tab is the opened tab. All the currently active connectors in Master Calendar are displayed on this tab.



2. If needed, click the **Inactive** tab to open it.
3. Select the connector for which you are viewing the history.
4. Under Actions, click **Edit**. The Details tab opens.
5. Click the **History** tab to open it and view the history for the selected connector.



CHAPTER 37: Import Events into Your EMS Master Calendar System

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 defined for Master Calendar.

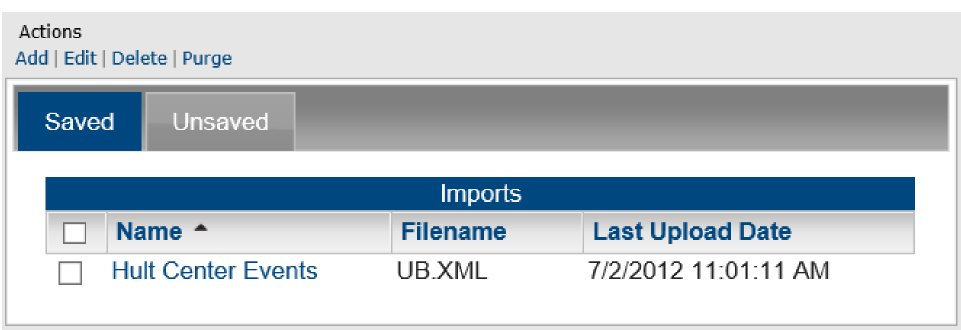
1. To obtain file specifications and view examples of allowed files, click the **Import file specifications** link on the **Details** tab of the **Imports** page.
2. To access this link, do one of the following:
   - Click **Admin** > **Event and Special Dates** > **Import Events**, and then click **Add**.
   - Select an imported event, and then click **Edit**.

This topic guides you in importing an event, editing, deleting and purging imported events, and viewing the history for an imported event.

> **Note:**
> Ensure Master Calendar is connected to the EMS database as a data source and has connectors set up.

Import an Event

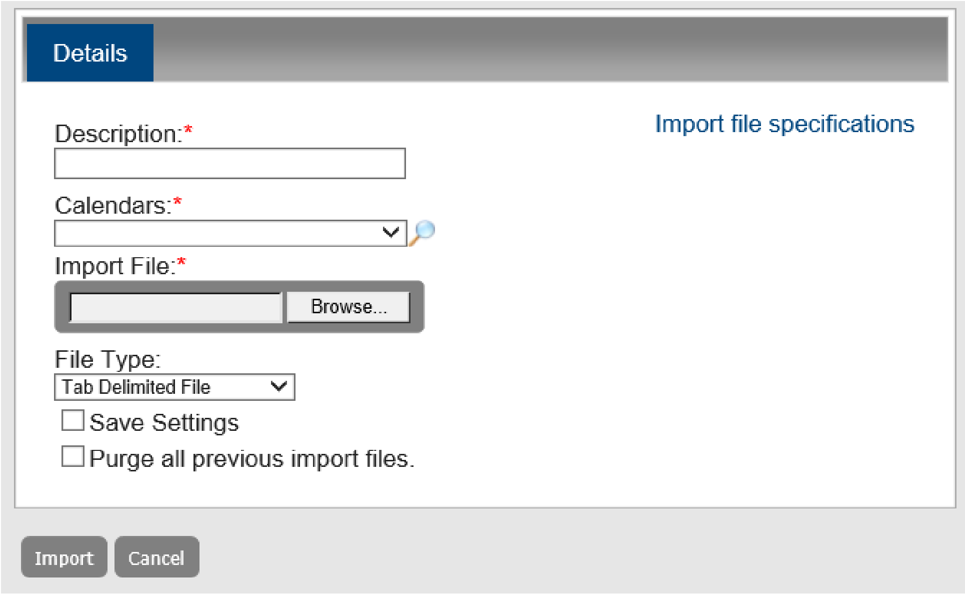
1. From the Admin Panel, navigate to **Admin** > **Events & Special Dates** > **Import Events**. The Imports page opens to the Saved tab, which lists all currently imported files saved in Master Calendar.



2. Under Actions, click **Add**. A blank Details tab opens, where you specify the calendar to which you are

importing the event and you select the file to import.

3. Enter the information for the imported file.



Details Tab Fields

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 Calendar Manager. Click the Lookup icon to open the Calendars dialog box and select the calendars to which you are adding the special date.
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 from which you can select one of two options: • Tab delimited file (the default value) • XML file
Save Settings	Optional. Select this value to save the imported file in Master Calendar.

Field	Description
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:

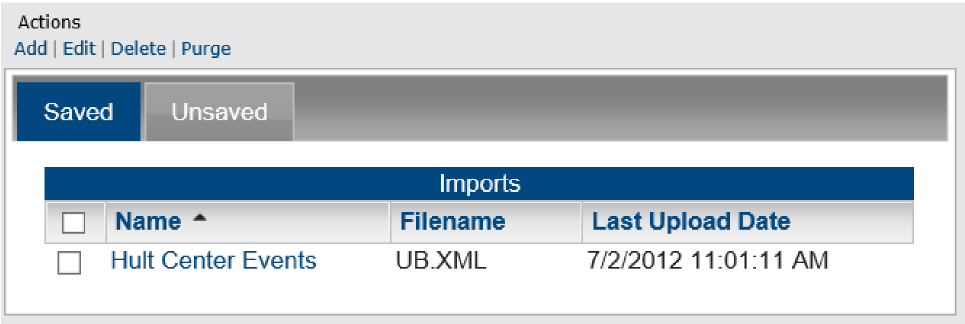
   - You selected Save Settings, the import is displayed on the Save tab. An automated email from emssoftware.com is sent to the address that you used to log in to Master Calendar. The email is titled “Master Calendar File Import Process” and the message states that “The file for the import named < > was successfully imported.”

   - You did *not* select Save settings, the import is displayed on the Unsaved tab. An automated email from 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 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.

Edit Imported EMS Event Files

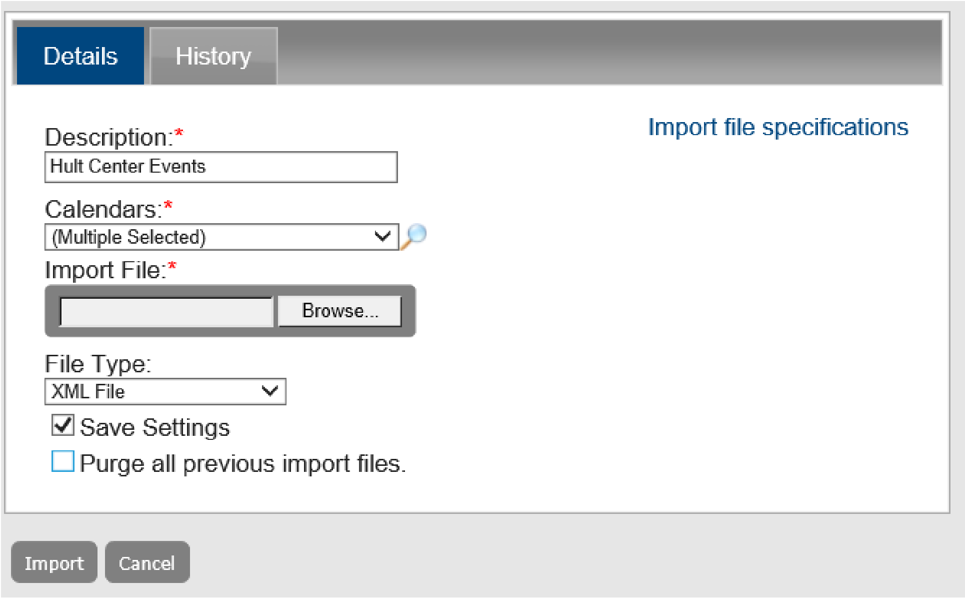
Note:
You can only edit an import file only if you saved it in EMS Master Calendar.

1. From the Admin Panel, navigate to **Admin** > **Events & Special Dates** > **Import Events**. The Imports page opens to the Saved tab, which lists all currently imported files saved in Master Calendar. You can select any file using the checkboxes on the left and then apply Actions from the **Actions** menu.



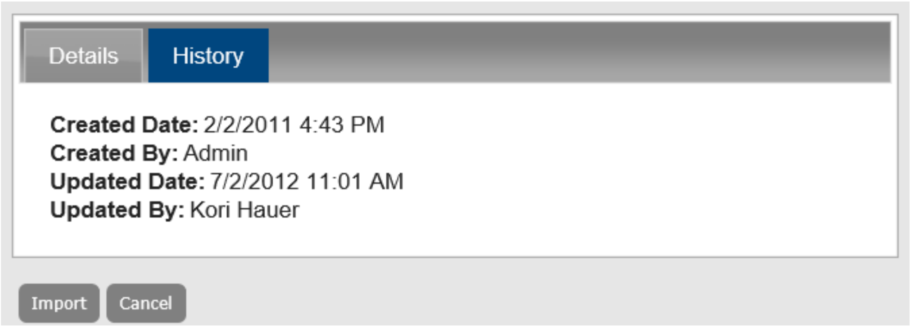
2. Select the imported event file you want to work with.

3. Under Actions, click **Edit**. The Details tab opens, where you edit the information for the import, including its description, the calendars to which you are importing the external events, the file to be used for the import, and the file type. You can also indicate whether you want to save this edited import and whether you want to purge all previously imported files that were saved in Master Calendar.



4. *To view the history for an import file*, select the import file for which you are viewing the history.

   - Under Actions, click **Edit**. The Details tab opens.
   - Click the History tab to view the history for the selected import. Click **Cancel** to return to the Details tab.



5. *To delete an imported event,* select the event file from the Saved or Unsaved tab in the Import Events page. To select all import files in a single step, select Description. If you have multiple pages of imports to delete, you must repeat this entire process on each page.

> **Note:**
> When you delete a *saved* import file, you are deleting the import file plus 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.

- Under Actions, click **Delete**. A message prompts you to confirm that you want to delete all the selected imports.
- Click **OK**. A message confirms the deletion.
- Click **OK**. The Active tab or Inactive tab is updated to reflect the deletion of the import file(s).

6. *To purge an imported even*t, select the file from the Saved tab (you can purge an import file only if you saved the file in Master Calendar). 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.
    - Under Actions, click **Purge**. A message prompts you to confirm that you want to purge all the selected imports.
    - Click **OK**. A message confirms the deletion.
    - Click **OK**. The Active tab or Inactive tab is updated to reflect the purge of the import file(s).

CHAPTER 38: Create Custom Reports in Master Calendar

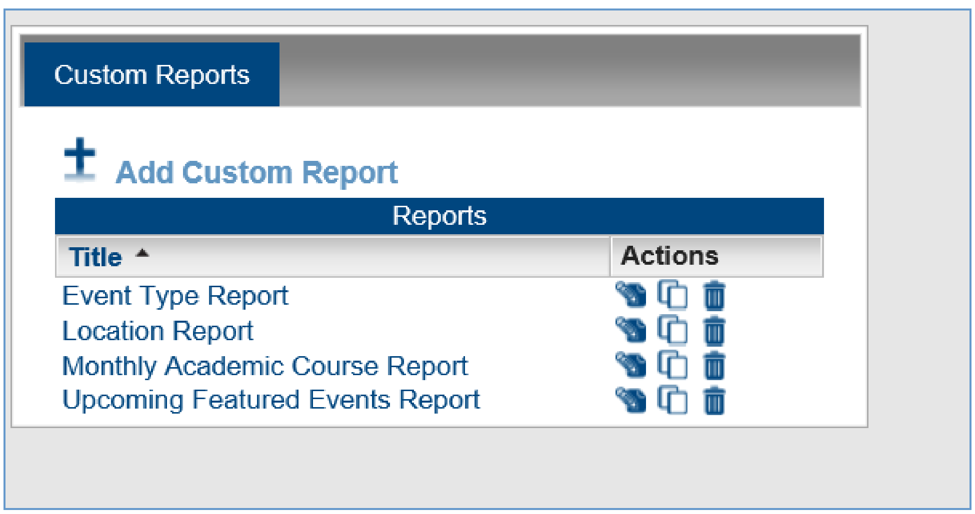
The*Custom Reports* function is available from the Admin menu. You use this function to create custom reports for retrieving information from your Master Calendar database. When you create a custom report, you can name and save the custom report so that you can run the custom report at any time that you choose. You can create a custom report from “scratch,” 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.

This topic provides information about the following:

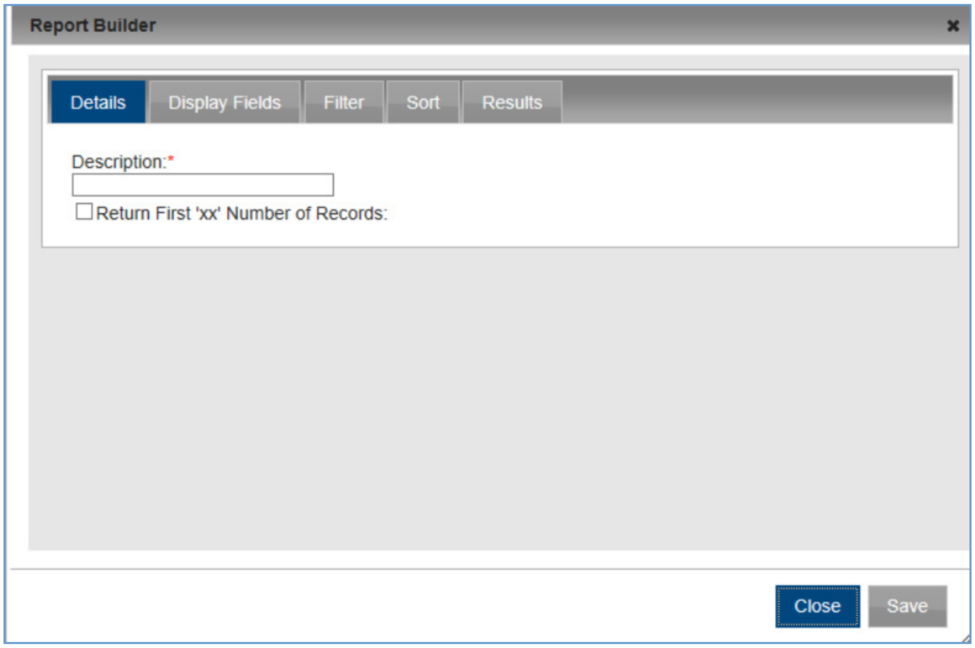
- Create a Custom Report “from Scratch”
- Report Builder Tabs
- Create a Custom Report by Copying an Existing Custom Report
- Edit a Custom Report
- Delete a Custom Report
- Run, Print, and Export a Custom Report

Create a Custom Report “from Scratch”

1. From the Admin Panel, navigate to **Admin** > **Events & Special Dates** > **Custom Reports**. The 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.



2. Click **Add Custom Report**. 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.



3. Enter the information for the custom report on each tab (using subsequent sections of this topic).
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.

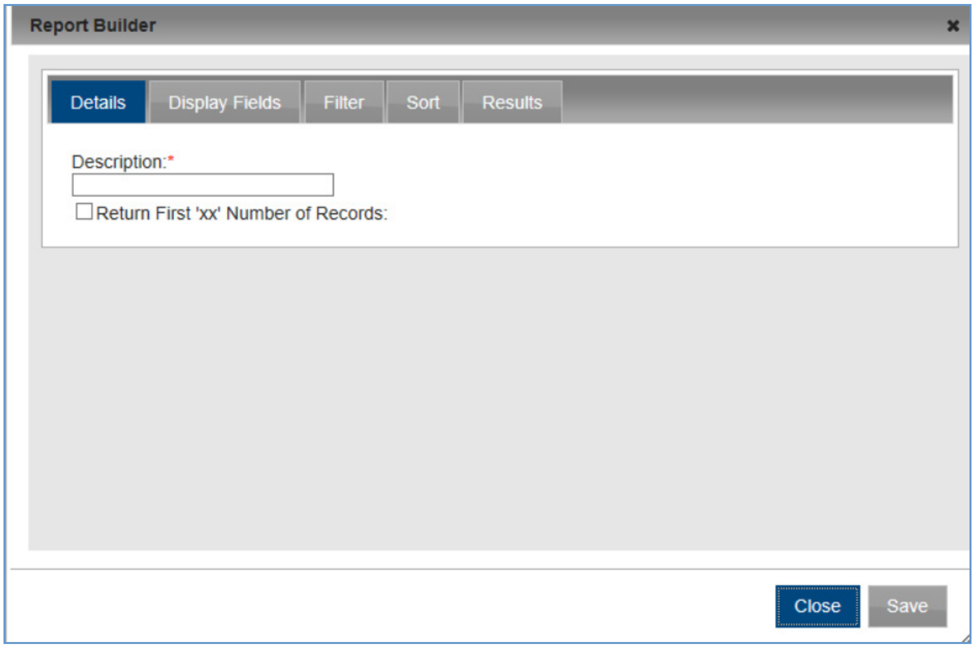
Report Builder Tabs

The following topics contain instructions for the Report Builder tabs:

- Details Tab
- Display Field Tab
- Filter Tab
- Sort Tab

Details Tab

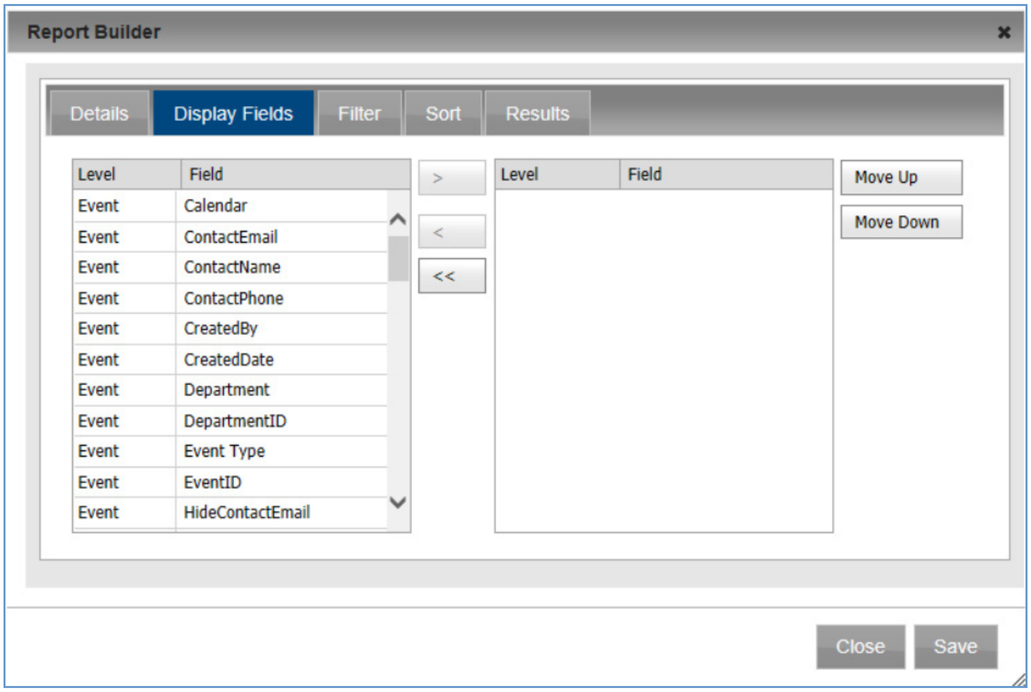
1. From the Admin Panel, navigate to **Admin** > **Events & Special Dates** > **Custom Reports**.
2. Click **Add Custom Report**. The Report Builder dialog box opens.



3. On the **Details** tab, name and define the custom report.

Option	Description
Description	Required. Name or title for the custom report (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.

4. 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.



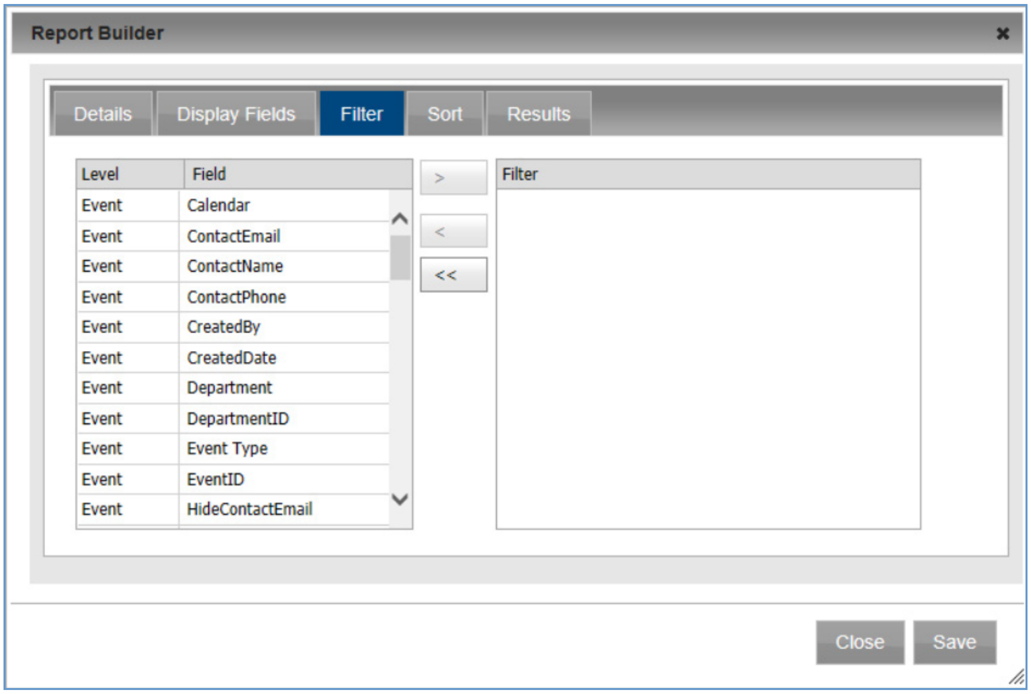
Display Fields Tab

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** arrow (**>**) 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.

   Note:
   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.
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.

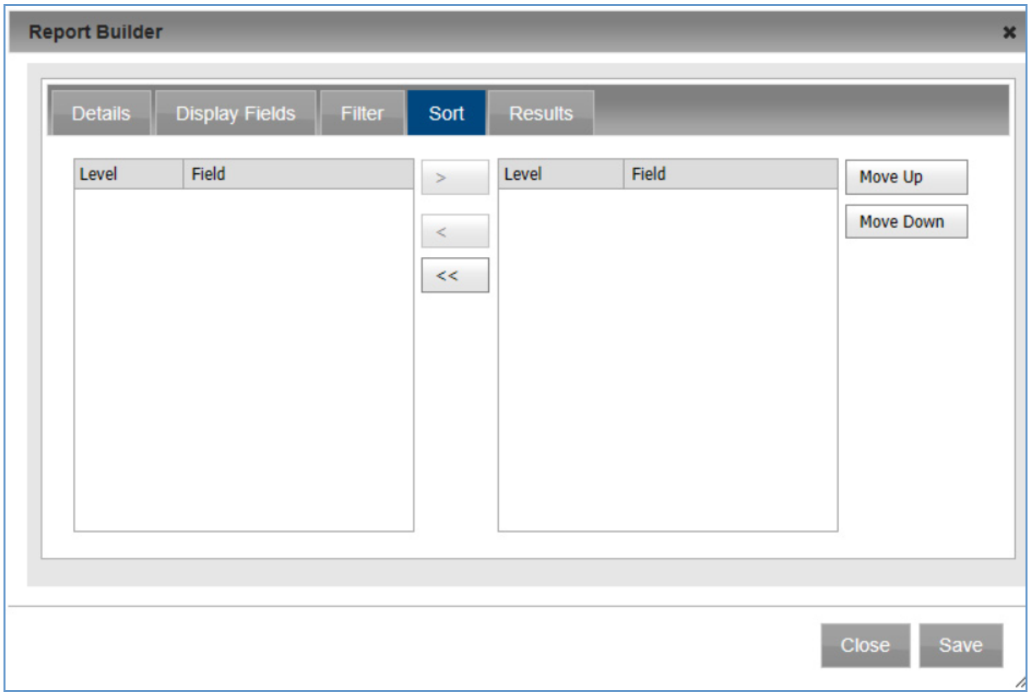


Filter Tab

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** arrow (>).
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

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** arrow (>) to move the fields to the Selected list.

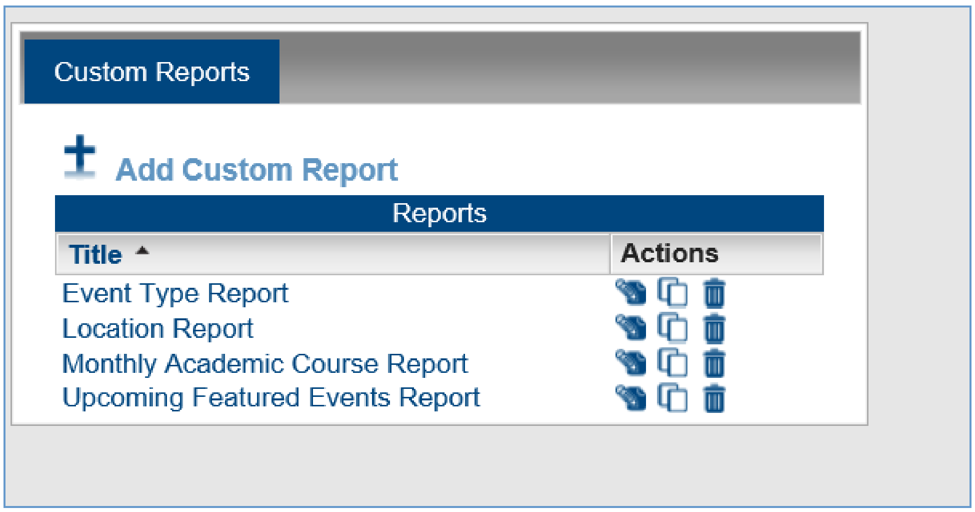
> **Note:**
> If you are copying an existing custom report, then when the **Sort** tab opens, the Selected list is already populated with a list of fields. You can select one or more of these fields in the Selected list and then click the **Remove** button (**<**) to move these fields back to the Available list. To remove all fields in a single step, click the **Remove All** (**<<**) button.

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.

Create a Custom Report by Copying an Existing Custom Report

1. From the Admin Panel, navigate to **Admin** > **Events & Special Dates** > **Custom Reports**. The 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.

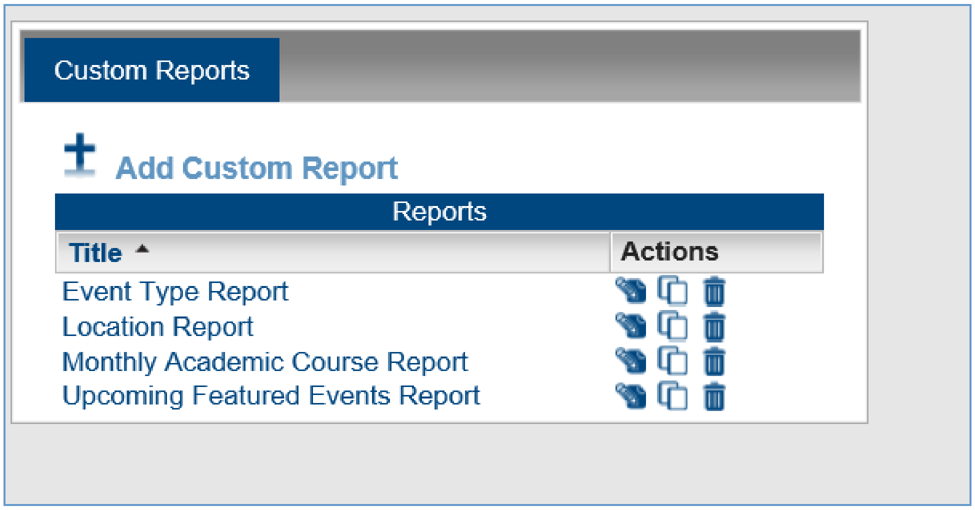


2. Under **Actions**, click the **Copy** icon for the custom report that you would like to copy. A message opens indicating that the selected report was copied.
3. Click **OK** to close the message and return to the Custom Reports page. An entry for the copied custom report is displayed on the Custom Reports page as <**custom report Name**> **Copy**.
4. Click **Edit** 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:
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.

Edit a Custom Report

1. From the Admin Panel, navigate to **Admin** > **Events & Special Dates** > **Custom Reports**. The 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.

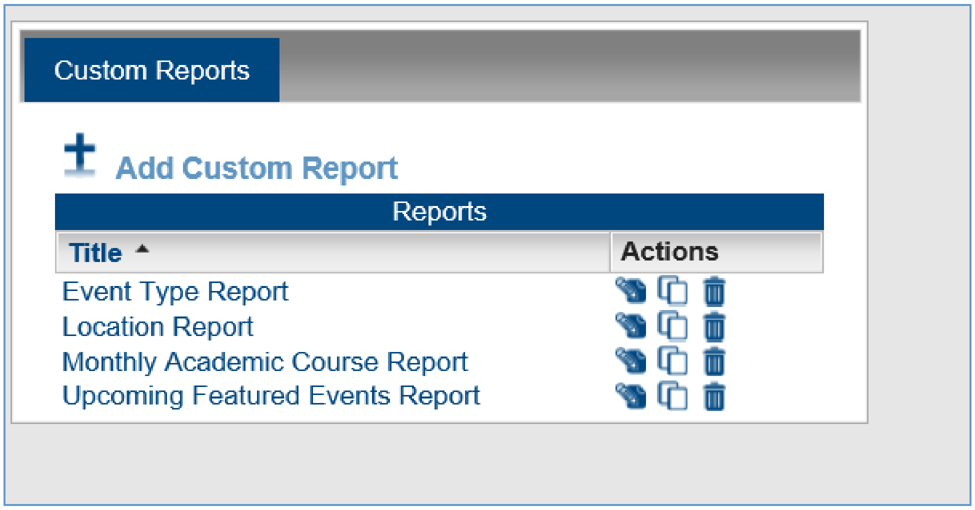


2. Click **Edit** next to the custom report that you are editing. The Report Builder dialog box opens. All the tabs are populated with the information for the selected custom report.
3. Edit the custom report as necessary including one or more of the following:
4. Do one of the following:
   - Click **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.

Delete a Custom Report

1. From the Admin Panel, navigate to **Admin** > **Events & Special Dates** > **Custom Reports**. The Custom Reports page opens. This page always contains the Add Custom Reports option. It also displays a list

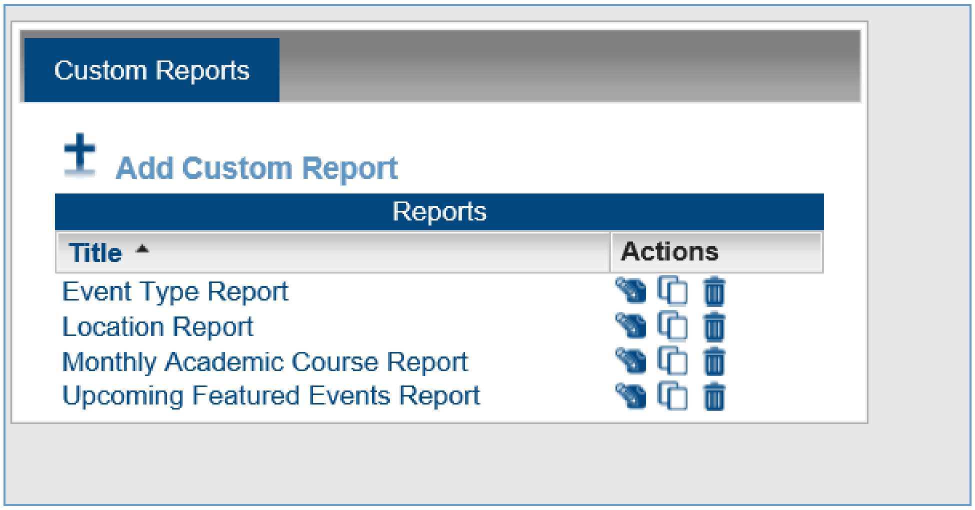
of custom reports that have been previously defined in your Master Calendar database.



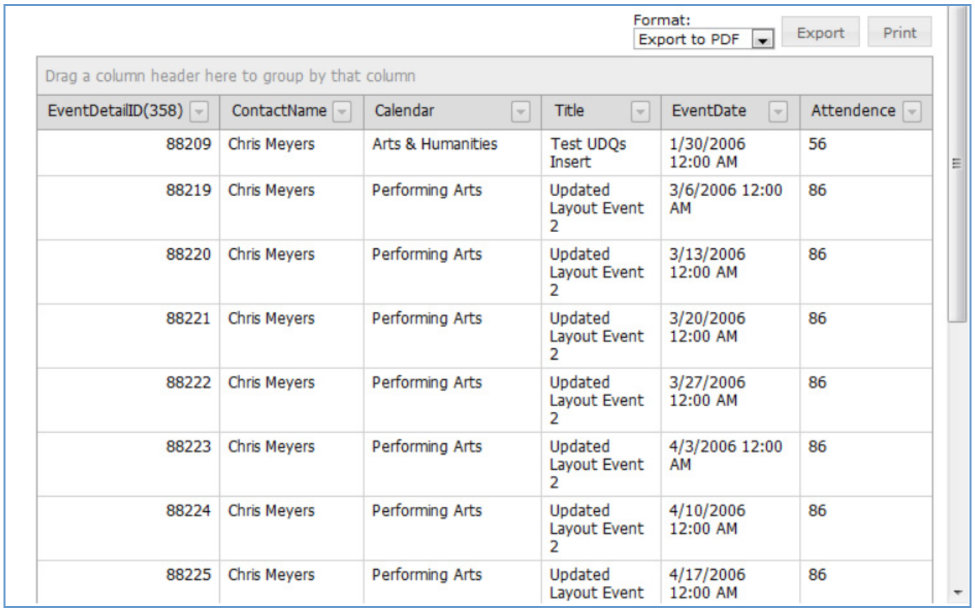
2. Click **Delete** next to the custom report that you are deleting.
3. Select the custom report that is to be deleted, and then click **Delete**. A message opens, asking you if it is OK to delete the selected report.
4. Click **Yes**. The message closes. The custom report is deleted, and another message opens indicating that the report was successfully deleted.

Run, Print, and Export a Custom Report

1. From the Admin Panel, navigate to **Admin** > **Events & Special Dates** > **Custom Reports**. The 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.



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.

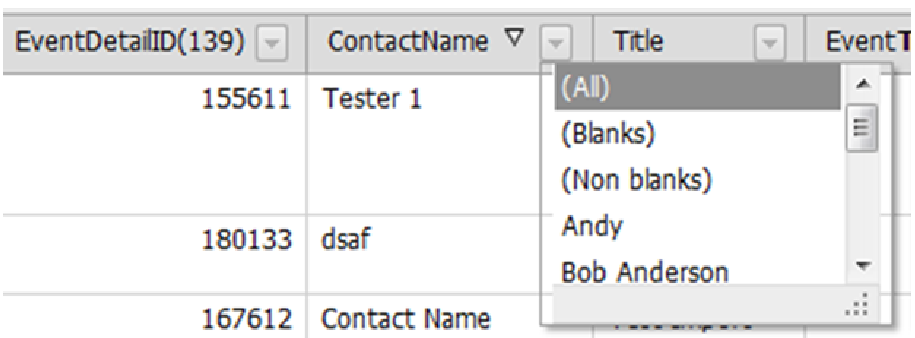


Format: Export to PDF | Export | Print

Drag a column header here to group by that column

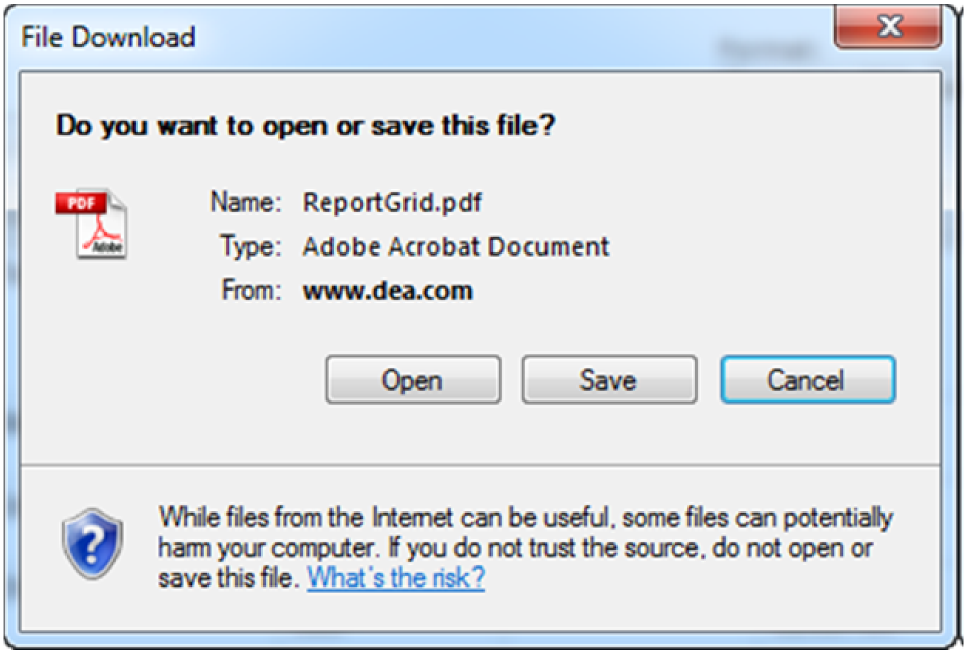
EventDetailID(358)	ContactName	Calendar	Title	EventDate	Attendence
88209	Chris Meyers	Arts & Humanities	Test UDQs Insert	1/30/2006 12:00 AM	56
88219	Chris Meyers	Performing Arts	Updated Layout Event 2	3/6/2006 12:00 AM	86
88220	Chris Meyers	Performing Arts	Updated Layout Event 2	3/13/2006 12:00 AM	86
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
88224	Chris Meyers	Performing Arts	Updated Layout Event 2	4/10/2006 12:00 AM	86
88225	Chris Meyers	Performing Arts	Updated Layout Event	4/17/2006 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.

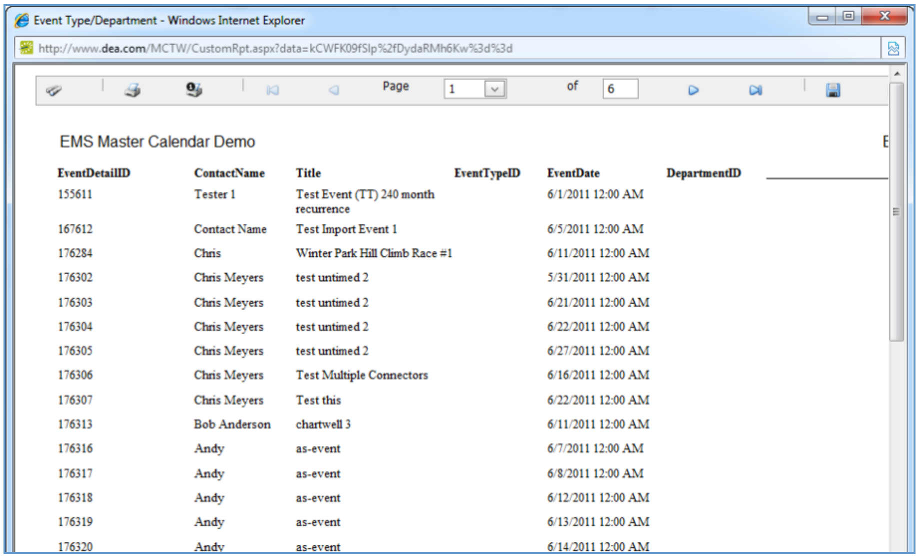


   - To export the custom report to a PDF file or a Microsoft Excel file (CSV or XLS), under Format, select the appropriate Export option, and then click **Export**.
     - Depending on your browser, a file dialog box might open, asking you if you want to open or save the file. If you click **Open**, then 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. PDF is the default format for exporting to a file. Other allowed formats are Xls, Xlsx, Rtf, Mnt, Text, Image, and Csv.



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	

CHAPTER 39: Configure Calendar Groupings and Calendars

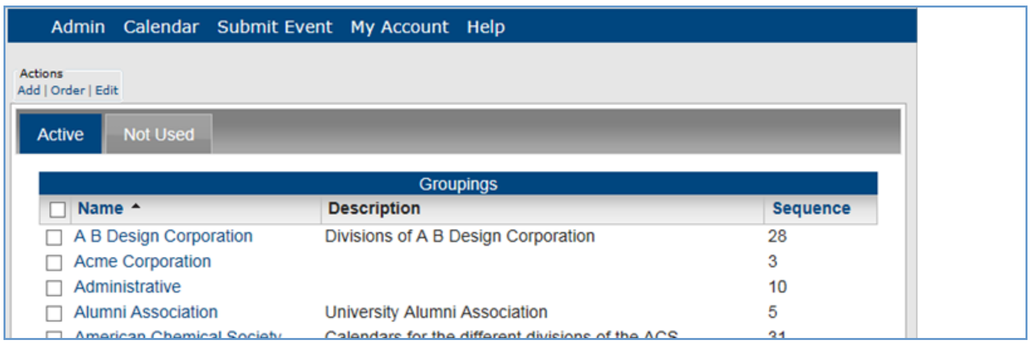
Managing groupings and calendars in Master Calendar consists of a variety of tasks, including adding, editing, and deleting groupings, adding, editing, and ordering calendars, adding links for calendar groupings, and adding calendar URLs.

- Groupings in Master Calendar
- Calendars in Master Calendar
- External Links in Master Calendar
- Calendar URLs

CHAPTER 40: Manage Groupings in Master Calendar

A *grouping* in Master Calendar is collection of one or more calendars typically used 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. All currently *active* groupings in Master Calendar, which are groupings to which at least one calendar has been added, 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.

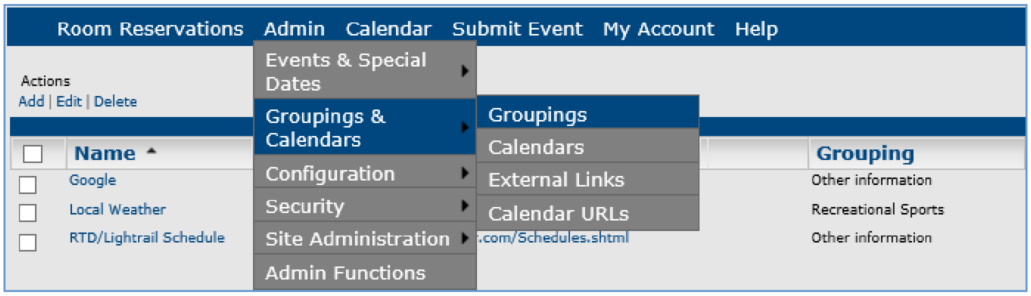


You can view calendars in a single grouping or from multiple groupings together. If appropriate, you can add an event to multiple calendars in multiple groupings. This topic guides you in creating new groupings and working with existing ones.

Creating a New Calendar Grouping

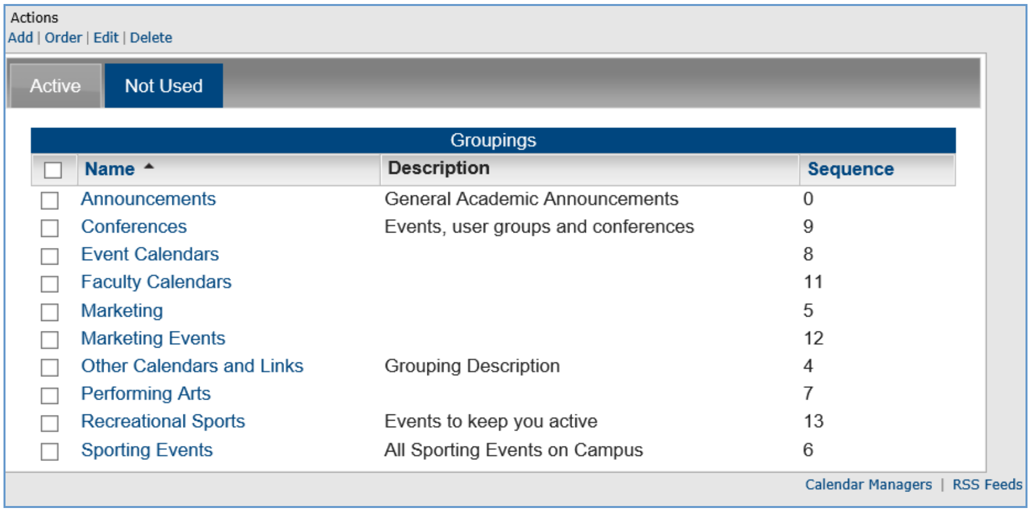
When you create a new Calendar Grouping, first you define it, then you associate it with a calendar group. This then activates the grouping. If you do not associate your grouping with a calendar group, it will show in the Not Used tab shown below.

1. From the Admin Panel, navigate to **Admin** > **Groupings & Calendars** > **Groupings**. The Groupings page opens on the Active tab, which lists all the calendar groupings in use in Master Calendar.



2. Under **Actions**, click **Add**. A blank Details tab opens, where you can name and describe the new calendar grouping.

3. Enter information and then click **Save**. The grouping is added as an *inactive* item to the Master Calendar and appears on the Not Used tab on the Groupings page. The grouping is not displayed on the Active tab on the Groupings page until you add at least one calendar to it. Until you change the default order of the groupings, the sequence for every grouping is 0.



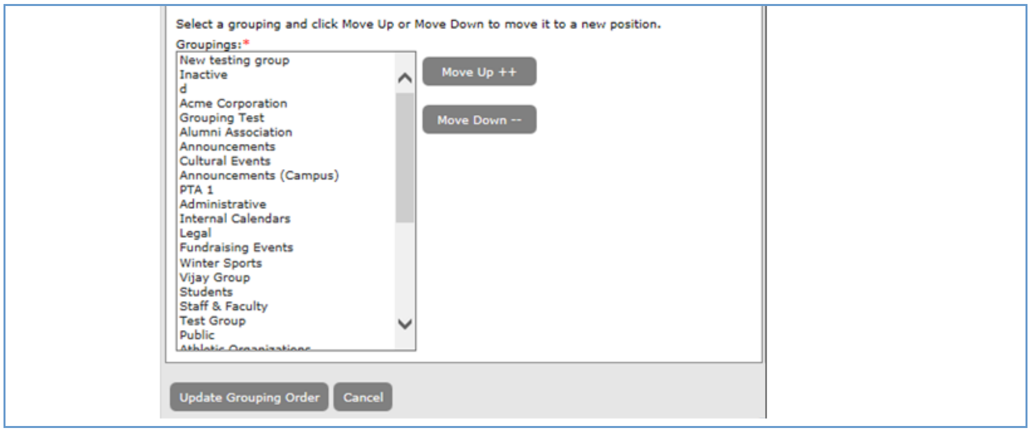
Ordering Calendar Groupings

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. This is how calendar groupings display in dropdown lists to users. You have two options for changing the order of the groupings:

- To change the order of groupings on the 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 default page and on the various Calendar pages, you can doing the following:

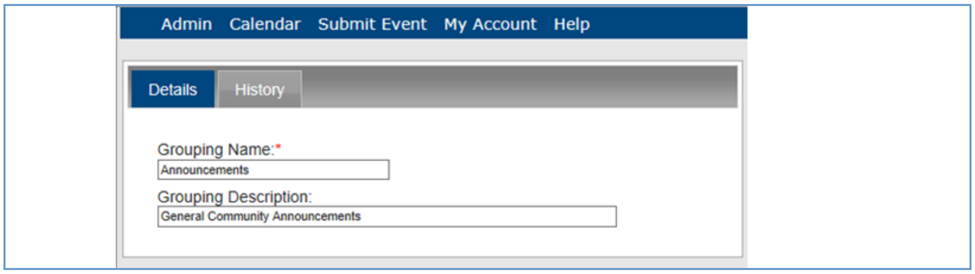
1. From Step 1 above, under Actions, click **Order**. A list of all groupings (Active and Not Used) opens.



2. Select a grouping, and then click **Move Up ++** or **Move Down** to move the grouping to a new position.
3. Click **Update Grouping Order**.
4. Click **OK**. The next time that you open the 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.

Working with an Existing Grouping

1. From Step 1 above on the Active or Not Used tab, select the calendar grouping you want to work with and under Actions, click **Edit**. The Details tab opens, where you can change basic information and view history (on the History tab) for the grouping.



2. Edit the grouping name, the grouping description, or both, as needed.

> **Note:**
> You can delete Calendar Groupings from the Not Used tab; select the item(s) and then click **Delete.**

3. Click **Save** to save the edited grouping in Master Calendar.

CHAPTER 41: Configure Calendars in Master Calendar

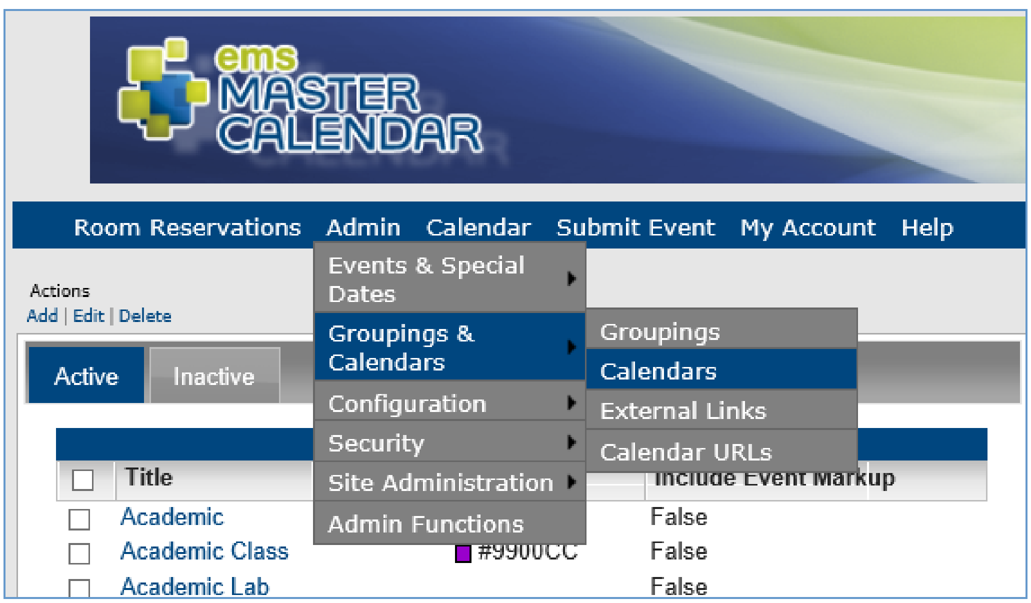
A *calendar* is the organizational tool that you use to display events in Master Calendar. You can organize and display events on a calendar by days week, month, or year. You can define a calendar as broadly or as narrowly as you need to meet your specific business needs. For example, if you are managing 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. You can view events for a single calendar, or you can select multiple calendars and view all their events in a single combined calendar. **See Also**: Maintain Master Calendar Software Registration.

> **Note:**
> The default settings for Master Calendar determine how the information is displayed for events on a combined calendar. **See Also:** Setting Default Site Behavior for Master Calendar.

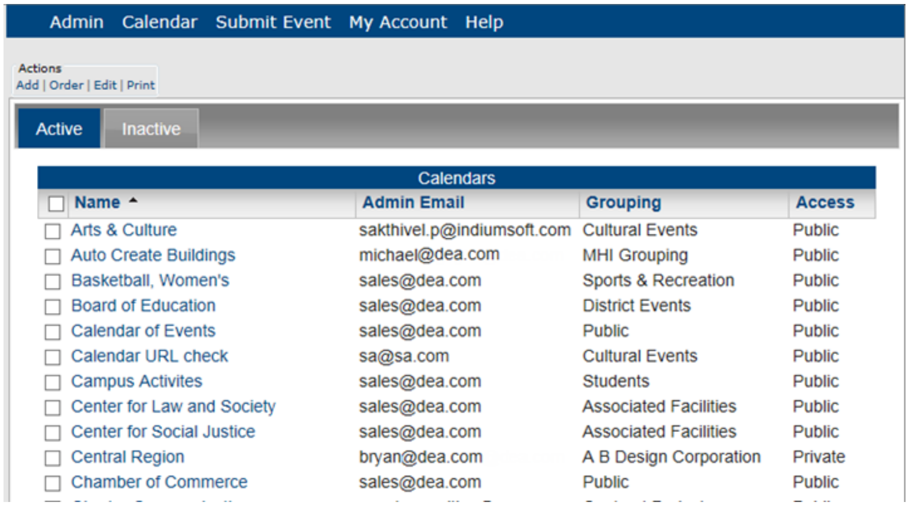
To add a calendar, at a minimum, you must add the required Details information. Optionally, you can specify the users who have access to the calendar, and you can add user-defined questions (UDQs) for the calendar, or you can add this information at a later date. This topic guides you in creating new calendars and working with existing ones.

Create a New Calendar

1. From the Admin Panel, navigate to **Admin** > **Groupings & Calendars** > **Calendars**.

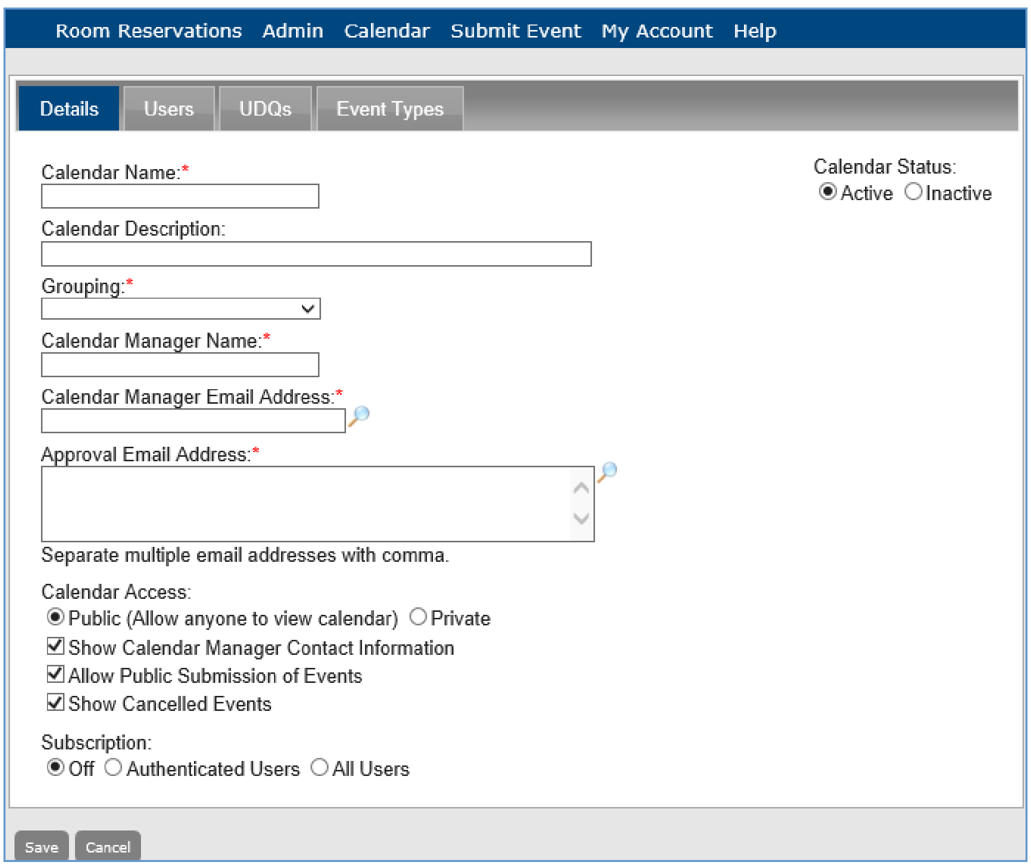


The Calendars page opens on the Active tab, listing all currently active calendars in Master Calendar.



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 Activites	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

2. Under Actions, click **Add**. The Details tab opens, where you 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.



3. Enter the information for the calendar.

Details Tab Fields

Tab	DESCRIPTION
Calendar Name	The title or name of the calendar.
Calendar Status	• **Active**—The default is **Active**. • **Inactive**—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	A text description of the calendar.
Grouping	Drop-down list. Available values are all active and inactive groupings 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 Address	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.
Calendar Access	Determines who has access to view the calendar: • **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 *and* 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 appear on the Calendar Managers list.
	Selected by default. Indicates whether anybody who can view the calendar can

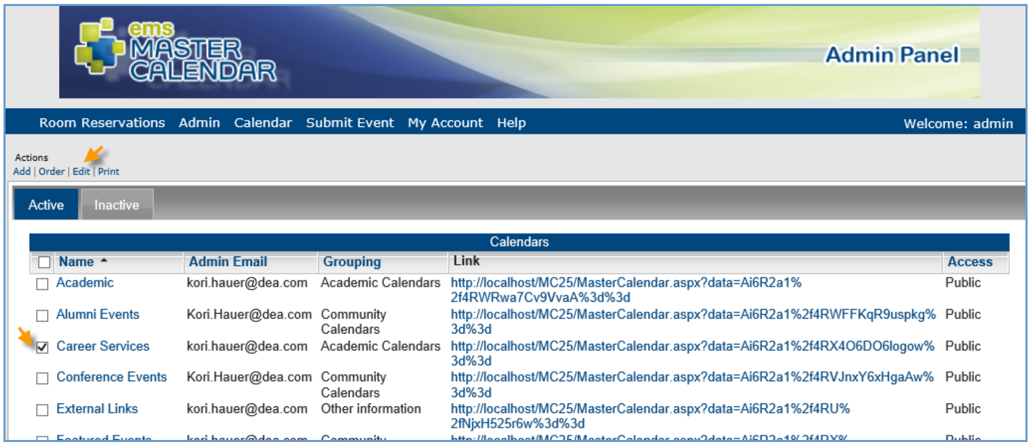
Tab	DESCRIPTION
Allow Public Submission of Events	submit events to the calendar.
Show Cancelled Events	Selected by default. Indicates whether canceled events should be displayed on the calendar.
Subscription	Determines who can subscribe to receive information about additions or modifications to the calendar. • **Off**—The default is **Off**, which means no subscriptions for either guests or users. • **Authenticated Users**—Only users can subscribe. • **All Users**—Both guests and users can subscribe to receive information about additions or modifications to the calendar.

4. Do one of the following:
   - If you want to specify users, UDQS, or both for the calendar at a later date, click **Save** to save the calendar as an *active* calendar in Master Calendar.
   - To specify the users, UDQs, or both for the calendar at the time that you are adding the calendar, continue to one or both of the following:
     - Associate Users With a Calendar
     - Add UDQs to a Calendar

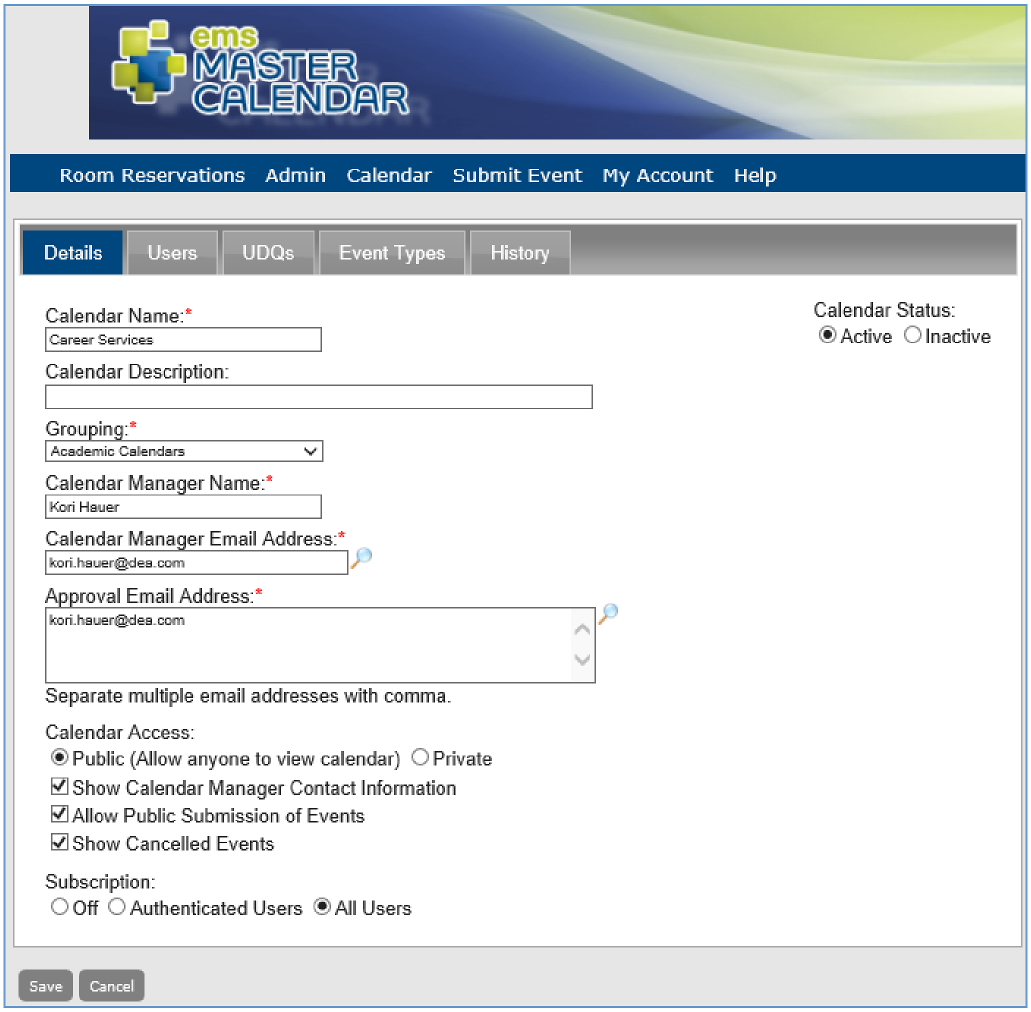
Edit an Existing Calendar

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 de-activate the calendar, and associate users with it.

1. From Step 1 above, select the calendar that you want to work with. Under Actions, select **Edit**.



2. The Calendar page opens on the Details tab.



You can select other tabs to work with those aspects of the calendar:

Calendar Tab	Enables You To...
Details	Define basic information about the calendar.
Users	Associate users with the calendar (this controls whether they can access it in Master Calendar).
UDQs	Select pre-defined User Defined Questions to prompt users when they work with events on this calendar.
Event Types	Associate Event Types that can be scheduled on this calendar.

3. On the Details tab, edit the information for the calendar. See Details Tab Fields details above.

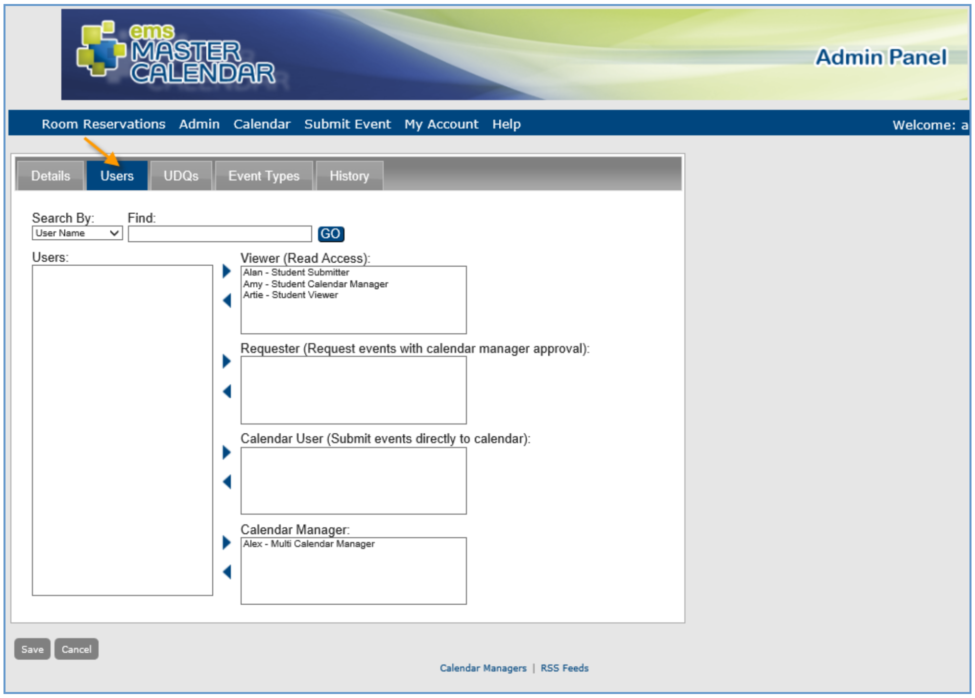
> **Note:**
> To de-activate a calendar, under Calendar status, select **Inactive**. To activate a calendar, select **Active**.

4. Click **Save** to save the edited calendar in Master Calendar.

Associate Users with a Calendar

To associate a user with a 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. See Also: Adding Users.

1. From Step 2 above, click the **Users** tab. Any users who are already assigned roles in Master Calendar appear on this tab.



2. 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.
3. 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**.

> **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 "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) appear in the Users field.

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

Calendar Access Types Fields

AREA	DESCRIPTION
Viewer	Read Access. 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 calender URLs, submit events to the calendar without approval, add/edit/delete special dates, and so on.)

5. Click **Save** to finalize your changes.

Important!

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.

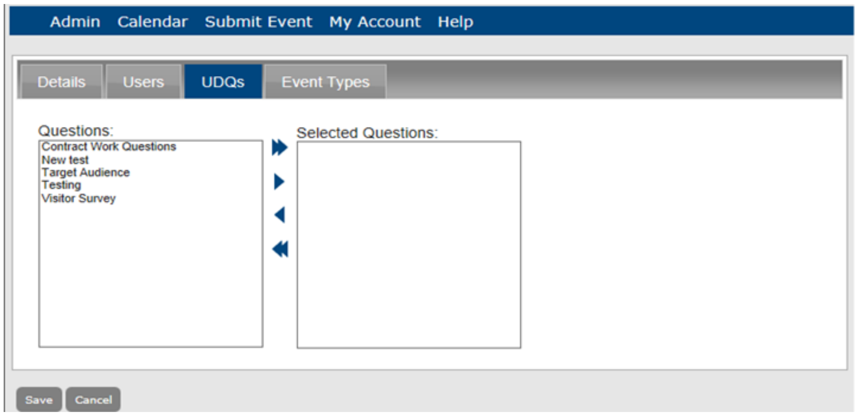
Add UDQs to a Calendar

A *user defined question (UDQ)* is a pre-defined prompt that displays to users when they book events for this calendar. You can set the prompt as mandatory so that users must answer it before submitting an event to the calendar.

Note:

A UDQ is pre-defined in Master Calendar and must be defined before you can associate it with a calendar. To add a UDQ to Master Calendar, see Edit User-Defined Questions.

1. From Step 2 above, click the **UDQs** tab. The UDQs defined in Master Calendar are listed by UDQ name in the Questions field.



2. Click **Save** to save the calendar as an *active* calendar in Master Calendar.
3. Select the UDQ (CTRL-click to select multiple UDQs) and use **Add** (>) and **Remove** (<) to move them from Questions to Selected Questions.

Delete a Calendar

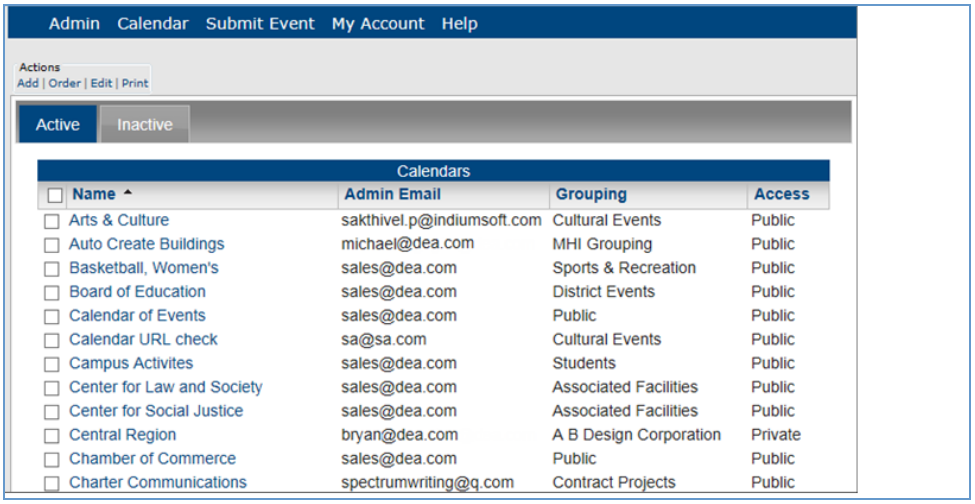
Important!
To delete a Calendar from Master Calendar, the calendar must be **Inactive**.

1. From the Admin Panel, navigate to **Admin** > **Groupings & Calendars** > **Calendars**.
2. From the **Inactive** tab, select the calendar you want to delete. To select all calendars 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.
3. Under Actions, click **Delete**. A message prompts you to confirm that you are sure you want to delete all the selected calendars.
4. Click **OK.** A message confirms the deletion.
5. Click **OK** to confirm the deletion.

Generate a Calendars Report

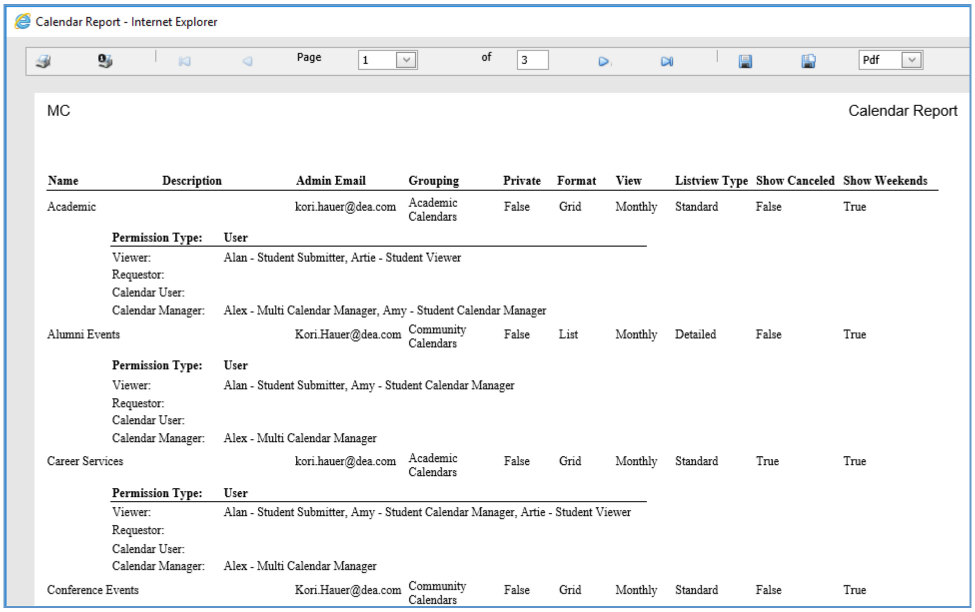
You can generate a Calendars report, which lists all active or inactive calendars configured in Master Calendar.

1. From the Admin Panel, navigate to **Admin** > **Groupings & Calendars** > **Calendars**.



2. Click **Print**. An preview of the Calendars List report launches, where you can search report, send it to a physical printer, print the current page, and export the report to a file and save. 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 and weekends show on the calendar.

> **Note:**
> PDF is the default format for exporting to a file. Other allowed formats are Xls, Xlsx, Rtf, Mnt, Text, Image, and Csv.



Calendar Report - Internet Explorer

Page 1 of 3 Pdf

MC

Calendar Report

Name	Description	Admin Email	Grouping	Private	Format	View	Listview Type	Show Canceled	Show Weekends
Academic		kori.hauer@dea.com	Academic Calendars	False	Grid	Monthly	Standard	False	True

Permission Type:	User
Viewer:	Alan - Student Submitter, Artie - Student Viewer
Requestor:	
Calendar User:	
Calendar Manager:	Alex - Multi Calendar Manager, Amy - Student Calendar Manager

Name	Description	Admin Email	Grouping	Private	Format	View	Listview Type	Show Canceled	Show Weekends
Alumni Events		Kori.Hauer@dea.com	Community Calendars	False	List	Monthly	Detailed	False	True

Permission Type:	User
Viewer:	Alan - Student Submitter, Amy - Student Calendar Manager
Requestor:	
Calendar User:	
Calendar Manager:	Alex - Multi Calendar Manager

Name	Description	Admin Email	Grouping	Private	Format	View	Listview Type	Show Canceled	Show Weekends
Career Services		kori.hauer@dea.com	Academic Calendars	False	Grid	Monthly	Standard	True	True

Permission Type:	User
Viewer:	Alan - Student Submitter, Amy - Student Calendar Manager, Artie - Student Viewer
Requestor:	
Calendar User:	
Calendar Manager:	Alex - Multi Calendar Manager

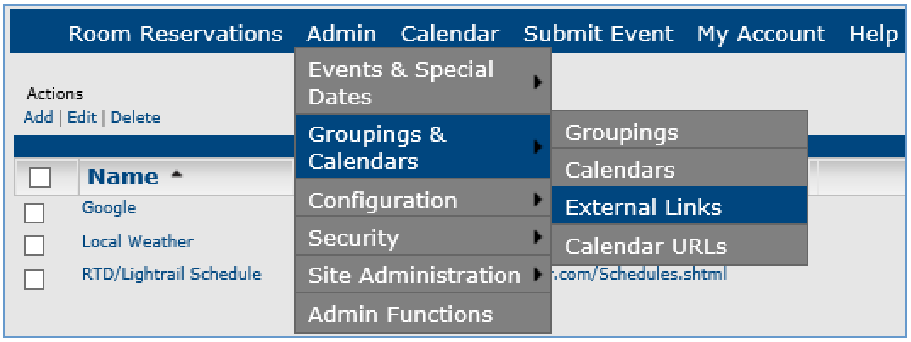
Name	Description	Admin Email	Grouping	Private	Format	View	Listview Type	Show Canceled	Show Weekends
Conference Events		Kori.Hauer@dea.com	Community Calendars	False	Grid	Monthly	Standard	False	True

CHAPTER 42: Manage External Links for a Grouping

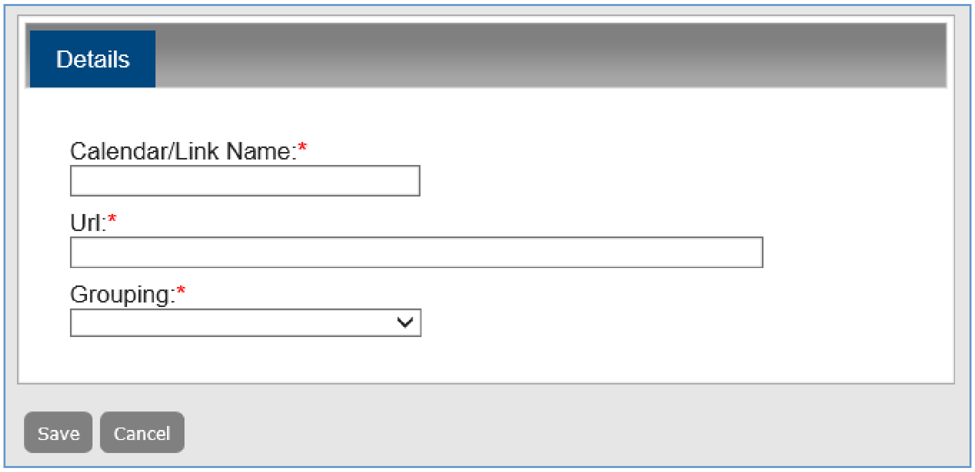
An *external link* is a link to a website that is outside of Master Calendar. When you associate a link with a calendar grouping, they appear on these calendars for users' convenience. For example, if you have a grouping of calendars for a university's athletic department, and many of the athletic events take place at the university's stadium, you might want to associate that grouping with an external link to the university's website, "About the Stadium." This topic guides you in creating links and editing/deleting existing links.

Create a New External Link

1. From the Admin Panel, navigate to **Admin** > **Groupings & Calendars** > **External Links**. The External Links page opens, listing all active external links in Master Calendar.



2. Under Actions, click **Add**. A blank Details tab opens, where you can name the external link, specify the URL, and select the calendar grouping to which the link belongs.



3. Enter the Calendar/Link Name.
4. Enter the URL.

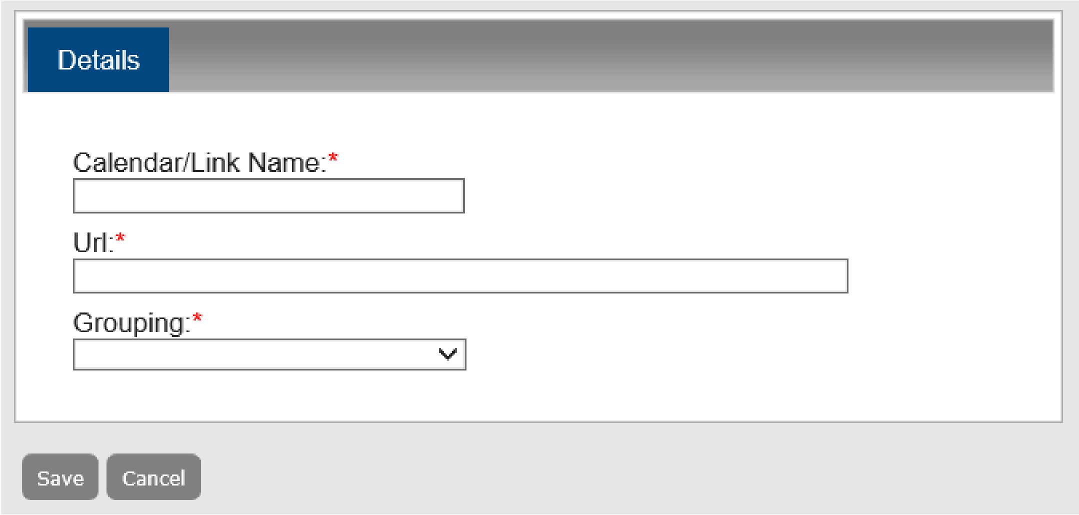
5. Select the calendar Grouping for the link.
6. Click **Save**. The link is saved in Master Calendar and displays on calendars in the grouping you specified.

Edit/Delete Existing Links

1. From the Admin Panel, navigate to **Admin** > **Groupings & Calendars** > **External Links**.
2. Select the link you want to edit.

> **Note:**
> To Delete one or more links, click the **Delete** option.

3. Under Actions, click **Edit**. The Details tab opens.



> **Note:**
> To see a history of this link, click the **History** tab.

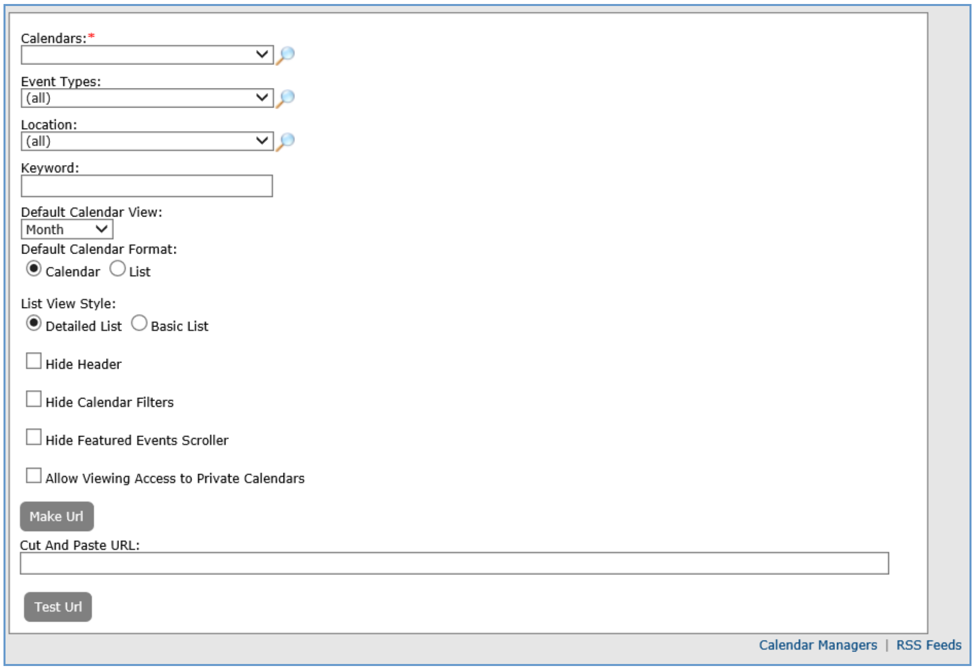
4. Edit information for the link as needed.
5. Click **Save** to save your changes.

CHAPTER 43: Configure Calendar URLs

A *calendar URL* provides a shortcut for your guests or users to navigate to 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 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. This topic guides you in creating a calendar URL and editing existing calendar URL.

When you are adding a calendar URL, the fields that appear 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. To configure optional information such as event types, see Configuring Optional Information.

1. From the Admin Panel, navigate to **Admin** > **Groupings & Calendars** > **Calendar URLs**. The Calendar URL page opens.



2. Enter or edit the information for the URL.

Calendar URL Information Fields

FIELD	DESCRIPTION

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	Enter the search string that will allow users to search for specific events. 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 and these search results can appear in the event name, the event description, and so on.
Default Calendar View	• Day • Week • Month
List View Style	Dropdown includes: • Detailed List • Basic List
Hide Header	Checking this box will prevent the header from appearing on your calendar.
Hide Calendar Filters	Checking this box will prevent the Calendar Filters from appearing on your calendar.
Hide Featured Events Scroller	Checking this box will prevent the Featured Events Scroller from appearing on your calendar.

FIELD	DESCRIPTION
Allow Viewing Access to Private Calendars	Allows all users to view your private calendar.
Make URL	Cut and paste the URL into this field.
Test URL	Click this button to verify that the system displays the correct calenders with the correct information.

3. 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**.

CHAPTER 44: Configuration

In Master Calendar, you can manage your information 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 event type, the event location, as well as the event keywords. All optional information is maintained in list views and follows a similar user interface design.

You can manage your information based on:

- Event Types
- Event Type Views
- Locations
- Rooms
- Departments
- Custom Field Hints
- User-Defined Questions (UDQs)
- Event Icons
- Cultures

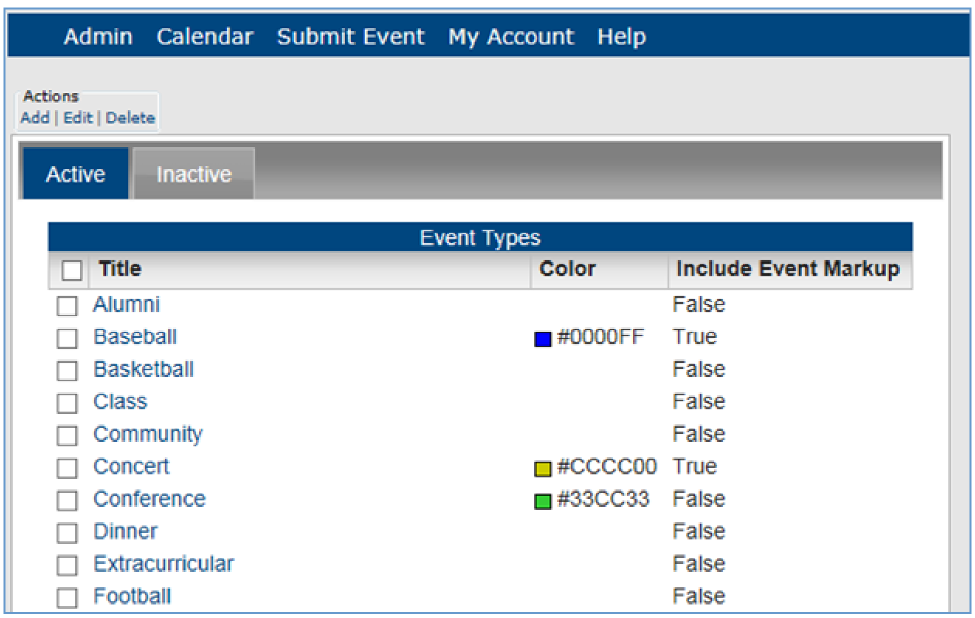
CHAPTER 45: Configure Event Types

An *event type* is a colored label that you can apply to an event in Master Calendar to make it easier for your guests and users to distinguish between different events, know the purpose of an event, and find events. 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. This topic guides you in defining new event types, editing event types, deleting event types, and activating and de-activating event types.

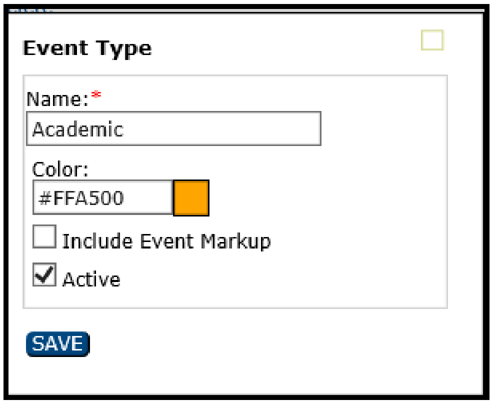
Create New Event Types

> **Note:**
> Rather than creating an event type from scratch, if you are an EMS customer, then you can import your EMS event types directly into Master Calendar. **See Also:** [Importing Data Sources from EMS](#).

1. From the Admin Panel, navigate to **Admin** > **Configuration** > **Event Types**. The Event Types page opens on the Active tab, which lists all active event types in Master Calendar. The Inactive tab lists event types defined for your system but not in use.



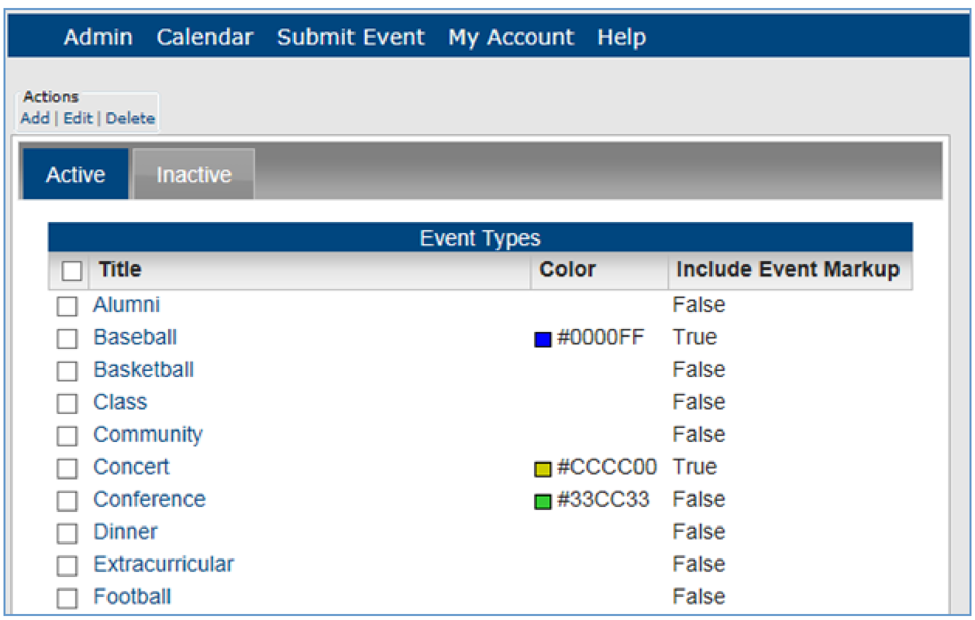
2. Under Actions, click **Add**. The Event Type dialog box will appear. You can name the event type, define the label color, and make the event type visible to search engines.



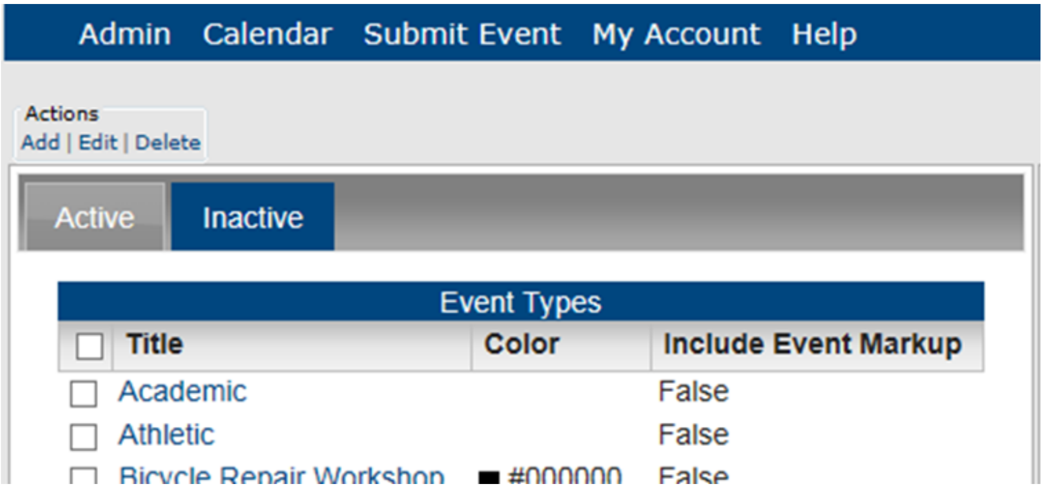
3. In the **Name** field, enter the name for the event type.
4. Optionally, in the Color field, select a color for the event type.
5. Click **Add**. The Event Type is added to Master Calendar as an *active* event type.
6. Click the Include Event Markup box to make the event type visible to the search engine.

Edit Existing Event Types

1. Navigate to Admin > **Configuration** > **Event Types**. The Event Types page opens on the Active tab, which lists all active event types in Master Calendar.

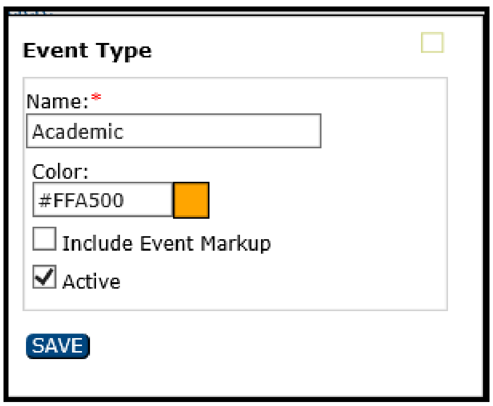


2. Select the **Active** or **Inactive** tab to work with event types.



3. *To edit, activate or deactivate an Event Type,* select the event type that you want to work with.

    - Under Actions, select **Edit**. The Event Type dialog box opens, showing the event type name and the event type color.



    - Edit the **Name** field to change the name of the Event Type, which appears to users in am Event Type dropdown field during the booking process.
    - Edit the color for the Event Type label users will see.
    - Use the **Active** checkbox to activate or de-activate the Event Type, which controls whether the event type is available to users during booking process.
    - Click **Save**.

4. *To delete an event type,* select the item from the list on the Active or Inactive tab. 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.

Note:

You can delete one or more active or an inactive event types. 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 Actions, click **Delete**. A message prompts you to confirm that you are sure that you want to delete all the selected event types.
- Click **OK**. A message confirms the deletion.
- Click **OK** in the message.

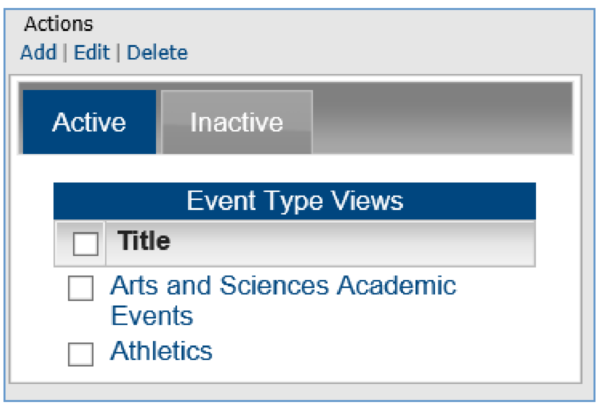
CHAPTER 46: Configure Event Type Views

An *Event Type View* is a grouping or collection of event types to help your guests or users to search for multiple event types in a single step, rather than conducting multiple searches for different event types. For example, if you are managing calendars for a university campus, you might group the event types of Freshmen Swimming, Freshmen Track and Field, Freshmen Soccer, and Freshmen Basketball under the Event Type View of "Freshmen Athletic Events." This topic guides you in creating, editing, deleting and activating and inactivating Event Type Views and viewing Event Type View history.

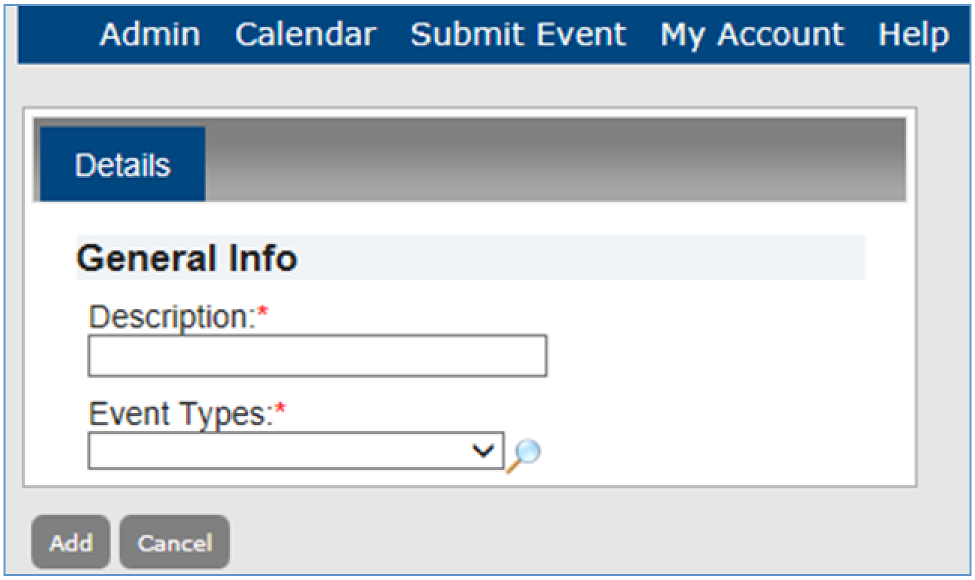
Create a New Event Type View

> **Note:**
> You can only add active event types to an Event Type View. You might first need to activate an event type so that you can add it to a view.

1. From the Admin Panel, navigate to **Admin** > **Configuration** > **Event Type Views**. The Event Type Views page opens on the Active tab, listing all active Event Type Views in Master Calendar.

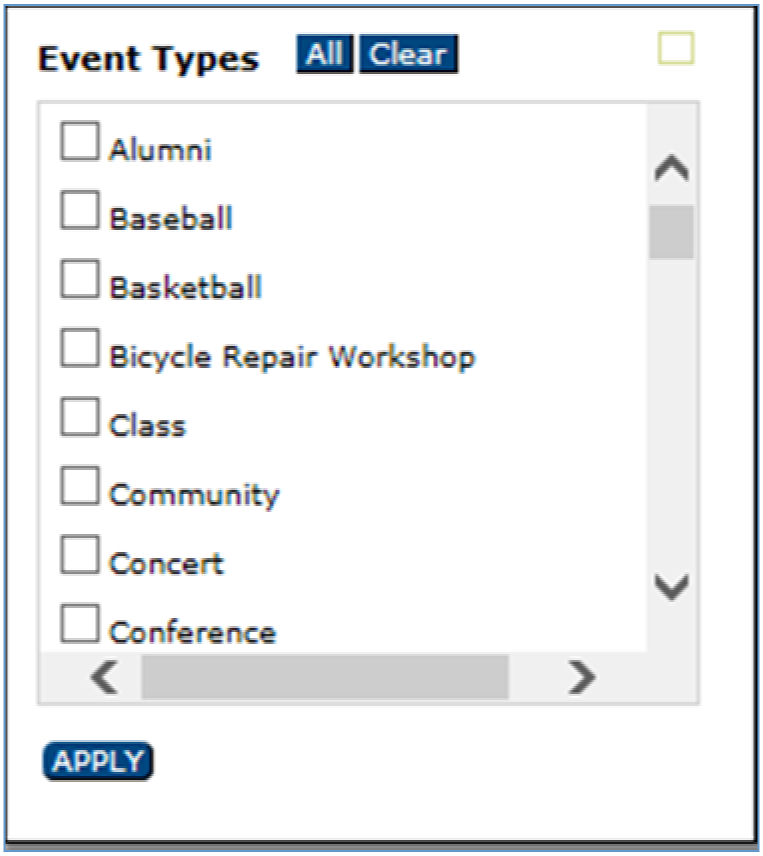


2. Under Actions, click **Add**. The Adding Event Types page opens on the Details tab.



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.
    - Select Multiple. The Event Types dialog box will appear. Select all event types in a single step by clicking **All** or select more than one event type, and then click **Apply**. This associates

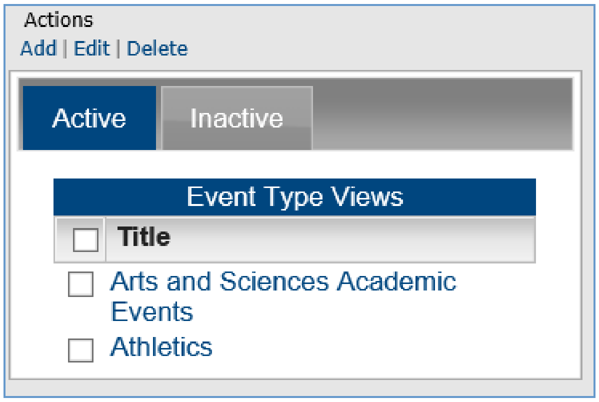
multiple event types with the Event Type View you are creating.



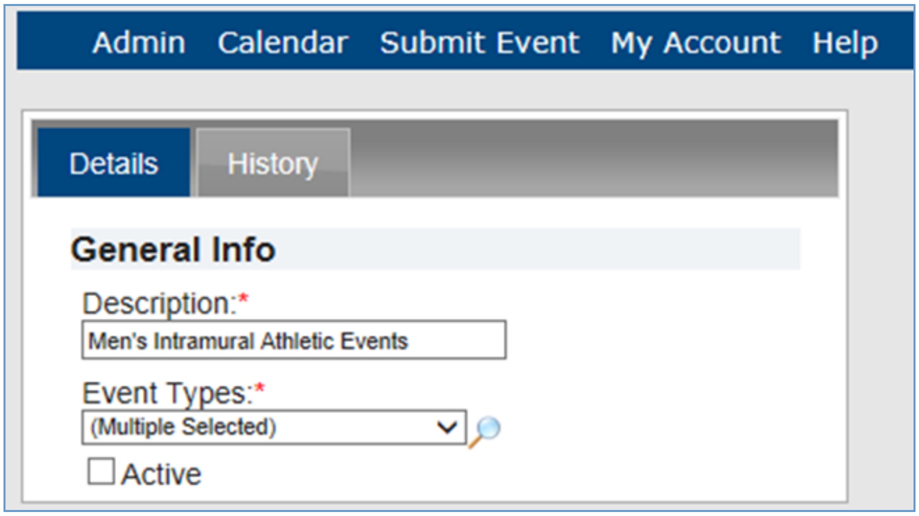
5. Click **Add**. The Event Type View is added as an *active* item in Master Calendar.

Edit/Delete Existing Event Type Views

1. From the Admin Panel, navigate to **Admin** > **Configuration** > **Event Type Views**. The Event Type Views page opens on the Active tab, listing all active Event Type Views in Master Calendar.



2. *To edit an Event Type View,* select it on the Active or Inactive tab.
   - Under Actions, click **Edit**. The Details tab opens, showing the description for the Event Type View and the event type that was selected for the view.



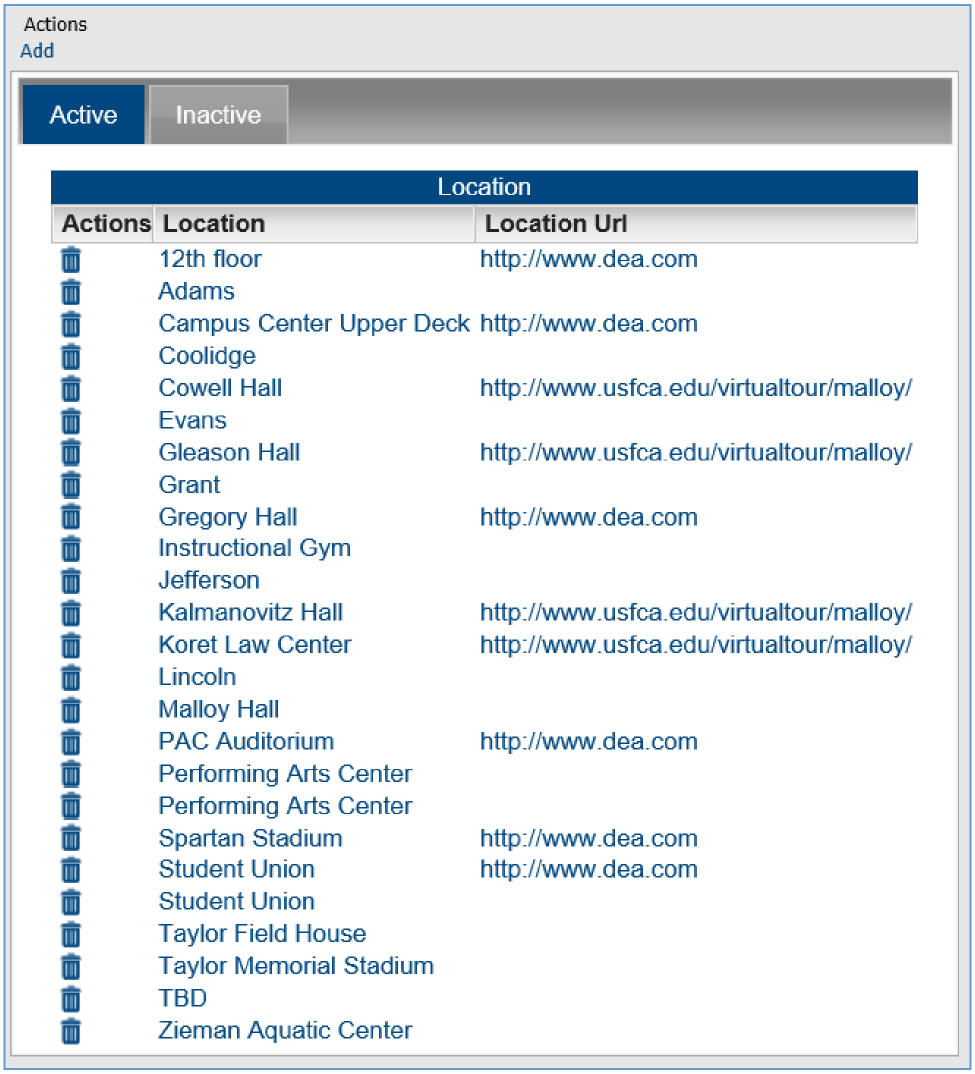
3. *To delete an Event Type View*, locate it on the Active or Inactive tab and select (one or more) Event Type Views to be deleted. To select all Event Type Views on the currently opened page for deletion in a single step, select Title. If you have multiple pages of views to delete, you must repeat this entire process on each page.
   a. Under Actions, click **Delete**. A message prompts you to confirm that you want to delete all the selected Event Type Views.
   b. Click **OK**. A message confirms the deletion.
   c. Click **OK.** The Active tab or Inactive tab is updated to reflect the deletion of the Event Type Views.

CHAPTER 47: Configure Event Locations

An *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, the gymnasium, and so on. When you set up a location in Master Calendar, you can also provide a hyperlink 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 include a URL for a webpage showing a map of the stadium. The Location field for an event can be optional or required, depending upon your Master Calendar parameter settings. This topic guides you in setting up new event locations, activating and de-activating event locations, editing event locations, and deleting event locations.

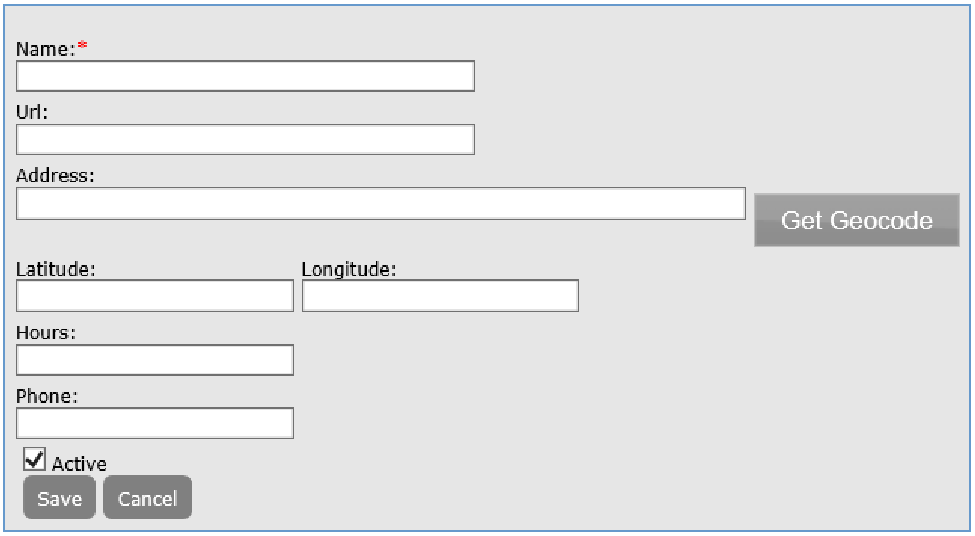
Create a New Event Location

1. From the Admin Panel, navigate to **Admin** > **Configuration** > **Locations**. The Locations page opens on the Active tab, which lists all currently active event locations in Master Calendar.



Actions	Location	Location Url
	12th floor	http://www.dea.com
	Adams	
	Campus Center Upper Deck	http://www.dea.com
	Coolidge	
	Cowell Hall	http://www.usfca.edu/virtualtour/malloy/
	Evans	
	Gleason Hall	http://www.usfca.edu/virtualtour/malloy/
	Grant	
	Gregory Hall	http://www.dea.com
	Instructional Gym	
	Jefferson	
	Kalmanovitz Hall	http://www.usfca.edu/virtualtour/malloy/
	Koret Law Center	http://www.usfca.edu/virtualtour/malloy/
	Lincoln	
	Malloy Hall	
	PAC Auditorium	http://www.dea.com
	Performing Arts Center	
	Performing Arts Center	
	Spartan Stadium	http://www.dea.com
	Student Union	http://www.dea.com
	Student Union	
	Taylor Field House	
	Taylor Memorial Stadium	
	TBD	
	Zieman Aquatic Center	

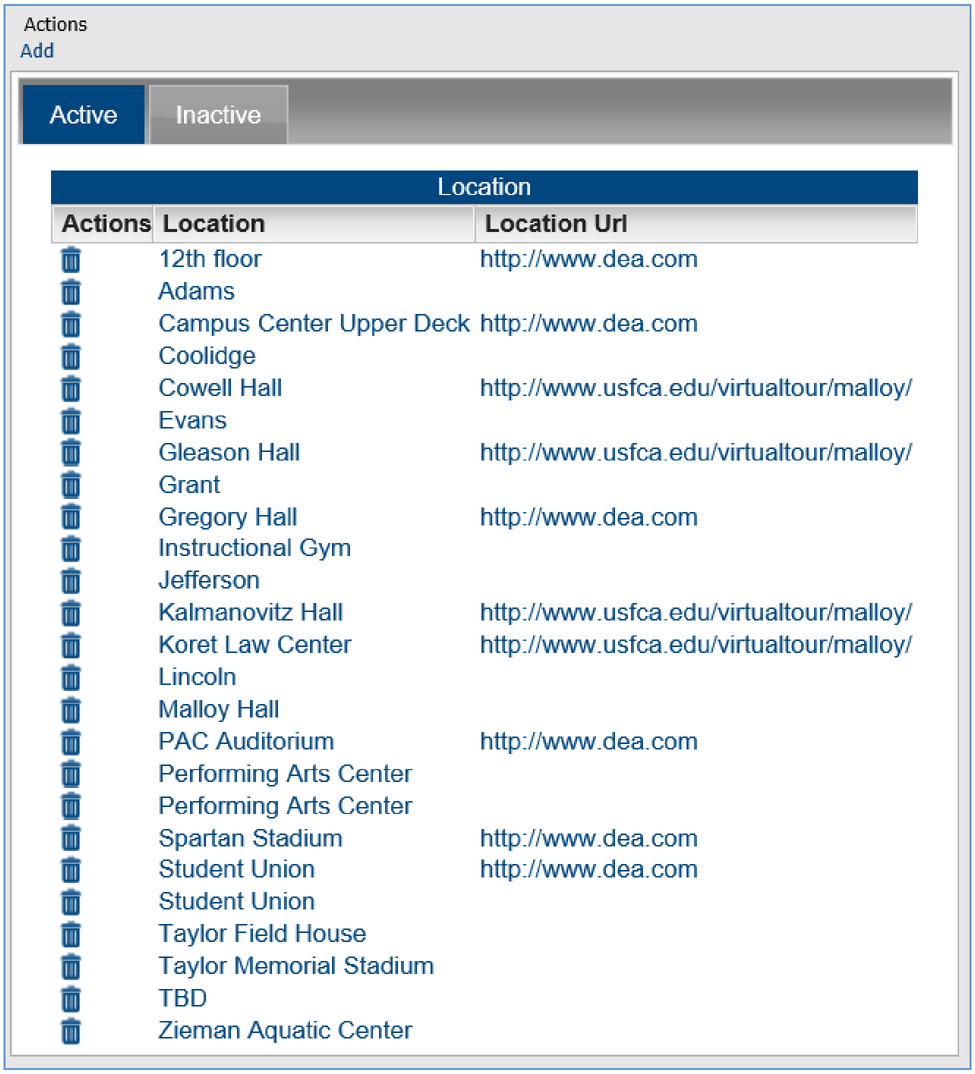
2. Under Actions, click **Add**. The Location dialog box opens, where you name the event location, provide a hyperlink, address, hours, or phone information. Users will then be able to select this new location from a dropdown list in the Location field on the Submit Events page.



3. In the **Name** field, enter a name or description for the event location.
4. In the **URL** field, enter a URL (optional).
5. Enter the **Address** of the event location (optional). Click the **Geocode** button to autopopulate the latitude and longitude of your address on the field below.
6. Enter the **Latitude** and **Longitude** of the event location (optional).
7. Enter the **Hours** of operation for the event location (optional).
8. Enter a **Phone** number for the event location (optional).
9. To make the location **Active**, click the checkbox.
10. Click **Save**. The event location is added as an *active* location in Master Calendar.

Edit Existing event Locations

1. From the Admin Panel, navigate to Admin > **Configuration** > **Locations**. The Locations page opens on the Active tab, which lists all currently active event locations in Master Calendar.



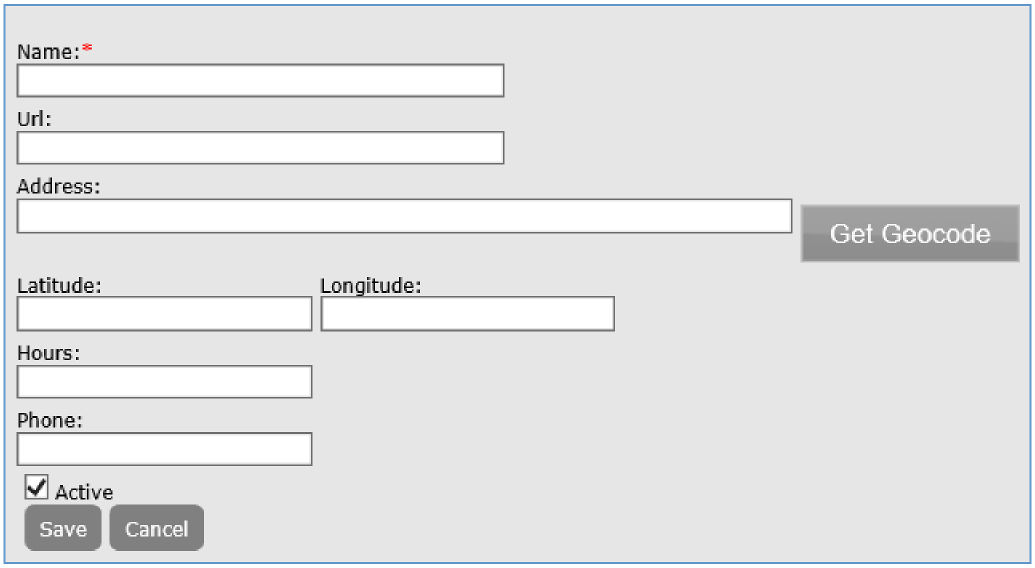
Actions
Add

Active | Inactive

Location		
Actions	Location	Location Url
	12th floor	http://www.dea.com
	Adams	
	Campus Center Upper Deck	http://www.dea.com
	Coolidge	
	Cowell Hall	http://www.usfca.edu/virtualtour/malloy/
	Evans	
	Gleason Hall	http://www.usfca.edu/virtualtour/malloy/
	Grant	
	Gregory Hall	http://www.dea.com
	Instructional Gym	
	Jefferson	
	Kalmanovitz Hall	http://www.usfca.edu/virtualtour/malloy/
	Koret Law Center	http://www.usfca.edu/virtualtour/malloy/
	Lincoln	
	Malloy Hall	
	PAC Auditorium	http://www.dea.com
	Performing Arts Center	
	Performing Arts Center	
	Spartan Stadium	http://www.dea.com
	Student Union	http://www.dea.com
	Student Union	
	Taylor Field House	
	Taylor Memorial Stadium	
	TBD	
	Zieman Aquatic Center	

2. *To activate/de-activate locations*, choose from the **Active** or **Inactive** tab.
   a. Click on the event location that you want to activate or de-activate.
   b. Use the Active checkbox to control whether the Location is available to users for selection when booking an event.
   c. Click Save. Your changes will be applied immediately; activated Locations will appear for selection in the dropdown next to the Location field on the Submit Events page, and de-

activated Locations will not.



Note:

Additionally, you can edit the Name, URL, Address, Latitutde, Longitude, Hours, and Phone from this screen. Make the necessary edits and click Save.

Delete an Existing Event Location

1. From the Admin Panel, navigate to **Admin** > **Configuration** > **Locations**. The Locations page opens on the Active tab, which lists all currently active event locations in Master Calendar.
2. Locate the event location you want to delete on either the **Active** or **Inactive** tab.
3. Click the **Delete** icon next to the Location you want to delete.

   Note:

   If any sub-locations reference the selected location, a dialog box launches indicating the number of sub-locations that reference it. You must first delete these sub-locations before you can delete the location. To delete these sub-locations, navigate to **Admin** > **Sub-locations**. EMS Software recommends reviewing and editing your sub-locations first.

4. If no sub-locations reference the selected location, a message prompts you to confirm that you want to delete the selected location.

Note:
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.

- Click **OK**. A message opens confirming the deletion.
- Click **OK** in the message. The list of locations is updated to reflect the deletion of the event location.

CHAPTER 48: Configure Rooms

Within locations, you can specify a *room*, which 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, a room could specify a specific lab room in the building for that event. Your Master Calendar parameter settings control whether the room field shows for users under a Location. **See Also**: Default Page Configuration Settings.

> **Note:**
> You should identify a room with a name or phrase that explains what it is, for example, desk, work area, stage, hall, pop-up booth, and so on. “Rooms” is the default label for rooms. To change this label to better suit your organization’s business needs, see Setting Default Behavior for Master Calendar.

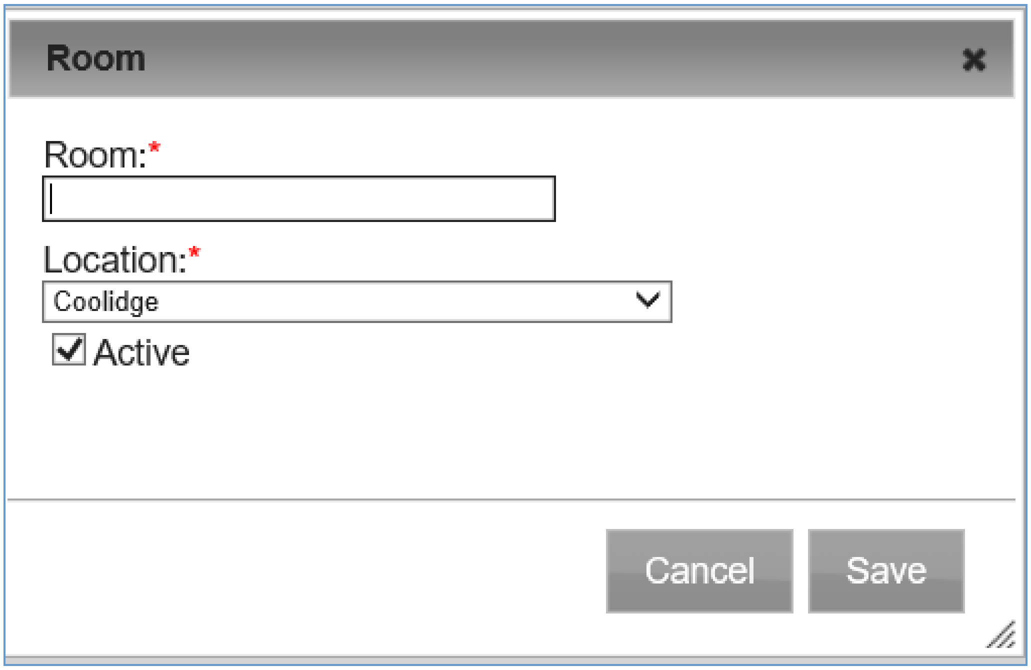
This topic guides you in adding rooms, activating and de-activating rooms, editing rooms, and deleting rooms.

Set Up a New Room

> **Note:**
> You can add an room only to an active event location. You must activate an event location before you can add a room to it.

1. From the Admin Panel, navigate to **Admin** > **Configuration > Rooms**. The Rooms page opens on the Active tab.
2. On the Locations dropdown list, select the location to which you want to add the room. The page refreshes to list all currently active rooms for the selected location.

3. Under Actions, click **Add**. The Room dialog box opens as shown below, where you name the room. Users will then be able to select this item from a drop-down list for the Location field during the booking process.



4. In the Room field, enter a name or description for the room.

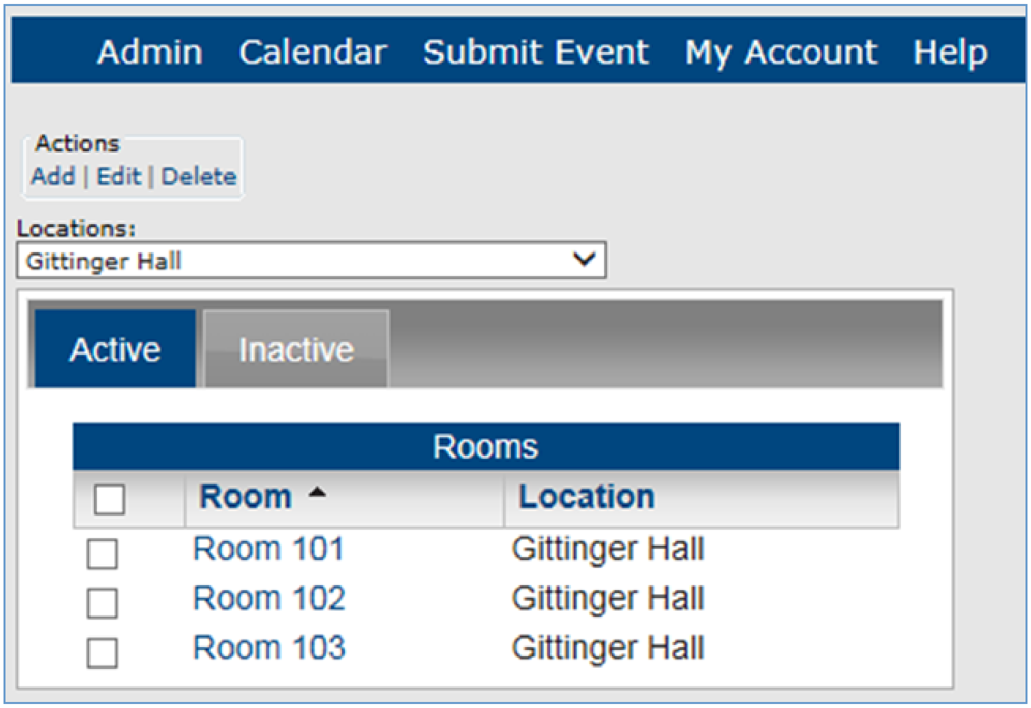
> **Note:**
> You can change the Location as needed using the Location field dropdown.

5. Click **Save**. The room is added as an *active* location in Master Calendar.

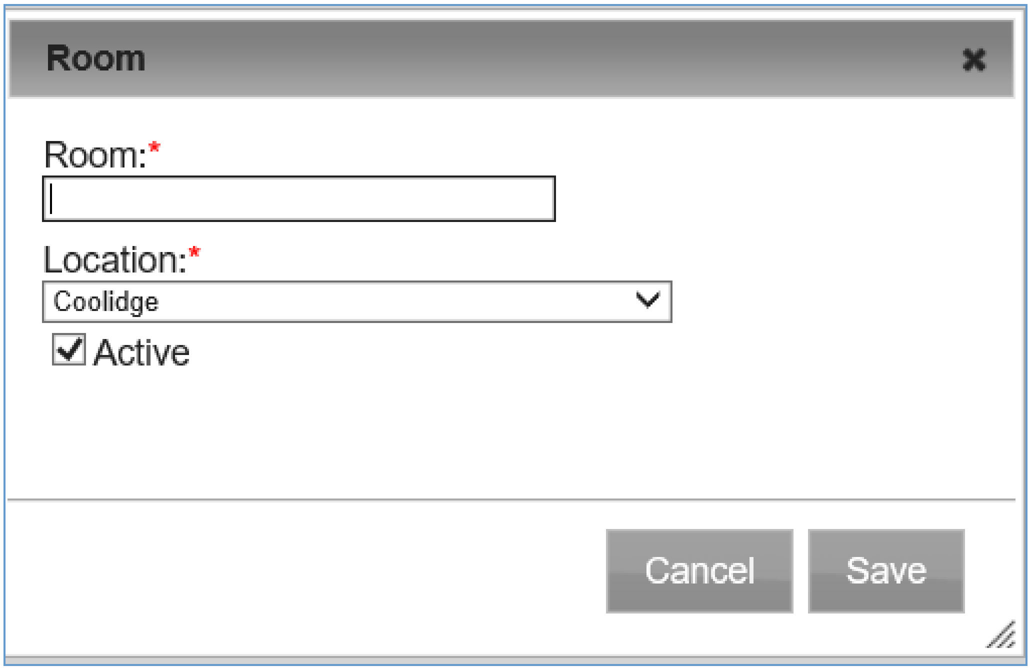
Edit Existing Rooms

1. From the Admin Panel, navigate to **Admin** > **Configuration > Rooms**. The Rooms page opens on the Active tab.
2. *To activate or de-activate a room,* choose the Active or Inactive tab.

- In the **Locations** field, select the location for which the rooms are being activated or de-activated. The list then displays all active or inactive rooms for the selected location.



- Select the room that you want to work with.
- Under Actions, click **Edit**. The Room dialog box opens.



- Use the **Active** checkbox to control whether users can choose this room from the dropdown list during the booking process.
- Click **Save**. Your changes take effect immediately.

3. *To change the name or URL for a room*, from the **Locations** dropdown on the Active or Inactive tab, select the location for which you want to edit rooms. The list updates to show the Location's rooms.
   a. Select the room that you want to edit.
   b. Under Actions, click **Edit**. The Room dialog box opens.
   c. Edit the name of the room, its location, or both.
   d. Click **Save** to save your edits.
4. *To delete a room,* from the **Locations** dropdown on the Active or Inactive tab, select the location for which you want to edit rooms. The list updates to show the Location's rooms.

> **Note:**
> You can delete both active and inactive rooms. If you delete an active event room, any current events that use this room are not affected. The deletion simply means that going forward, the room is not available for use.

   a. Select the room that you want to delete. To select all rooms on the currently opened page for deletion in a single step, select Room, for example, Room. If you have multiple pages of rooms to delete, you must repeat this entire process on each page.

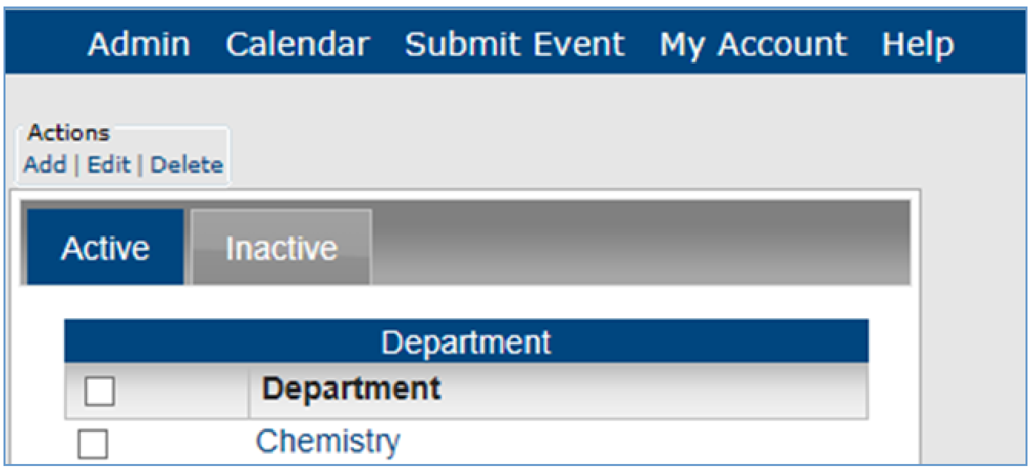
b. Under Actions, click **Delete**. A message prompts you to confirm that you want to delete all the selected rooms.
c. Click **OK** in the message. A message confirms the deletion.
d. Click **OK**. The Active tab or Inactive tab is updated to reflect the deletion.

CHAPTER 49: Configure Departments in Master Calendar

A *department* in Master Calendar is a division of a business specializing in a particular product or service, such as a Personnel department, or a division of a school or college such as 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/sponsoring the event. This topic guides you in adding departments, activating departments, inactivating departments, editing departments, and deleting departments.

> **Note:**
> "Departments" is a default label, which you can change.
> **See Also**: Setting Default Home Page Behavior in Master Calendar.

1. From the Admin Panel, navigate to Admin > **Configuration** > **Departments**. The Departments page opens on the Active tab, listing all currently active departments in Master Calendar.

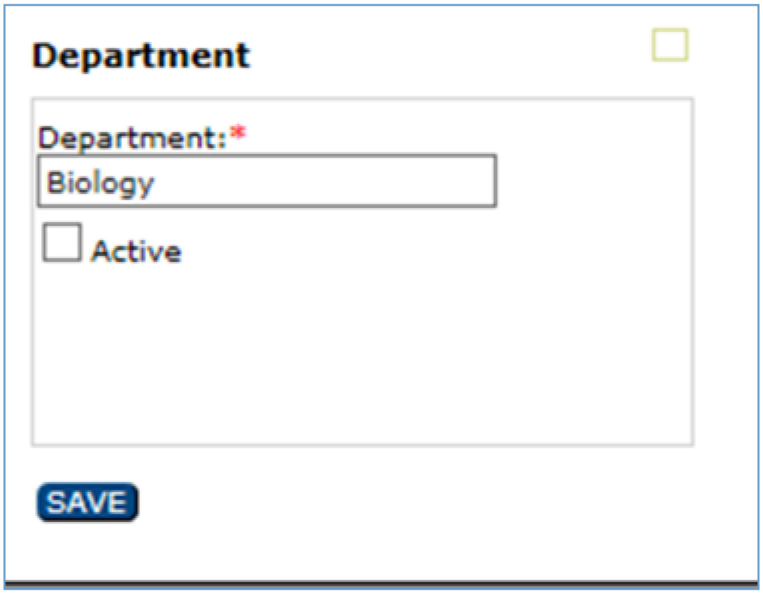


2. *To define a new department*, under Actions, click **Add**. The Department dialog box opens. You use this dialog box to name the department.

- In the **Name** field, enter the name for the department.
- On the Department dialog box, click **Add**. The Department is added to Master Calendar as an *active* department.

3. *To rename or activate/de-activate an existing department,* choose from the **Active** or **Inactive tab.**

- Select the department you want to rename, activate or deactivate.
- Under Actions, select **Edit**. The Department dialog box opens, showing the department name.



- Edit the text to rename the department.
- Use the **Active** checkbox to control whether this department is available for selection in Master Calendar.
- Click **Save**.

4. *To delete a department* select one or more departments to be deleted from the Active or Inactive tab. 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.

> **Note:**
> 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.

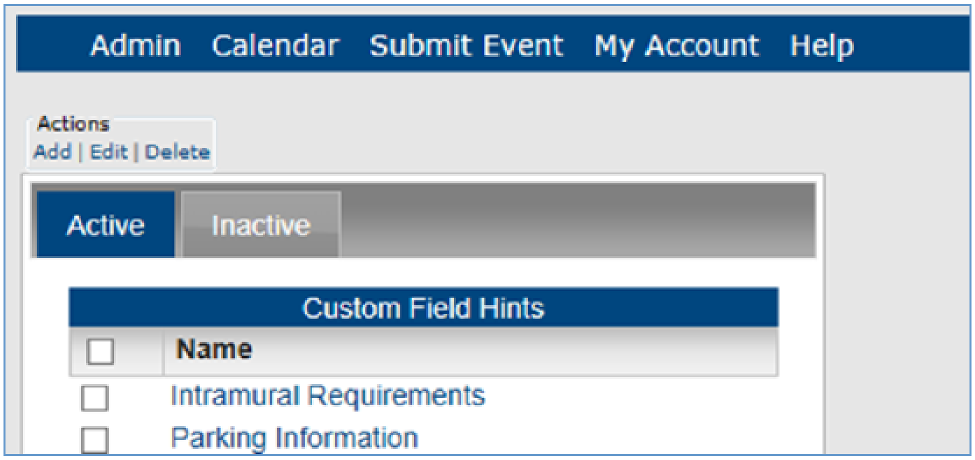
- Under Actions, click **Delete**. You will be prompted to confirm that you want to delete all the selected departments.
- Click **OK** in the message. A message confirms that all the selected departments were successfully deleted.
- Click **OK**.

CHAPTER 50: Configure Custom Field Hints

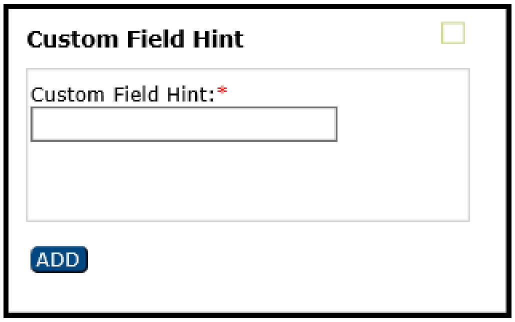
A *custom field* is found on the Submit Event page in EMS Master Calendar. Custom fields supply additional information about events on the calendar for guests or users. As a Master Calendar manager, you can provide *hints* or suggestions about these fields to the user. For example, if you are managing 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. This topic guides you in creating, activating/de-acitvating, editing, and deleting these custom field hints.

> **Note:**
> 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. From the Admin Panel, navigate to **Admin** > **Configuration** > **Custom Field Hints**. The Custom Field Hints page opens on the Active tab, listing all currently active custom field hints in Master Calendar.



2. *To create a new custom field hint*, under Actions, click **Add**. The Custom Field Hint dialog box opens, where you can name the new custom field hint. This name will appear in a dropdown list when a guest or user clicks the Lookup icon next to a Custom field on the Submit Events page.



- In the **Custom Field Hint** field, enter a name or description for the custom field.
- Click **Add**. The hint is added as an *active* custom field hint in Master Calendar.

3. *To Edit or Activate/De-Activate a Custom Field Hint* (this controls which custom field hints appear to the user), use the **Inactive** tab to activate field hints, or use the **Active** tab to de-activate field hints.
   a. Select the custom field hint you want to activate or de-activate.
   b. Under Actions, select **Edit**. The Custom Field Hint dialog box opens. The dialog box shows the custom field hint name.
   c. To change the name of the hint, edit the text in the field.
   d. Use the Active checkbox to activate/de-activate the hint,, which controls whether users will see it.
   e. Click **Save**.
4. *To Delete a Custom Field Hint*, select the field hint you want to delete on the Active or Inactive tab, and then 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.

> **Note:**
> 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.

   a. Under Actions, click **Delete**. You will be prompted to confirm that you want to delete the selected custom field hints.
   b. Click **OK**. A message confirms that the selected custom field hints were successfully deleted.
   c. Click **OK**. The Active tab or Inactive tab is updated to reflect the deletion of the custom field hints.

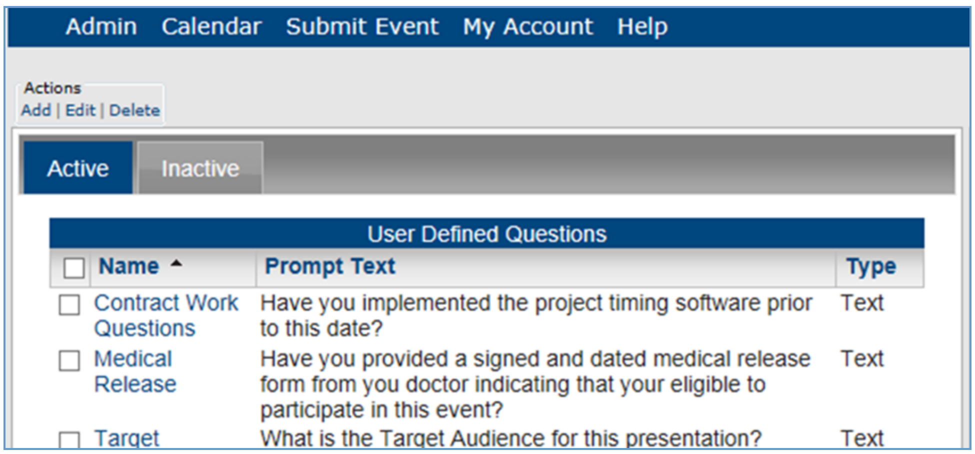
CHAPTER 51: Configure User Defined Questions (UDQs)

A *user defined question* (UDQ) is a question you can set to prompt a guest or user as part event request process. A UDQ can be optional or required, and you can assign one or more UDQs to one or more calendars of your choice. This topic guides you in adding, editing, deleting, activating and de-activating UDQs, and viewing UDQ history.

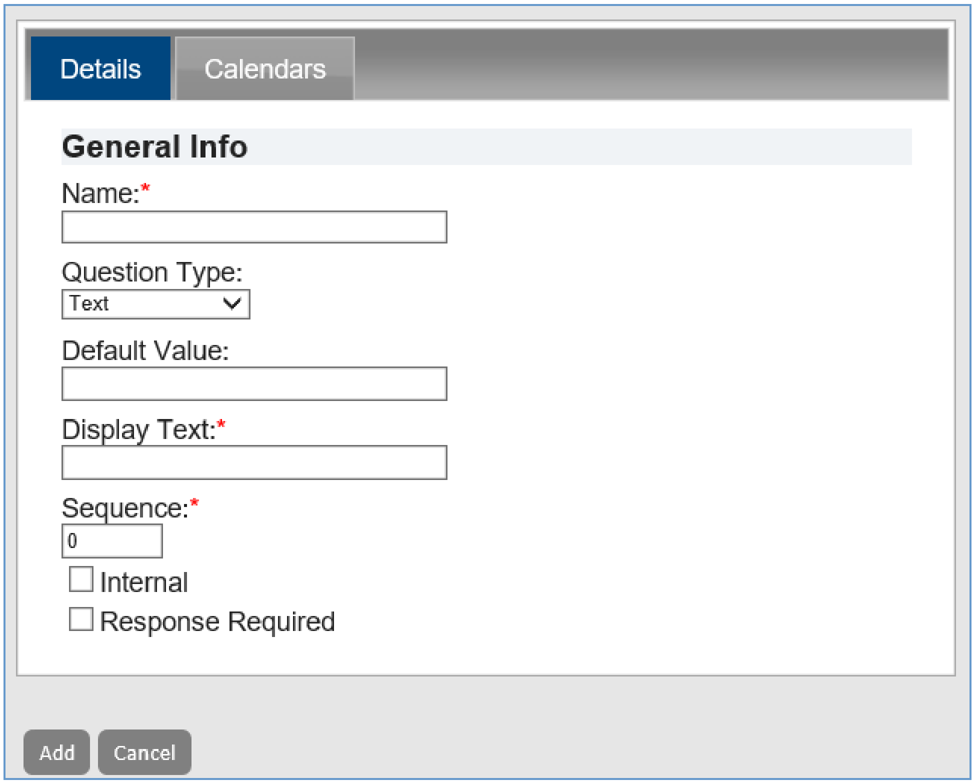
Define a New UDQ

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

1. From the Admin Panel, navigate to **Admin** > **Configuration** > **User Defined Questions**. The User Defined Questions page opens on the Active tab, listing all currently active UDQs in Master Calendar.



2. Under Actions, click **Add**. The Details tab opens, where you can specify information for the new UDQ.



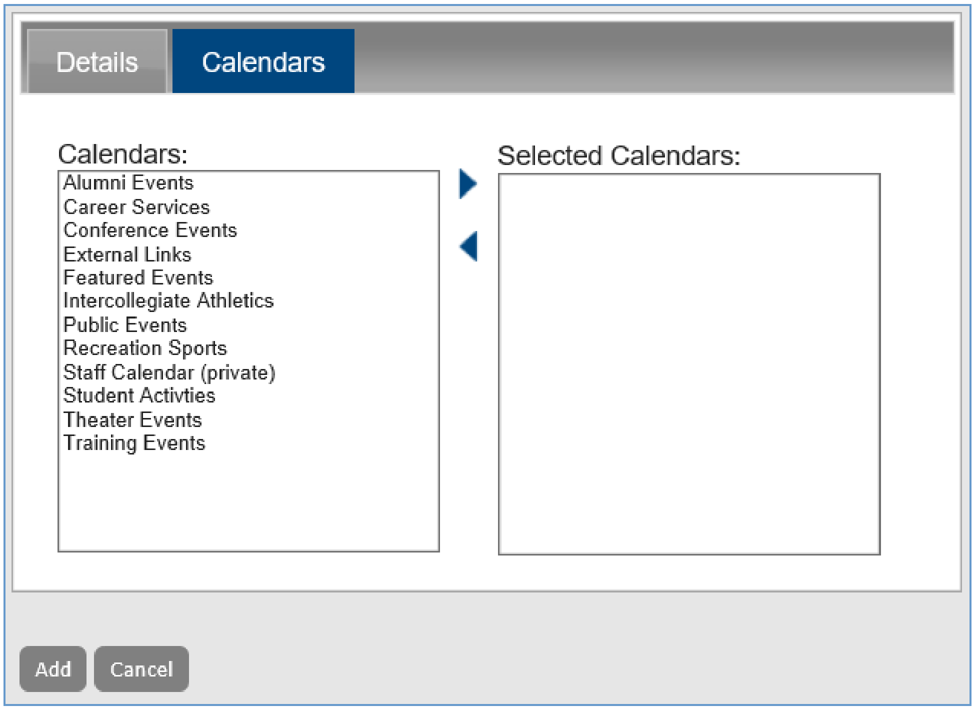
3. Enter the information for the UDQ.

UDQ Details Tab Fields

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 for the required format of the answer to the UDQ: • Text • Date • Numeric • List
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	The text that is displayed for the UDQ under Additional Information on the Submit

Field	Description
Text	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.

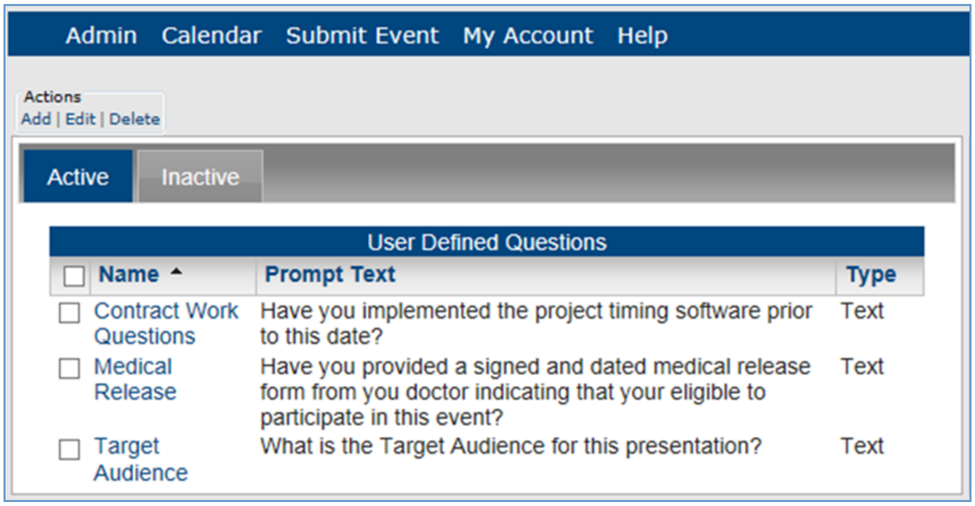
4. Click the **Calendars** tab.



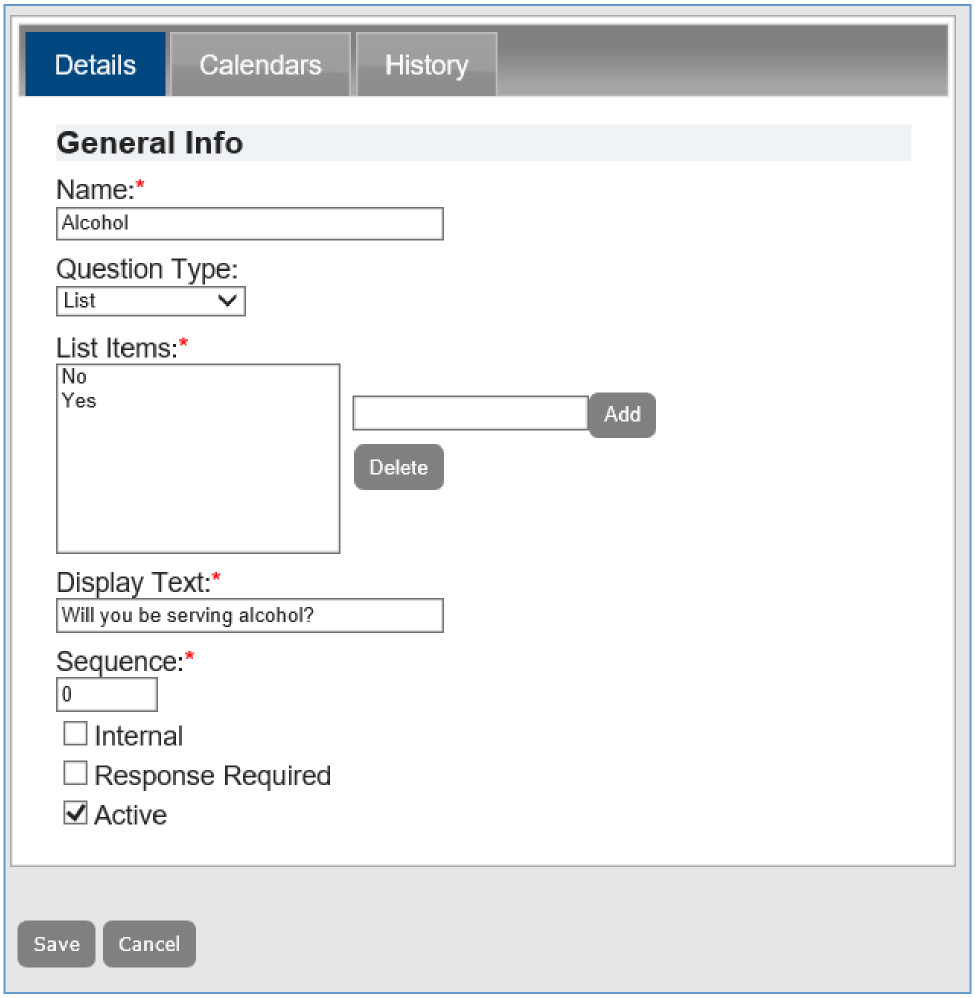
5. In the Calendars list, select the calendar to which the UDQ is to be assigned (CTRL-click to select multiple calendars). The calendar now appears in the Selected Calendars list.
6. Click **Add**. The UDQ is saved as an *active* UDQ in Master Calendar.

Edit Existing UDQs

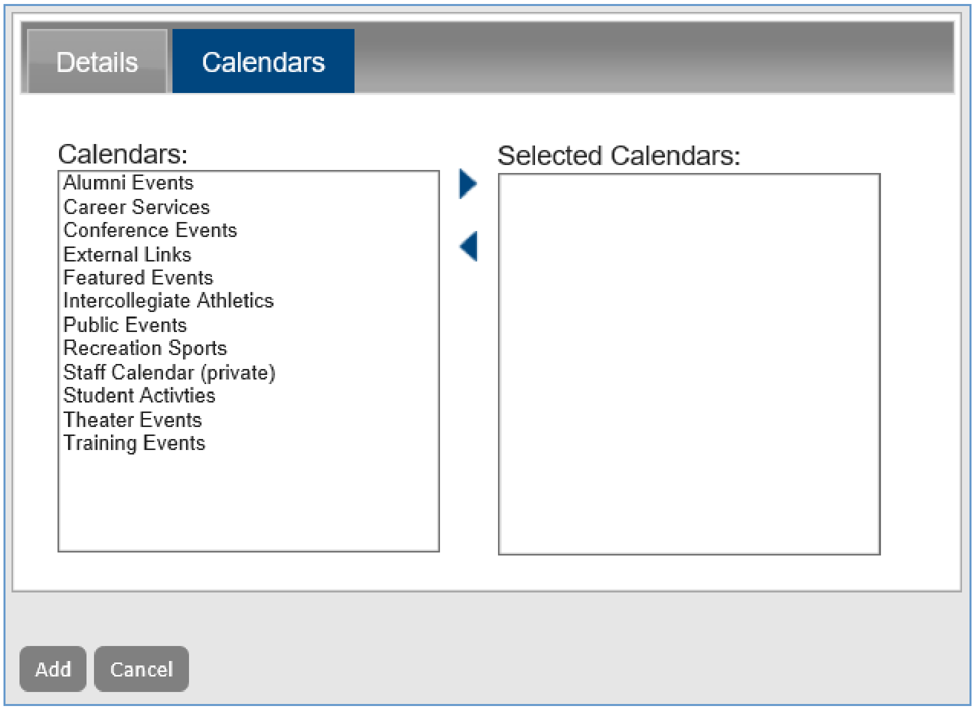
1. From the Admin Panel, navigate to **Admin** > **Configuration** > **User Defined Questions**. The User Defined Questions page opens on the Active tab, listing all currently active UDQs in Master Calendar.



2. *To edit, activate or de-activate a UDQ*, select the Active or Inactive tab.
3. Select the UDQ you want to edit from the list.
4. Under Actions, click **Edit**. The Details tab opens.



5. Make changes as needed to the UDQ information.
6. *To change the calendar the UDQ applies to,* use the **Calendars** tab.



- In the Calendars list, click the calendar to which the UDQ is to be assigned (CTRL-click to select multiple calendars), and then click the **Add** (>) arrow to add the selected calendar(s) to the Selected Calendars list. Click the **Remove** (<) arrow to remove it from the Selected Calendars list.
- To view the UDQ's history, click the **History** tab. 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, as well as the name of the user who last edited the UDQ. You can view the history for both active or inactive UDQs.
- Use the Active checkbox to control whether the UDQ presents to users during the booking process.
- Click **Save**. The Active or Inactive list of UDQs updates to reflect your changes.

7. *To delete a UDQ,* from the Active or Inactive tab, select the UDQ you want to delete. 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.

> **Note:**
> 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.

8. Under Actions, click **Delete**. A message prompts you to confirm that you are sure that you want to delete all the selected UDQs.

9. Click **OK**. A message confirms the deletion.
10. Click **OK**. The list of UDQs is updated to reflect the deletion.

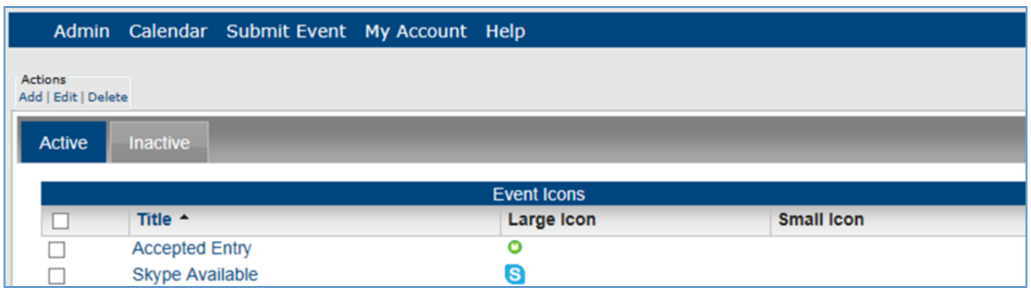
CHAPTER 52: Configure Event Icons

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 you can have the icon displayed on the calendar for the event. Managing event icons consists of adding event icons to event descriptions, tooltips or calendars, activating and inactivating event icons, editing event icons, and deleting event icons.

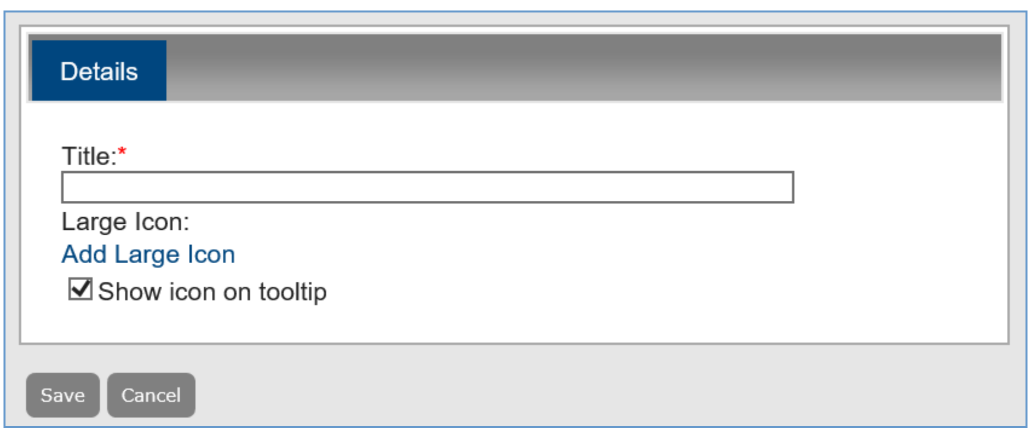
Add a New Event Icon

When you add an event icon, you must, at a minimum, add a large icon.

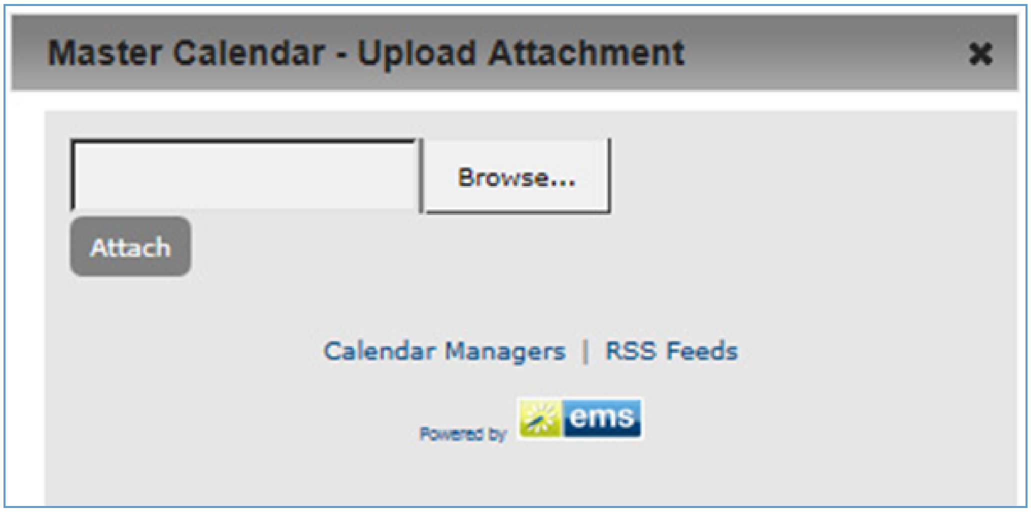
1. From the Admin Panel, navigate to Admin > **Configuration** > **Event Icons**. The Event Icons page opens on the Active tab, listing all currently active event icons in Master Calendar.



2. Under Actions, click **Add**. The Details dialog box opens, where you can upload and name the event icon, and control where it is used (event descriptions, tooltips, or calendars) to add the icons. By default, Show icon on tooltip is selected.



3. In the **Title** field, enter a name to describe the event icon.
4. Click **Add Large Icon**. The Upload Attachment dialog box opens, where you can **Browse** and select an image.



5. After you select the image 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 event icon.

Note:
A large icon is less than 25 x 25 pixels.

6. 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.

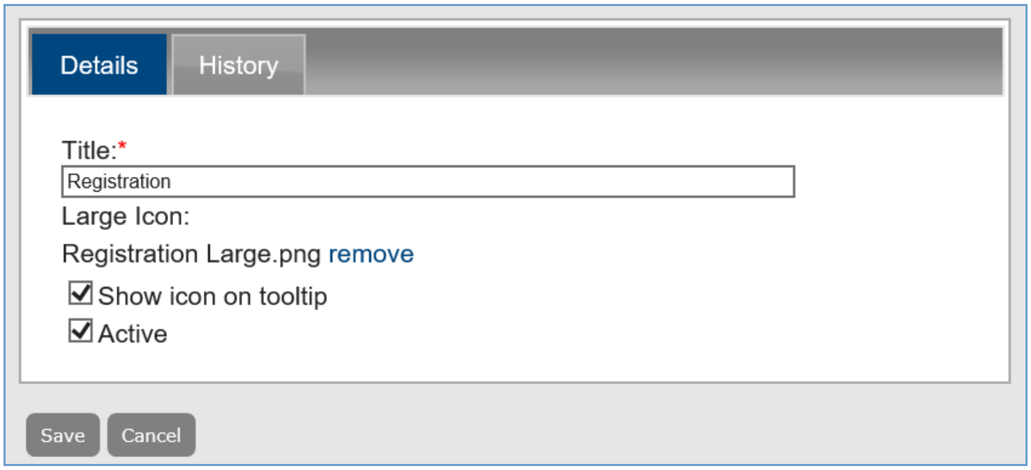
7. Optionally, do one or both of the following:
   g. If you do not want the icon to be displayed in the event tooltip, clear Show icon on tooltip.
   h. If you want to display the icon on the calendar entry, select Show icon on calendar.

8. Click **Save** to save the event icon as an active icon in Master Calendar. The icon is displayed on the Act-ive tab of the Event Icons page.

Edit Event Icons

When editing existing icons, you can simply change details about the icons, such as name or where it is used, you can change the image itself, or you activate or de-activate the icon, which controls whether it displays to users anywhere in Master Calendar.

1. From the Admin Panel, navigate to Admin > **Configuration** > **Event Icons**. Select the **Active** or **Inactive** tab.
2. Select the icon you want to edit.
3. Under Actions, click **Edit**. The Details tab opens.



Note:

To view the history of an event icon, click the **History** tab.

4. Edit the text in the **Title** field to rename the icon.
5. Use the **Remove** and **Add** options to upload a different icon file.
6. Select the **Show icon on tooltip** checkbox to control where the icon appears.
7. Select the **Active** checkbox to control whether the icon displays to users anywhere in Master Calendar.
8. Click **Save**.

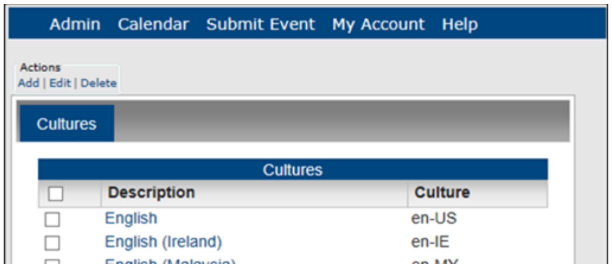
Note:

To delete an icon entirely, from Step 2 above, choose **Delete**. To select all icons on a page, select **Title** in the list view first. Click **OK** (twice) to confirm your actions and the icon will no longer appear in the Active or Inactive tabs.

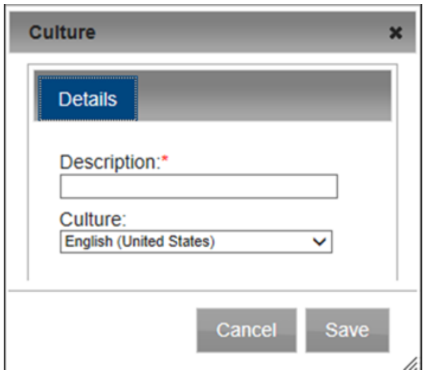
CHAPTER 53: Configure Cultures

Cultures are used if you use language translation: a culture is the language (which you provide) into which the menu text, menu items, field labels, and help text will be translated on your Master Calendar site. This topic guides you in working with these settings.

1. From the Admin Panel, navigate to **Admin** > **Configuration** > **Cultures**. The Cultures page opens, listing all the cultures that are currently configured in your Master Calendar database.



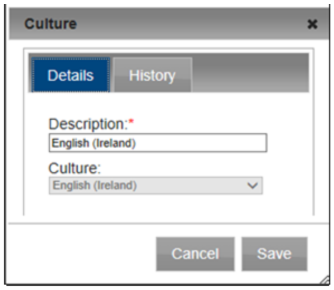
2. *To add a culture*, under Actions, click **Add**. The Culture dialog box opens, where you can name or describe the culture that you are configuring and select the appropriate culture. The default value is English (United States).



- 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.
- On the **Cultures** dropdown list, select the culture.
- Click **Save**. A message opens indicating that the culture was saved.
- Click **OK** in the message. The message closes and the newly configured culture is displayed on the Cultures page.

> **Note:**
> 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 Also: Entering translations for menu text and options and Customize 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.

3. *To edit a culture's description,* select the culture you want to edit.
   - Under Actions, click **Edit**. The Culture dialog box opens. The dialog box lists the selected culture and its description. Only the description is editable.



> **Note:**
> If you selected the wrong culture for a culture description, then you must delete the culture, and add it again.

   - Edit the description for the culture.
   - Click **Save**. A message opens indicating that the culture was saved.
   - Click **OK** in the message. The message closes and the newly edited culture is displayed on the Cultures page.

4. *To delete a culture*, select the culture you want to delete. To select all cultures, select **Description**. If you have multiple pages of cultures 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 cultures.
   - Click **OK** in the message. A message opens indicating that all the selected cultures were successfully deleted.
   - Click **OK** in the message. The Cultures page is updated to reflect the deletion of the cultures.

CHAPTER 54: Security: Configure Users and User Templates

Configuring *Users* and *User 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.

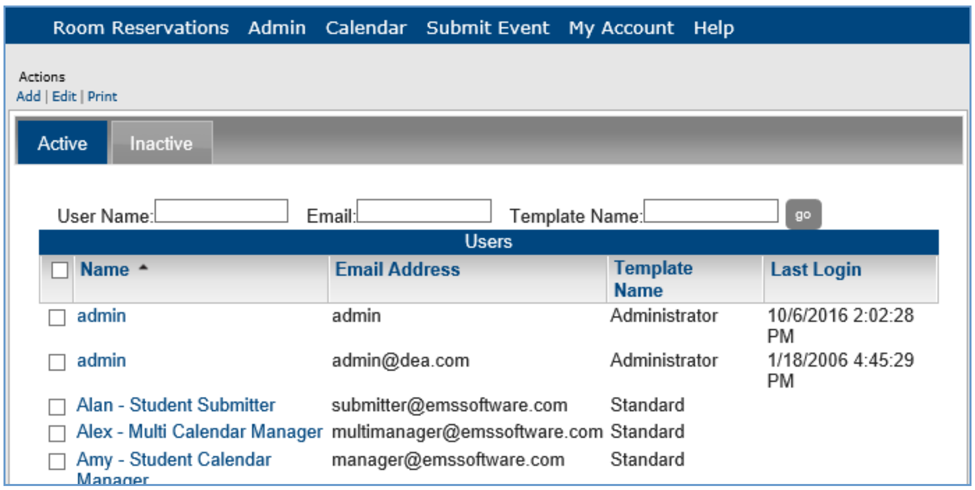
See Also: Configure Users and Configure User Templates.

CHAPTER 55: Configure 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. This topic guides you in searching for users, creating new ones, and working with existing ones.

Search For a User

1. From the Admin Panel, navigate to **Admin** > **Security** > **Users**. The Users page open, on the Active tab, which lists all currently active users in Master Calendar.



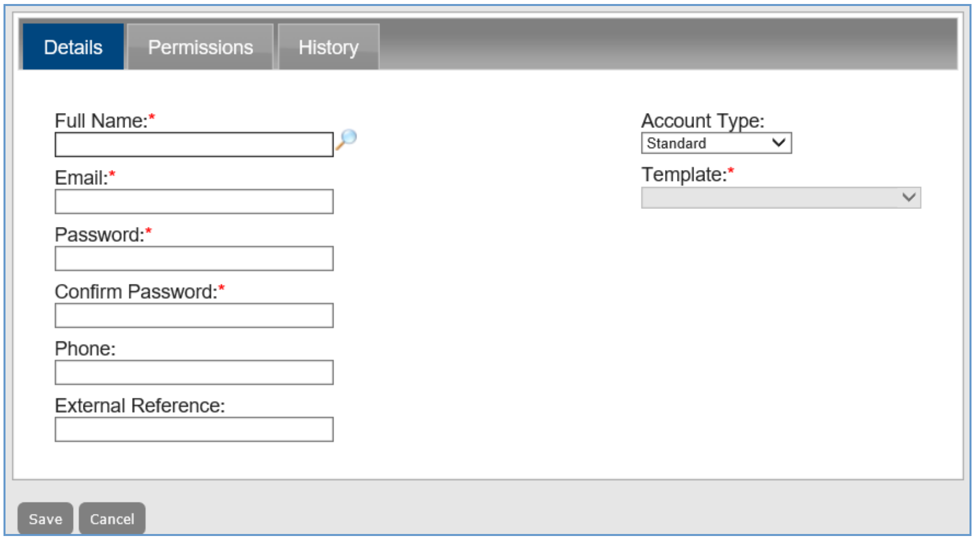
Users Page

> **Note:**
>
> The **Inactive** tab lists all inactive users in EMS Master Calendar. You might find the user on either tab. Use the **Print** option to generate a report list of all users configured in Master Calender, which you can export as a PDF (default), Xls, Xlsx, Rtf, Mnt, Text, Image, or Csv.

2. Use 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.

Create a New Master Calendar User

1. From the Admin Panel, navigate to **Admin** > **Security** > **Users**.
2. Under Actions, click **Add**. The Details window opens, where you can add the information about the user.



> **Note:** If your organization has purchased the optional Integrated Authentication module, a Lookup icon shows next to the **Full Name** field. Click this icon to open a list of users in your EMS system and automatically populate these fields.

3. Add the information for the new user.

Details Fields

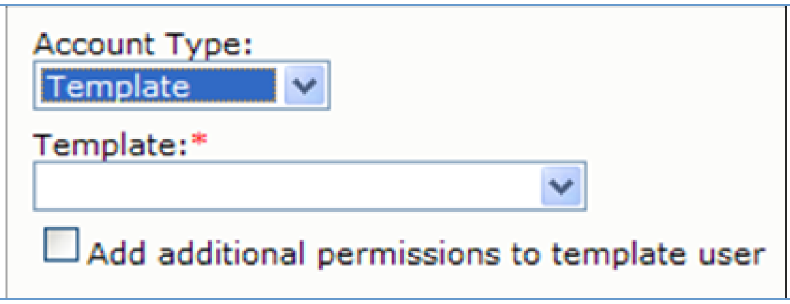
FIELD	DESCRIPTION
Full Name	The full name for the user.
Email	The email address for the user.
Password	The login password for the user. **Note:** The password does not have any special rules.

FIELD	DESCRIPTION
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	Choose one of the three options from the dropdown: • Standard • Template • Administrator
Template	If you select Template as the Account Type, the Template dropdown appears. Choose a template from the dropdown. Select the Add Additional Permissions to Template User checkbox to add additional permissions.

4. Select the account type for the user - Standard, Template or Administrator.

User Types

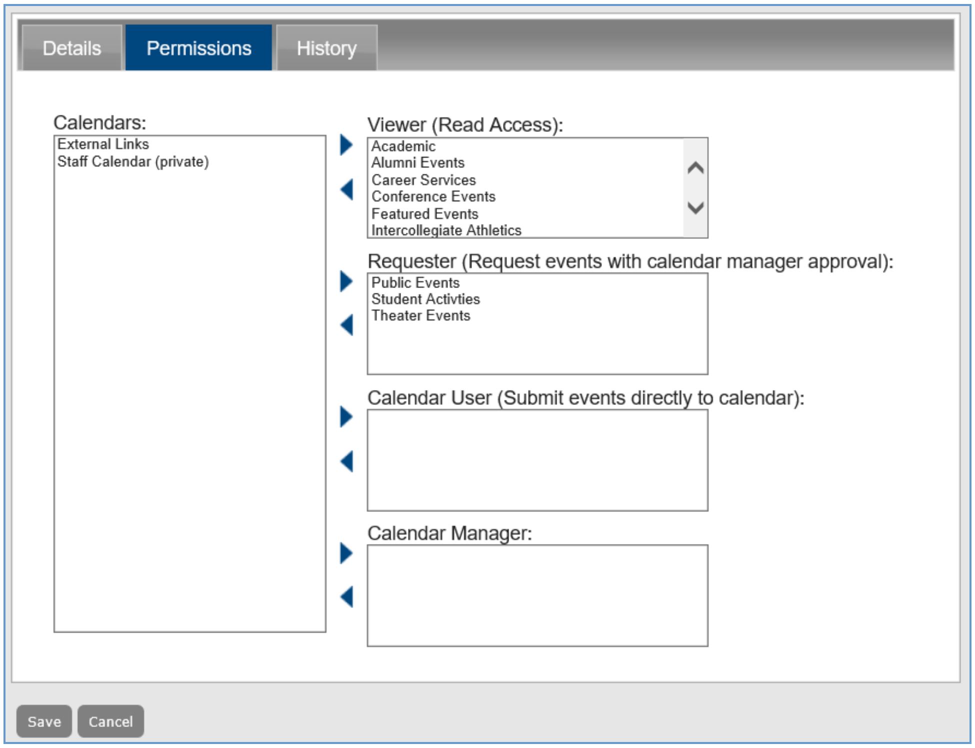
User type	Description
Standard	This is the default value for a user type. You must manually apply permissions for this type of user.
Template	**Note:** This type of user is available only if you have active templates defined in Master Calendar. See Configure User Templates. If you select this type of user: • 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.

User type	Description
	 • 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 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 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.

Define User Permissions

1. Click the **Permissions** tab, which lists all currently active calendars in Master Calendar.



2. To indicate the type of access 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.

Calendar Access Type Fields

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.

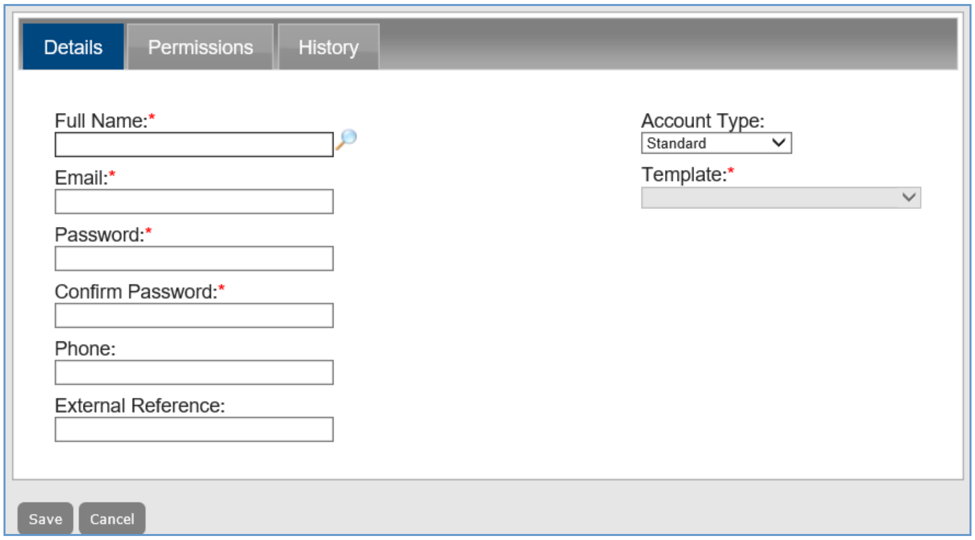
FIELD	DESCRIPTION
Calendar Manager	The user can carry out all administration functions for the calendar (edit the calendar, create calender URLs, submit events to the calendar without approval, add/edit/delete special dates, and so on.)

Note:
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.

Edit Existing Users

1. From the Admin Panel, navigate to **Admin** > **Security** > **Users**. Select the Active or Inactive tab and select the user you want to work with and click **Edit**. The Details tab opens.



> **Note:**
> Use the **Active** option to control whether the user is active or inactive in Master Calendar.
>
> You can only **Delete** inactive users, so to delete a user from Master Calendar entirely, first set them to Inactive, and then on the Inactive tab you can select the user and click the **Delete** option.
>
> You can view history on a user by clicking the **History** tab.

2. Edit the information as needed for the user.
3. If needed, edit the user's permissions on the Permissions tab, and update the type of access 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.
4. Click **Save** to save your changes.

CHAPTER 56: Configure User Templates

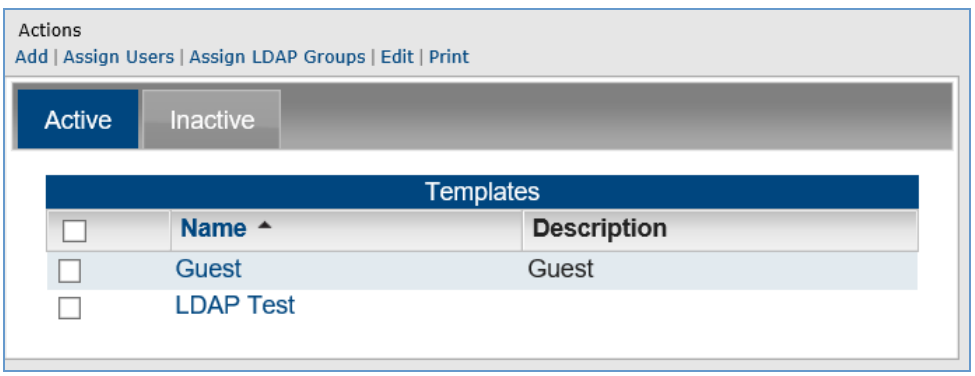
A *user template* contains a set of calendar permissions. For example, Template A specifies requestor access to Calendar A and view-only access to Calendar B, Template B specifies view-only access to all calendars in Master Calendar, and so on. Templates are always optional. You can apply a template to a group of user records in a single step to simplify the setup and maintenance of Master Calendar.

This topic guides you in creating a new user template and working with existing ones.

> **Note:**
> If your organization has purchased and installed the optional EMS Integrated Authentication module, you can select LDAP groups for assignment to a template and you can associate these selected LDAP groups with a User Template.

Create a New User Template

1. From the Admin Panel, navigate to **Admin** > **Security** > **User Templates**. The User Templates page opens on the Active tab, which lists all currently active user templates in Master Calendar.

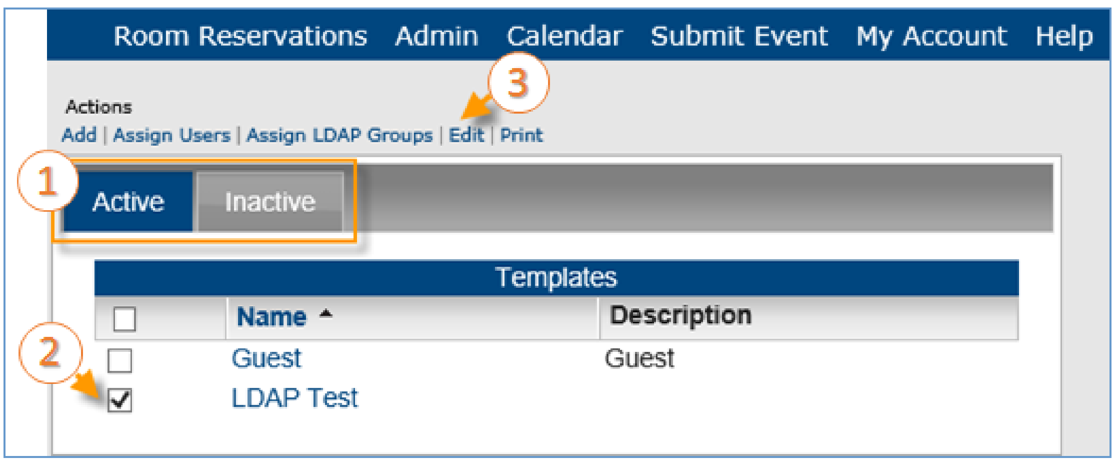


2. Under Actions, click **Add**. The Template tab opens, where you can name and describe the template.

3. Click **Save** or proceed to the subsequent sections of this topic.

Edit Existing Templates

1. To work with existing templates, from the User Templates page, click the Active or Inactive tab.
2. Select the template you want to edit.
3. Click **Edit**.



Note:
Use the **Print** option on the page above to generate a report of templates in Master Calendar. On the Inactive tab, you can Delete templates. You can only delete inactive templates.

4. The User template opens in edit mode. You can change the name and description for the User Template on this page.

Note:
You can use the **Active** checkbox to control whether the template is active or inactive. The History tab provides a history of this User Template.

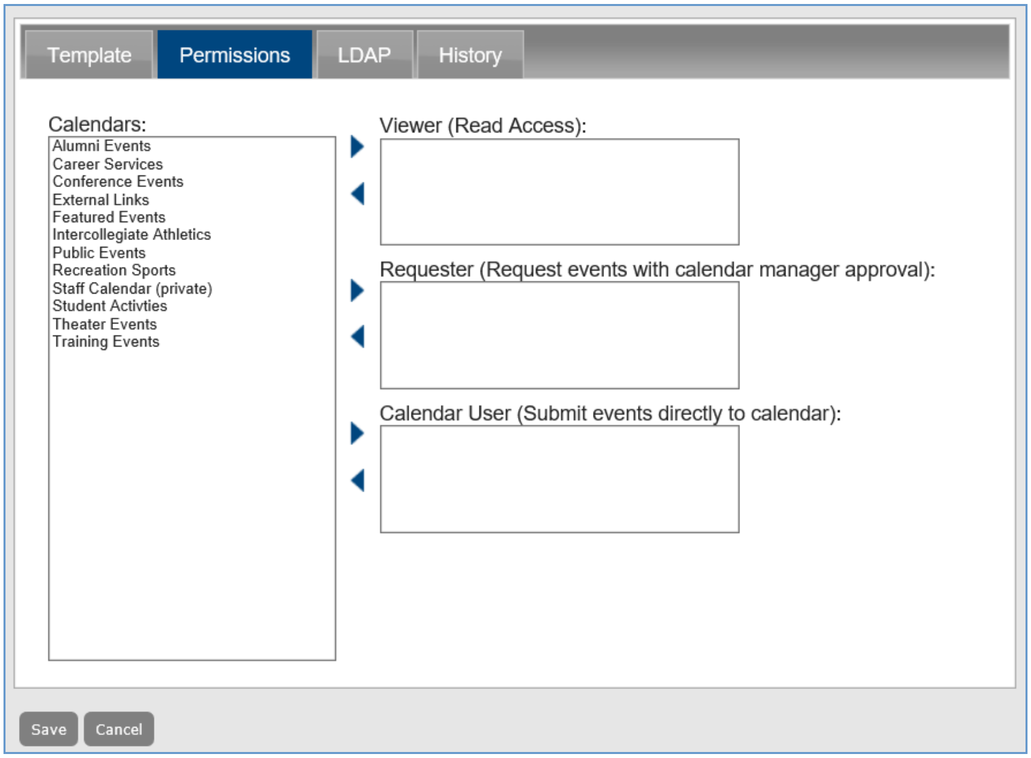
TAB	INFORMATION TO EDIT
Template	• Template Name • Template Description
Permissions	The type of access that a user with the selected template will have to the calendars in Master Calendar. See Also: Set user template permissions.
LDAP	The security group information that is maintained on your organization’s network in conjunction with the templates in Master Calendar. See Also: Add LDAP groups to a user template.

5. Proceed to the subtopics in this section.

Set Permissions for a Template

Note:
Permissions control the type of access users assigned to the template have to a calendar.

1. From the Admin Panel, navigate to **Admin** > **Security** > **User Templates**.
2. Select a template. Click the **Permissions** tab.



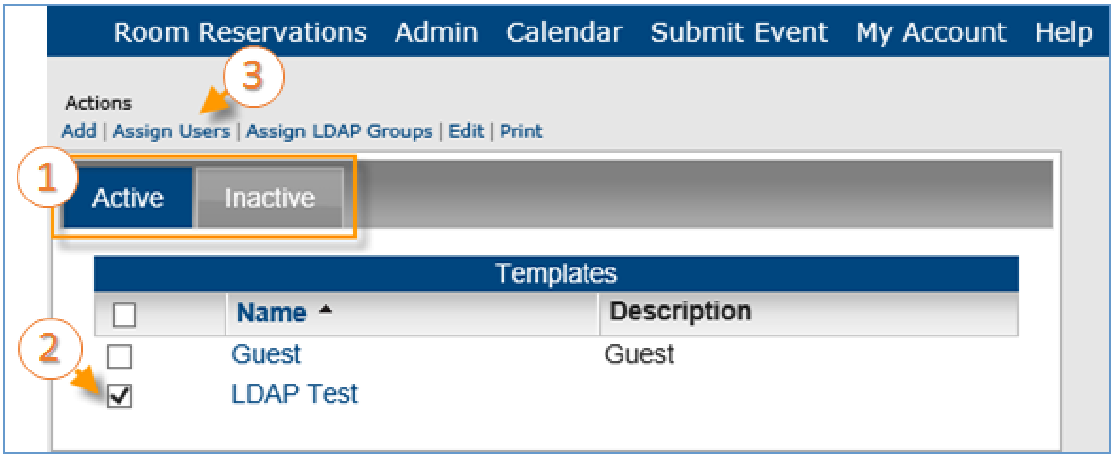
The Viewer, Requester, and Calendar User fields indicate the type of access that a user with the selected template will have to the calendars in Master Calendar. Users assigned to the selected template can still view any calendar that remains in the Available Calendars column, unless the calendar is defined as a private.

Calendar Access Type Fields

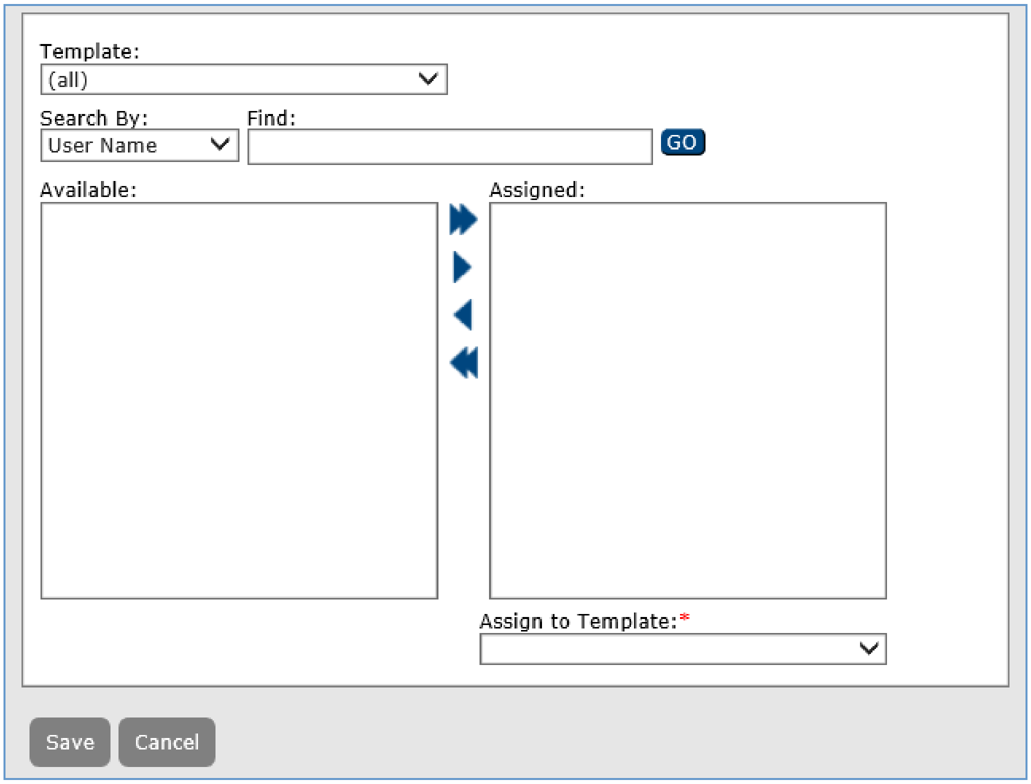
FIELD	DESCRIPTION
Viewer	Users can only view events on the calendar.
Requester	Users can view events on the calendar and submit events to the calendar; however, the submitted event is posted only if approved by the Calendar Manager.
Calendar User	Users can view events on the calendar and submit events to the calendar and the events are automatically posted without approval by the Calendar Manager. Calendar Manager is not an option when you are defining templates. It is available only when you are adding or editing a user record.

Assign Users to a Template

1. From the Admin Panel, navigate to **Admin** > **Security** > **User Templates**. Click the Active or Inactive tab and select the templates you want to assign users to.
2. Under Actions, click **Assign Users**.



The page for assigning users to a template opens.



3. Enter the search criteria and then click **Go** to search for the users that you want to assign to a selected template.
4. Move the User from Available to Assigned.
5. Click **Save** to save the template as an *active* template in Master Calendar.

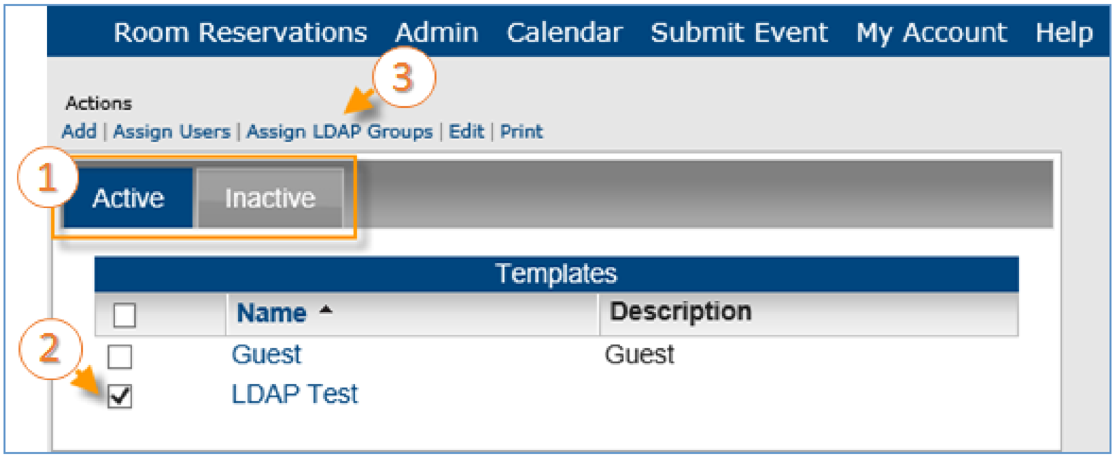
Assign Users to LDAP Template Groups

> **Note:**
> Before you can assign LDAP "Security Groups" to a template, you must select the LDAP groups that you want to assign.

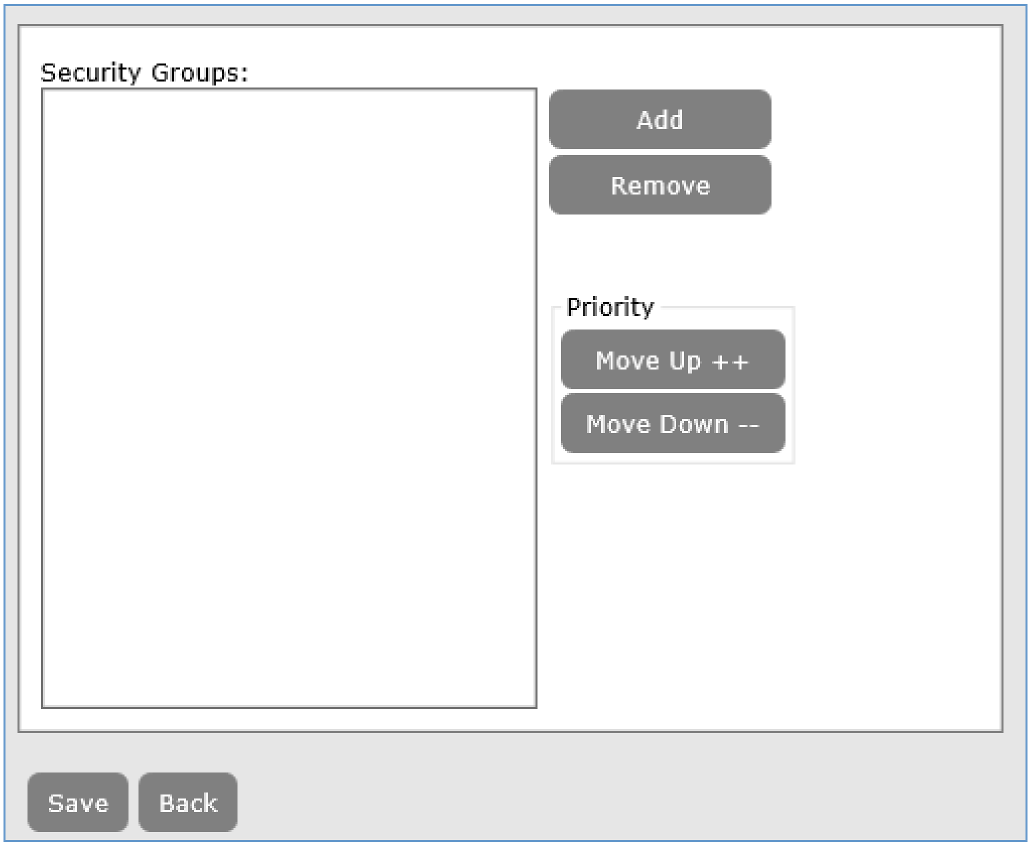
The Assign LDAP Groups option is available only if your organization has purchased and installed the optional Integrated Authentication module. This module allows your organization to use the security group information that is maintained on its own network in conjunction with the templates in Master Calendar to set permissions for its Master Calendar users.

Select LDAP Groups to Assign to User Templates

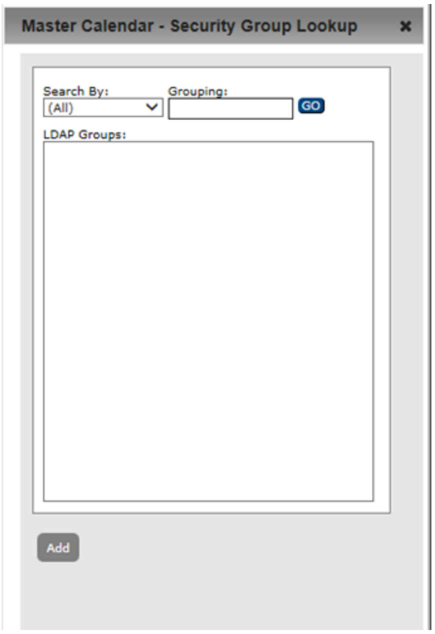
1. From the Admin Panel, navigate to **Admin** > **Security** > **User Templates**. Click the Active or Inactive tab and select the templates you want to assign.
2. Under Actions, click **Assign to LDAP Groups.**



The Security Groups page opens, listing LDAP security groups you can assign to the template.



3. To select a security group, select it from the list and 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 template.

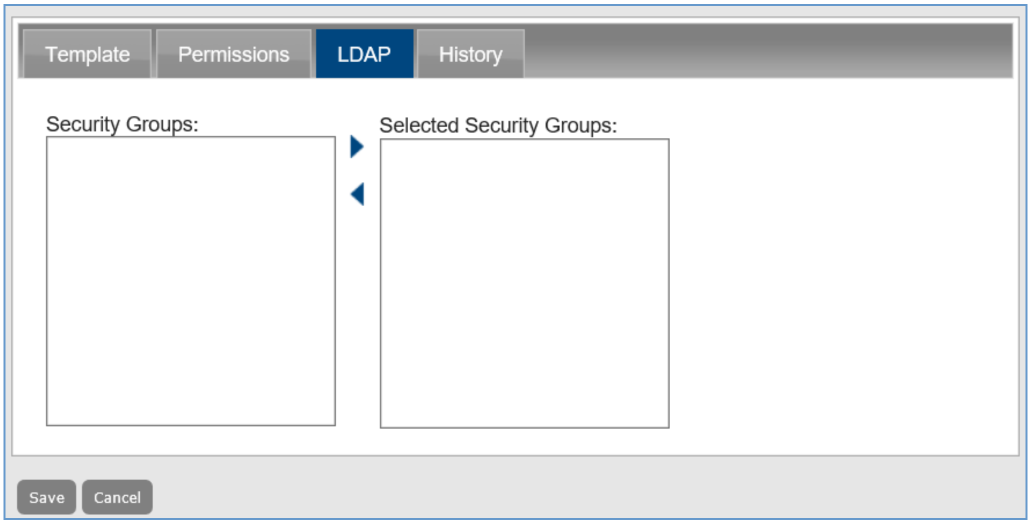


4. Specify the search criteria for the security groups that you want to assign to a template and then click **Go**.
5. From the search results, select the security group that is to be assigned to a template (CTRL-click to select multiple groups), and then click Add to move the groups to the Security 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. You can leave them as is or change the priority order of the groups in this list by using the **Move Up ++** and **Move Down --** buttons.

> **Note:**
> 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.

Associate LDAP Groups With a User Template

1. From the Admin Panel, navigate to **Admin** > **Security** > **User Templates**. Click the **LDAP** tab.



2. From the Security Groups list, select the security group that is to be assigned to the 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.
3. Click **Save** to assign the selected LDAP security groups to the template.

CHAPTER 57: Site Administration and Customizing Your Master Calendar Site

Administrators can utilize the Site Administration function in Master Calendar to select the appearance of their Master Calendar site, specify the default page layout, manage RSS feeds and menu options, update Master Calendar registration information, build and generate custom reports, as well as manage data sources, connectors, help text, and subscriptions.

In addition, settings are available for customizing the appearance of your Master Calendar site, including themes, colors, icons, and site banners. Administrators can customize automated emails that are sent from many areas within Master Calendar, including subscriptions, reminders, and change notifications.

This section will provide information on:

- Customize Your Master Calendar Site (Theme)
- Customize Default Settings
- Customize RSS Feeds
- Customize Menus
- Maintain Registration
- Connect to Data Sources
- Customizing Email Headers
- Customize Help Text
- Manage Subscriptions

CHAPTER 58: Customize Your Master Calendar Site and Automated Emails

Settings are available for customizing the appearance of your Master Calendar site, including the automated emails that are sent from many areas within Master Calendar, including subscriptions, reminders, and change notifications.

This topic will provide information on:

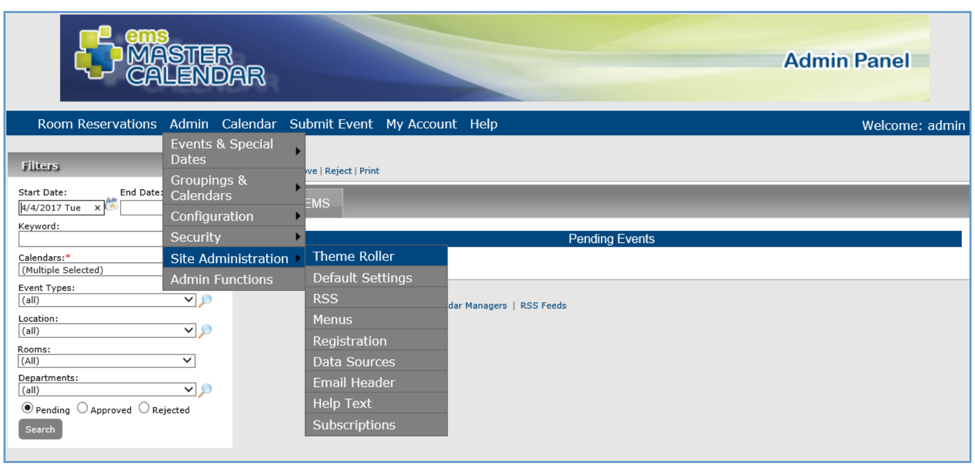
- Customize Themes, Colors, Site Banners, and Event Icons
- Customize Headers for Automated Emails
- Customize Email Text

Customize Themes, Colors, Site Banners, and Event Icons For Your Master Calendar Site

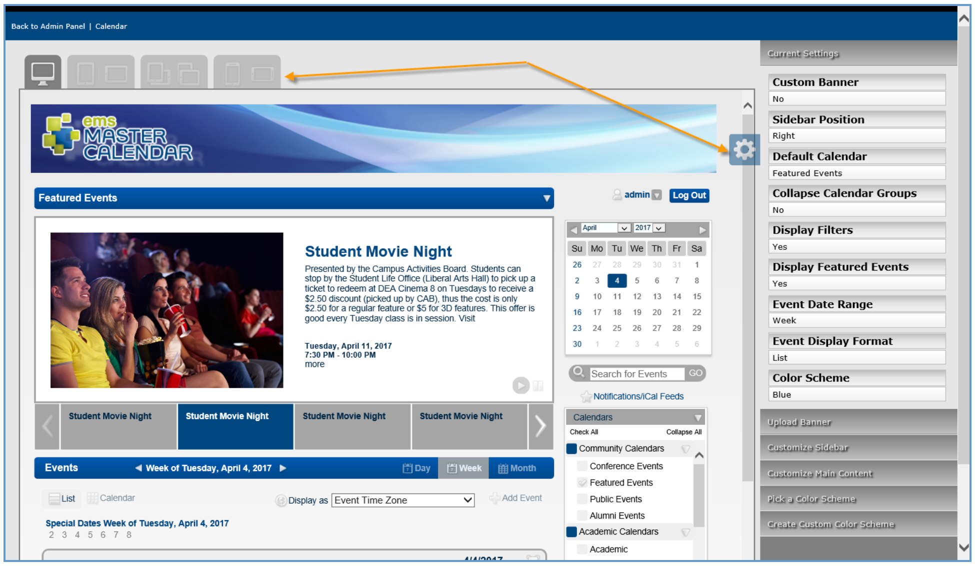
> **Note:**
> The theme determines the background color for calendars and section headers on pages in Master Calendar.

1. Navigate to **Admin** > **Site Administration** > **Theme Roller**.

   Themes will display in the upper-left corner of the application.



2. Click the **Settings** icon on the right for a list of options for customizing your application's appearance.

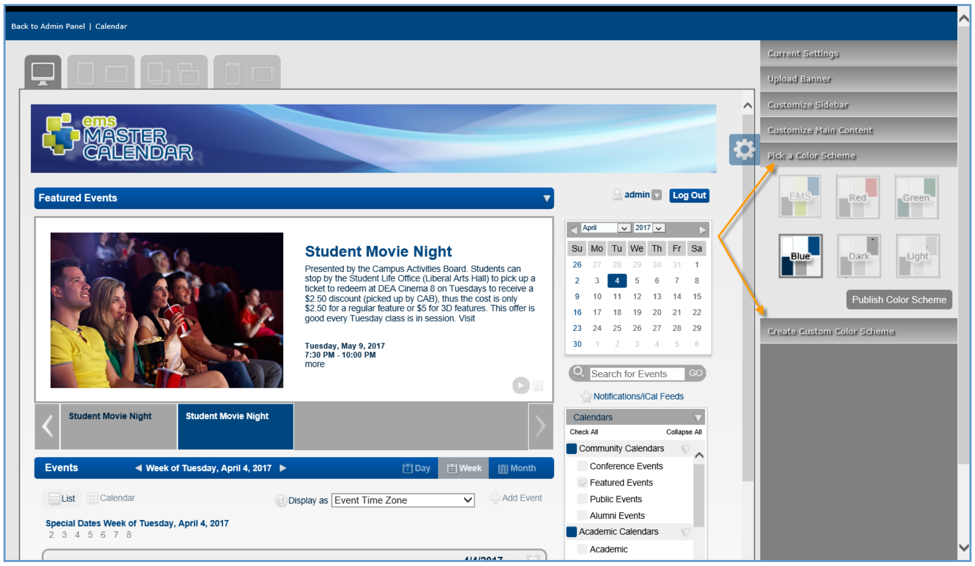


3. Click the theme you prefer in the upper left, and use the menu on the right to customize additional visual elements of the application.

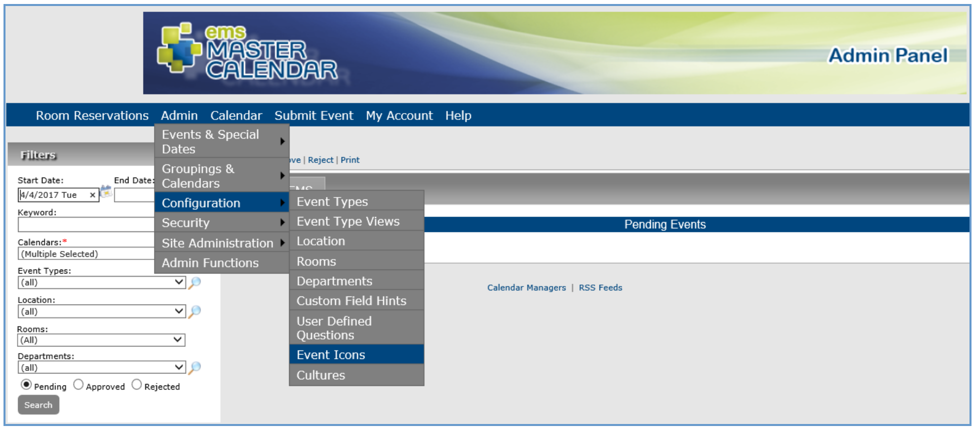
> **Note:**
> You can **Pick a Color Scheme** or **Create Custom Color Scheme** by expanding the menus on the right.

4. You can upload your organization's custom site banner, which displays at the top of every page on your Master Calendar site, by expanding the **Upload Banner** menu.

   The banner is a single image, and the optimal image size is 1000 x 100 pixels (width x height).



5. To change event icons, navigate back to the Admin panel and click **Admin** > **Configuration** > **Event Icons**.

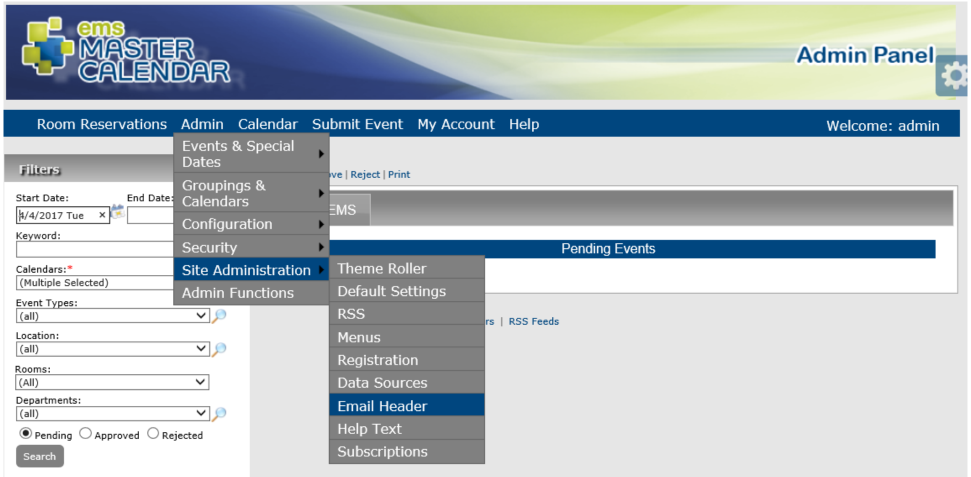


6. You can select items to **Edit** or **Delete**, or **Add** a new icon.

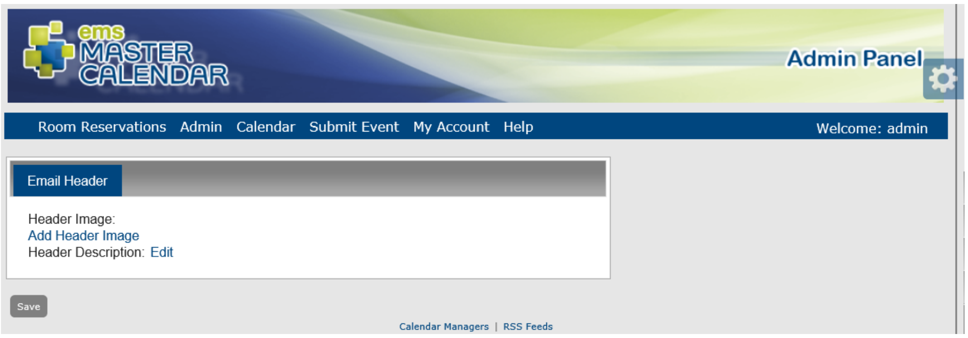
Customize Headers for Automated Emails

Automated emails can be sent from many areas within your Master Calendar application, including subscriptions, reminders, and change notifications. You can configure a customized email 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.

1. Navigate to **Admin** > **Site Administration** > **Email Header**.



2. On the page that displays, you can **Add Header Image** or **Edit** the header description.



Note:

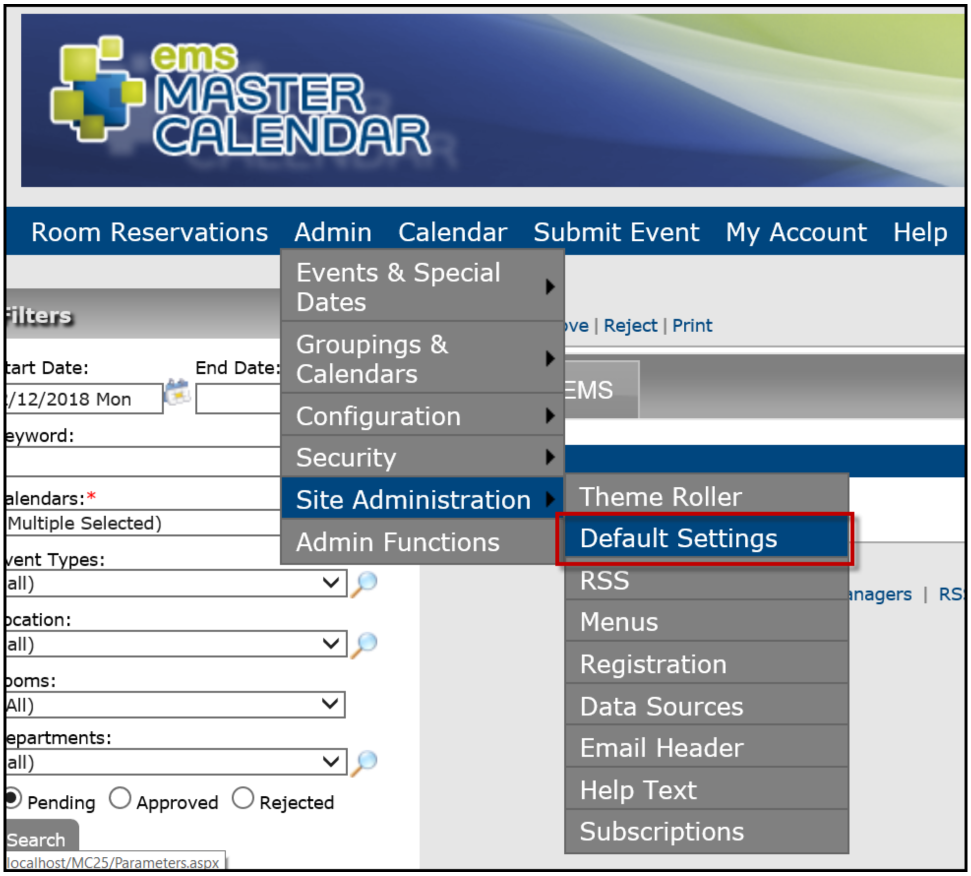
The new logo must be an image in one of the following formats —.jpg, .gif, .png, .bmp, and .ico.

3. Click **Save**.

Customize Email Text

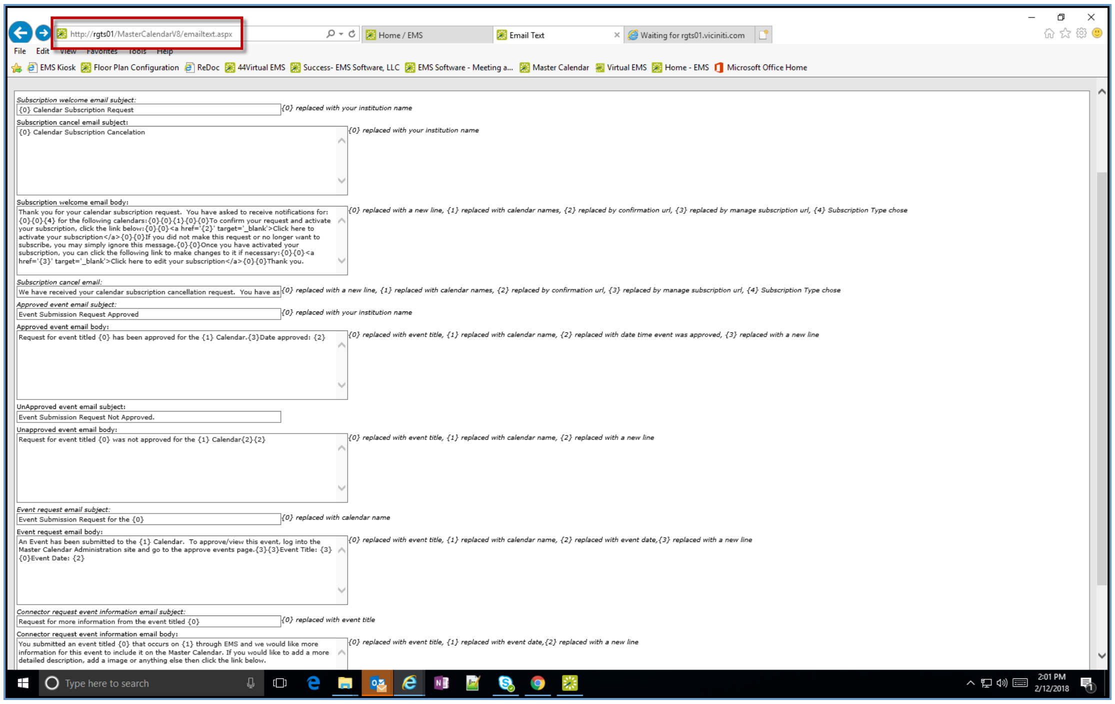
Customize text for your automated emails from the Admin Panel.

1. Navigate to **Admin** > **Site Administration** > **Default Settings**.



2. From the Default Settings screen, manually navigate to the **EmailText.aspx** area as follows;
   a. Append the Master Calendar URL.
   b. Highlight the suffix of the URL that is displayed and replace the last section with /emailtext.aspx (e.g.,http://rgts01/MasterCalendarV8/emailtext.aspx).

A page opens, allowing you to change the email text for the sections that are described.

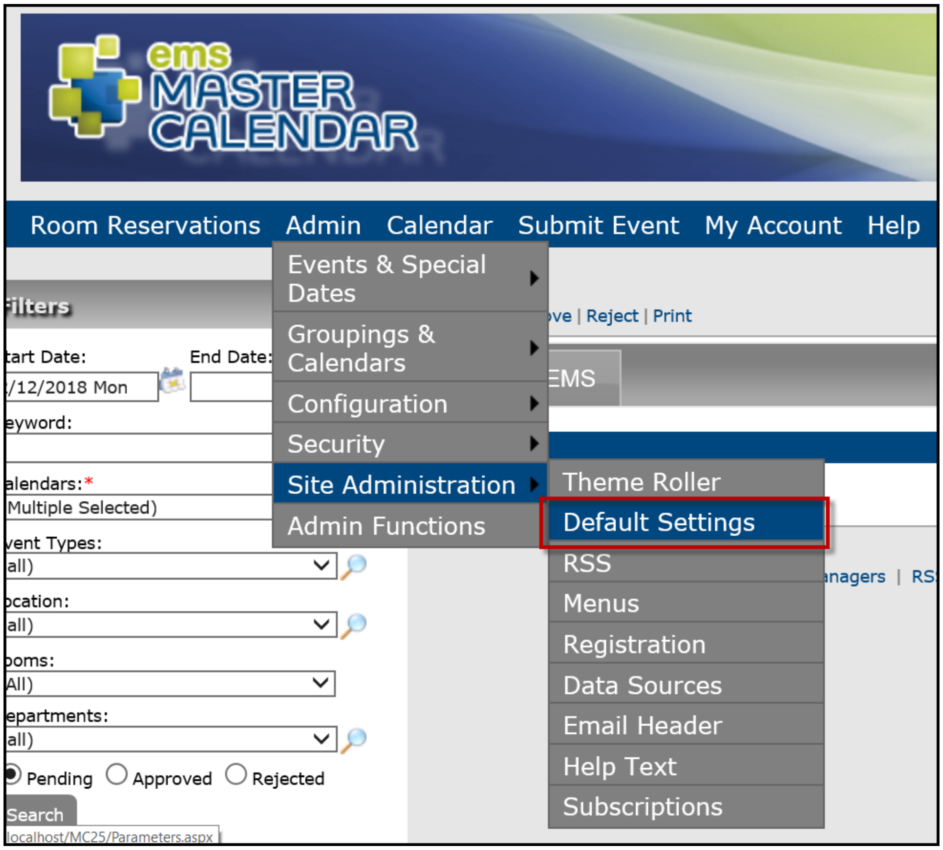


3. Click **Save**.

CHAPTER 59: Customize Email Text

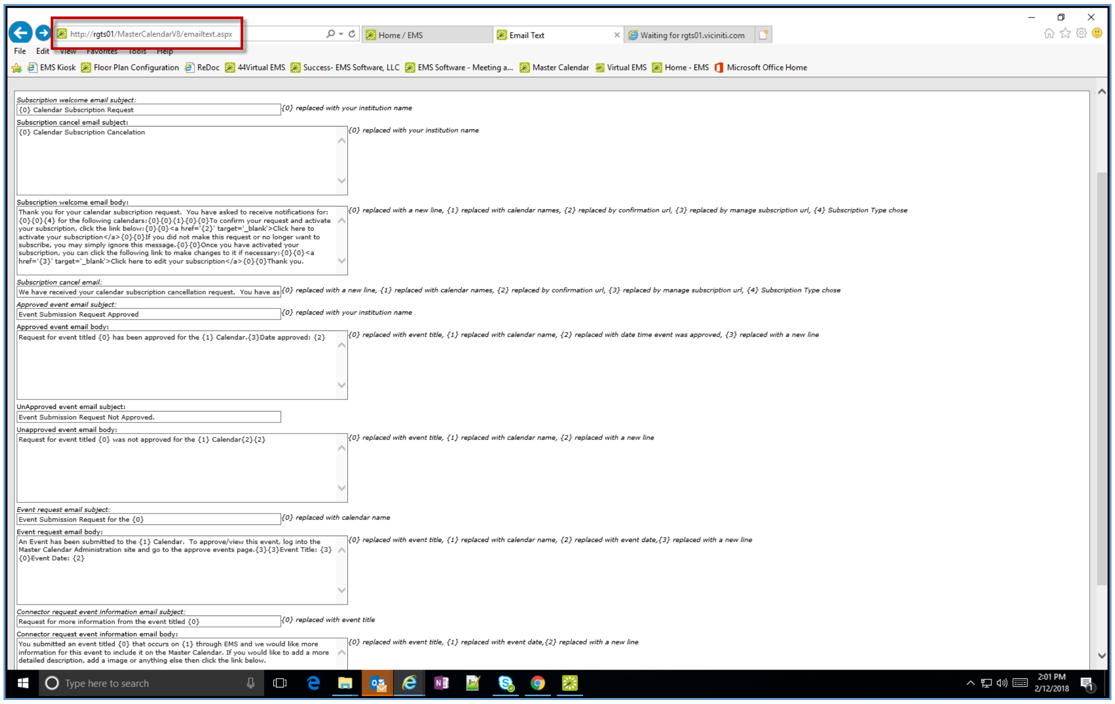
Customize text for your automated emails from the Admin Panel.

1. From the Admin Panel, navigate to **Admin** > **Site Administration** > **Default Settings.**



2. From the Default Settings screen, manually navigate to the **EmailText.aspx** area.
   a. To do this, append the Master Calendar URL.
   b. Highlight the suffix of the URL that is displayed and replace the last section with /emailtext.aspx (e.g.,http://rgts01/MasterCalendarV8/emailtext.aspx).

c. A page opens, allowing you to change the email text for the sections that are described.



3. Click **Save**.

CHAPTER 60: Customize RSS Feeds

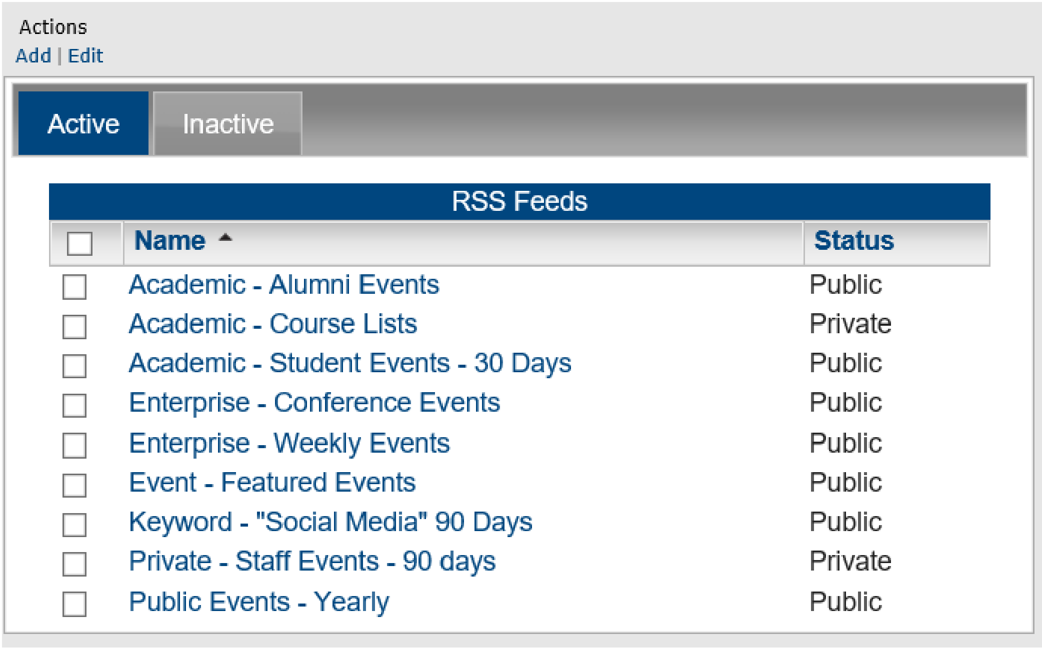
A *Really Simple Syndication (RSS) feed* can be used to provide convenient links to dynamic web content in your Master Calendar. A *featured* RSS feed is like a calendar URL. It can be featured across the top or bottom of your Master Calendar default page, and it can be static or dynamic (See Also: Setting the Default Page Layout). All other RSS feeds appear under the RSS link at the bottom of each page in Master Calendar. All public RSS feeds are always available from this link. 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.

This topic will provide information that will allow you to:

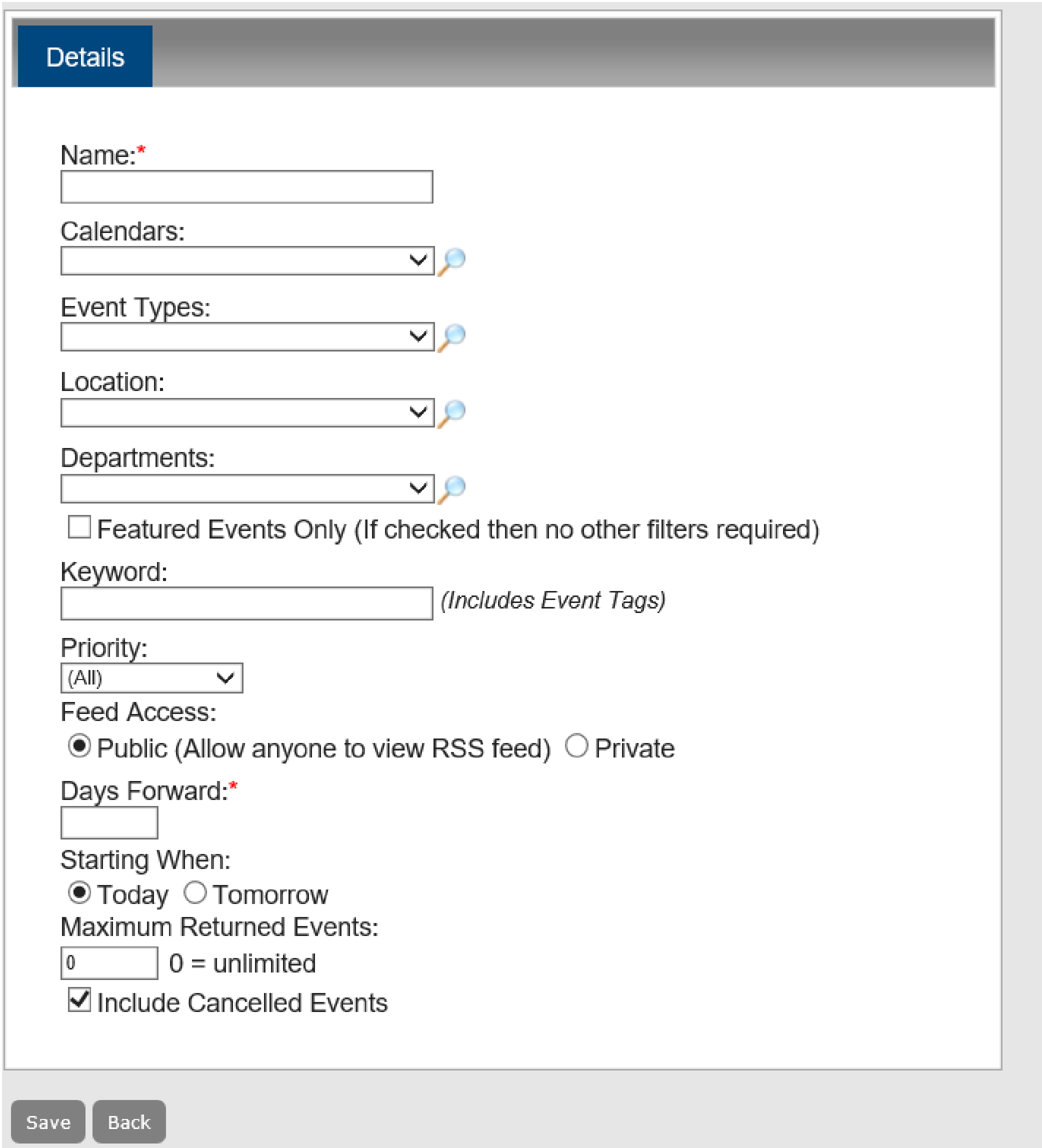
- Add an RSS Feed
- Activate an RSS Feed
- De-Activate an RSS Feed
- Edit an RSS Feed
- Delete an RSS Feed
- View the History of an RSS Feed

Add an RSS feed

1. From the Admin Panel, navigate to **Admin** > **Site Administration** > **RSS**. The RSS Feeds page opens on the Active tab, listing all currently active RSS feeds in Master Calendar.



2. Under Actions, click **Add**. The Details tab opens, where you can specify the information for the new RSS feed.



3. Enter the information for the RSS feed.

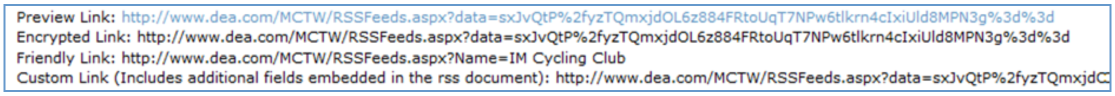
Details Tab, RSS Feed

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.

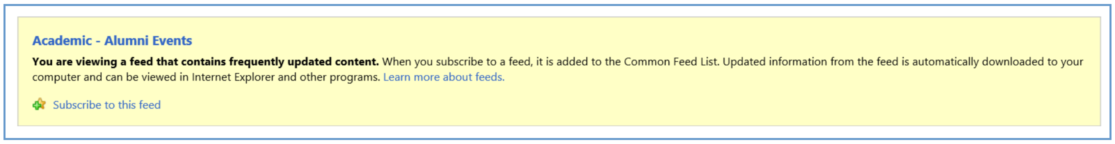
FIELD	DESCRIPTION
Event Types	A list of all active event types that are currently configured in Master Calendar. Click the Lookup icon to open the Event Types dialog box and select the event type or types that RSS feed should pull.
Location	A list of all active event locations that are currently configured 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.
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 the department or departments to select the events with these specific departments that the RSS feed should pull. The RSS feed will pull the events with these specific departments. **Note:** Department is a default label. Depending on how your Master Calendar site administrator has configured Master Calendar, you might see this labeled as something else, such as “Business Units” for example.
Featured Events Only	If this box is checked, no other filters are required.
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 change this to one of three values: • High

FIELD	DESCRIPTION
	• Medium • Low
Feed Access	• **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	• **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 Canceled Events	The default value is Yes. To set to No, clear this selection.

4. Click **Save**. An RSS Feed Saved message opens.
5. Click **OK** in the RSS Feed Saved message to save your RSS Feed. The following inks 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 in smartness, and communication that is web-specific.
   - **Custom Link**—Includes additional fields (Start Time, End Time, Location and IsAlldayEvent) that are embedded in the RSS document.


Preview Link: http://www.dea.com/MCTW/RSSFeeds.aspx?data=sxJvQtP%2fyzTQmxjdOL6z884FRtoUqT7NPw6tlkrn4cIxiUld8MPN3g%3d%3d
Encrypted Link: http://www.dea.com/MCTW/RSSFeeds.aspx?data=sxJvQtP%2fyzTQmxjdOL6z884FRtoUqT7NPw6tlkrn4cIxiUld8MPN3g%3d%3d
Friendly Link: http://www.dea.com/MCTW/RSSFeeds.aspx?Name=IM Cycling Club
Custom Link (Includes additional fields embedded in the rss document): http://www.dea.com/MCTW/RSSFeeds.aspx?data=sxJvQtP%2fyzTQmxjdC

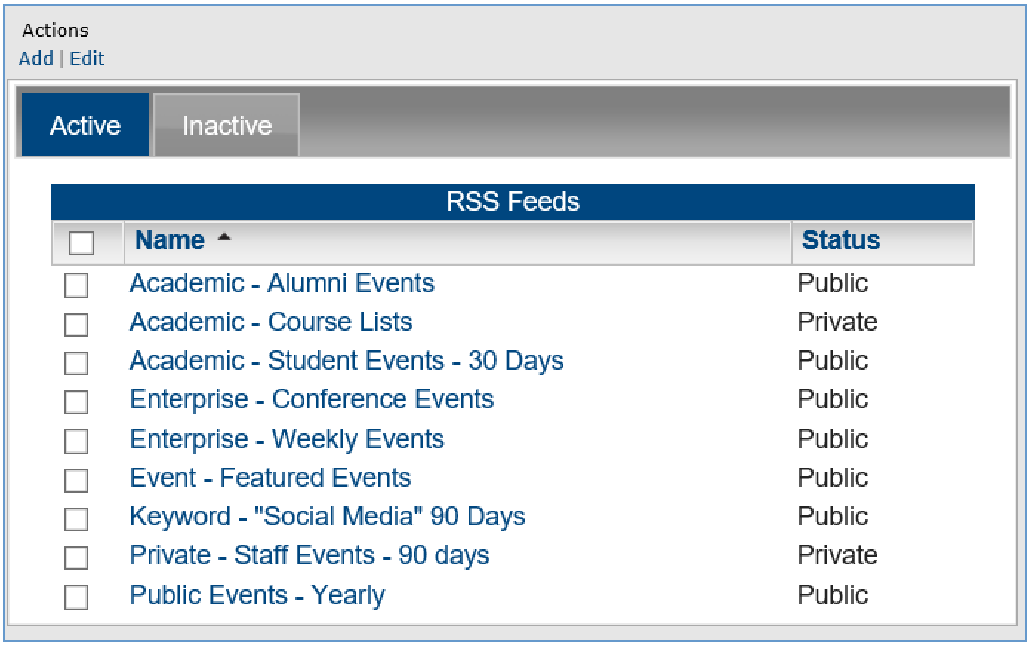
RSS Links



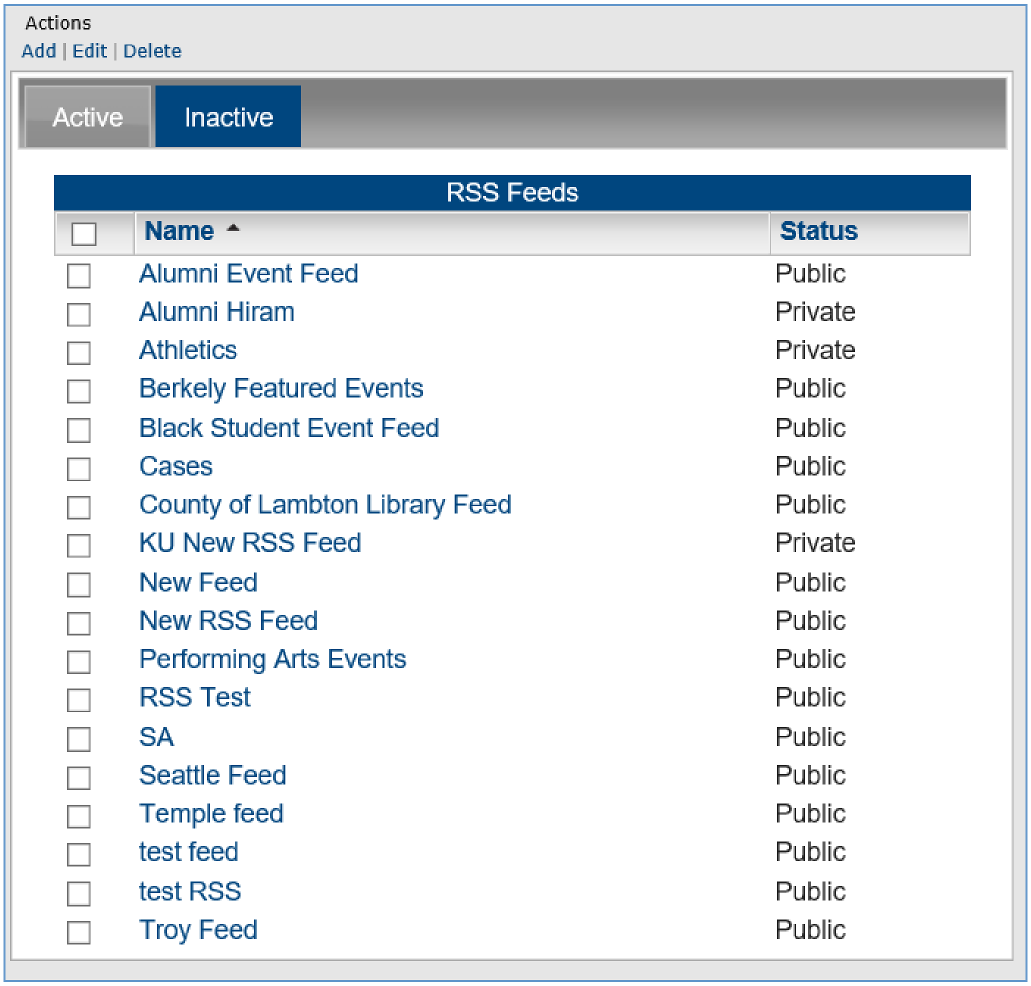
Previewing an RSS feed

Activate an RSS feed

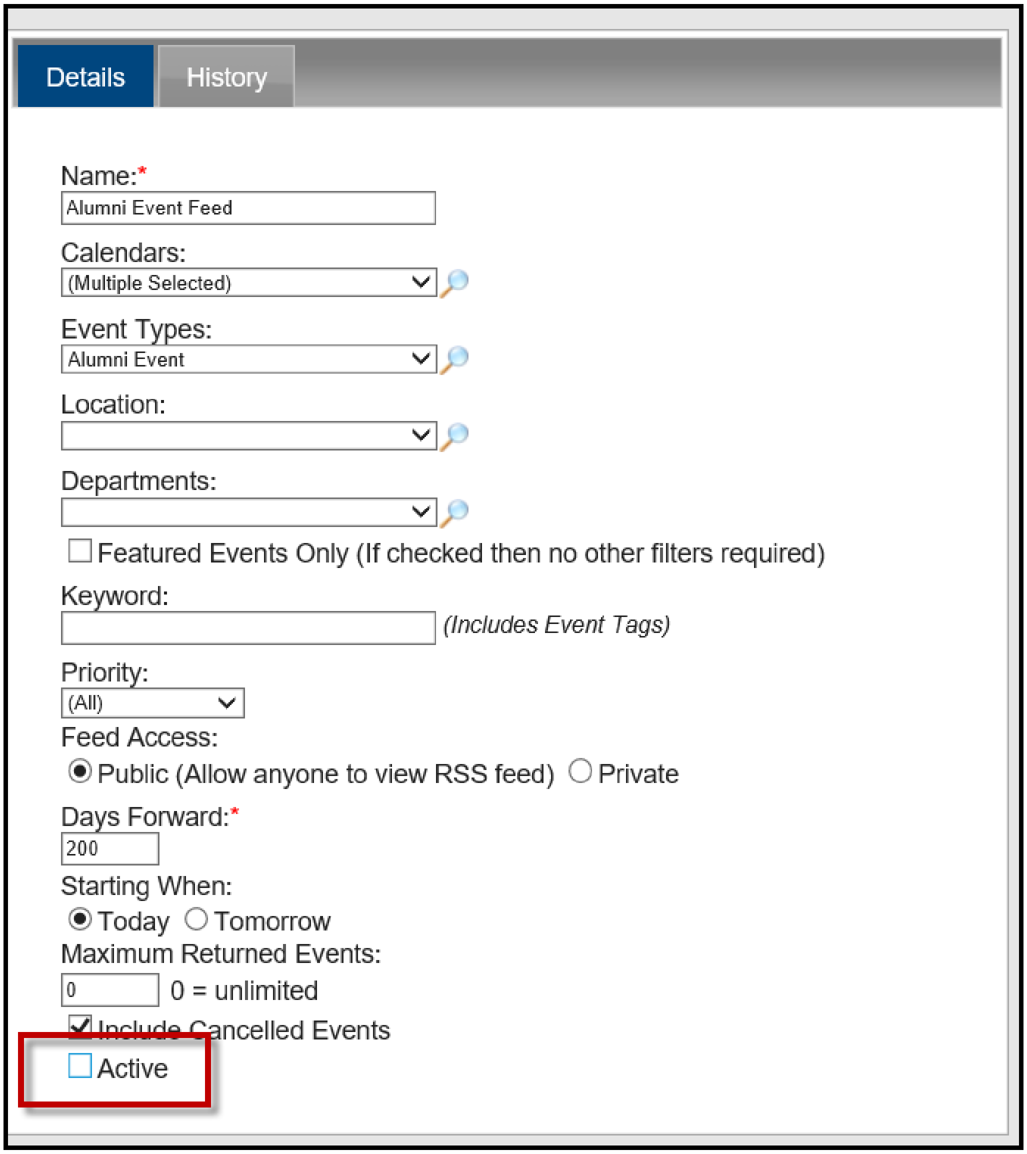
1. From the Admin Panel, navigate to **Admin** > **Site Administration** > **RSS**. The RSS Feeds page opens on the Active tab, listing all currently active RSS feeds in Master Calendar.



2. Click the **Inactive** tab to see all currently inactive RSS feeds in Master Calendar.



3. Select the RSS Feed you want to activate.
4. Under Actions, click **Edit**. The **Details** tab opens. The Active option is not selected.

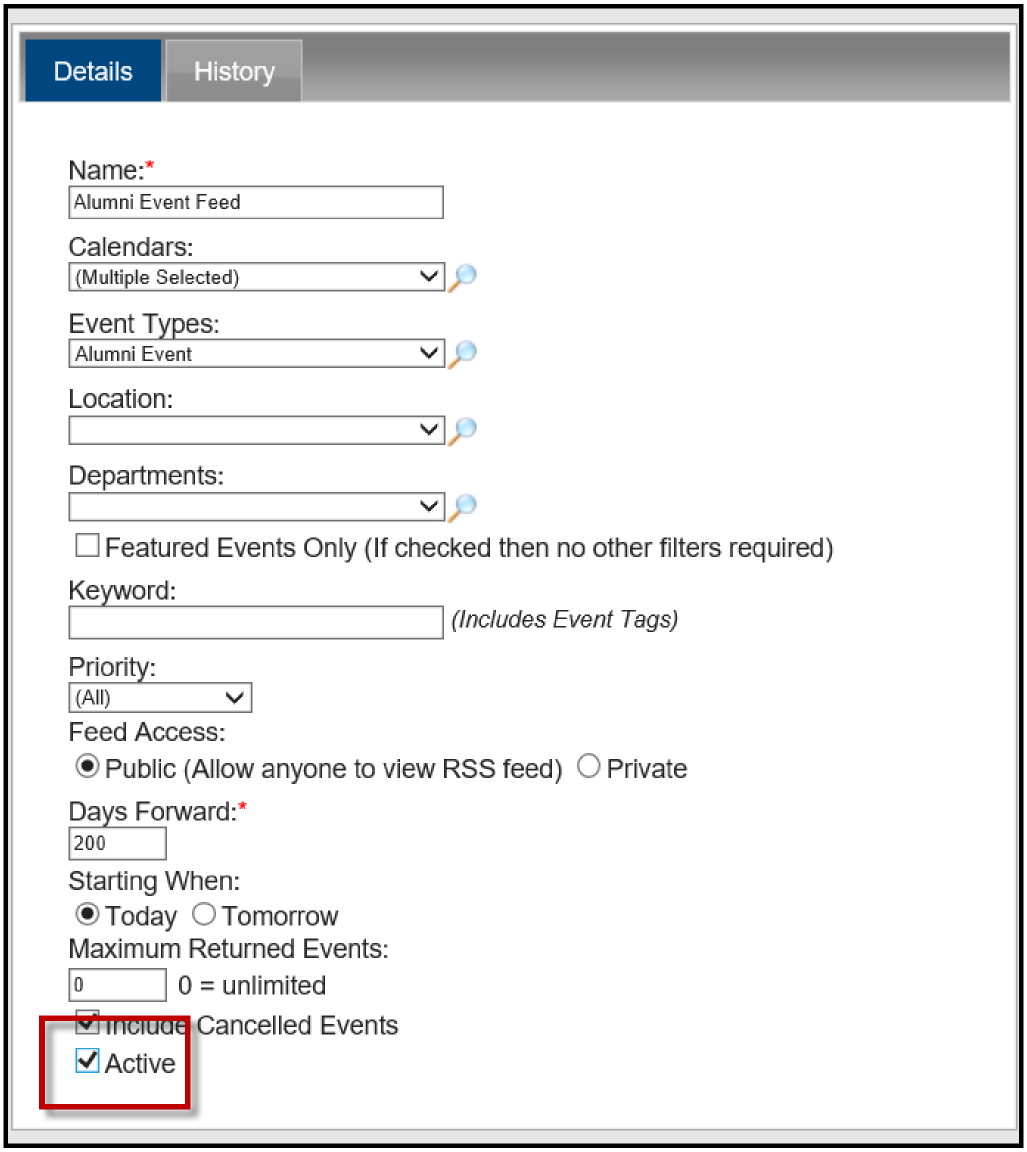


5. Select **Active**.
6. Click **Save**. An RSS Feed Saved message opens.
7. Click **OK** to save your RSS Feed.
8. Click **Back** to return to the RSS Feeds page. The RSS Feed is now displayed on this tab.

De-Activate an RSS Feed

1. From the Admin Panel, navigate to **Admin** > **Site Administration** > **RSS**. The RSS Feeds page opens on the Active tab, listing all currently active RSS feeds in Master Calendar.

2. Select the RSS Feed that you want to de-activate.
3. Under Actions, click **Edit**. The Details tab opens. The Active option is selected.

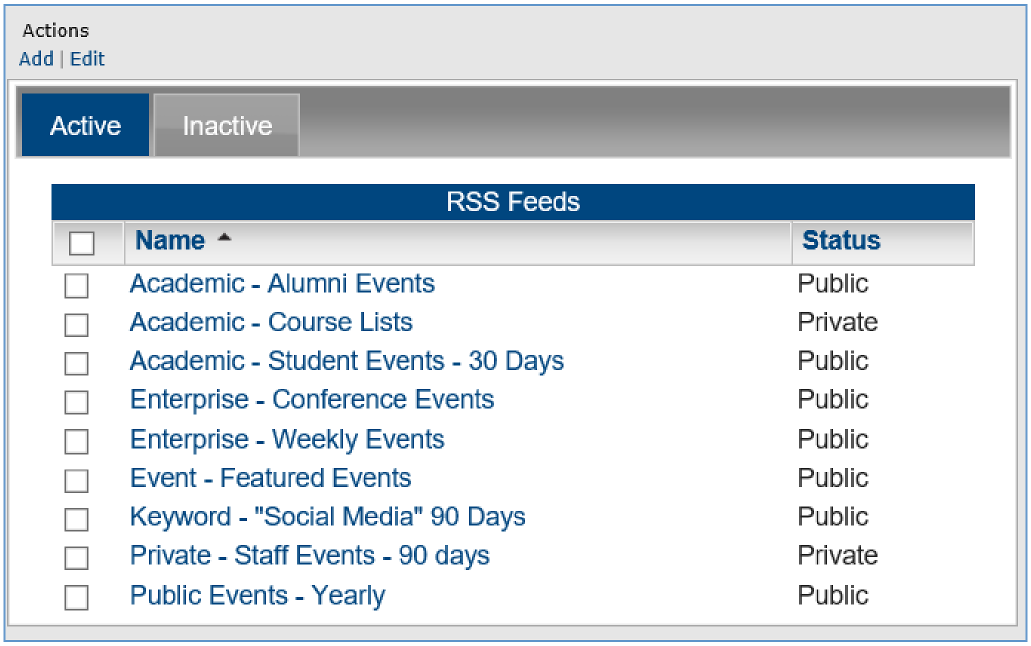


4. Clear the **Active** option.
5. Click **Save**. An RSS Feed Saved message opens.
6. Click **OK** in the RSS Feed Saved message to save your RSS Feed.
7. Click **Back** to return to the RSS Feeds page. By default, the Active tab is the opened tab.
8. Click the **Inactive** tab to open it. The inactivated RSS Feed is displayed on this tab.

Edit an RSS feed

You can edit both active and inactive RSS feeds.

1. From the Admin Panel, navigate to **Admin** > **Site Administration** > **RSS**. The RSS Feeds page opens on the Active tab, listing all currently active RSS feeds in Master Calendar.



Actions
Add | Edit

Active | Inactive

RSS Feeds

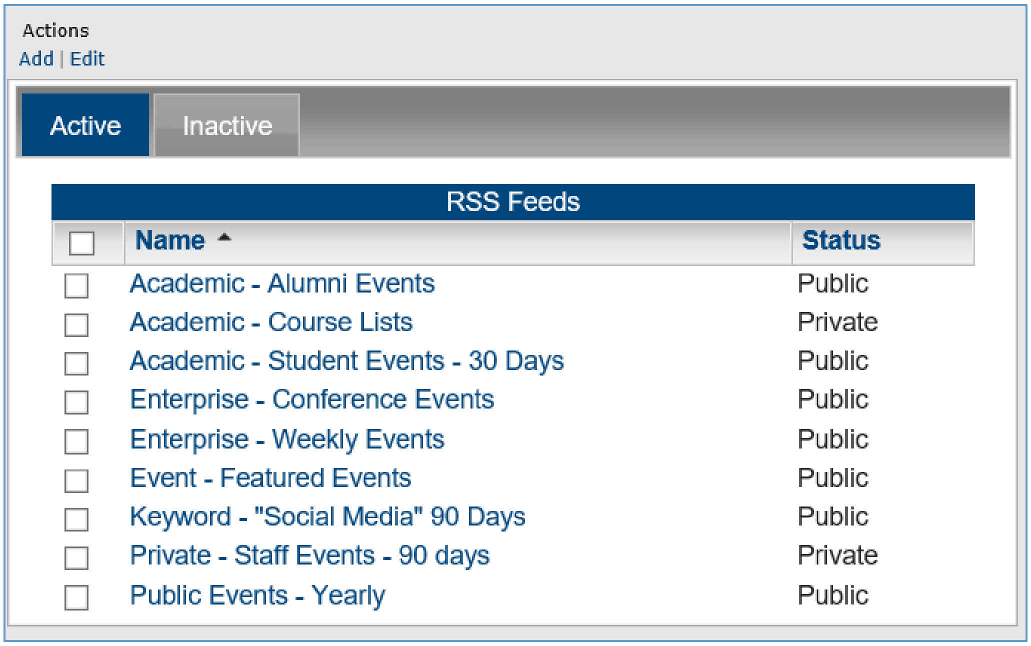
Name	Status
Academic - Alumni Events	Public
Academic - Course Lists	Private
Academic - Student Events - 30 Days	Public
Enterprise - Conference Events	Public
Enterprise - Weekly Events	Public
Event - Featured Events	Public
Keyword - "Social Media" 90 Days	Public
Private - Staff Events - 90 days	Private
Public Events - Yearly	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 Details tab opens.
5. Edit any and all the information as needed for the feed. See the Details Tab RSS Feed table.
6. Clear the **Active** option.
7. Click **Save**. An RSS Feed Saved message opens.
8. Click **OK** in the RSS Feed Saved message to save your edited RSS Feed.

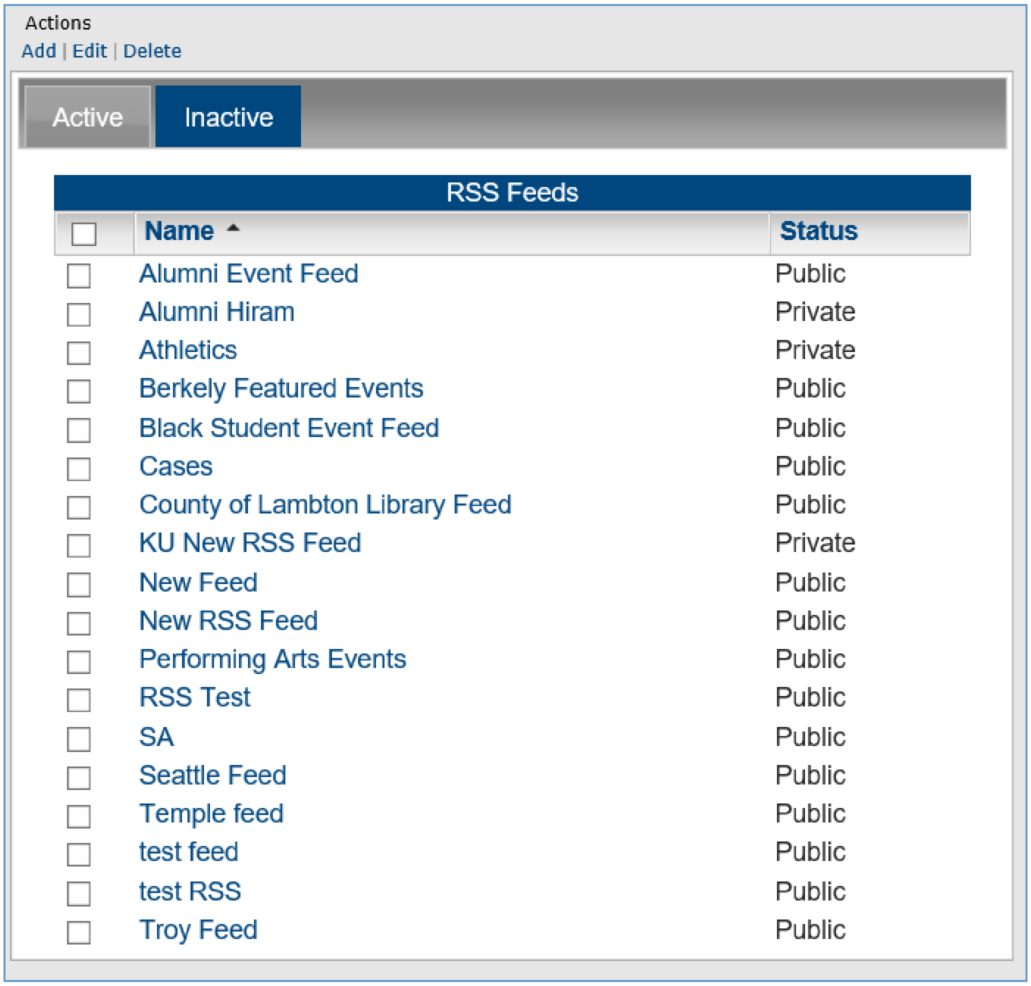
Delete an RSS feed

You can delete only inactive RSS feeds. To delete an active RSS feed, you must first inactivate it.

1. From the Admin Panel, navigate to **Admin** > **Site Administration** > **RSS**. The RSS Feeds page opens. By default, the Active tab is the opened tab. All currently active RSS feeds in Master Calendar are displayed on this tab.



2. Click the **Inactive** tab to open it. All currently inactive RSS feeds in Master Calendar are displayed on this tab.

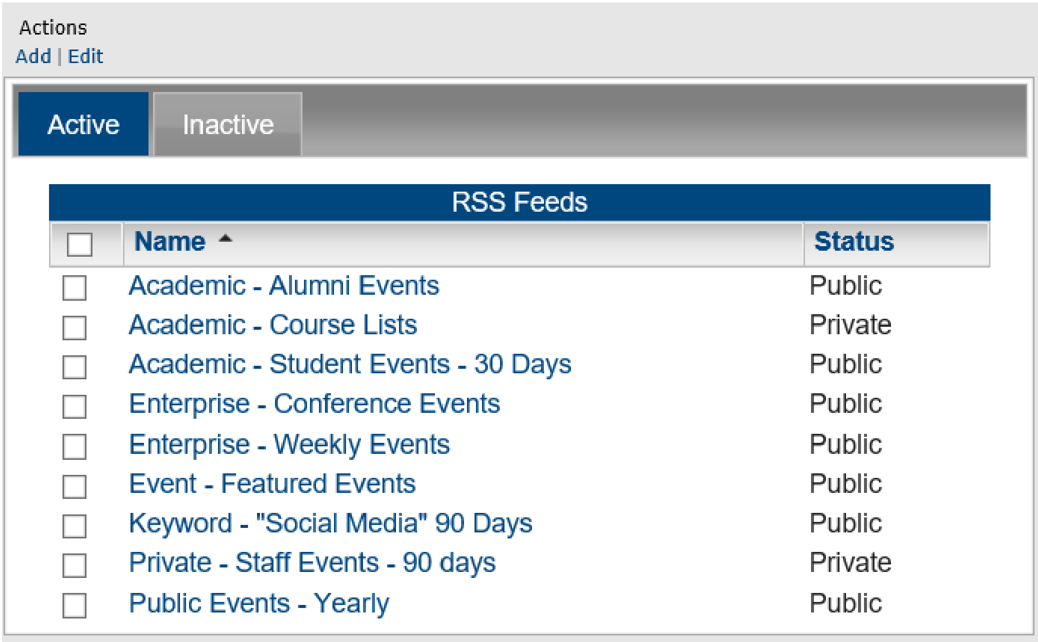


3. Select the RSS feed that you are deleting. To select all RSS feeds on the currently opened page for deletion in a single step, select Name. If you have multiple pages of feeds to delete, you must repeat this entire process on each page.
4. Under Actions, click **Delete**. A message opens, asking you 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.

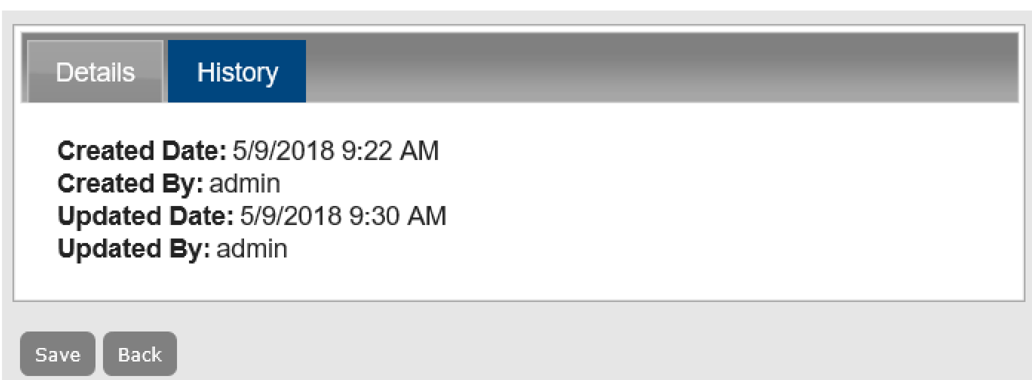
View the History of an RSS feed

The history for an RSS feed consists of the original creation date of the feed, the name of the user who created the feed, and the last date that the feed was edited as well as the name of the user who last edited the feed. You can view the history for both active and inactive feeds.

1. From the Admin Panel, navigate to **Admin** > **Site Administration** > **RSS**. The RSS Feeds page opens on the Active tab, listing all currently active RSS feeds in Master Calendar.



2. If needed, click the **Inactive** tab to open it.
3. Select the RSS Feed that for which you are viewing.
4. Under Actions, click **Edit**. The Details tab opens.
5. Click the **History** tab to open it and view the history for the selected feed. The tab also shows the three links for the RSS feed.



CHAPTER 61: Customize Menus in Master Calendar

When Master Calendar is first installed, the *main menu*, or *system menu*, has a default layout. 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 menus.

Main Menu, default layout

Main Menu, default layout with Links parent menu activated

Note:
The Links option is displayed on the main menu after you add user-defined child options for it.

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.

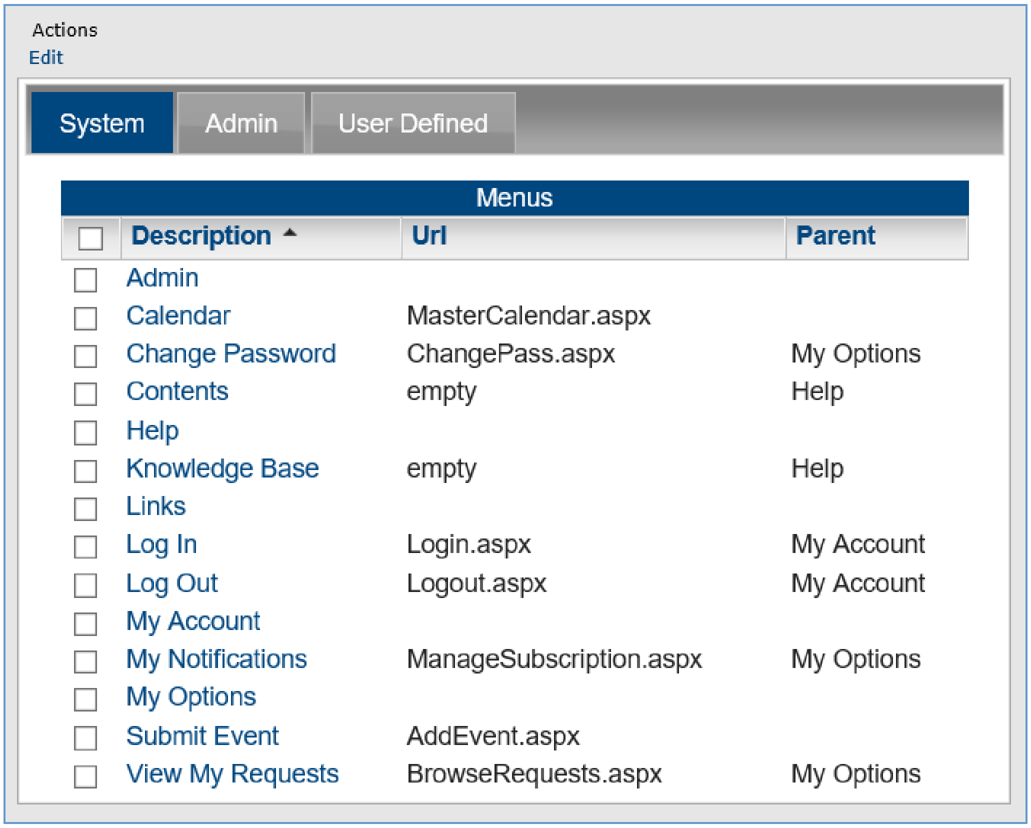
Managing menu options consists of editing main menu options and child menu options, adding user-defined options, editing user-defined menu options, entering translations for menu text and menu options, and deleting user-defined menu options. You can also view the history for a menu option.

This topic will provide information that will allow you to:

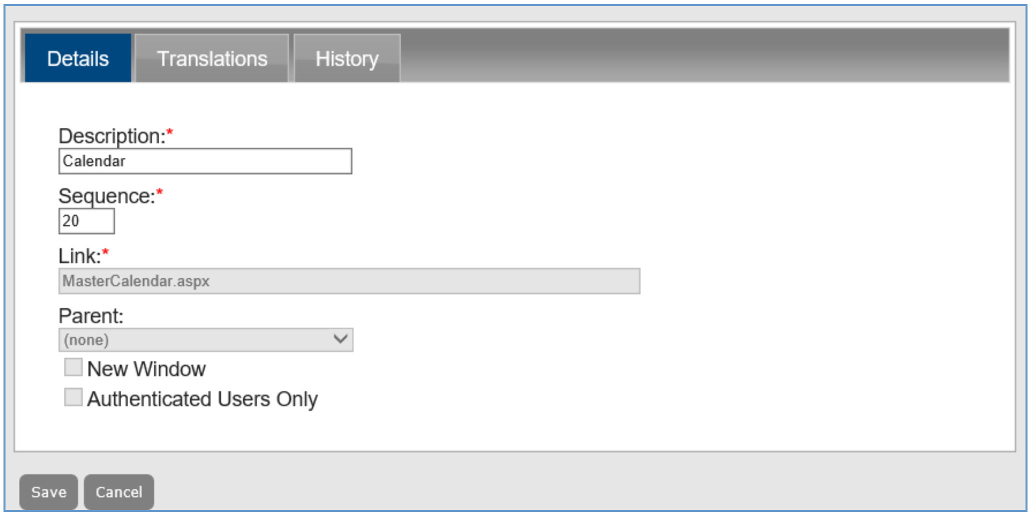
- Edit a Menu Option
- Add a User-Defined Option to the Main Menu
- Edit a User-Defined Menu Option
- Enter Translations for Menu Text and Options
- Delete a User-Defined Menu Option
- View the History of a Menu Option

Edit a Menu Option

1. From the Admin Panel, navigate to **Admin** > **Site Administration** > **Menus**. The Menus page opens. By default, 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.



2. Select the main menu option or child menu option that you are editing.
3. Under Actions, click **Edit**. The Details tab opens. You use the options on this tab to change the description of the menu option, its position (Sequence) on the menu, or both.

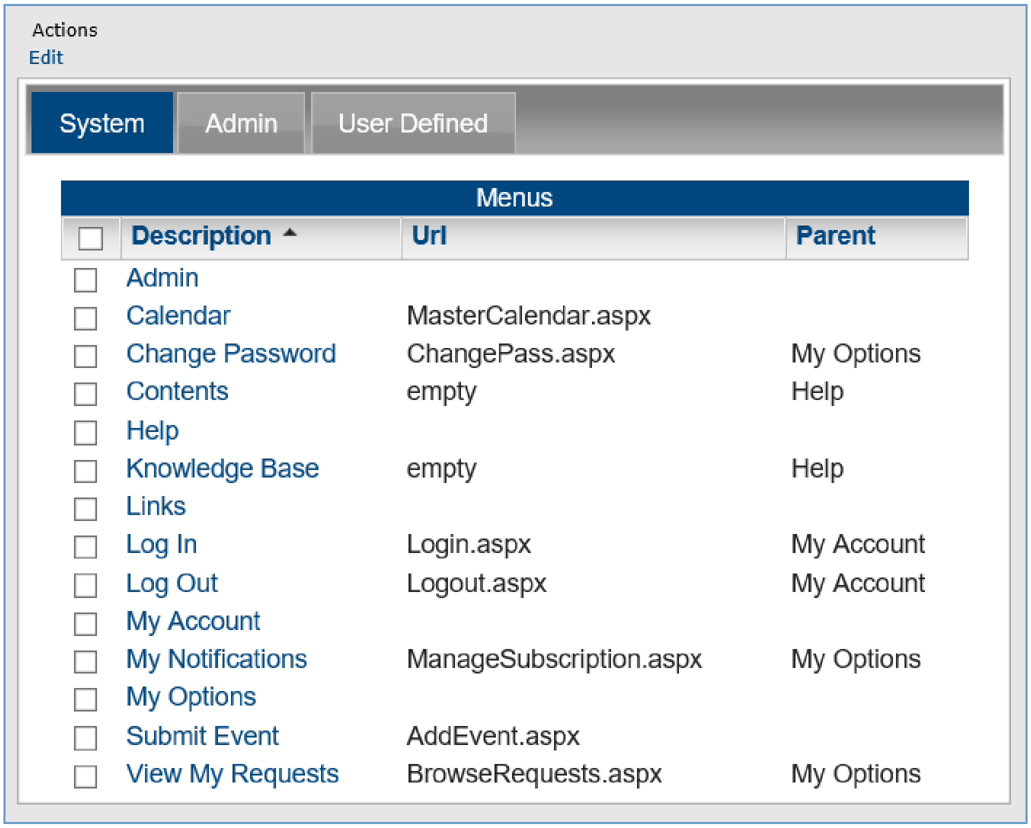


4. After you make the changes to the menu option, click **Save**. To see your change, log off the system, then log back in to the system.

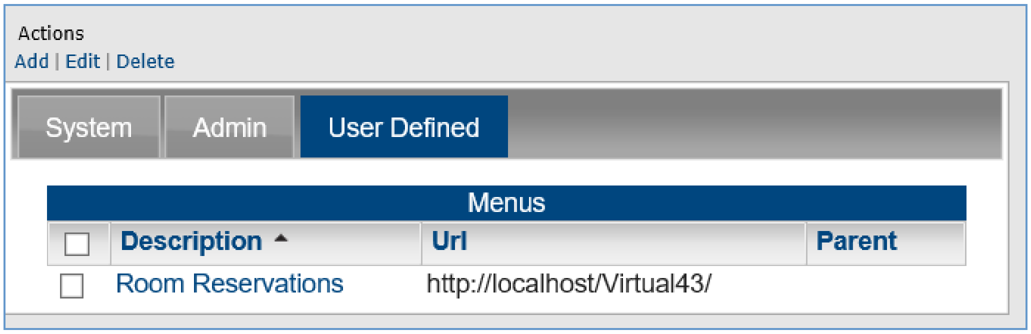
Add a User-Defined Option to the Main Menu

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.

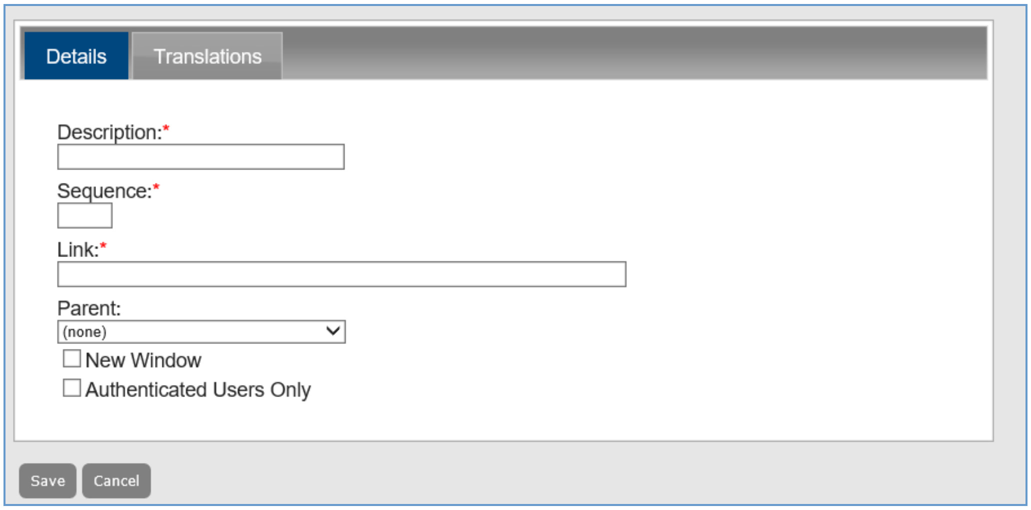
1. From the Admin Panel, navigate to **Admin** > **Site Administration** > **Menus**. The Menus page opens on the System tab, and lists all the current main menu options plus all the child menu options.



2. Click the **User Defined** tab to open it. All currently active user-defined options in Master Calendar are displayed on this tab.



3. Under Actions, click **Add**. The Details tab opens. You use the options on this tab to specify the information for the user-defined menu option.



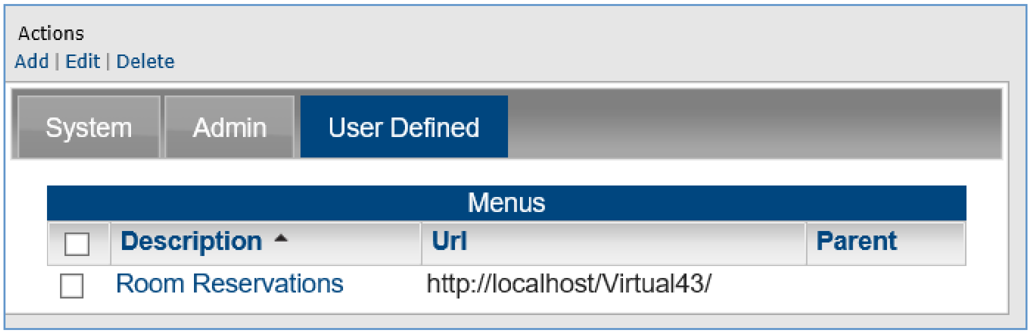
4. Enter the information for the user-defined menu option.
   Details Tab Fields

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 Menus page.
6. Click the **User Defined** tab to open it and view the newly added user-defined link. To see your user-defined menu option, log off the system, then log back in to the system.

Edit a User-Defined Menu Option

1. From the Admin Panel, navigate to **Admin** > **Site Administration** > **Menus**.
2. Click the **User Defined** tab to open it.

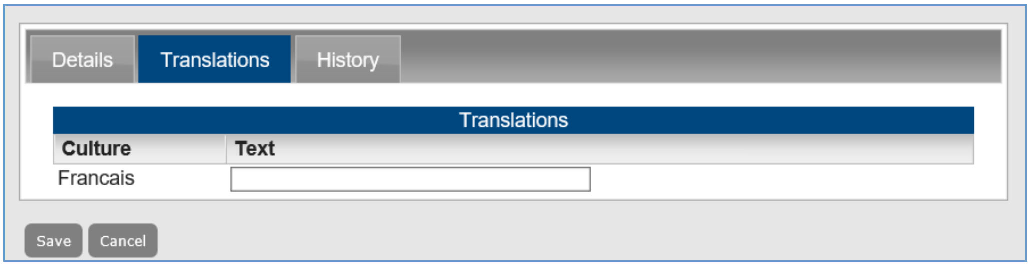


3. Select the menu option you want to edit.
4. Under Actions, click **Edit**. The Details tab opens.
5. Edit any and all the associated information as needed. See the Details Tab Fields table for more information on these fields.
6. Click **Save**. The Details tab closes and you return to the System tab of the Menus page. To see your edited menu option, log off the system, then log back in to the system and open the **User Defined** tab.

Enter Translations for Menu Text and Options

If you have configured one more 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. From the Admin Panel, navigate to **Admin** > **Site Administration** > **Menus**. The Menus page opens on the System tab, and lists all the current main menu options plus all the child menu options.
2. If needed, open the **Admin** tab (lists all the Admin menu options for which you can enter translations) or **User Defined** tab.
3. Click the **Translations** tab to open it. All the cultures that you have configured for Master Calendar are displayed on this page.



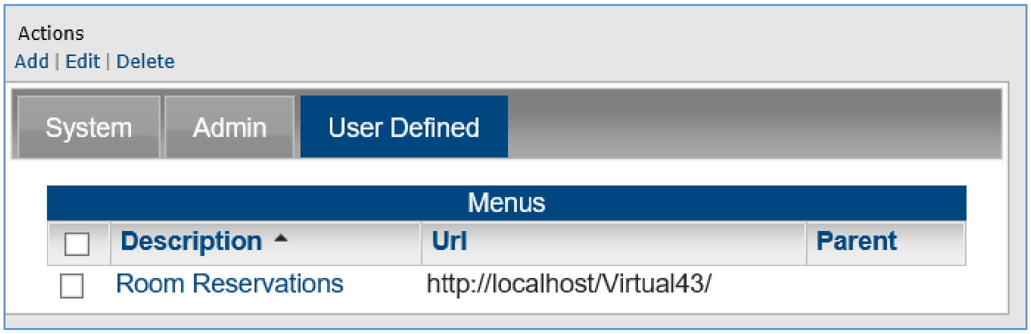
4. Enter the appropriate translation for every displayed culture on the page.
5. Click **Save**. The Translations tab closes. You return to the opened tab for the selected menu text or menu option.

> **Note:**
> 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.

Delete a User-Defined Menu Option

> **Note:**
> You can delete only user-defined menu options. You cannot delete a system menu option.

1. From the Admin Panel, navigate to **Admin** > **Site Administration** > **Menus**. The Menus page opens on the System tab, and lists all the current main menu options plus all the child menu options.
2. Click the **User Defined** tab to open it.

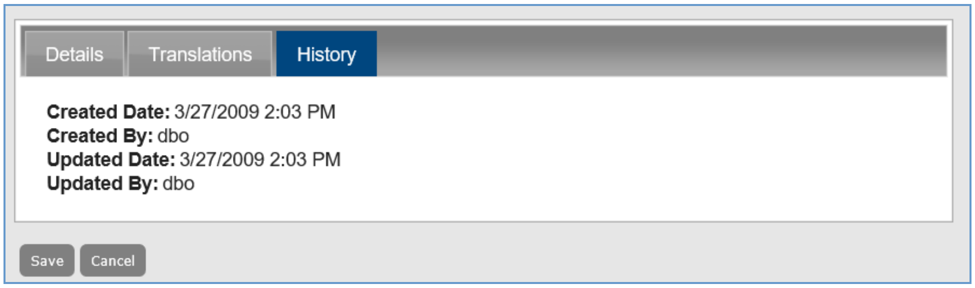


3. Select the menu option that you are deleting. To select all user-defined menu options on the currently opened page for deletion in a single step, select **Description**. If you have multiple pages of options to delete, you must repeat this entire process on each page.
4. Under Actions, click **Delete**. A message opens, asking you if you are sure that you want to delete all the selected menu options.
5. Click **OK** in the message. A message opens indicating that all the selected menu options were successfully deleted.
6. Click **OK** in the message. The User Defined tab is refreshed to show the remaining, if any, user-defined menu options in Master Calendar.

View the History of 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, and the last date that the option was edited as well as 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.

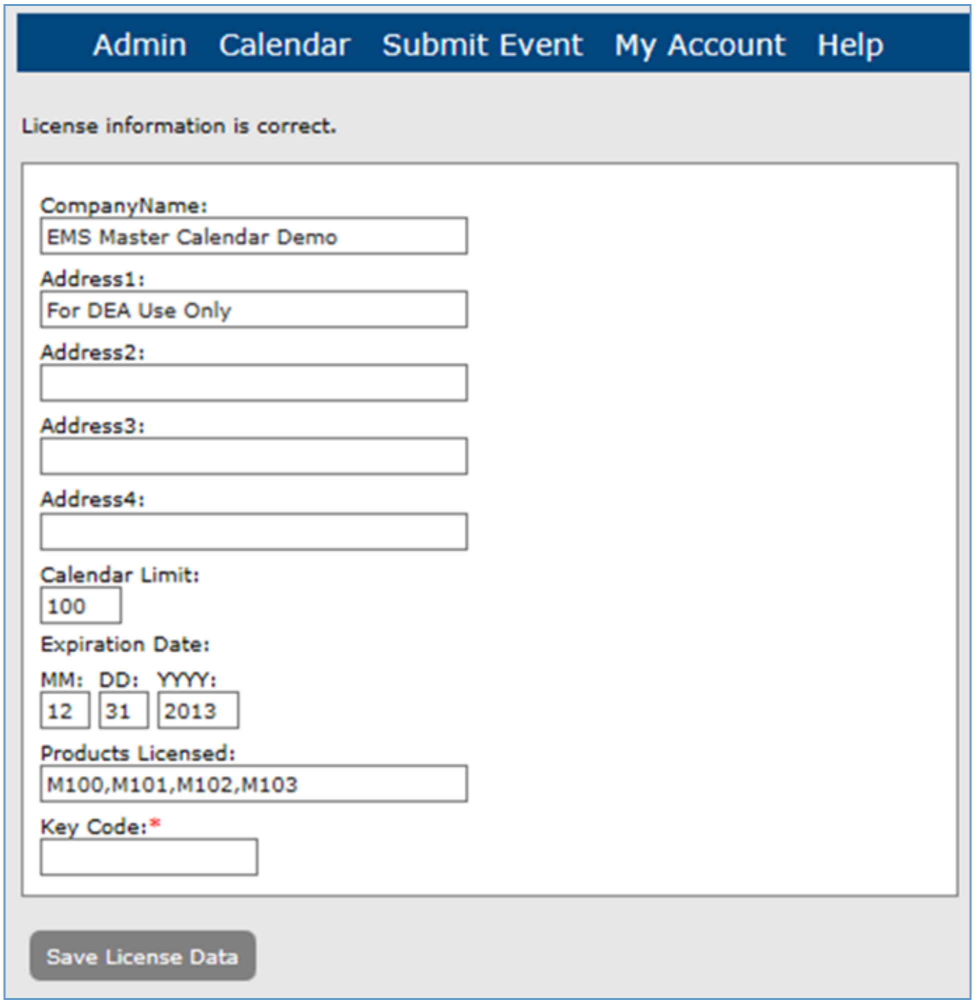
1. From the Admin Panel, navigate to **Admin** > **Site Administration** > **Menus**. The Menus page opens on the System tab.
2. If needed, click the **Admin** tab or the **User Defined** tab to open it.
3. Under Actions, click **Edit**. The Details tab opens.
4. Click the **History** tab to open it and view the history for the menu option.



CHAPTER 62: Maintain Master Calendar Software Registration

As the Master Calendar site administrator, you can use the *Registration* function to maintain your Master Calendar registration information. This information (provided to your organization by EMS) 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.

1. From the Admin Panel, navigate to **Admin** > **Site Administration** > **Registration**. The Registration page opens, listing all your current Master Calendar registration information.



2. Update this information as needed.

Important!

Do not edit any information on this page unless you receive new information from EMS. In addition, the information is case-sensitive and you must enter the information exactly as EMS provides it to your organization, or you cannot save the updated information. EMS recommends that instead of manually entering any modifications, that you copy and paste the new information line by line on this page.

3. When you are done viewing or making any updates to the registration information, click **Save License Data**.

CHAPTER 63: Connect to Data Sources

Data Sources consist of Event Types, Holidays, and User-Defined fields defined in your EMS implementation.

This topic will provide information that will allow you to:

- Add a Data Source
- Delete a Data Source
- Import EMS Event Types
- View the History for an Event Type Mapping
- Import EMS Holidays or Special Dates
- Select EMS User-Defined Fields (UDFs) for Importing

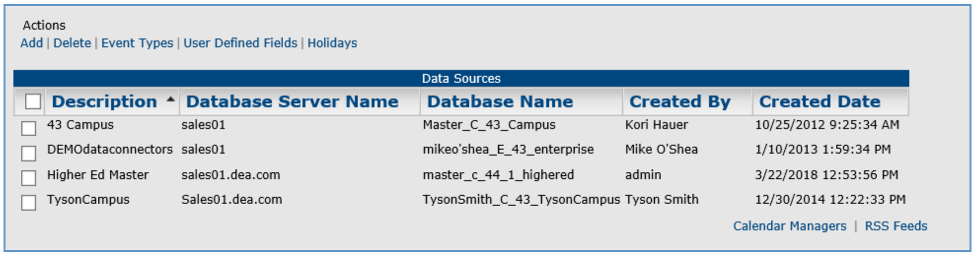
In EMS Master Calendar, as the site administrator, you have the option of setting up event types and holidays (special dates) from “scratch;” however, if you are an existing EMS customer who uses one of the EMS products, such as Campus, Desktop Client, Enterprise, Professional, Legal, and so on, this means that you have already configured this information for your EMS application. Rather than creating these items from scratch, if your organization has purchased the optional module, Master Calendar Data Connectors, you can follow the steps in this topic to perform 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.

See Also:

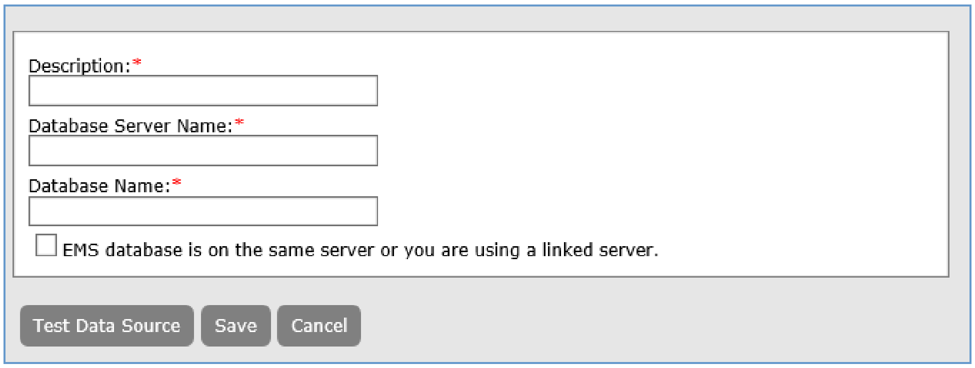
- For setting up event types from “scratch,” see Manage Your Events.
- For setting up holidays (special dates) from “scratch,” see Configure Special Dates.

Add a Data Source

1. From the Admin Panel, navigate to **Admin** > **Site Administration** > **Data Sources**. The Data Sources page opens. This page lists all the currently available data sources in Master Calendar.



2. Under Actions, click **Add**. The Adding a Data Source page opens.



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 from which you are importing the information resides.
   - Database Name—The name of the EMS database from which you are importing the event types and/or holidays.
   - **EMS database resides on the same server or you are using a linked server.**

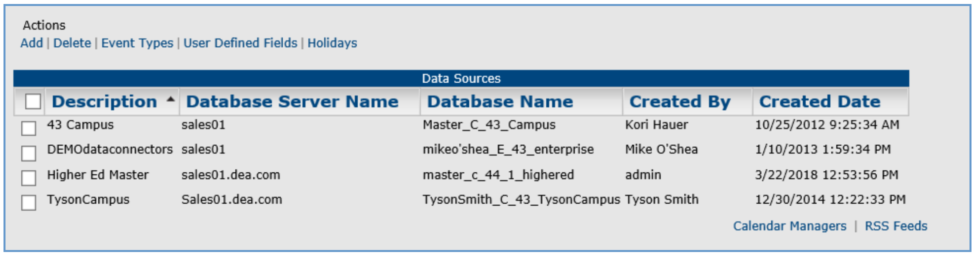
> **Note:**
> You can obtain the database server name and the database name by logging in to the EMS client and then choosing **Select File** > **Change Database**, or you can work with your local Database Administrator to obtain the correct server name and database name.

4. 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.
5. After the message indicates that the "Connection succeeded," click **Save**.

Delete a Data Source

When you a delete a data source, all connectors that use this data sources and associated events are deleted.

1. From the Admin Panel, navigate to **Admin** > **Site Administration** > **Data Sources**. The Data Sources page opens. This page lists all the currently available data sources in Master Calendar.



Actions
Add | Delete | Event Types | User Defined Fields | Holidays

Data Sources

Description	Database Server Name	Database Name	Created By	Created Date
43 Campus	sales01	Master_C_43_Campus	Kori Hauer	10/25/2012 9:25:34 AM
DEMOdataconnectors	sales01	mikeo'shea_E_43_enterprise	Mike O'Shea	1/10/2013 1:59:34 PM
Higher Ed Master	sales01.dea.com	master_c_44_1_highered	admin	3/22/2018 12:53:56 PM
TysonCampus	Sales01.dea.com	TysonSmith_C_43_TysonCampus	Tyson Smith	12/30/2014 12:22:33 PM

Calendar Managers | RSS Feeds

2. 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.
3. 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 are sure that you want to continue.
4. Click **OK** in the message. A message opens indicating that all the selected data sources were successfully deleted.
5. Click **OK** in the message. The Data Sources page is refreshed to show the remaining, if any, data sources in Master Calendar.

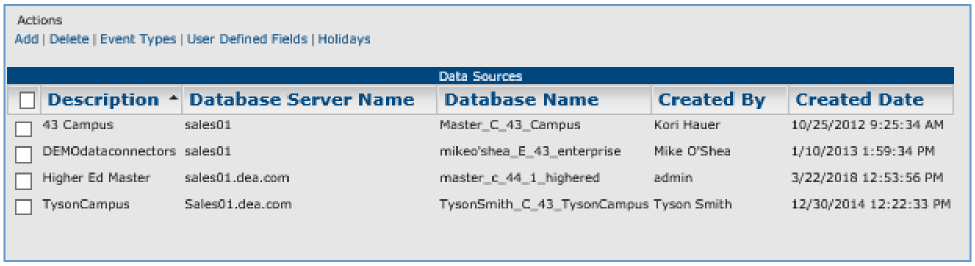
> **Important!**
> Deleting a Data Source and its associated events cannot be undone.

Import 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 doesn't already exist.
- Indicate that you do not want to import the EMS event type.

1. From the Admin Panel, navigate to **Admin** > **Site Administration** > **Data Sources**. The Data Sources page opens. This page lists all the currently available data sources in Master Calendar.

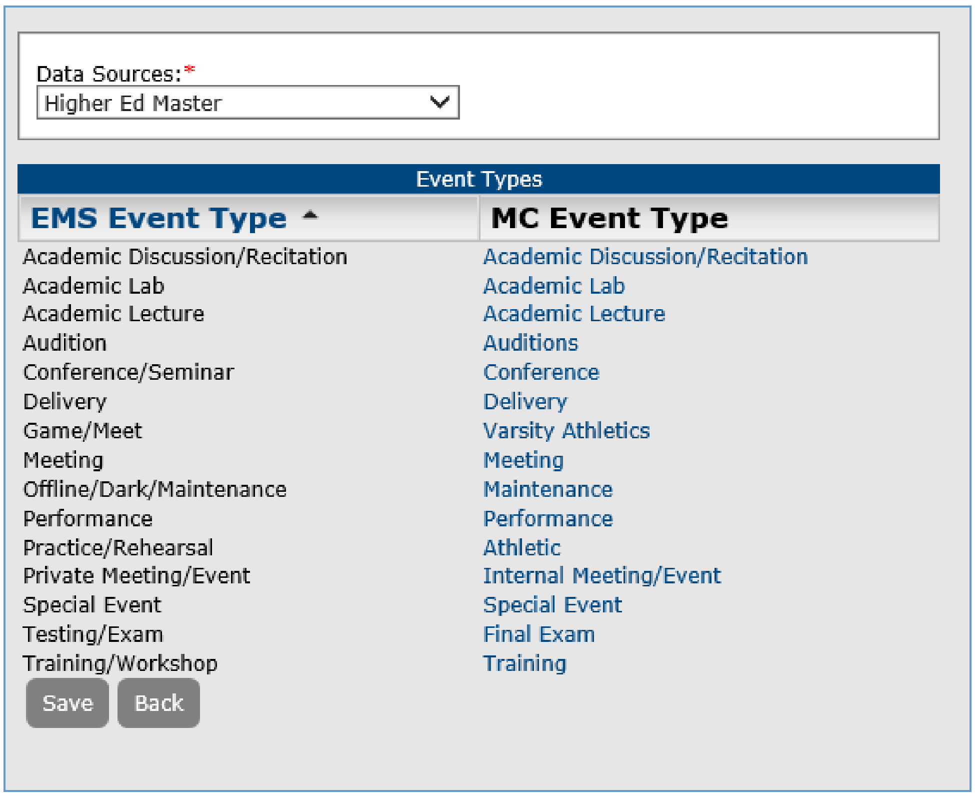


Actions
Add | Delete | Event Types | User Defined Fields | Holidays

Data Sources

Description	Database Server Name	Database Name	Created By	Created Date
43 Campus	sales01	Master_C_43_Campus	Kori Hauer	10/25/2012 9:25:34 AM
DEMOdataconnectors	sales01	mikeo'shea_E_43_enterprise	Mike O'Shea	1/10/2013 1:59:34 PM
Higher Ed Master	sales01.dea.com	master_c_44_1_highered	admin	3/22/2018 12:53:56 PM
TysonCampus	Sales01.dea.com	TysonSmith_C_43_TysonCampus	Tyson Smith	12/30/2014 12:22:33 PM

2. Select the data source from which you are importing the event types and then, under Actions, click **Event Types**. The 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."



Data Sources:*
Higher Ed Master

Event Types

EMS Event Type	MC Event Type
Academic Discussion/Recitation	Academic Discussion/Recitation
Academic Lab	Academic Lab
Academic Lecture	Academic Lecture
Audition	Auditions
Conference/Seminar	Conference
Delivery	Delivery
Game/Meet	Varsity Athletics
Meeting	Meeting
Offline/Dark/Maintenance	Maintenance
Performance	Performance
Practice/Rehearsal	Athletic
Private Meeting/Event	Internal Meeting/Event
Special Event	Special Event
Testing/Exam	Final Exam
Training/Workshop	Training

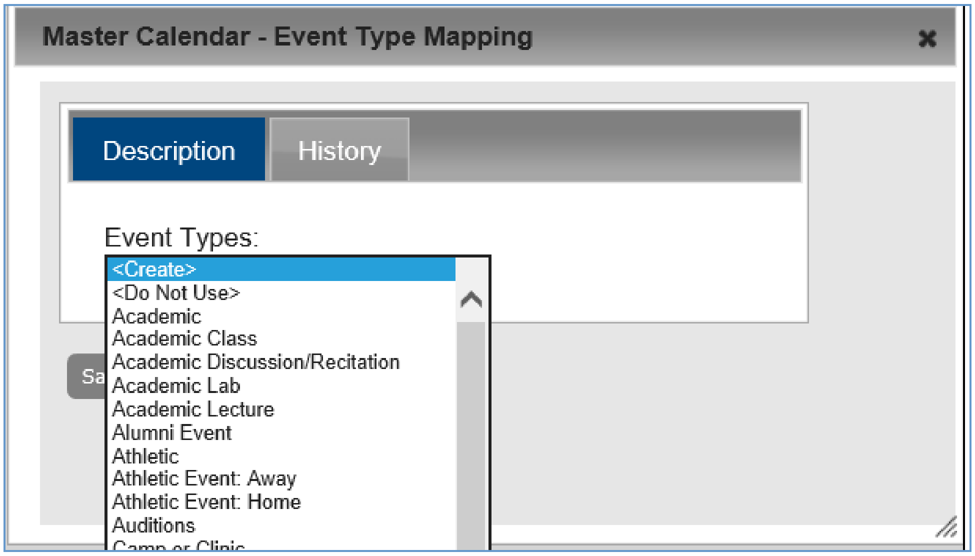
Save Back

Note:

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.

3. For any of the unmapped EMS event types, click Create to open a Master Calendar 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".

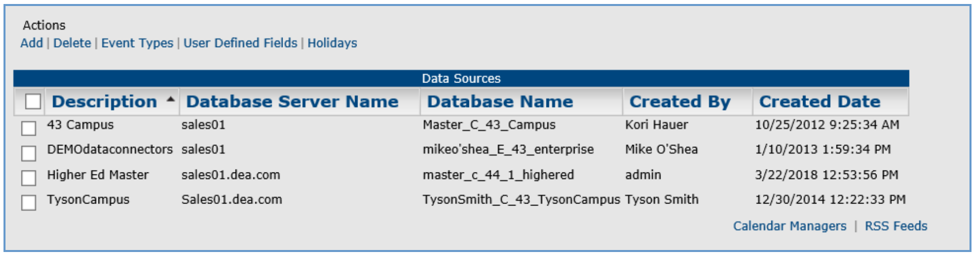


4. On the list, select the Master Calendar event type to which you are mapping the EMS event type, or select **Do Not Use.**
5. Optionally, for any of the currently mapped EMS event types, change the mapping, or set the mapping to "Do Not Use." All EMS event types that you leave in a '<Create>' status 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.
9. Optionally, continue to one or both of the following:
   - Import EMS holidays
   - Select EMS user-defined fields (UDFs) for importing

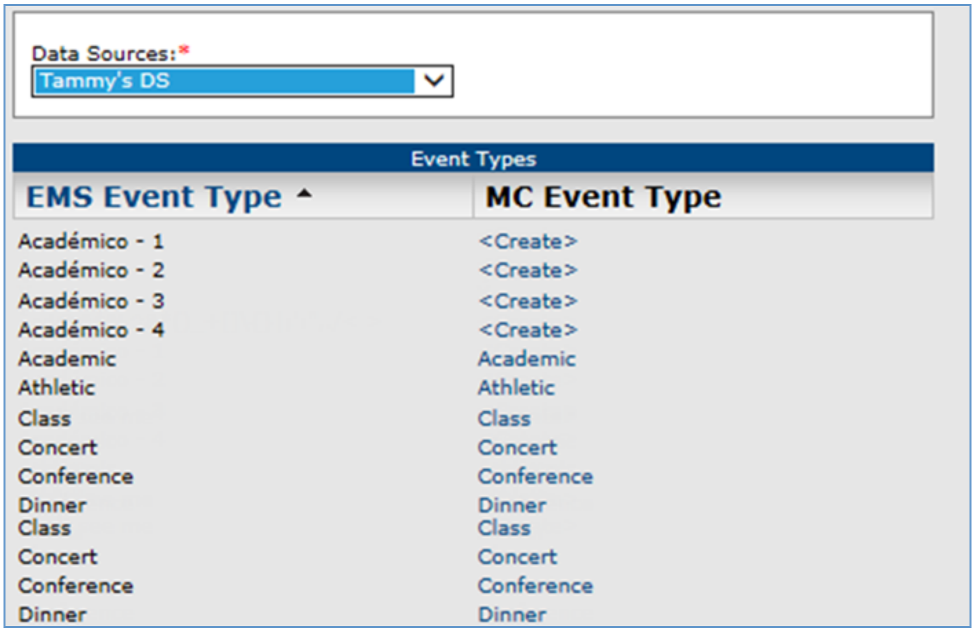
View the History for an Event Type Mapping

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, and the last date that the mapping was edited as well as the name of the user who last edited the mapping.

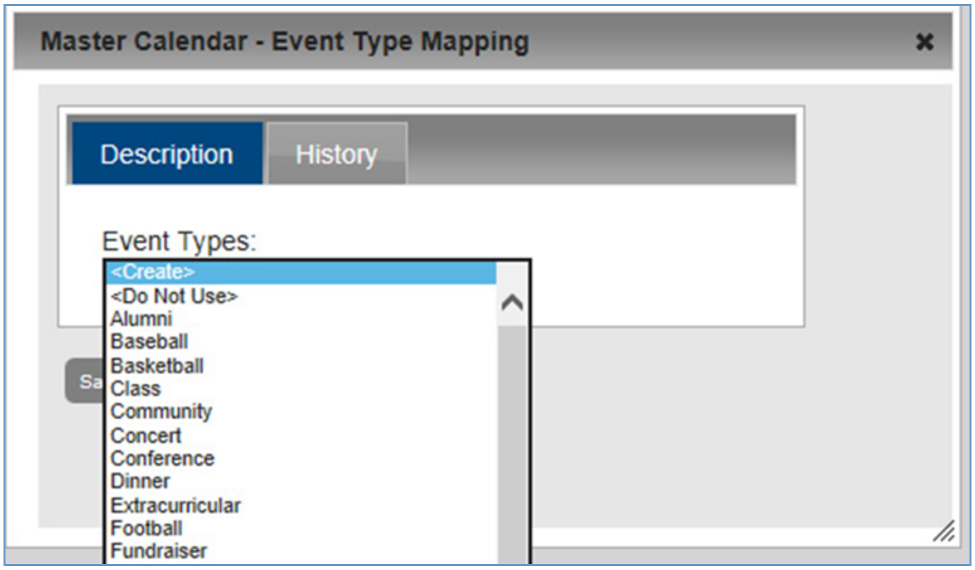
1. From the Admin Panel, navigate to **Admin** > **Site Administration** > **Data Sources**. The Data Sources page opens. This page lists all the currently available data sources in Master Calendar.



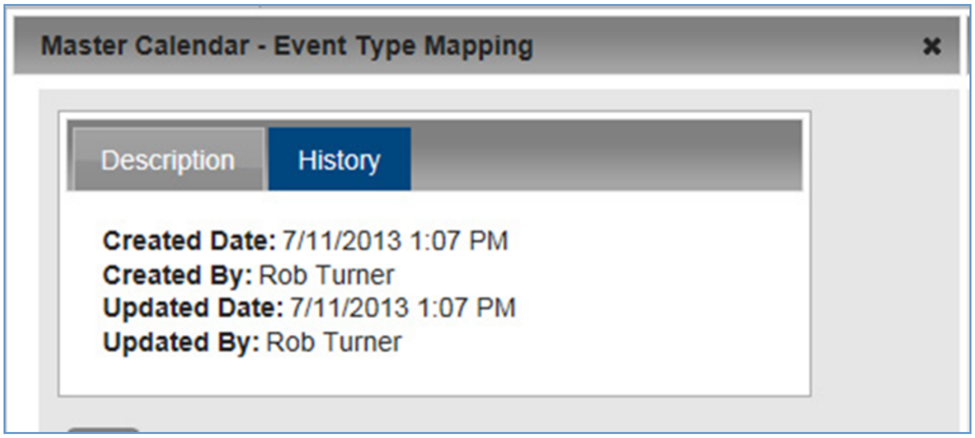
2. Select the data source from which you are viewing the history of the event mappings.
3. Under Actions, click **Event Types**. The Event Types page opens. This page lists all the currently defined event types for the selected data source.



4. Click the MC Event Type link for the mapping for which you are viewing the history. A Master Calendar dialog box opens. By default, the Description tab is the opened tab.



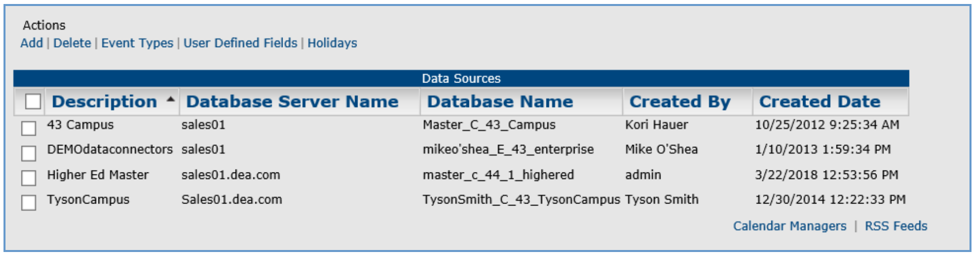
5. Click the History tab to open it and view the history for the selected mapping.



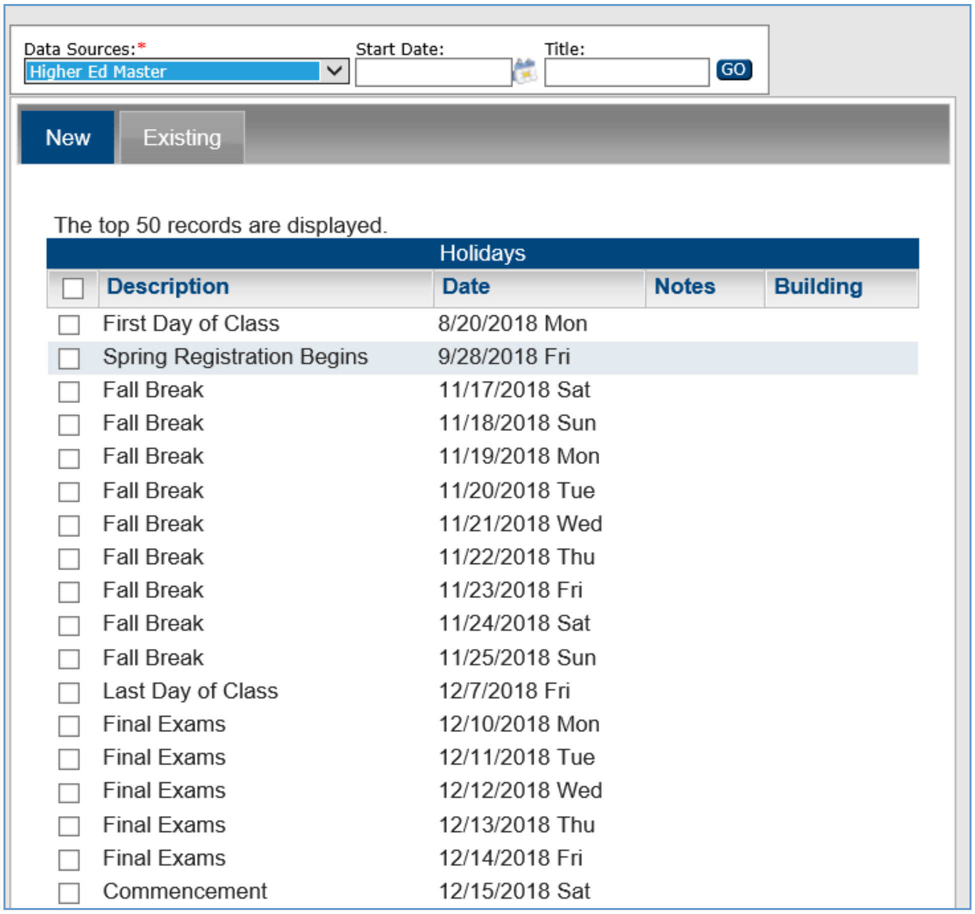
Import EMS Holidays or Special Dates

Note:
The term “holiday” is equivalent to the Master Calendar term “special date.”

1. From the Admin Panel, navigate to **Admin** > **Site Administration** > **Data Sources**. The Data Sources page opens. This page lists all the currently available data sources in Master Calendar.



2. Select the data source from which you are importing the holidays.
3. Under Actions, click **Holidays**. The Holidays page open. By default, 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.



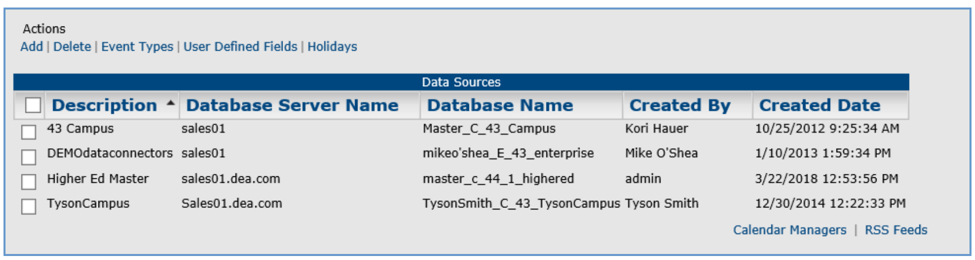
4. Optionally, to refine this list, do one or both of the following:
   - In the **Start Date** field, enter a different start date.
   - In the **Title** field, enter partial or complete search criteria for the holiday description. The search is limited to the exact order of the characters in the string; 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.

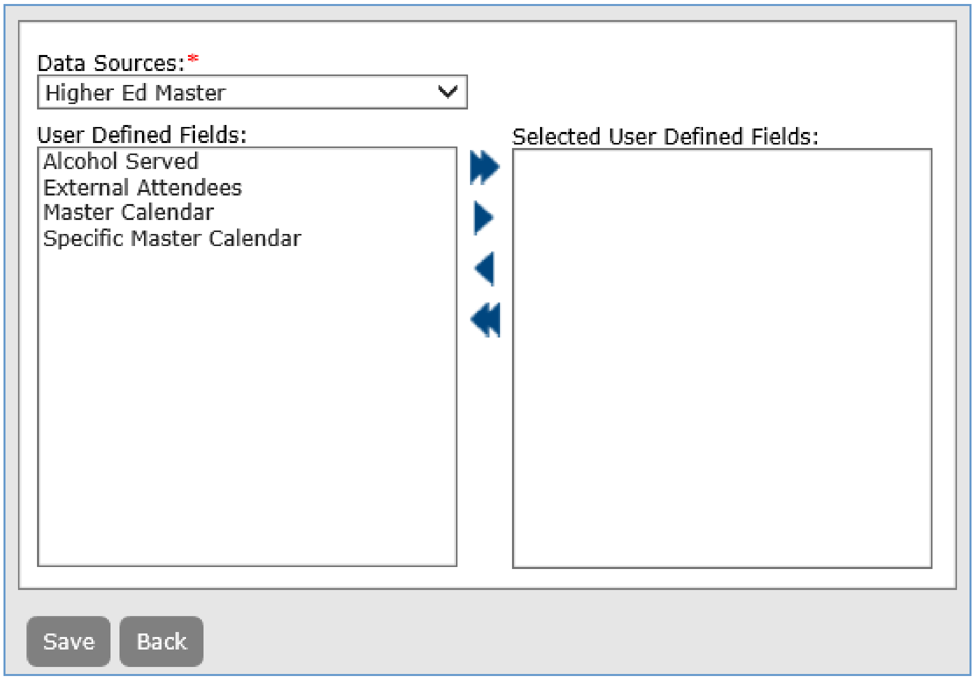
5. Click **Go**. The page is refreshed to show the Holidays that meet your search criteria.
6. Select the holidays that are to be imported from the selected data source, and then **Add**.To select all holidays on the currently opened page for importing in a single step, select **Description**. If you have multiple pages of holidays to import, you must repeat this entire process on each page. You will be prompted to confirm that you are sure you want to add all the selected holidays.
7. Click **OK** in the message. The message closes. You return to 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.
8. Optionally, do one or both of the following:
   - Click the **Existing** tab to open it and view the list of all the holidays that you have imported into Master Calendar.
   - Continue to procedures below.

Select EMS User-Defined Fields (UDFs) for Importing

1. From the Admin Panel, navigate to **Admin** > **Site Administration** > **Data Sources**. The Data Sources page opens. This page lists all the currently available data sources in Master Calendar.



2. Select the data source from which you are importing the UDFs.
3. Under **Actions**, click **User Defined Fields**. The User Defined Fields page opens. On this page, you see only those UDFs that have the Field Applies To: Reservation configured within the EMS database. You can find this information in the EMS Desktop Client by navigating to Configuration > Other > User Defined Fields.

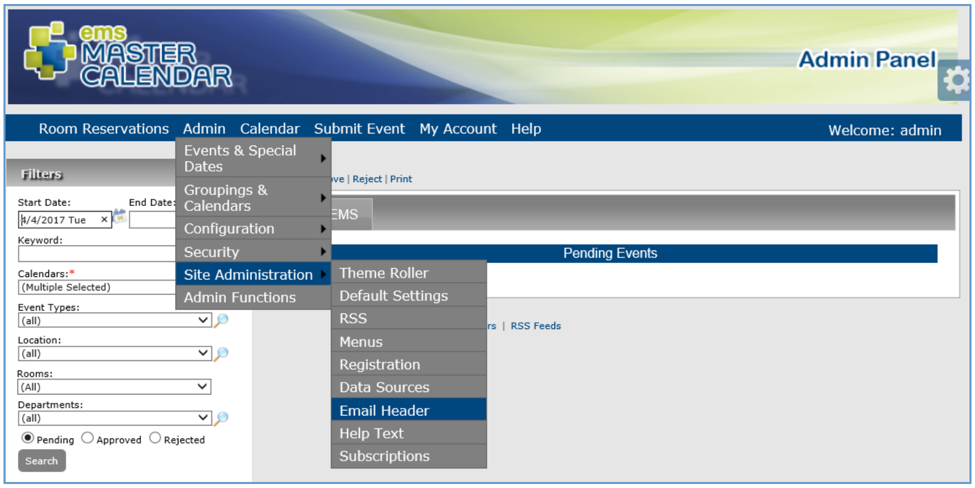


4. On the User Defined Fields list, select the UDF that is to be imported from the selected data source (CTRL-click to select multiple UDFs), and then click the Add button to move the UDFs to the Assigned list. To move all the UDFs in a single step, click the Add All button.
5. Click **Save**.
6. You must now run a connector to import the selected UDFs and their associated answers into your Master Calendar database.

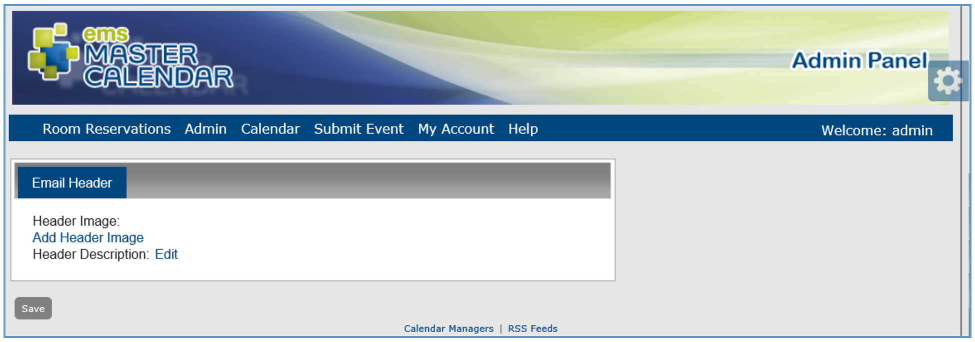
CHAPTER 64: Customize Email Headers

Automated emails can be sent from many areas within your Master Calendar application, including subscriptions, reminders, and change notifications. You can configure a customized email 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.

1. From the Admin Panel, navigate to **Admin** > **Site Administration** > **Email Header**.



2. On the page that displays, you can **Add Header Image** or **Edit** the header description.



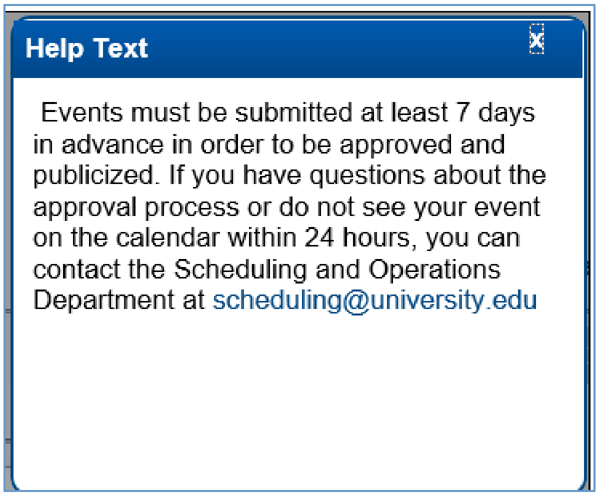
Note:

The new logo must be an image in one of the following formats —.jpg, .gif, .png, .bmp, and .ico.

3. Click **Save**.

CHAPTER 65: Customize Help Text in Master Calendar

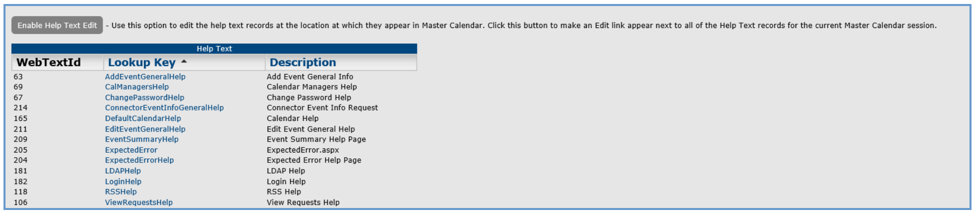
As the Master Calendar site administrator, you can customize messages in key areas of your system that provides organization-specific information or hints to your users about how to use Master Calendar. For example, you might want to place *help text* above a calendar that explains what type of events that a user should and should not post to the calendar.



Sample Help Text

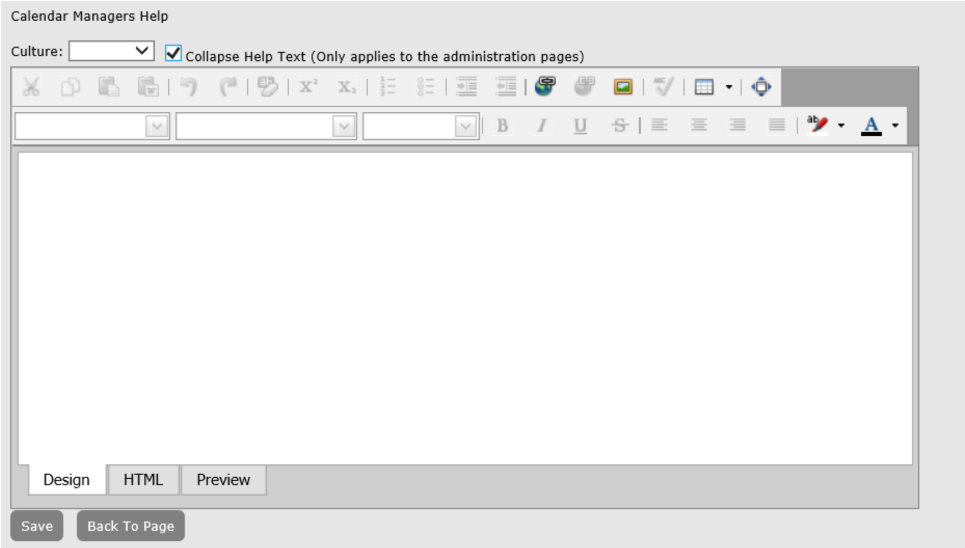
You have two options for managing help text in Master Calendar—from the **Help Text** function on the Admin menu, or by clicking an **Edit** link next to the help text on a page.

1. From the Admin Panel, navigate to **Admin** > **Site Administration** > **Help Text**. The Help Text page opens. By default, when the page first opens, Help Text Edit mode is disabled.

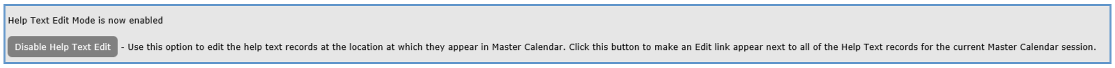


2. Click the **Lookup Key** link for the help text to open the page for editing the help text. The Calendar Managers Help page opens for editing the help text in the selected area of Master Calendar. Options include:
   - **Collapse Help Text**—This requires the user to click on the Help Text icon to display the help text.
   - **Cultures**—If you have configured cultures for Master Calendar, then these cultures are

displayed in a Culture dropdown list. You can 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.



3. Enter the help text in the blank **Design** tab. Use the available formatting options to select the font size, style, color, and so on.
4. Optionally, do one or both of the following:
5. Click **Preview** to open the Preview tab and view the Help text as it will be displayed in your Master Calender system.
6. Click **HTML** to open the HTML tab and view the HTML code for the help text.
7. Click **Save**.
8. 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."

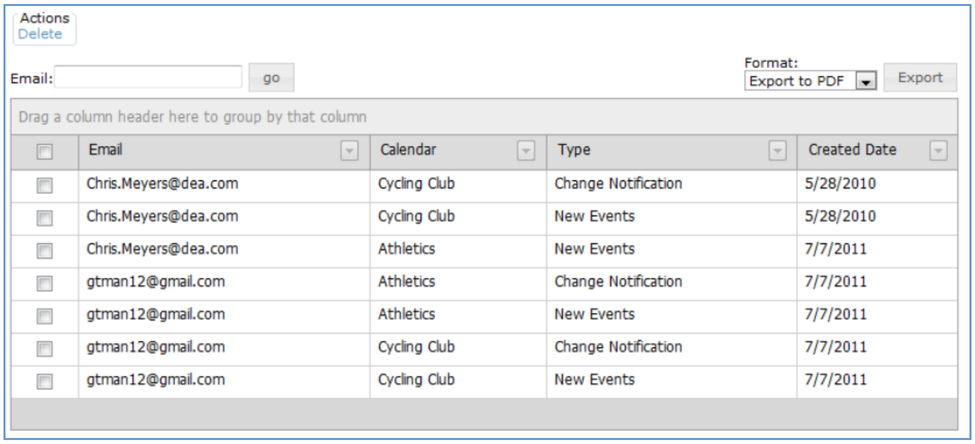


9. *To disable Help Text mode*, toggle **Disable Help Text Edit**. The message "Help Text Mode is now disabled" is displayed above the toggle, and the toggle now reads "Enable Help Text Edit."

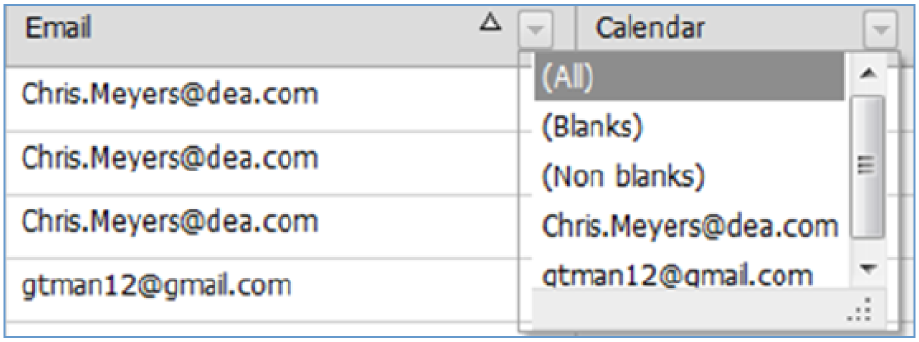
CHAPTER 66: Manage Subscriptions

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.

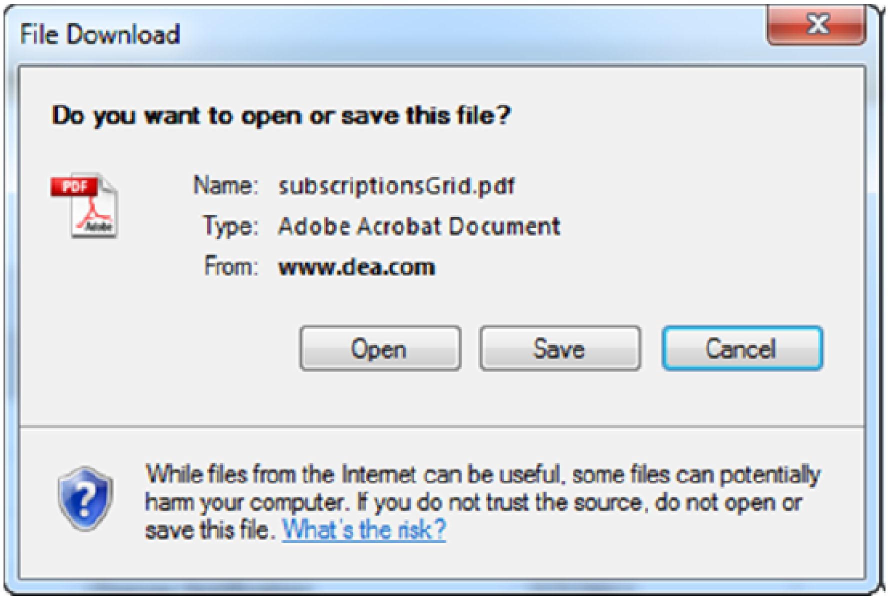
1. From the Admin Panel, navigate to **Admin** > **Site Administration** > **Subscriptions**. The Subscriptions page opens, listing all currently active subscriptions to all calendars in Master Calendar.



2. 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@emssoftware.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.
   - *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.



- *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 File dialog box 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 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 a subscription,* select the subscription and under Actions, click **Delete**. You will be prompted to confirm that you want to delete all the selected RSS feeds.
    - Click **OK** in the message. A message opens indicating that all the selected subscriptions were successfully deleted.
    - Click **OK** in the message. The Subscriptions page is refreshed to show the remaining (if any) active subscriptions in Master Calendar.

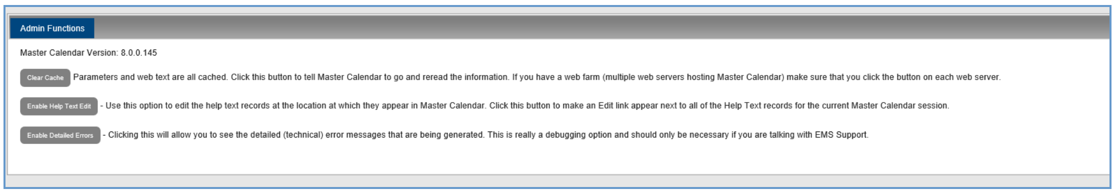
CHAPTER 67: Admin Functions in Master Calendar

Administrators can Clear their Cache, Enable Help Text and Enable Detailed Errors using the Admin Functions screen in Master Calendar.

Clear the Cache in Master Calendar

Parameters and web text are all cached. Administrators can clear this cache by following the instructions below.

1. From the Admin Panel, navigate to **Admin** > **Admin Functions**. The Admin Functions screen appears.



2. Click the **Clear Cache** button. Master Calendar will reread the information.

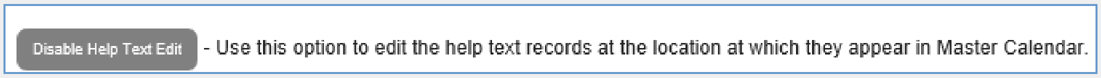
> **Important!**
> If you have a web farm (e.g., multiple web servers hosting Master Calendar), ensure that you click the button on each Web server.

Enable Help Text in Master Calendar

Administrators can edit the help text records at the location in which they appear in Master Calendar.

1. From the Admin Panel, navigate to **Admin** > **Admin Functions**. The Admin Functions screen appears.
2. Click the **Enable Help Text Edit** button. The message, "Help Text Edit Mode is now enabled" appears. An Edit link will now appear next to all the Help Text records for the current Master Calendar session. See Also: Customize Help Text.

> **Note:**
> To Disable Help Text, click the **Disable Help Text Edit** button.



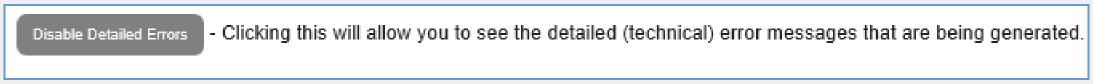
Enable Detailed Errors

Administrators can view detailed (technical) error messages in Master Calendar.

> **Important!**
> This is a debugging option that should only be used while interacting with EMS Customer Support.

1. From the Admin Panel, navigate to **Admin** > **Admin Functions**. The Admin Functions screen appears.
2. Click the **Enable Detailed Errors** button. The message, "Detailed Error Mode is now enabled" appears.

> **Note:**
> To Disable Detailed Errors, click the **Disable Detailed Errors** button.



CHAPTER 68: Master Calendar Admin Field Definitions

The following topics provide field definitions for all areas of the Admin panel in Master Calendar:

- Area: Calendar
- Area: Email
- Area: Labels
- Area: Mobile
- Area: Portal Authentication
- Area: RSS
- Area: Submit
- Area: System Configuration
- Area: Tooltip

CHAPTER 69: Area: Calendar

Master Calendar Default Page Configuration Settings

Parameter Description	Default	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.
Default to display on main calendar	<Variable>	The calendar that is displayed by default on the Master Calendar Home page.
Display the Event Title using the event color type	No	Select this to show the event title on a calendar in the same color as the event type.
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	10	In the Weekly view, select the number of events that are to be displayed.

Parameter Description	Default	Function
to display in weekly view		
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	No	Display the time zone abbreviation (for example EST) next to the event time on the calendar.
Display "Untimed event" label for untimed events on calendar.	Yes	If the event is an untimed event, then "Untimed event" is displayed for the event on the calendar.
Use scroll bar in calendar grid view	No	On the Calendar grid view, select to show scroll bars on days that have multiple events to be displayed.
Collapse search filters on calendar page	No	Select to collapse the search filters on the calendar page.
Default Calendar Format	Grid	Indicate whether a calendar or list format should be the default display for events. (Users can always select a different format.)
Default	Month	Indicate whether a calendar should be

Parameter Description	Default	Function
Calendar Display		defaulted to a daily, weekly, monthly, or yearly view.
List style type for calendar	Detailed	Indicate the style type for the list view.
Show weekends on calendar	Yes	Select to show weekends on the calendar.
Default start day of week for calendar	Sunday	Select the day of the week on which a calendar week should begin.

See Also:

- Area: Email
- Area: Labels
- Area: Mobile
- Area: Portal Authentication
- Area: RSS
- Area: Submit
- Area: System Configuration
- Area: Tooltip

CHAPTER 70: Area: Email

Master Calendar Default Page Configuration Settings

Parameter Description	Default	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.
Name of Email Sender	Events Office	Enter the name that is to be displayed on system-generated emails.
Email Address of Sender	Events@dea.com	Enter the email address that is to be displayed on system-generated emails.
SMTP Server	mail.dea.com	Enter the name of the organization's SMTP Server.
Use SSL	No	Create a secure encrypted connection between the email client application and the email server.

See Also:

- Area: Labels
- Area: Mobile
- Area: Portal Authentication
- Area: RSS
- Area: Submit
- Area: System Configuration
- Area: Tooltip

CHAPTER 71: Area: Labels

Master Calendar Default Page Configuration Settings

Parameter Description	Default	Function
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	ET	Indicate the wording that should show for the Event Type Label plural.
Event Type Singular Label	ET	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	Rooms	Indicate the wording that should show for the Sub Location Label plural.
Sub Location Singular Label	Room	Indicate the wording that should show for the Sub Location Label singular.

See Also:

- Area: Email
- Area: Mobile
- Area: Portal Authentication
- Area: RSS
- Area: Submit

- Area: System Configuration
- Area: Tooltip

CHAPTER 72: Area: Mobile

Master Calendar Default Page Configuration Settings

Parameter Description	Default	Function
Display the filter options when loading the mobile calendar.	No	Do not display the options for filtering the events that are displayed on a calendar when loading the Calendar page for mobile devices.

See Also:

- Area: Email
- Area: Labels
- Area: Portal Authentication
- Area: RSS
- Area: Submit
- Area: System Configuration
- Area: Tooltip

CHAPTER 73: Area: Portal Authentication

Master Calendar Default Page Configuration Settings

Parameter Description	Default	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	MCCookie	For portal authentication, enter your organizations portal authentication variable.

See Also:

- Area: Email
- Area: Labels
- Area: Mobile
- Area: RSS
- Area: Submit
- Area: System Configuration
- Area: Tooltip

CHAPTER 74: Area: RSS

Master Calendar Default Page Configuration Settings

Parameter Description	Default	Function
Append the event data to RSS title	No	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	No	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.

See Also:

- Area: Calendar
- Area: Email
- Area: Labels
- Area: Mobile
- Area: Portal Authentication
- Area: Submit
- Area: System Configuration
- Area: Tooltip

CHAPTER 75: Area: Submit

Master Calendar Default Page Configuration Settings

Parameter Description	Default	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 Submit an Event page.
Allow invitee emails	Yes	Indicate if users are allowed to invitee attendees on the Submit an Event page.
Acceptable attachment extensions	.csv,.doc,.gif,.jpg, .pdf,.ppt,.txt,.xls	Indicate the acceptable types of attachments that can be added to the Submit an Event page.
Acceptable attachment extensions	.csv,.doc,.gif,.jpg, .pdf,.ppt,.txt,.xls	Indicate the acceptable types of attachments that can be added to the Submit an Event page.
Check Hide Contact Boxes by default	No	Hide the checkbox for Contact Name and Contact Email when submitting an event.
After submitting event clear form and do not redirect to calendar	No	After a user submits an event, the system processes the submission and is returned to calendar to which the event was submitted.
Require department field	No	Indicate if the Department field should be required on the Submit an Event page.
Default end time of submit page	5:00	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 Submit an Event page.
User groups allowed to use HTML editor	All	Indicate which level of users should be allowed to use the HTML editor from within the Event Description box on the Submit an Event page.

Parameter Description	Default	Function
Require location field	No	Indicate if the Location field should be required on the Submit an Event page.
Max number of attachments allowed per event	4	Indicate the maximum number of attachments that can be added to a single event.
Max size of a single attachment (in megabytes)	5	Indicate the maximum size (in megabytes) of an attachment for the Submit an Event page.
Minute increment drop-down list	30	Select 5, 15, 30, or 60 as the way time fields are incremented.
Allow requestors to edit their events after they have been approved?	No	Allow requestors to edit their events after the Calendar Manager has approved the events. Two options for Yes: • 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 Submit an Event page.
Display priority field	Yes	Indicate if the priority field should be displayed on the Submit an event page and for RSS Feeds.
Default start time of submit page	9:00	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 Submit Event page that must be verified before the event can be submitted.

Parameter Description	Default	Function
Number of months forward that a user can submit an event	12	Select a number of months in the future that a user can submit an event to a calendar.

See Also:

- Area: Calendar
- Area: Email
- Area: Labels
- Area: Mobile
- Area: Portal Authentication
- Area: RSS
- Area: System Configuration
- Area: Tooltip

CHAPTER 76: Area: System Configuration

Master Calendar Default Page Configuration Settings

Parameter Description	Default	Function
Collapse calendars into groupings	Yes	Indicate if the calendars should collapse into the grouping.
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?	Yes	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	50	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 Default page.
This determines whether to show the 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.
Suppress HTML from featured events & detailed list view	No	Indicate if HTML should be suppressed from featured events and from the detailed list view.
Suspend sending of subscription emails	No	Indicate if the subscription emails should be suspended.

Parameter Description	Default	Function
Height of thumbnail image (in pixels)	50	Enter the number (in pixels) for the height of a thumbnail image.
Width of thumbnail image (in pixels)	50	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.
Time to send out email subscriptions	7:00	Indicate the time in which email subscriptions are to be sent out.
Delay between text change on dynamic feeds (in seconds)	3	Indicate (in seconds) the delay between text change for the dynamic feeds.

See Also:

- Area: Calendar
- Area: Email
- Area: Labels
- Area: Mobile
- Area: Portal Authentication
- Area: RSS
- Area: Submit
- Area: Tooltip

CHAPTER 77: Area: Tooltip

Master Calendar Default Page Configuration Settings

Parameter Description	Default	Function
Display calendars on tooltip	Yes	Indicate if the calendars should show on the tooltip.
Display contact email on Tool Tip	Yes	Indicate if the contact email address should show on the tooltip.
Display contact phone on Tool Tip	Yes	Indicate if the contact phone number should show on the tooltip.
Display contact name on Tool Tip	Yes	Indicate if the contact name should show on the tooltip.
Display custom fields on Tool Tip	Yes	Indicate if the custom fields should show on the tooltip.
Show tooltip on calendar	Yes	Indicate if the tooltip should show on the calendar.
Display location on Tool Tip	Yes	Indicate if the location should show on the tooltip.
Display user defined questions on Tool Tip	Yes	Indicate if user defined questions should show on the tooltip.

See Also:

- Area: Calendar
- Area: Email
- Area: Labels
- Area: Mobile
- Area: Portal Authentication
- Area: RSS
- Area: Submit

CHAPTER 78: EMS Master Calendar API

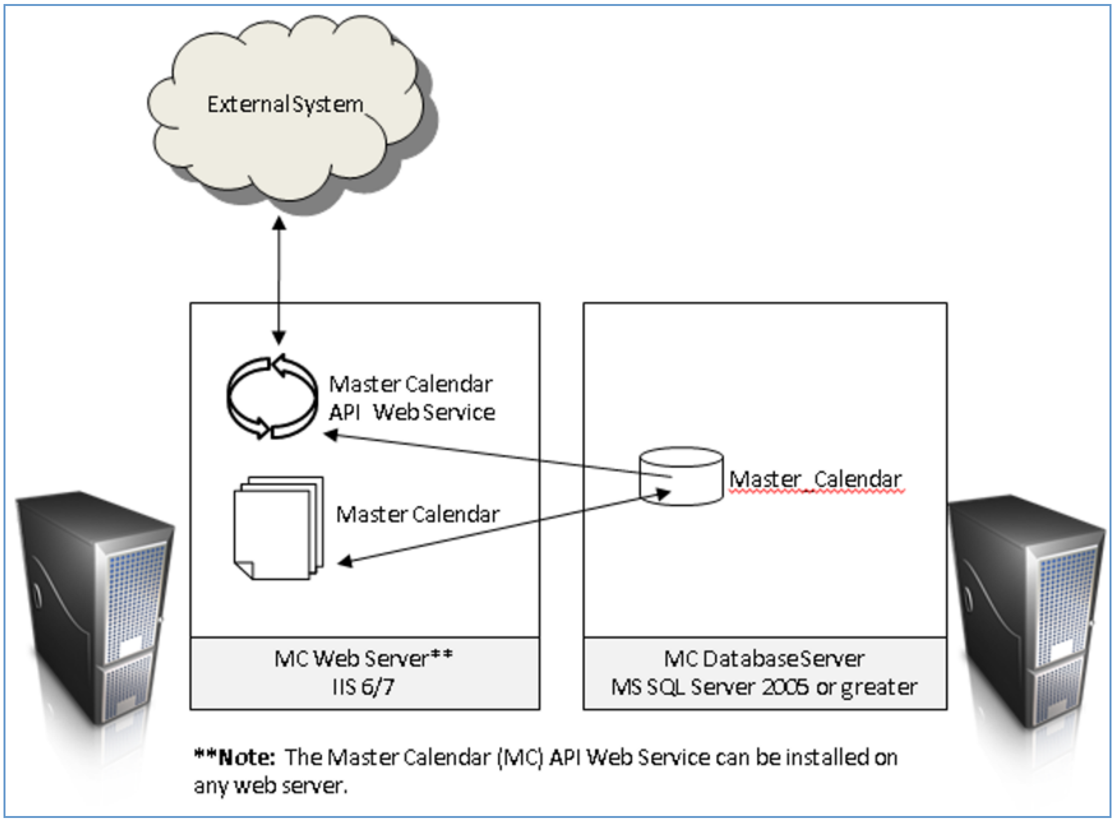
This section is intended for programmers that need detailed information about our web service based API.

This section will provide information on the following:

- Master Calendar API Requirements and Licensing
- Configuring Master Calendar to Use the Master Calendar API Web Service
- API Functions
- Verifying the Master Calendar API

This section assumes you are familiar with the following:

- XML
- Web services
- Query or SOAP
- One or more programming languages



Note:

If an offsite external third party integrator (i.e., outside of your network) requires access to the Master Calendar API, the Master Calendar API Web Service will need to be installed as a public facing website.

Master Calendar API Licensing

The Read Only API and the Updating API are both optional system features that might be licensed by Master Calendar customers. Note that the Updating API includes the Read Only API.

The Read Only API provides all of the calls to pull data (i.e., “get” calls) from the Master Calendar database. Calls to update or add events (i.e., “update” and “add” calls) also require the Updating API.

Note:

Updating API requires Master Calendar 4.0 or greater.

If you are unsure whether your organization is licensed for the API, or if you would like to learn more, please contact your account executive.

CHAPTER 79: Master Calendar API Requirements and Licensing

Master Calendar API Requirements

Important!
EMS Master Calendar 3.1 or greater must be installed.

SOFTWARE & HARDWARE REQUIREMENTS	
Supported Platforms	Windows 2012 Server, Windows 2012 Server R2 Windows 2008 Server R2 and IIS 7.0/7.5
Minimum System Requirements	Processor: 2.0 GHz and 4 cores or faster Memory: 8 GB or more Hard-Disk Space: 2 separate physical drives of at least 6 GB; one for data, and the other for transaction logs (SCSI drives w/9ms access or better and RAID strategy for fault tolerance recommended) Software: Microsoft SQL Server 2014, Microsoft SQL Server 2012, Microsoft SQL Server 2008 R2, Microsoft SQL Server 2005 SP3 Network Card: 100 / 1000 Mbps ethernet, switched

CHAPTER 80: Configure Master Calendar to Use the Master Calendar API Web Service

Once you meet the prerequisites, download the installation files, run the Master Calendar Installer, Install/upgrade the Database Component, and Install/upgrade the Web Service, you will configure Master Calendar to use the API Web Service as shown below:

Concept: You Use a Pre-Defined Master Calendar User Account to Authenticate the Master Calendar Web Service.

External applications require a pre-defined Master Calendar User account to authenticate to the Master Calendar Web Service. The Master Calendar User account should not be granted any rights within the Master Calendar application itself. The Master Calendar Installation Guide provides instructions on how to create a Master Calendar user account. In the Sample Code examples provided in the API Functions section, you use the Master Calendar account created here for UserID and Password.

1. Create a Master Calendar User Account to use for configuring the Web Service.
2. Make a note of this user account's UserID and Password for future use when authenticating your Web Service.

CHAPTER 81: API Functions

This section provides information on the following API calls:

- GetEventTypes
- GetLocations
- GetCalendars
- GetCalendar
- GetGroupings
- GetEvents
- GetFeaturedEvents
- GetEvent
- GetUDQs
- GetComments
- AddEvent (Requires Advanced API Option)
- AddEventWithMultipleDates (Requires Advanced API Option)
- UpdateEvent (Requires Advanced API Option)
- UpdateEventDate (Requires Advanced API Option)

GetEventTypes

This API returns a list of event types.

Request Parameters

Name	Description	Type
UserName	MC User Name	String
Password	MC User Password	String

Response Elements

Name	Description	Type
Name	Location Name	String

Name	Description	Type
EventTypeID	Event Type ID	Integer
Color	Event Type Color	String

Sample Code

```
private void GetEventTypes()
{
        MCAPI.MCAPIService svc = new MCAPI.MCAPIService();
svc.Url = "http://yourserver/MCAPI/MCAPIService.asmx?WSDL";
        StringReader sr = new StringReader(svc.GetEventTypes
("username", "pwd"));
        DataSet ds = new DataSet();
        System.Xml.XmlDocument doc = new System.Xml.XmlDocument();
doc.LoadXml(sr.ReadToEnd());
        ds.ReadXml(new System.Xml.XmlNodeReader(doc));
}
```

Example Response

<EventTypes>
<Data>
<EventTypeID>169</EventTypeID>
<Name>Academic</Name>
<Color>#CCCC66</Color>
</Data>
<Data>
<EventTypeID>171</EventTypeID>
<Name>Athletic</Name>
<Color>#FF3300</Color>
</Data>
</EventTypes>

GetLocations

This API returns a list of locations.

Request Parameters

Name	Description	Type
UserName	MC User Name	String
Password	MC User Password	String

Response Elements

Name	Description	Type
Name	Location Name	String
LocationID	Location ID	Integer
Url	Location Url	String

Sample Code

```
private void GetLocations()
{
        MCAPI.MCAPIService svc = new MCAPI.MCAPIService();
svc.Url = "http://yourserver/MCAPI/MCAPIService.asmx?WSDL";
        StringReader sr = new StringReader(svc.GetLocations
("username", "pwd"));
        DataSet ds = new DataSet();
        System.Xml.XmlDocument doc = new System.Xml.XmlDocument();
        doc.LoadXml(sr.ReadToEnd());
        ds.ReadXml(new System.Xml.XmlNodeReader(doc));
  }
```

Example Response

```
<Locations>
    <LocationID>15</LocationID>
    <Name>10th Floor</Name>
    <Url>http://maps.google.com/</Url>
  </Data>
  <Data>
    <LocationID>11</LocationID>
    <Name>11th Floor</Name>
    <Url>http://maps.google.com/</Url>
  </Data> </Locations>
```

GetCalendars

This API returns a list of calendars.

Request Parameters

Name	Description	Type
UserName	MC User Name	String
Password	MC User Password	String

Response Elements

Name	Description	Type
Name	Calendar Name	String
CalendarID	Calendar ID	Integer

Sample Code

```
private void GetCalendars()
```

```
 {
        MCAPI.MCAPIService svc = new MCAPI.MCAPIService();
        svc.Url = "http://y-
ourserver/MCAPI/MCAPIService.asmx?WSDL";
        StringReader sr = new StringReader(svc.GetCalendars
("username", "pwd"));
        DataSet ds = new DataSet();
        System.Xml.XmlDocument doc = new System.Xml.XmlDocument
();
        doc.LoadXml(sr.ReadToEnd());
        ds.ReadXml(new System.Xml.XmlNodeReader(doc));
  }
```

Example Response

```
<Calendars>
  <Data>
    <CalendarID>134</CalendarID>
    <Name>Alumni</Name>
  </Data>
    <CalendarID>3</CalendarID>
    <Name>Athletics</Name>
  </Data>  </Calendars>
```

GetCalendar

This API returns calendar information for a specific calendar.

Request Parameters

Name	Description	Type
UserName	MC User Name	String

Name	Description	Type
Password	MC User Password	String
CalendarID	MC Calendar ID	Integer

Response Elements

Name	Description	Type
Name	Calendar Name	String
CalendarID	Calendar ID	Integer
Description	Calendar Description	String
AdminName	Calendar Admin Name	String
AdminEmail	Calendar Admin Email	String
ApprovalEmail	Calendar Approval Email	
IsPrivate	Calendar is set as private	Boolean
IsActive	Calendar is active	Boolean
ShowCancelledEvents	Calendar shows canceled events	Boolean
DefaultViewID	Calendar View 0=Daily, 1=Weekly, 3=Monthly, 4=Yearly	Integer
CalendarFormatID	Calendar Format 1 = List, 2 = Grid	Integer
GroupingID	Calendar GroupingID	Integer
ShowWeekends	Calendar shows weekends	Boolean
StartWeekOn	Calendar Starts On 0=Sun,1=Mon,2=Tue,3=Wed,4=Thu,5=Fri,6=Sat	Integer
AllowPublicSubmission	Calendar allows public submission	Boolean

Name	Description	Type
ContactInfoPublic	Show Calendar contact info	Boolean
Subscription	Calendar Subscription 0=Off, 1=Authenticated Users, 2=All Users	Integer
ListTypeID	Calendar List Type Format 1=Condensed, 2=Standard, 3=Detailed	Integer

Sample Code

```
private void GetCalendar()
 {
        MCAPI.MCAPIService svc = new MCAPI.MCAPIService();
        svc.Url = "http://y-
ourserver/MCAPI/MCAPIService.asmx?WSDL";
        StringReader sr = new StringReader(svc.GetCalendar
("username", "pwd", 1));
        DataSet ds = new DataSet();
        System.Xml.XmlDocument doc = new System.Xml.XmlDocument
();
        doc.LoadXml(sr.ReadToEnd());
        ds.ReadXml(new System.Xml.XmlNodeReader(doc));
  }
```

Example Response

```
<Calendar>
  <Data>
    <Name>Cycling Club</Name>
    <CalendarID>126</CalendarID>
    <Description />
    <AdminName>Brad</AdminName>
```

```
    <AdminEmail> email@yourcompany.com </AdminEmail>
    <ApprovalEmail>email@yourcompany.com</ApprovalEmail>
    <IsPrivate>false</IsPrivate>
    <IsActive>true</IsActive>
    <ShowCancelledEvents>false</ShowCancelledEvents>
    <DefaultViewID>2</DefaultViewID>
    <CalendarFormatID>1</CalendarFormatID>
    <GroupingID>3</GroupingID>
    <ShowWeekends>true</ShowWeekends>
    <StartWeekOn>0</StartWeekOn>
    <AllowPublicSubmission>true</AllowPublicSubmission>
    <ContactInfoPublic>true</ContactInfoPublic>
    <Subscription>2</Subscription>
    <ListTypeID>3</ListTypeID>
  </Data> </Calendar>
```

GetGroupings

This API returns a list of group IDs.

Request Parameters

Name	Description	Type
UserName	MC User Name	String
Password	MC User Password	String

Response Elements

Name	Description	Type
Name	Grouping Name	String
GroupingID	Grouping ID	Integer

Sample Code

```
private void GetGroupings()
 {
        MCAPI.MCAPIService svc = new MCAPI.MCAPIService();
        svc.Url = "http://y-
ourserver/MCAPI/MCAPIService.asmx?WSDL";
        StringReader sr = new StringReader(svc.GetGroupings
("username", "pwd"));
        DataSet ds = new DataSet();
        System.Xml.XmlDocument doc = new System.Xml.XmlDocument
();         doc.LoadXml(sr.ReadToEnd());
        ds.ReadXml(new System.Xml.XmlNodeReader(doc));
  }
```

Example Response

```
<Groupings>
    <GroupingID>18</GroupingID>
    <Name>Administration</Name>
  </Data>
  <Data>
    <GroupingID>15</GroupingID>
    <Name>Conference Center</Name>
  </Data> </Groupings>
```

GetEvents

This API returns a list of events.

Request Parameters

Name	Description	Type
UserName	MC User Name	String
Password	MC User Password	String
StartDate	Event Start Date	DateTime
EndDate	Event End Date	DateTime
EventName	Event Title (searches partial)	String
Location	Event Location (Searches partial)	String
Calendars	Calendars to search. (null value = all calendars)	Integer Array
EventTypes	EventTypes to search. (null value = all eventtypes)	Integer Array

Response Elements

Name	Description	Type
EventDetailID	Event Detail ID	Integer
EventID	Event ID	Integer
Title	Event Title	String
Description	Event Description	String
Location	Event Location	String
LocationUrl	Event Location Url	String

Name	Description	Type
Canceled	Event Canceled	Boolean
NoEndTime	Event has no end time	Boolean
Priority	Event priority 1=High, 2=Medium, 3=Low	Integer
EventDate	Event Date	DateTime
TimeEventStart	Time Event Starts	DateTime
TimeEventEnds	Time Event Ends	DateTime
IsAllDayEvent	Is Event All Day	Boolean
IsTimedEvent	Is Event a timed event	Boolean
EventTypeID	Event Type ID	Integer
EventTypeName	Event Type Name	String
Contactname	Event Contact Name	String
ContactEmail	Event Contact Email	String
IsReOccurring	Event has multiple dates	Boolean
IsOnMultipleCalendars	Event is on multiple calendars	Boolean
BookingID	EMS Booking ID	Integer
ReservationID	EMS Reservation ID	Integer
ConnectorID	MC Connector ID	Integer
HideContactName	Hide Contact Name	Boolean
HideContactEmail	Hide Contact Email	Boolean
HideContactPhone	Hide Contact Phone	Boolean
CustomFieldLabel1	Custom Field Label 1	String

Name	Description	Type
CustomFieldDescription1	Custom Field Description 1	String
CustomUrl1	Custom Url 1	String
CustomFieldLabel2	Custom Field Label 2	String
CustomFieldDescription2	Custom Field Description 2	String
CustomUrl2	Custom Url 2	String
EventUpdatedBy	Last Event Updated By	String
EventUpdatedDate	Last Event Updated Date	DateTime
EventDetailUpdatedBy	Last Event Detail Updated By	String
EventDetailUpdatedDate	Last Event Detail Updated Date	DateTime

Sample Code

```
private void GetEvents()
 {
         MCAPI.MCAPIService svc = new MCAPI.MCAPIService();
 svc.Url = "http://yourserver/MCAPI/MCAPIService.asmx?WSDL";


       svcMCAPI.ArrayOfInt  calendars = new svcMCAPI.ArrayOfInt
();
       calendars.Add(12);        calendars.Add(14);


       svcMCAPI.ArrayOfInt  eventTypes = new svcMCAPI.Ar-
rayOfInt();
       eventTypes.Add(4);
       StringReader sr = new StringReader(svc.GetEvents
       ("username", "pwd", DateTime.Now.AddDays(-5),
       DateTime.Now.AddDays(5), "", "", calendars, eventTypes));

      DataSet ds = new DataSet();
```

```
        System.Xml.XmlDocument doc = new System.Xml.XmlDocument
();
        doc.LoadXml(sr.ReadToEnd());
        ds.ReadXml(new System.Xml.XmlNodeReader(doc));
  }
```

Example Response


```
<Events>
 <Data>
    <EventDetailID>155609</EventDetailID>
    <EventID>23173</EventID>
    <Title>Test Event (TT) 240 month recurrence</Title>
    <Description />
    <Location>RM B</Location>
    <Canceled>false</Canceled>
    <NoEndTime>false</NoEndTime>
    <Priority>2</Priority>
    <EventDate>2011-04-01T00:00:00-06:00</EventDate>
    <TimeEventStart>2011-04-01T10:00:00-06:00</TimeEventStart>
    <TimeEventEnd>2011-04-01T11:00:00-06:00</TimeEventEnd>
    <IsAllDayEvent>false</IsAllDayEvent>
    <IsTimedEvent>true</IsTimedEvent>
    <EventTypeID>111</EventTypeID>
    <EventTypeName>Conference</EventTypeName>
    <ContactName>Tester 1</ContactName>
    <ContactEmail>test@dea.com</ContactEmail>
    <IsReOccurring>true</IsReOccurring>
```

```
    <IsOnMultipleCalendars>false</IsOnMultipleCalendars>
    <BookingID>61157</BookingID>
    <ReservationID>3609</ReservationID>
    <ConnectorID>0</ConnectorID>
    <HideContactName>false</HideContactName>
    <HideContactEmail>false</HideContactEmail>
    <HideContactPhone>false</HideContactPhone>
    <EventUpdatedBy>Connector Service</EventUpdatedBy>
    <EventUpdatedDate>2018-06-03T16:34:34.15-06:00</EventUp-
datedDate>
    <EventDetailUpdatedBy>dbo</EventDetailUpdatedBy>
    <EventDetailUpdatedDate>2018-06-03T16:34:34.167-
06:00</EventDetailUpdatedDate>   </Data>
</Events>
```


GetEvent

This API returns event information for a specific event date.

Request Parameters

Name	Description	Type
UserName	MC User Name	String
Password	MC User Password	String
EventDetailID	Event Detail ID for the specific event date	Integer

Response Elements

Name	Description	Type
EventDetailID	Event Detail ID	Integer

Name	Description	Type
EventID	Event ID	Integer
Title	Event Title	String
TitleURL	Event Title Url	String
Description	Event Description	String
Department	Event Department	String
Location	Event Location	String
LocationUrl	Event Location Url	String
Canceled	Event Canceled	Boolean
NoEndTime	Event has no end time	Boolean
Priority	Event priority 1=High, 2=Medium, 3=Low	Interger
EventDate	Event Date	DateTime
TimeEventStart	Time Event Starts	DateTime
TimeEventEnd	Time Event Ends	DateTime
PostDate	Date Event Posts on the calendar	DateTime
TimezoneID	TimezoneID	Integer
TimezoneAbbr	Timezone abbreviation	String
IsAllDayEvent	Is Event All Day	Boolean
IsTimedEvent	Is Event a timed event	Boolean
CalendarName	Calendar Name	String
EventTypeID	Event Type ID	Integer
EventTypeName	Event Type Name	String

Name	Description	Type
EventTypeColor	Color of the Event Type	String
ContactName	Event Contact Name	String
ContactEmail	Event Contact Email	String
IsReOccurring	Event has multiple dates	Boolean
IsOnMultipleCalendars	Event is on multiple calendars	Boolean
BookingID	EMS Booking ID	Integer
ReservationID	EMS Reservation ID	Integer
ConnectorID	MC Connector ID	Integer
HideContactName	Hide Contact Name	Boolean
HideContactEmail	Hide Contact Email	Boolean
HideContactPhone	Hide Contact Phone	Boolean
CustomFieldLabel1	Custom Field Label 1	String
CustomFieldDescription1	Custom Field Description 1	String
CustomUrl1	Custom Url 1	String
CustomFieldLabel2	Custom Field Label 2	String
CustomFieldDescription2	Custom Field Description 2	String
CustomUrl2	Custom Url 2	String
EventUpdatedBy	Last Event Updated By	String
EventUpdatedDate	Last Event Updated Date	DateTime
EventDetailUpdatedBy	Last Event Detail Updated By	String
EventDetailUpdatedDate	Last Event Detail Updated Date	DateTime

Name	Description	Type
ImageId	Event Image ID	Integer
FileExtension	Event Image file extension	String
ImageName	Event Image Name	String
Image	Event Image	Image Bytes

Sample Code

```
private void GetEvent()
 {
        MCAPI.MCAPIService svc = new MCAPI.MCAPIService();
        svc.Url = "http://y-
ourserver/MCAPI/MCAPIService.asmx?WSDL";


       int eventDetailId = 126;
       StringReader sr = new StringReader(svc.GetEvents
       ("username", "pwd", eventDetailId));


       DataSet ds = new DataSet();


        System.Xml.XmlDocument doc = new System.Xml.XmlDocument
();
        doc.LoadXml(sr.ReadToEnd());
        ds.ReadXml(new System.Xml.XmlNodeReader(doc));
  }
```

Example Response

```
<Event>
  <Data>
```

```
<EventDetailID>155609</EventDetailID>
<EventID>23173</EventID>
<Title>Test Event (TT) 240 month recurrence</Title>
<TitleUrl />
<Description />
<Department>Test Group</Department>
<Location>RM B</Location>
<Canceled>false</Canceled>
<NoEndTime>false</NoEndTime>
<StartDate>2011-04-01T00:00:00-06:00</StartDate>
<Priority>2</Priority>
<TimeEventStart>2011-04-01T10:00:00-06:00</TimeEventStart>
<TimeEventEnd>2011-04-01T11:00:00-06:00</TimeEventEnd>
<IsAllDayEvent>false</IsAllDayEvent>
<IsTimedEvent>true</IsTimedEvent>
<TimeZoneID>68</TimeZoneID>
<ContactName>Tester 1</ContactName>
<ContactEmail>test@dea.com</ContactEmail>
<ContactPhone>0123456789</ContactPhone>
<IsOnMultipleCalendars>false</IsOnMultipleCalendars>
<IsReOccurring>true</IsReOccurring>
<CustomFieldLabel1 />
<CustomFieldDescription1 />
<CustomURL1 />
<CustomFieldLabel2 />
<CustomFieldDescription2 />
<CustomURL2 />
```

```
    <EventTypeID>111</EventTypeID>
    <EventTypeName>Conference</EventTypeName>
    <EventTypeColor>#CC00CC</EventTypeColor>
    <BookingID>61157</BookingID>
    <ReservationID>3609</ReservationID>
    <Priority1>2</Priority1>
    <HideContactName>false</HideContactName>
    <HideContactEmail>false</HideContactEmail>
    <HideContactPhone>false</HideContactPhone>
    <CalendarName>Cycling Club</CalendarName>
    <PostDate>2010-06-03T16:34:34.15-06:00</PostDate>
    <TimezoneAbbr>MT</TimezoneAbbr>
    <EventUpdatedBy>Connector Service</EventUpdatedBy>
    <EventUpdatedDate>2010-06-03T16:34:34.15-06:00</EventUp-
datedDate>
    <EventDetailUpdatedBy>dbo</EventDetailUpdatedBy>
    <EventDetailUpdatedDate>2010-06-03T16:34:34.167-
06:00</EventDetailUpdatedDate>     <ImageId>0</ImageId>
    <FileExtension />
    <ImageName>Image</ImageName>
  </Data>
</Event>
```


GetFeaturedEvents

This API returns a list of events.

Request Parameters

Name	Description	Type
UserName	MC User Name	String
Password	MC User Password	String
StartDate	Event Start Date	DateTime
EndDate	Event End Date	DateTime
EventName	Event Title (searches partial)	String
Location	Event Location (Searches partial)	String
Calendars	Calendars to search. (null value = all calendars)	Integer Array
EventTypes	EventTypes to search. (null value = all event types)	Integer Array
UDQAnswer	UDQ Answer (text or list)	String

Response Elements

Name	Description	Type
EventDetailID	Event Detail ID	Integer
EventID	Event ID	Integer
Title	Event Title	String
Description	Event Description	String
Location	Event Location	String
LocationUrl	Event Location Url	String
Canceled	Event Canceled	Boolean
NoEndTime	Event has no end time	Boolean

Name	Description	Type
Priority	Event priority 1=High, 2=Medium, 3=Low	Integer
EventDate	Event Date	DateTime
TimeEventStart	Time Event Starts	DateTime
TimeEventEnds	Time Event Ends	DateTime
IsAllDayEvent	Is Event All Day	Boolean
IsTimedEvent	Is Event a timed event	Boolean
EventTypeID	Event Type ID	Integer
EventTypeName	Event Type Name	String
ContactName	Event Contact Name	String
ContactEmail	Event Contact Email	String
ContactPhone	Event Contact Phone	String
IsReOccurring	Event has multiple dates	Boolean
IsOnMultipleCalendars	Event is on multiple calendars	Boolean
BookingID	EMS Booking ID	Integer
ReservationID	EMS Reservation ID	Integer
ConnectorID	MC Connector ID	Integer
HideContactName	Hide Contact Name	Boolean
HideContactEmail	Hide Contact Email	Boolean
HideContactPhone	Hide Contact Phone	Boolean
CustomFieldLabel1	Custom Field Label 1	String
CustomFieldDescription1	Custom Field Description 1	String

Name	Description	Type
CustomUrl1	Custom Url 1	String
CustomFieldLabel2	Custom Field Label 2	String
CustomFieldDescription2	Custom Field Description 2	String
CustomUrl2	Custom Url 2	String
EventUpdatedBy	Last Event Updated By	String
EventUpdatedDate	Last Event Updated Date	DateTime
EventDetailUpdatedBy	Last Event Detail Updated By	String
EventDetailUpdatedDate	Last Event Detail Updated Date	DateTime

Sample Code

```
private void GetFeaturedEvents()
 {
        MCAPI.MCAPIService svc = new MCAPI.MCAPIService();
 svc.Url = "http://yourserver/MCAPI/MCAPIService.asmx?WSDL";


       svcMCAPI.ArrayOfInt  calendars = new svcMCAPI.ArrayOfInt
();        calendars.Add(12);        calendars.Add(14);


       svcMCAPI.ArrayOfInt  eventTypes = new svcMCAPI.Ar-
rayOfInt();         eventTypes.Add(4);

       StringReader sr = new StringReader(svc.GetFeatured-
sEvents("username", "pwd", DateTime.Now.AddDays(-5),
DateTime.Now.AddDays(5), "", "", calendars, eventTypes));


      DataSet ds = new DataSet();
```

```
        System.Xml.XmlDocument doc = new System.Xml.XmlDocument
();         doc.LoadXml(sr.ReadToEnd());

        ds.ReadXml(new System.Xml.XmlNodeReader(doc));

  }
```

Example Response


```
<Events>
 <Data>
    <EventDetailID>155609</EventDetailID>
    <EventID>23173</EventID>
    <Title>Test Event (TT) 240 month recurrence</Title>
    <Description />
    <Location>RM B</Location>
    <Canceled>false</Canceled>
    <NoEndTime>false</NoEndTime>
    <Priority>2</Priority>
    <EventDate>2011-04-01T00:00:00</EventDate>
    <TimeEventStart>2011-04-01T10:00:00</TimeEventStart>
    <TimeEventEnd>2011-04-01T11:00:00</TimeEventEnd>
    <IsAllDayEvent>false</IsAllDayEvent>
    <IsTimedEvent>true</IsTimedEvent>
    <EventTypeID>111</EventTypeID>
    <EventTypeName>Conference</EventTypeName>
    <ContactName>Tester 1</ContactName>
    <ContactEmail>test@dea.com</ContactEmail>
    <IsReOccurring>true</IsReOccurring>
    <IsOnMultipleCalendars>false</IsOnMultipleCalendars>
    <BookingID>61157</BookingID>
```

```
    <ReservationID>3609</ReservationID>
    <ConnectorID>0</ConnectorID>
    <HideContactName>false</HideContactName>
    <HideContactEmail>false</HideContactEmail>
    <HideContactPhone>false</HideContactPhone>
    <EventUpdatedBy>Connector Service</EventUpdatedBy>
    <EventUpdatedDate>2010-06-03T16:34:34.15</EventUpdatedDate>
    <EventDetailUpdatedBy>dbo</EventDetailUpdatedBy>
    <EventDetailUpdatedDate>2010-06-03T16:34:34.167</EventDe-
tailUpdatedDate>
  </Data>
</Events>
```

GetEvent

This API returns event information for a specific event date.

Request Parameters

Name	Description	Type
UserName	MC User Name	String
Password	MC User Password	String
EventDetailID	Event Detail ID for the specific event date	Integer

Response Elements

Name	Description	Type
EventDetailID	Event Detail ID	Integer
EventID	Event ID	Integer

Name	Description	Type
Title	Event Title	String
TitleURL	Event Title Url	String
Description	Event Description	String
Department	Event Department	String
Location	Event Location	String
LocationUrl	Event Location Url	String
Canceled	Event Canceled	Boolean
NoEndTime	Event has no end time	Boolean
Priority	Event priority 1=High, 2=Medium, 3=Low	Integer
EventDate	Event Date	DateTime
TimeEventStart	Time Event Starts	DateTime
TimeEventEnd	Time Event Ends	DateTime
PostDate	Date Event Posts on the calendar	DateTime
TimezoneID	TimezoneID	Integer
TimezoneAbbr	Timezone abbreviation	String
IsAllDayEvent	Is Event All Day	Boolean
IsTimedEvent	Is Event a timed event	Boolean
CalendarName	Calendar Name	String
EventTypeID	Event Type ID	Integer
EventTypeName	Event Type Name	String
EventTypeColor	Color of the Event Type	String

Name	Description	Type
ContactName	Event Contact Name	String
ContactEmail	Event Contact Email	String
ContactPhone	Event Contact Phone	String
IsReOccurring	Event has multiple dates	Boolean
IsOnMultipleCalendars	Event is on multiple calendars	Boolean
BookingID	EMS Booking ID	Integer
ReservationID	EMS Reservation ID	Integer
ConnectorID	MC Connector ID	Integer
HideContactName	Hide Contact Name	Boolean
HideContactEmail	Hide Contact Email	Boolean
HideContactPhone	Hide Contact Phone	Boolean
CustomFieldLabel1	Custom Field Label 1	String
CustomFieldDescription1	Custom Field Description 1	String
CustomUrl1	Custom Url 1	String
CustomFieldLabel2	Custom Field Label 2	String
CustomFieldDescription2	Custom Field Description 2	String
CustomUrl2	Custom Url 2	String
EventUpdatedBy	Last Event Updated By	String
EventUpdatedDate	Last Event Updated Date	DateTime
EventDetailUpdatedBy	Last Event Detail Updated By	String
EventDetailUpdatedDate	Last Event Detail Updated Date	DateTime

Name	Description	Type
ImageId	Event Image ID	Integer
FileExtension	Event Image file extension	String
ImageName	Event Image Name	String
Image	Event Image	Base64String

Sample Code

```
private void GetEvent()
 {
        MCAPI.MCAPIService svc = new MCAPI.MCAPIService();
 svc.Url = "http://yourserver/MCAPI/MCAPIService.asmx?WSDL";


       int eventDetailId = 126;
       StringReader sr = new StringReader(svc.GetEvents("user-
name", "pwd", eventDetailId));


       DataSet ds = new DataSet();


        System.Xml.XmlDocument doc = new System.Xml.XmlDocument
();
        doc.LoadXml(sr.ReadToEnd());
        ds.ReadXml(new System.Xml.XmlNodeReader(doc));
  }
```

Example Response

```
<Event>
  <Data>
    <EventDetailID>155609</EventDetailID>
    <EventID>23173</EventID>
```

```
<Title>Test Event (TT) 240 month recurrence</Title>
<TitleUrl />
<Description />
<Department>Test Group</Department>
<Location>RM B</Location>
<Canceled>false</Canceled>
<NoEndTime>false</NoEndTime>
<StartDate>2011-04-01T00:00:00</StartDate>
<Priority>2</Priority>
<TimeEventStart>2011-04-01T10:00:00</TimeEventStart>
<TimeEventEnd>2011-04-01T11:00:00</TimeEventEnd>
<IsAllDayEvent>false</IsAllDayEvent>
<IsTimedEvent>true</IsTimedEvent>
<TimeZoneID>68</TimeZoneID>
<ContactName>Tester 1</ContactName>
<ContactEmail>test@dea.com</ContactEmail>
<ContactPhone>0123456789</ContactPhone>
<IsOnMultipleCalendars>false</IsOnMultipleCalendars>
<IsReOccurring>true</IsReOccurring>
<CustomFieldLabel1 />
<CustomFieldDescription1 />
<CustomURL1 />
<CustomFieldLabel2 />
<CustomFieldDescription2 />
<CustomURL2 />
<EventTypeID>111</EventTypeID>
<EventTypeName>Conference</EventTypeName>
```

```
    &lt;EventTypeColor&gt;#CC00CC&lt;/EventTypeColor&gt;
    &lt;BookingID&gt;61157&lt;/BookingID&gt;
    &lt;ReservationID&gt;3609&lt;/ReservationID&gt;
    &lt;Priority1&gt;2&lt;/Priority1&gt;
    &lt;HideContactName&gt;false&lt;/HideContactName&gt;
    &lt;HideContactEmail&gt;false&lt;/HideContactEmail&gt;
    &lt;HideContactPhone&gt;false&lt;/HideContactPhone&gt;
    &lt;CalendarName&gt;Cycling Club&lt;/CalendarName&gt;
    &lt;PostDate&gt;2010-06-03T16:34:34.15&lt;/PostDate&gt;
    &lt;TimezoneAbbr&gt;MT&lt;/TimezoneAbbr&gt;
    &lt;EventUpdatedBy&gt;Connector Service&lt;/EventUpdatedBy&gt;
    &lt;EventUpdatedDate&gt;2010-06-03T16:34:34.15&lt;/EventUpdatedDate&gt;
    &lt;EventDetailUpdatedBy&gt;dbo&lt;/EventDetailUpdatedBy&gt;
    &lt;EventDetailUpdatedDate&gt;2010-06-03T16:34:34.167</EventDe-
tailUpdatedDate>
    &lt;ImageId&gt;0&lt;/ImageId&gt;
    &lt;FileExtension /&gt;
    &lt;ImageName&gt;Image&lt;/ImageName&gt;
  &lt;/Data&gt;
&lt;/Event&gt;
```

GetUdqs

This API returns user defined question information for a specific event.

Request Parameters

Name	Description	Type
UserName	MC User Name	String

Name	Description	Type
Password	MC User Password	String
EventID	MC Event ID	Integer

Response Elements

Name	Description	Type
UDQID	User Defined Question ID	Integer
PromptText	User Defined Question Prompt	String
Answer	User Defined Question Answer	String
Sequence	User Defined Question Sequence	Integer

Sample Code

```
private void GetUdqs()
 {
        MCAPI.MCAPIService svc = new MCAPI.MCAPIService();
 svc.Url = "http://yourserver/MCAPI/MCAPIService.asmx?WSDL";
        StringReader sr = new StringReader(svc.GetUdqs("user-
name", "pwd", 1));
        DataSet ds = new DataSet();
        System.Xml.XmlDocument doc = new System.Xml.XmlDocument
();
        doc.LoadXml(sr.ReadToEnd());
        ds.ReadXml(new System.Xml.XmlNodeReader(doc));
  }
```

Example Response

```
<Udqs>
  <Data>
```

```
    <UDQID>126</UDQID>
    <PromptText>How will your organization pay for this
event?</PromptText>
    <Answer>Cash</Answer>
   <Sequence>1</Sequence>
  </Data> </Udqs>
```

GetComments

This API returns EMS comments for a specific event.

Request Parameters

Name	Description	Type
UserName	MC User Name	String
Password	MC User Password	String
EventID	MC Event ID	Integer
ReservationID	EMS Reservation ID	Integer
BookingID	EMS Booking ID	Integer

Response Elements

Name	Description	Type
ID	EMS Comment ID	Integer
Notes	EMS Comment Notes	String
CommentType	EMS Comment Type	String
NoteType	Returns value of 'User Notes', 'Reservation Notes' or 'Booking Notes'	String

Sample Code

```
private void GetComments()
 {
        MCAPI.MCAPIService svc = new MCAPI.MCAPIService();
        svc.Url = "http://y-
ourserver/MCAPI/MCAPIService.asmx?WSDL";
        StringReader sr = new StringReader(svc.GetComments
("username", "pwd", 1,25, 482));
        DataSet ds = new DataSet();
        System.Xml.XmlDocument doc = new System.Xml.XmlDocument
();
        doc.LoadXml(sr.ReadToEnd());
        ds.ReadXml(new System.Xml.XmlNodeReader(doc));
  }
```

Example Response

```
<Comments>
  <Data>
    <ID>1</ID>
    <Notes>details…</Notes>
    <CommentType>Event Details</CommentType>
   <NoteType>Reservation Notes</ NoteType >
  </Data> </Comments>
```

AddEvent (Requires Advanced API Option)

This API allows you to add an Event.

Request Parameters

Name	Description	Type
UserName	MC User Name	String
Password	MC User Password	String
EventDate	Event Start Date	DateTime
Calendars	Calendar Ids	Integer Array
Title	Event Name	String
TitleURL	Event Title URL	String
Description	Event Description	String
TimeEventStart	Time Event Starts	DateTime
TimeEventEnd	Time Event Ends	DateTime
Location	Event Location	String
LocationURL	Event Location URL	String
ContactName	Event Contact Name	String
ContactEmail	Event Contact Email	String
ContactPhone	Event Contact Phone	String
IsAllDayEvent	Is Event All Day	Boolean
IsUntimed	Is Event a timed event	Boolean
NoEndTime	Event has no end time	Boolean
Canceled	Event Canceled	Boolean
CustomFieldLabel1	Event Custom Field Label 1	String
CustomFieldDescription1	Event Custom Field Description 1	String

Name	Description	Type
CustomFieldUrl1	Event Custom Field Url 1	String
CustomFieldLabel2	Event Custom Field Label 2	String
CustomFieldDescription2	Event Custom Field Description 2	String
CustomFieldUrl2	Event Custom Field Url 2	String
EventTypeID	EventTypeID	Integer
Department	Event Department	String
HideContactName	Hide Event Contact Name	Boolean
HideContactEmail	Hide Event Contact Email	Boolean
HideContactPhone	Hide Event Contact Phone	Boolean

Response Elements

Name	Description	Type
EventID	EventID	Integer
EventDetailID	Event Detail ID	Integer

Sample Code

```
 private void AddEvent()

 {

        MCAPI.MCAPIService svc = new MCAPI.MCAPIService();
 svc.Url = "http://yourserver/MCAPI/MCAPIService.asmx?WSDL";

                int[] cals = new int[] { 3, 126 };

       StringReader sr = new StringReader(svc.AddEvent("user-
name", "pwd", "1/1/1900", cals,

"Test API Event","", "This is a test api description",
"1/1/1900    00:00", "1/1/1900    00:00", "Denver",
```

```
"http://www.dea.com", "Contact Name", "Contact Email", "",
false, false, false,  false,"","","","","","",-1, "", false,
false, true));

              DataSet ds = new DataSet();

                 System.Xml.XmlDocument doc = new Sys-
tem.Xml.XmlDocument();          doc.LoadXml(sr.ReadToEnd());

        ds.ReadXml(new System.Xml.XmlNodeReader(doc));

 }
```

Example Response

```
<Event>

  <Data>

    <EventDetailID>155609</EventDetailID>

    <EventID>23173</EventID>

  </Data>

</Event>
```

AddEventWithMultipleDates (Requires Advanced API Option)

This API allows you to add an Event.

Request Parameters

Name	Description	Type
UserName	MC User Name	String
Password	MC User Password	String
Dates	List of Event Dates	DateTime Array
Calendars	Calendar Ids	Integer Array
Title	Event Name	String
TitleURL	Event Title URL	String

Name	Description	Type
Description	Event Description	String
TimeEventStart	Time Event Starts	DateTime
TimeEventEnd	Time Event Ends	DateTime
Location	Event Location	String
LocationURL	Event Location URL	String
ContactName	Event Contact Name	String
ContactEmail	Event Contact Email	String
ContactPhone	Event Contact Phone	String
IsAllDayEvent	Is Event All Day	Boolean
IsUntimed	Is Event a timed event	Boolean
NoEndTime	Event has no end time	Boolean
Canceled	Event Canceled	Boolean
CustomFieldLabel1	Event Custom Field Label 1	String
CustomFieldDescription1	Event Custom Field Description 1	String
CustomFieldUrl1	Event Custom Field Url 1	String
CustomFieldLabel2	Event Custom Field Label 2	String
CustomFieldDescription2	Event Custom Field Description 2	String
CustomFieldUrl2	Event Custom Field Url 2	String
EventTypeID	EventTypeID	Integer
Department	Event Department	String
HideContactName	Hide Event Contact Name	Boolean

Name	Description	Type
HideContactEmail	Hide Event Contact Email	Boolean
HideContactPhone	Hide Event Contact Phone	Boolean

Response Elements

Name	Description	Type
EventID	EventID	Integer
EventDetailID	Event Detail ID	Integer

Sample Code

```
private void AddEventWithMultipleDates()
{
       MCAPI.MCAPIService svc = new MCAPI.MCAPIService();
svc.Url = "http://yourserver/MCAPI/MCAPIService.asmx?WSDL";


       DateTime[] dates = new DateTime[] { DateTime.Now,
DateTime.Now.AddDays(1) };        int[] cals = new int[] { 3,
126 };

       StringReader sr = new StringReader(svc.Ad-
dEventWithMultipleDates("username", "pwd", dates, cals, "Test
API Event","", "This is a test api description", "1/1/1900
00:00", "1/1/1900    00:00", "Denver", "http://www.dea.com",
"Contact Name", "Contact Email", "", false, false, false,
false,"","","","","","",-1, "", false, false, true));

              DataSet ds = new DataSet();

                 System.Xml.XmlDocument doc = new Sys-
tem.Xml.XmlDocument();         doc.LoadXml(sr.ReadToEnd());

       ds.ReadXml(new System.Xml.XmlNodeReader(doc));
}
```

Example Response


```
<Event>
  <Data>
    <EventID>23173</EventID>
  </Data>
</Event>
```


UpdateEvent (Requires Advanced API Option)

This API allows you to add an Event.

Request Parameters

Name	Description	Type
UserName	MC User Name	String
Password	MC User Password	String
EventID	EventID	Integer
EventDate	Event Start Date	DateTime
Calendars	Calendar Ids	Integer Array
Title	Event Name	String
TitleURL	Event Title URL	String
Description	Event Description	String
TimeEventStart	Time Event Starts	DateTime
TimeEventEnd	Time Event Ends	DateTime
Location	Event Location	String
LocationURL	Event Location URL	String

Name	Description	Type
ContactName	Event Contact Name	String
ContactEmail	Event Contact Email	String
ContactPhone	Event Contact Phone	String
IsAllDayEvent	Is Event All Day	Boolean
IsUntimed	Is Event a timed event	Boolean
NoEndTime	Event has no end time	Boolean
Canceled	Event Cancelled	Boolean
CustomFieldLabel1	Event Custom Field Label 1	String
CustomFieldDescription1	Event Custom Field Description 1	String
CustomFieldUrl1	Event Custom Field Url 1	String
CustomFieldLabel2	Event Custom Field Label 2	String
CustomFieldDescription2	Event Custom Field Description 2	String
CustomFieldUrl2	Event Custom Field Url 2	String
EventTypeID	EventTypeID	Integer
Department	Event Department	String
HideContactName	Hide Event Contact Name	Boolean
HideContactEmail	Hide Event Contact Email	Boolean
HideContactPhone	Hide Event Contact Phone	Boolean

Response Elements

Name	Description	Type
Message	“Success!” or error	String

Sample Code

```
private void UpdateEvent()

 {

        MCAPI.MCAPIService svc = new MCAPI.MCAPIService();
 svc.Url = "http://yourserver/MCAPI/MCAPIService.asmx?WSDL";

                int[] cals = new int[] { 3, 126 };

       StringReader sr = new StringReader(svc.AddEvent("user-
name", "pwd", eventId, "1/1/1900", cals, "Test API Event","",
"This is a test api description", "1/1/1900    00:00",
"1/1/1900    00:00", "Denver", "http://www.dea.com", "Contact
Name", "Contact Email", "", false, false, false,
false,"","","","","","",-1, "", false, false, true));

              DataSet ds = new DataSet();

                 System.Xml.XmlDocument doc = new Sys-
tem.Xml.XmlDocument();         doc.LoadXml(sr.ReadToEnd());

        ds.ReadXml(new System.Xml.XmlNodeReader(doc));

 }
```

Example Response

```
<Messages>

<Message>

<Message>Success!</Message>

</Message>

</Messages>
```

UpdateEventDate (Requires Advanced API Option)

This API allows you to add an Event.

Request Parameters

Name	Description	Type
UserName	MC User Name	String
Password	MC User Password	String
EventDetailID	EventDetailID	Integer
EventDate	Event Start Date	DateTime
Title	Event Name	String
TitleURL	Event Title URL	String
Description	Event Description	String
TimeEventStart	Time Event Starts	DateTime
TimeEventEnd	Time Event Ends	DateTime
Location	Event Location	String
LocationURL	Event Location URL	String
IsAllDayEvent	Is Event All Day	Boolean
IsUntimed	Is Event a timed event	Boolean
NoEndTime	Event has no end time	Boolean
CustomFieldLabel1	Event Custom Field Label 1	String
CustomFieldDescription1	Event Custom Field Description 1	String
CustomFieldUrl1	Event Custom Field Url 1	String
CustomFieldLabel2	Event Custom Field Label 2	String
CustomFieldDescription2	Event Custom Field Description 2	String
CustomFieldUrl2	Event Custom Field Url 2	String

Name	Description	Type
EventTypeID	EventTypeID	Integer

Response Elements

Name	Description	Type
Message	“Success!” or error	String

Sample Code

```
private void UpdateEventDate()

 {

        MCAPI.MCAPIService svc = new MCAPI.MCAPIService();
 svc.Url = "http://yourserver/MCAPI/MCAPIService.asmx?WSDL";

                    StringReader sr = new StringReader(svc.Ad-
dEventDate("username", "pwd",

eventDetailId, “1/1/1900”, "Test API Event","", "This is a test
api description", “1/1/1900

00:00”, “1/1/1900    00:00”, "Denver", "http://www.dea.com",
false, false, false,  false,"","","","","","",-1));

              DataSet ds = new DataSet();

                 System.Xml.XmlDocument doc = new Sys-
tem.Xml.XmlDocument();         doc.LoadXml(sr.ReadToEnd());

        ds.ReadXml(new System.Xml.XmlNodeReader(doc));

 }
```

Example Response

```
<Messages>

<Message>

<Message>Success!</Message>

</Message>
```

</Messages>

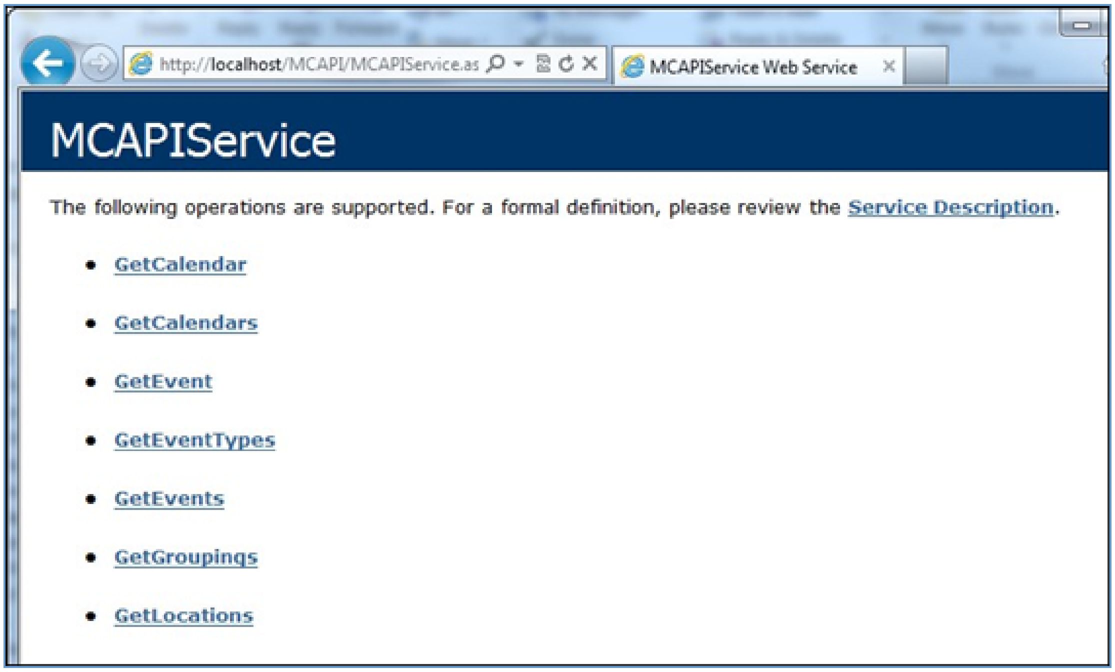
CHAPTER 82: Verify the Master Calendar API

Once you meet the prerequisites, download the installation files, run the Master Calendar Installer, Install/upgrade the Database Component, Install/upgrade the Web Service, and Configure Master Calendar to use the Web Service, you will verify the Master Calendar API as shown below.

1. Open a browser and enter the following URL:

   http://[ServerName]/MCAPI/MCAPIService.asmx(replace [ServerName] with the name of your web server)

   Your browser should return a list of API calls.

2. Proceed to the sections of this guide defining each API function as needed.
   - GetEventTypes
   - GetLocations
   - GetCalendars
   - GetCalendar
   - GetGroupings
   - GetEvents
   - GetFeaturedEvents
   - GetEvent

- GetUDQs
- GetComments
- AddEvent (Requires Advanced API Option)
- AddEventWithMultipleDates (Requires Advanced API Option)
- UpdateEvent (Requires Advanced API Option)
- UpdateEventDate (Requires Advanced API Option)

CHAPTER 83: EMS Master Calendar User Guide

EMS 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 guide details the procedures for opening and logging in to EMS 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 an EMS Master Calendar user. See Also: Master Calendar Release Notes.

This user guide provides information about the following topics:

- Log into EMS Master Calendar
- Use Basic Features of EMS Master Calendar
  - Use Field Icons in EMS Master Calendar
  - Search by Keyword
  - Export Search Results
  - Search for an Event or Special Date
  - Use RSS Feeds in EMS Master Calendar
- Manage Your Calendars
  - Modify the Calendar Display
  - Filter Events on the Calendar
  - Set a Timeframe for the Calendar Display
  - Navigate in the Master Calendar
  - Open Events from the Master Calendar
  - Subscribe to a Calendar
  - Subscribe to a Calendar using Email
  - Subscribe to a Calendar Using iCal
- User Options
  - Change Your Password
  - View Your Notifications
  - View Your Requests
- Publicize an Event in EMS Master Calendar
- Manage Events
  - Types of Master Calendar Users
  - Submit an Event
  - Additional Info Fields

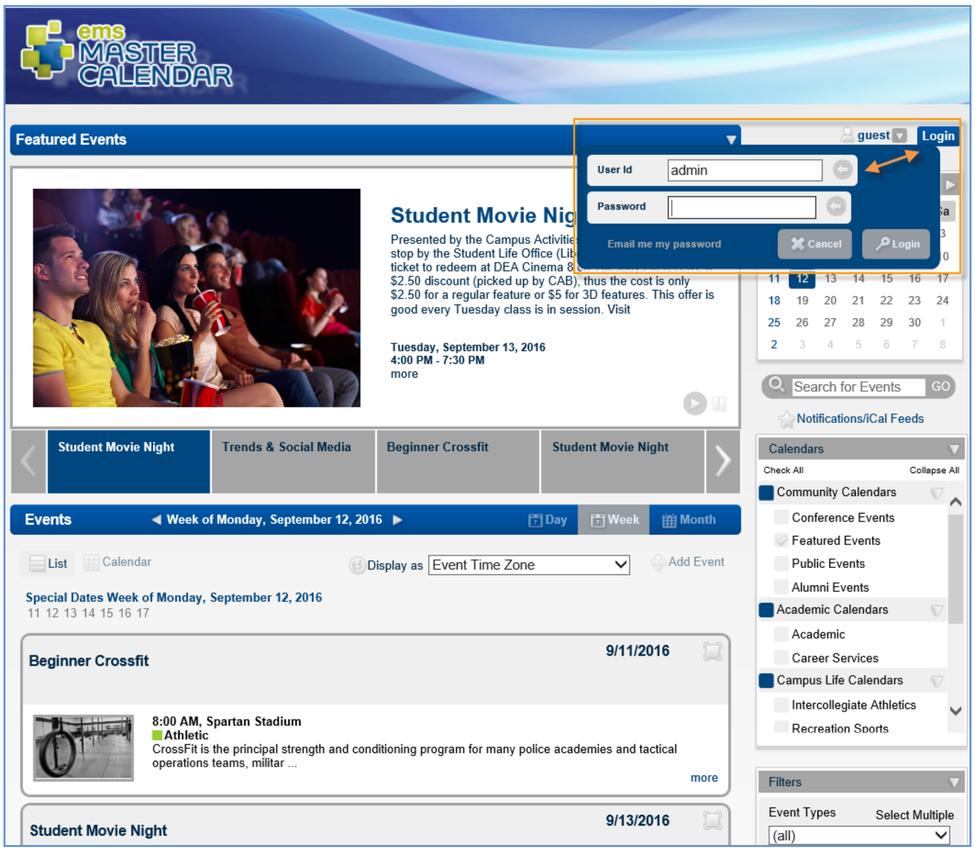
Contact Customer Support

- **Option 1 (Recommended):** Search the Knowledge Base available at Accruent Access.
- **Option 2:** Submit a case directly via Accruent Access.
- **Option 3:** Email emssupport@accruent.com.
- **Option 4:** Phone (800) 288-4565.

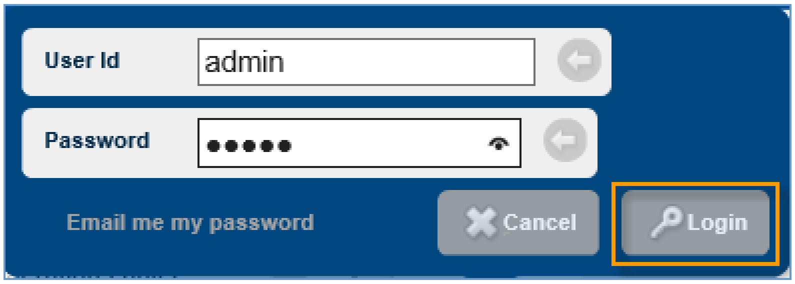
> **Important!**
> If you do not have a customer login, register here.

CHAPTER 84: Log into EMS Master Calendar

1. When you first launch EMS Master Calendar, in the upper-right corner, the user area indicates "Guest." This page might appear differently than shown below depending on how your site administrator has configured the page. Variations in the page configuration include:
   - A two column or three column layout.
   - A dynamic or static feed at the top or bottom of the page.
   - A dynamic or static announcement at the top or bottom of the page.
   - If your site has public calendars, a calendar picker either in the top row or in the second or third column.



2. Click **Log In** and enter your User ID and password, then click Login.



Note:

Your User ID is not the same as your User Name; it is the email address defined for your user account in Master Calendar. If you forget your password and the option **Email me my password** shows at the bottom of the Login dialog box, click this option to have your full password emailed to you.

If you are a site administrator, the first time you log in, you must use admin/admin as the User ID /password combination. It is recommended that you change this combination after your first login.

3. If the option is available, select a time zone. The time zone you pick is automatically set as the default time zone for any event that you submit. You can always change this value for an event.
4. Once you have logged in to the system, the User ID field will automatically populate with your ID, the Welcome message will state “Welcome <User Name>,” and EMS Master Calendar will open on the Home page. The calendars you can access and the tasks you can do from this page are determined by your user profile.

CHAPTER 85: Use Basic Features of EMS Master Calendar

This section provides an overview of basic features on the EMS Master Calendar.

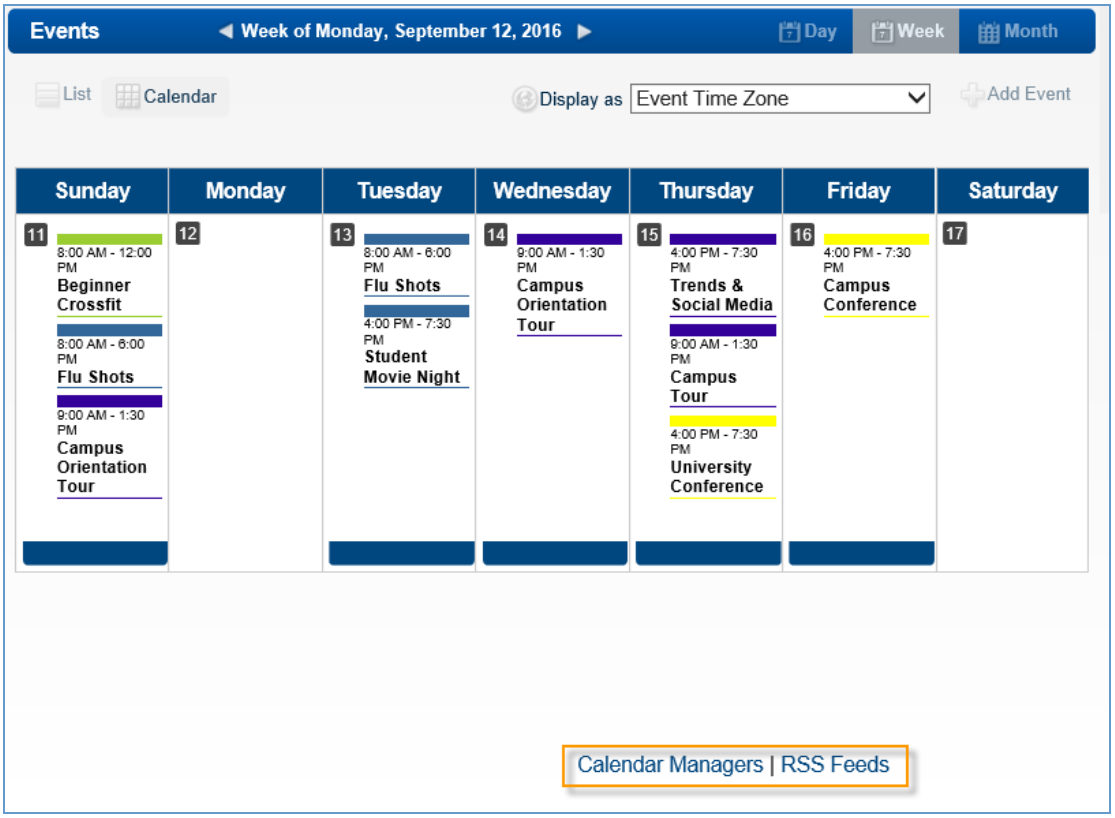
Basic features include:

- Using Field Icons in EMS Master Calendar
- Searching by Keyword
  - Exporting Search Results
- Searching for an Event or Special Date
- Using RSS Feeds in EMS Master Calendar

Hyperlinks

On any Master Calendar page, any item that appears in blue 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, as well as carry out other actions. 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.

A **Calendar Managers** hyperlink and an **RSS Feeds** hyperlink shows at the bottom of the default Master Calendar page, the bottom of the Master Calendar Home page, and the bottom of every page in Master Calendar.



Clicking on **Calendar Managers** takes you to a page of all currently active calendars in EMS Master Calendar, listed by name and the name and email of the Calendar Manager.

See Also: Use RSS Feeds in EMS Master CalendarUsing Field Icons in EMS Master Calendar and Search for an Event or Special Date

CHAPTER 86: Use Field Icons in EMS Master Calendar

This topic guides you in using the interactive icons next to many fields in the application, including:

- Search Icon
- Lookup Icon
- Calendar Tool Icon
- Color Picker Icon
- Time Picker Icon

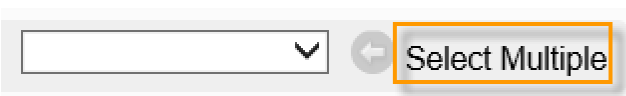
Search Icon

You can keyword-search any field with the **Search** icon.

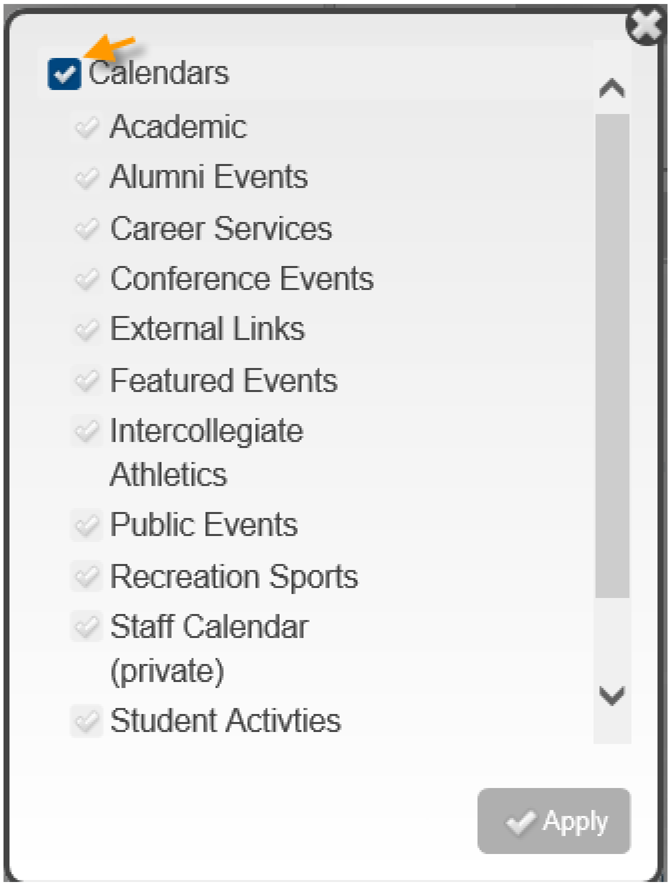
Lookup Icon

Fields with a Lookup icon enable you to select from a list of options.

Some fields provide an option to select multiples.



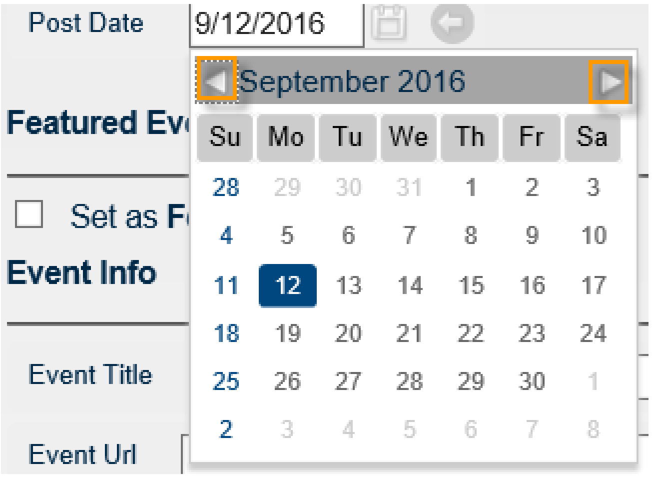
To select all, click the check box at the top of the list.



After you make your selections, click Apply to close the dialog box. “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.”

Calendar Tool Icon

For any date field in EMS Master Calendar, you can manually enter the date, or you can click the Calendar Tool from which you can select a date for the field. By default, the Calendar Tool shows the current day’s date when it opens. You can use the scroll features on the tool to select dates within the current calendar year, or for previous or future years. 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.

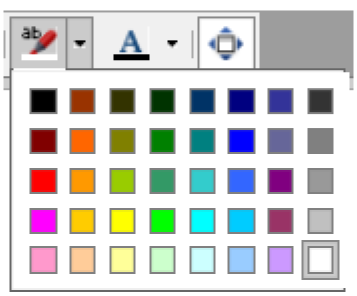


Calendar Tool

Use the forward and back buttons to scroll through the months for a given year. Select a different month for a given year. Select a different year for a given month.

Color Picker Icon

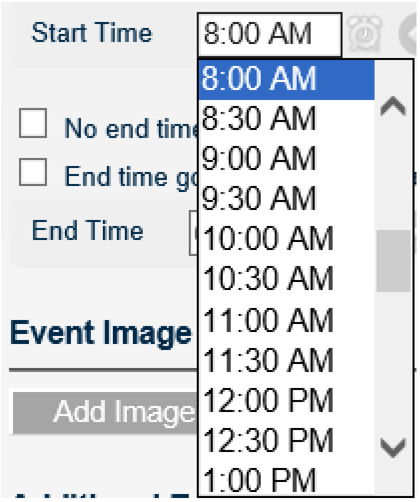
If you can specify a color for a selected item in Master Calendar, for example, an event label, then a Color Picker icon appears next to the item. You can manually enter an RGB or HEX value for the color in the field, or you can click the Color Picker icon to open the Color Picker dialog box and select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



Color Picker Dialog Box

Time Picker Icon

For any time field in EMS Master Calendar, you can click the Time Picker icon to open a list from which you can select a time for the field. The list shows half hour time increments for a 24-hour period.



Time Picker List

CHAPTER 87: Search by Keyword

You can keyword-search any field with the Search icon.

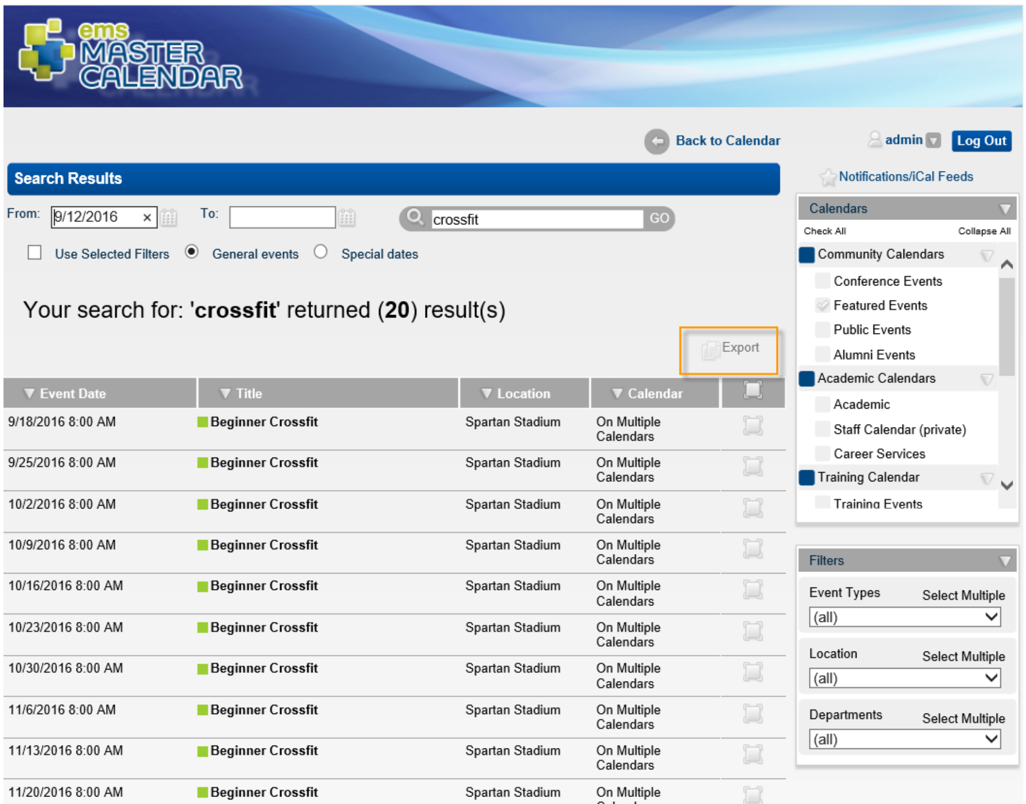
Whether you are searching for events and special dates, or you are searching for other information in other areas of Master Calendar, the page from which you are carrying the search always has a field into which you can enter partial or complete search criteria. This search field is frequently named “Keyword,” but is also can be named something else such as Title or Description.

A search from a Master Calendar page is not case-sensitive and the search is limited to the exact order of characters in the search string and typically, the string can appear anywhere in the search results. For example, if you enter “ball” as your search string, search results can include Football, Baseball, Ballgame, and so on. In addition, the search string can appear in any information that is associated with the item for which you are searching. For example, if you are searching for an event, the search results can appear in the event name, the event description, and so on. Some searches that are accessible only to a Master Calendar site administrator require that the search results begin with the search string.

CHAPTER 88: Export Search Results

Once you have searched for an event or special date, you can export the search results to an external file. The default name that Master Calendar assigns to a data file that is exported from the Search page is Export.<format>. For example, for a comma-delimited file, the default file name is Export.csv. You can change the filename and specify where to save the file.

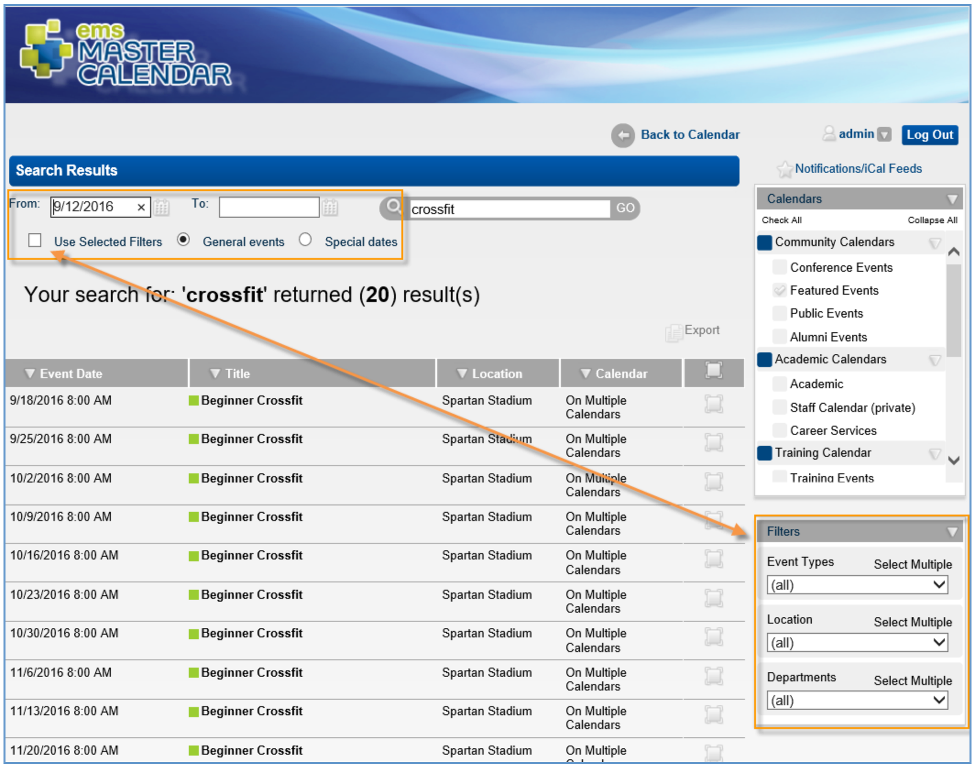
From the Search results page, click the **Export** option. Depending on your browser settings, the File downloads. You might be prompted to choose the file location.



CHAPTER 89: Search for an Event or Special Date

1. On the Master Calendar main menu, click **Search**. The Search page opens. This page contains all the fields that you use to specify the search criteria. It also contains a list of all calendars to which you have access either as a guest or user.

2. In the search results that appear, filter your search criteria.

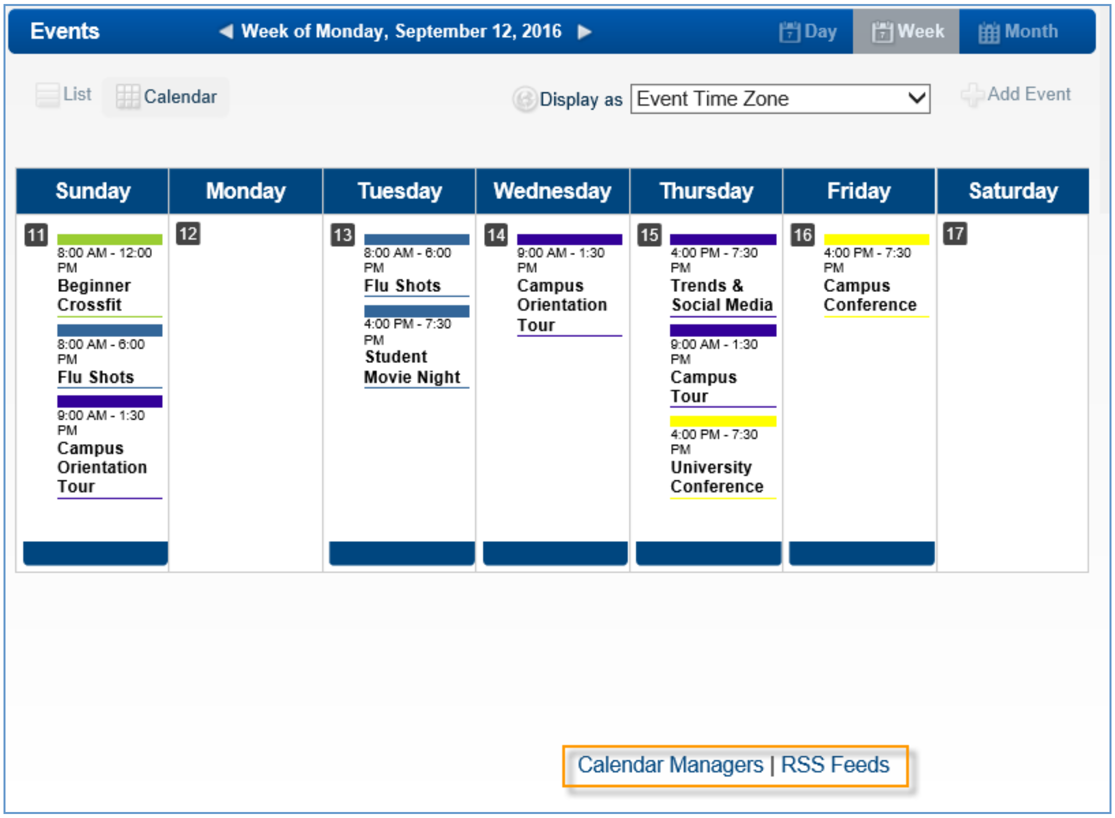


3. Click **Go** to apply your filters. Event search results are grouped by event date, location, and calendar. Special date search results are grouped by event date, title, notes and calendar.

See Also: Export Search Results.

CHAPTER 90: Use RSS Feeds in EMS Master Calendar

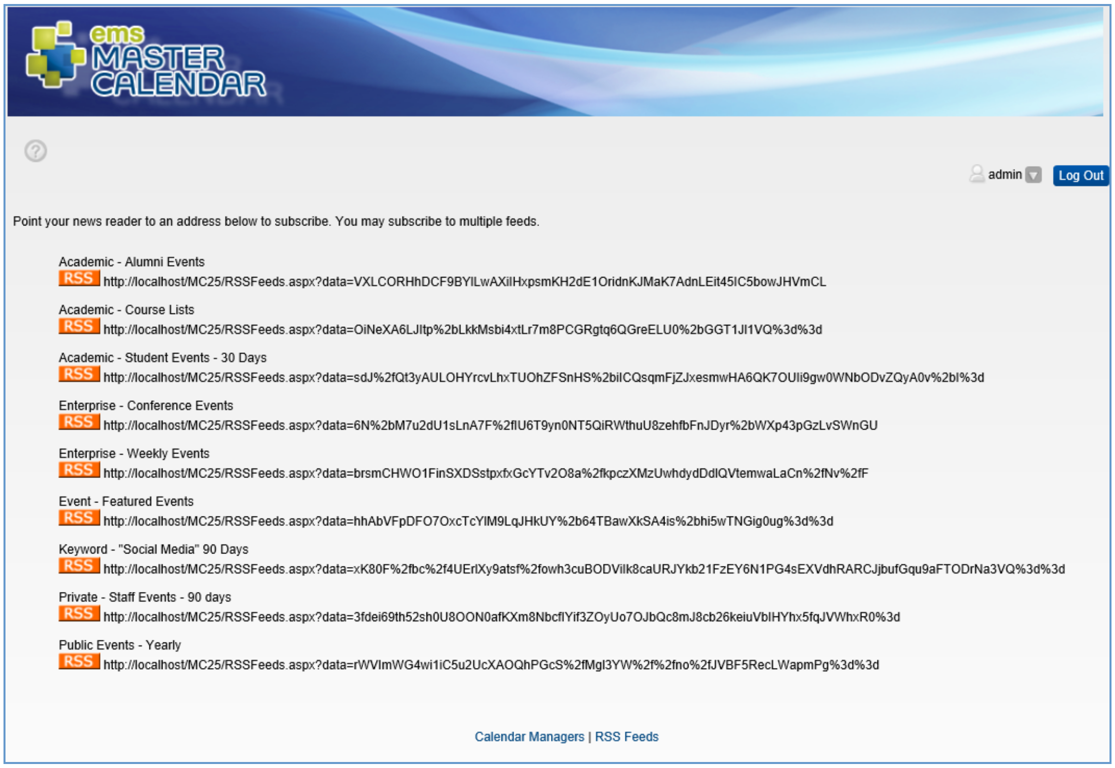
If your site administrator has configured RSS feeds, the RSS Feeds hyperlink will be available at the bottom of all pages in EMS Master Calendar.



1. Click on the link to see a list of all currently active RSS feeds.
2. Click on the **RSS button** below a feed to open the feed.

Note:

The first time you click the RSS Feeds link, you might be prompted to download an RSS feed reader.


ems
MASTER
CALENDAR
admin
Log Out
Point your news reader to an address below to subscribe. You may subscribe to multiple feeds.
Academic - Alumni Events
RSS
http://localhost/MC25/RSSFeeds.aspx?data=VXLCORHhDCF9BYILwAXilHxpsmKH2dE1OridnKJMaK7AdnLEit45IC5bowJHVmCL
Academic - Course Lists
RSS
http://localhost/MC25/RSSFeeds.aspx?data=OiNeXA6LJltp%2bLkkMsbi4xtLr7m8PCGRgtq6QGreELU0%2bGGT1Jl1VQ%3d%3d
Academic - Student Events - 30 Days
RSS
http://localhost/MC25/RSSFeeds.aspx?data=sdJ%2fQt3yAULOHYrcvLhxTUOhZFSnHS%2biICQsqmFjZJxesmwHA6QK7OUIi9gw0WNbODvZQyA0v%2bI%3d
Enterprise - Conference Events
RSS
http://localhost/MC25/RSSFeeds.aspx?data=6N%2bM7u2dU1sLnA7F%2flU6T9yn0NT5QiRWthuU8zehfbFnJDyr%2bWXp43pGzLvSWnGU
Enterprise - Weekly Events
RSS
http://localhost/MC25/RSSFeeds.aspx?data=brsmCHWO1FinSXDSstpxfxGcYTv2O8a%2fkpczXMzUwhdydDdlQVtemwaLaCn%2fNv%2fF
Event - Featured Events
RSS
http://localhost/MC25/RSSFeeds.aspx?data=hhAbVFpDFO7OxcTcYIM9LqJHkUY%2b64TBawXkSA4is%2bhi5wTNGig0ug%3d%3d
Keyword - "Social Media" 90 Days
RSS
http://localhost/MC25/RSSFeeds.aspx?data=xK80F%2fbc%2f4UErlXy9atsf%2fowh3cuBODVilk8caURJYkb21FzEY6N1PG4sEXVdhRARCJjbufGqu9aFTODrNa3VQ%3d%3d
Private - Staff Events - 90 days
RSS
http://localhost/MC25/RSSFeeds.aspx?data=3fdei69th52sh0U8OON0afKXm8NbcflYif3ZOyUo7OJbQc8mJ8cb26keiuVbIHYhx5fqJVWhxR0%3d
Public Events - Yearly
RSS
http://localhost/MC25/RSSFeeds.aspx?data=rWVImWG4wi1iC5u2UcXAOQhPGcS%2fMgI3YW%2f%2fno%2fJVBF5RecLWapmPg%3d%3d
Calendar Managers | RSS Feeds

CHAPTER 91: Manage Your Calendars

When anyone, guest or user, first access EMS Master Calendar, the Default page opens. All calendars that have been defined as public are available from this page. Anyone, guest or user, can view all public events that have posted to these public calendars. If you want to view the events that are posted to the private calendars to which you have been granted access, then you must log in to EMS Master Calendar and open the Master Calendar Home page. You can view events for both single and multiple calendars. Also, a variety of options of available for working with the calendar display and the events.

This section will provide information that will allow you to:

- Modify the Calendar Display
    - Filter Events on the Calendar
    - Set a Timeframe for the Calendar Display
- Navigate EMS Master Calendar
- Open Events from EMS Master Calendar
- Subscribe to a Calendar
    - Subscribe to a Calendar Using Email
    - Subscribe to a Calendar Using iCal

CHAPTER 92: Modify the Calendar Display

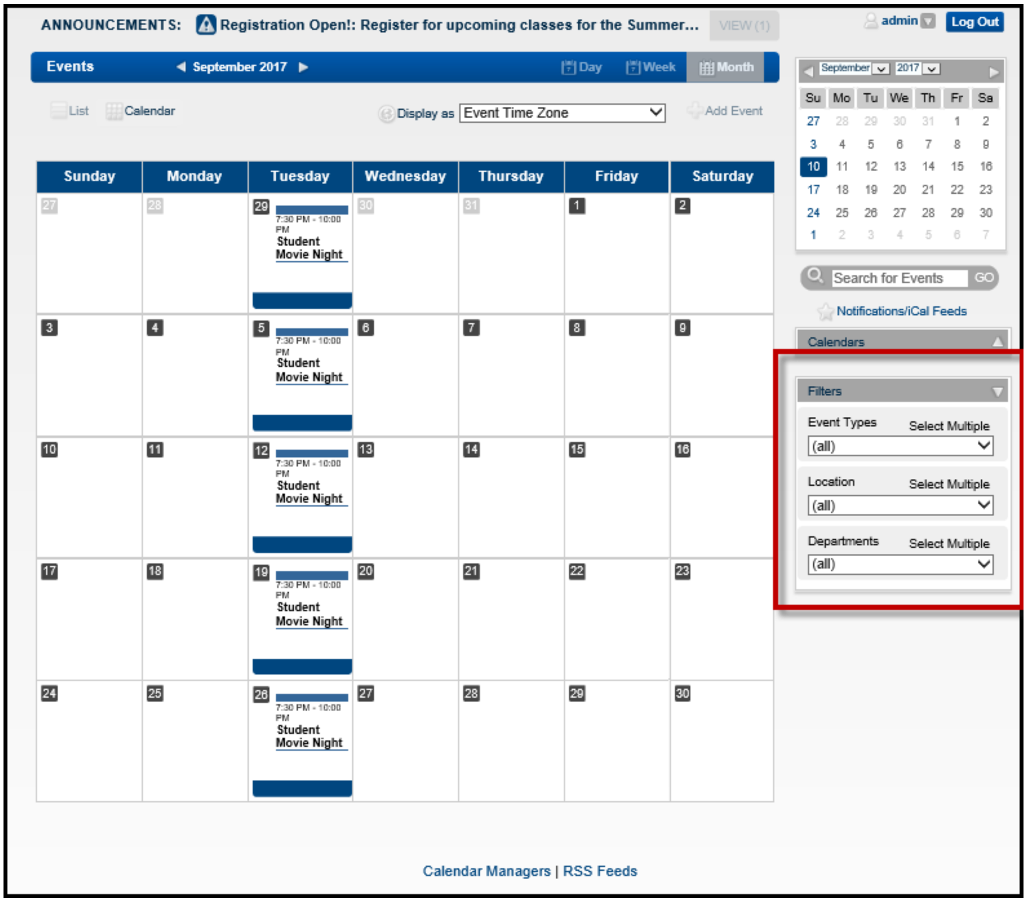
To modify the calendar display and work with the calendar, use the Calendar Display icons at the top of the Calendar Display page. Depending on the Icon Set that your Master Calendar site administrator has selected, the Calendar Display icons that you see might look slightly different than the icons shown here.

Calendar Display Icons

Icon	Description
	Export the calendar event information.
	Add an event to the selected calendar or calendars.
	To receive a system-generated email when events are added to the selected calendars or when events are modified or canceled for the selected calendars.
	To print the selected calendars from a selected printer in the current format and view.
	To approve events for a calendar that you are viewing as the Calendar Manager
	Change the current Calendar view to a list.
	Change the current Calendar view to a grid

CHAPTER 93: Filter Events on the Calendar

From the calendar display, set filters in the lower-right corner.



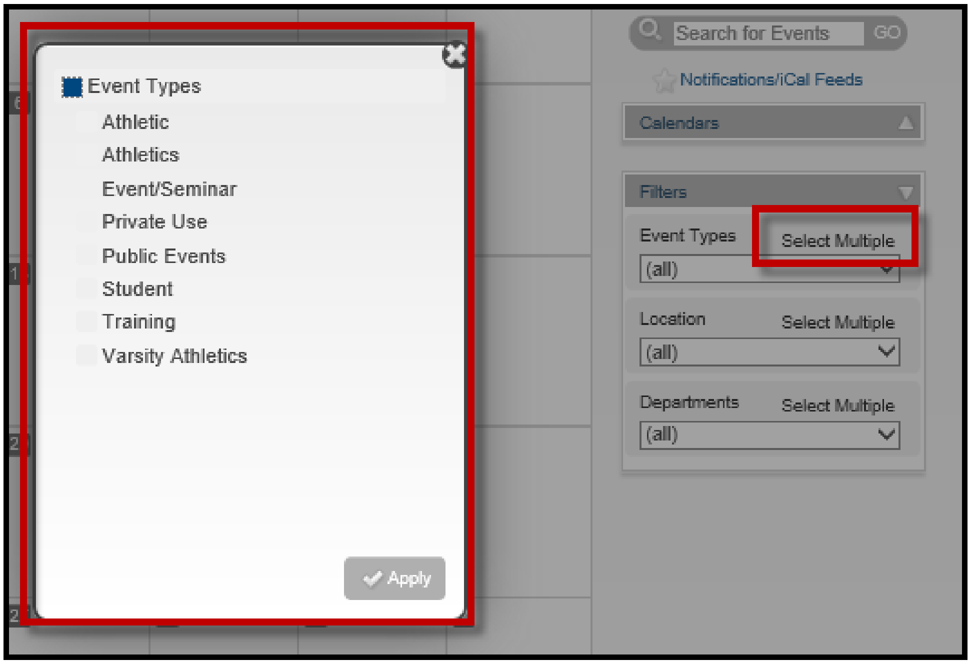
- **Event Types**—Only those events of a selected type or types.
- **Locations**—Only those events that take place at a selected location or locations.
- **Rooms**—Only those events that take place at a selected sub-location or sub-locations.
- **Departments**—Only those events that take place at a selected department or departments.

Note:

"Rooms" is the default label for a sub-location. Depending on how your Master Calendar site administrator has configured Master Calendar, you might see this labeled differently, such as "Fields," "Offices," and so on.

"Department" is a default label. Depending on how your Master Calendar site administrator has configured Master Calendar, you might see this labeled as something different, such as "Business Units."

1. To select multiple event types to display on the calendar, click on the **Select Multiple** link next to the Event Type filter.
2. Click **Apply**.



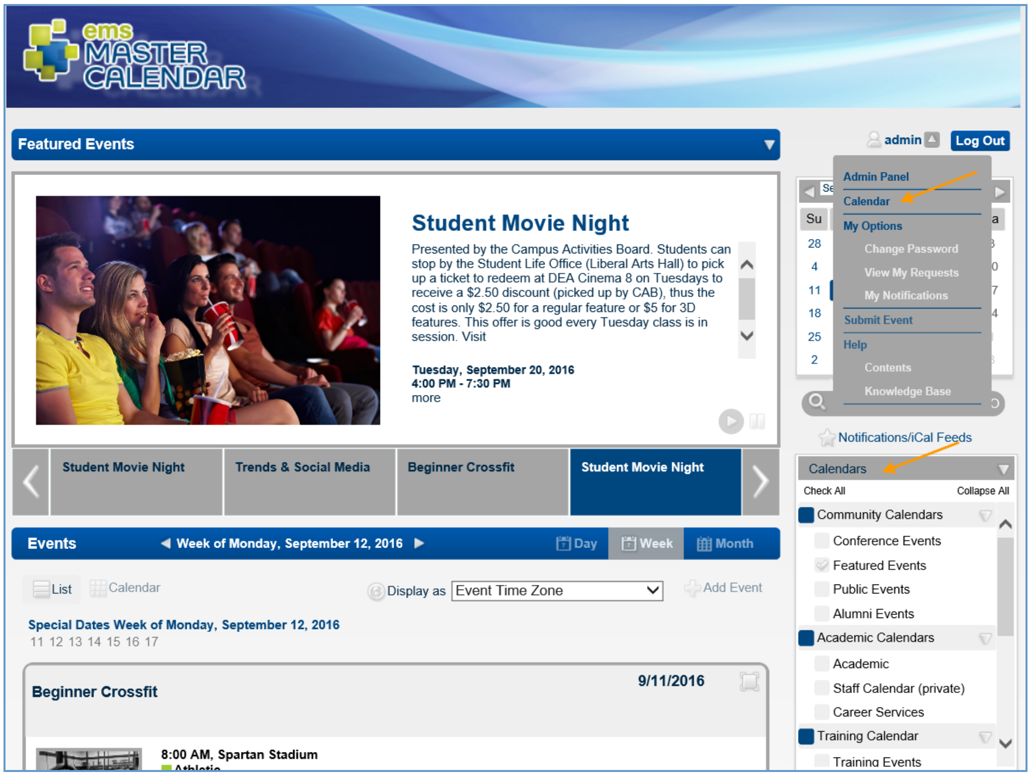
CHAPTER 94: Set a Timeframe for the Calendar Display

To change the timeframe for the Calendar view or the List view, for example, show only a day at a time, select the appropriate option (Day, Week, or Month).

Icons for changing the starting date for the calendar display.

CHAPTER 95: Navigate EMS Master Calendar

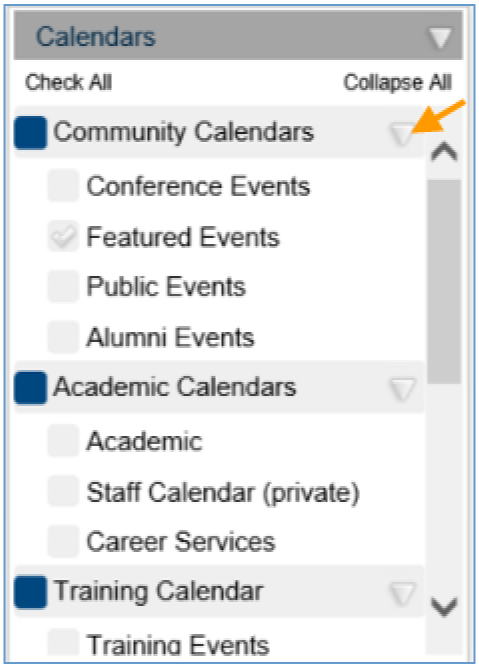
The Calendars section is available on the Default page and on the EMS Master Calendar Home page. You can also click **Calendar** on the EMS Master Calendar main menu.



View Events in EMS Master Calendar

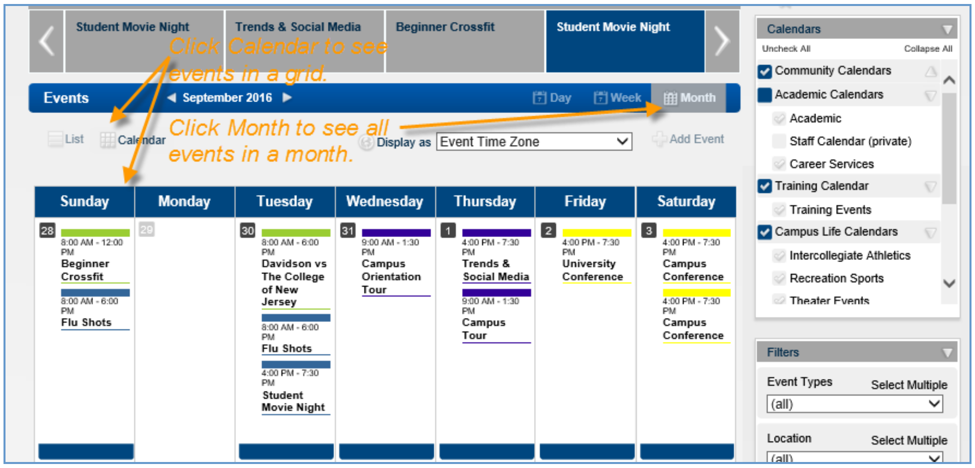
The Calendar panel is condensed into groups, which you can expand or collapse. Next to each grouping and each category within each group, you can click to select specific items.

1. To expand a group, click the **Expand** button.



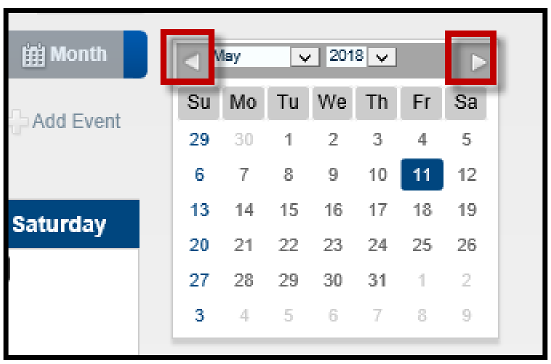
2. As you select and deselect checkboxes next to each item, the events shown in the left panel change.

3. Each calendar you select might have its own default timeframe (Day, Week, Month, or Year) and view (Calendar or List). For multiple calendars, a single combined calendar shows all the events. The default date for the calendar display is the current day's date.



Scroll Through Events in EMS Master Calendar

1. In the Calendar view or the List view, use the Next and Previous Buttons on the Calendar Tool to navigate through calendar dates month by month or year by year.



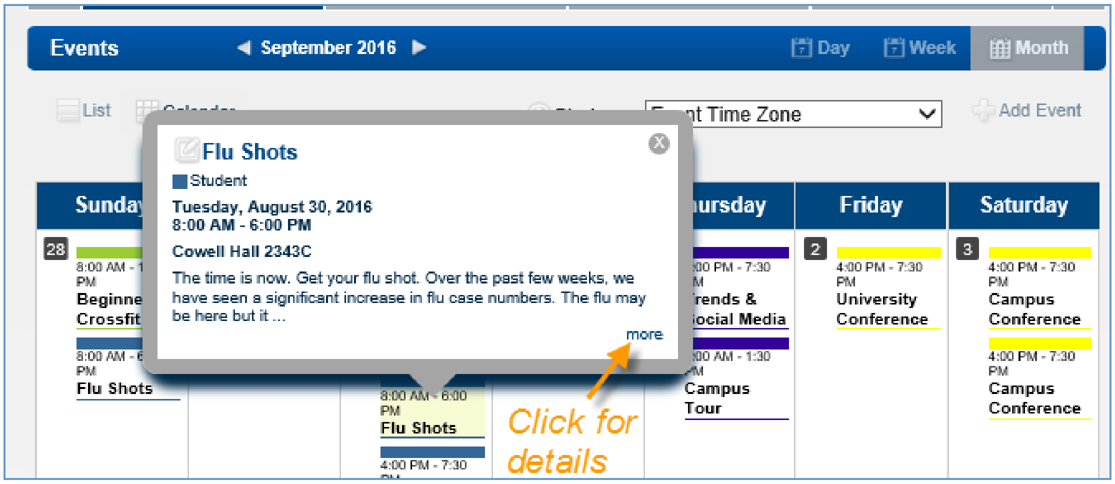
2. In the Calendar view, if any events are present as you scroll through the dates, the calendar is updated with these events. In addition, if you chose “Day,” as the timeframe, and no events are scheduled for a particular day, then as you scroll this day, the phrase “No Events” is displayed.
3. In the List view, if any events are present as you scroll through the dates, the list is updated with these events. If no events are scheduled within the selected time frame, then “No Events” is displayed; however, if events occur within the selected timeframe but they have a date prior to the current day’s date, then a Show Past Events option is displayed on the calendar. Select this option to update the list with these past events.

> **Note:**
> By default, the list is grouped by Event Date. You can select a different Group By option (Location or Calendar).

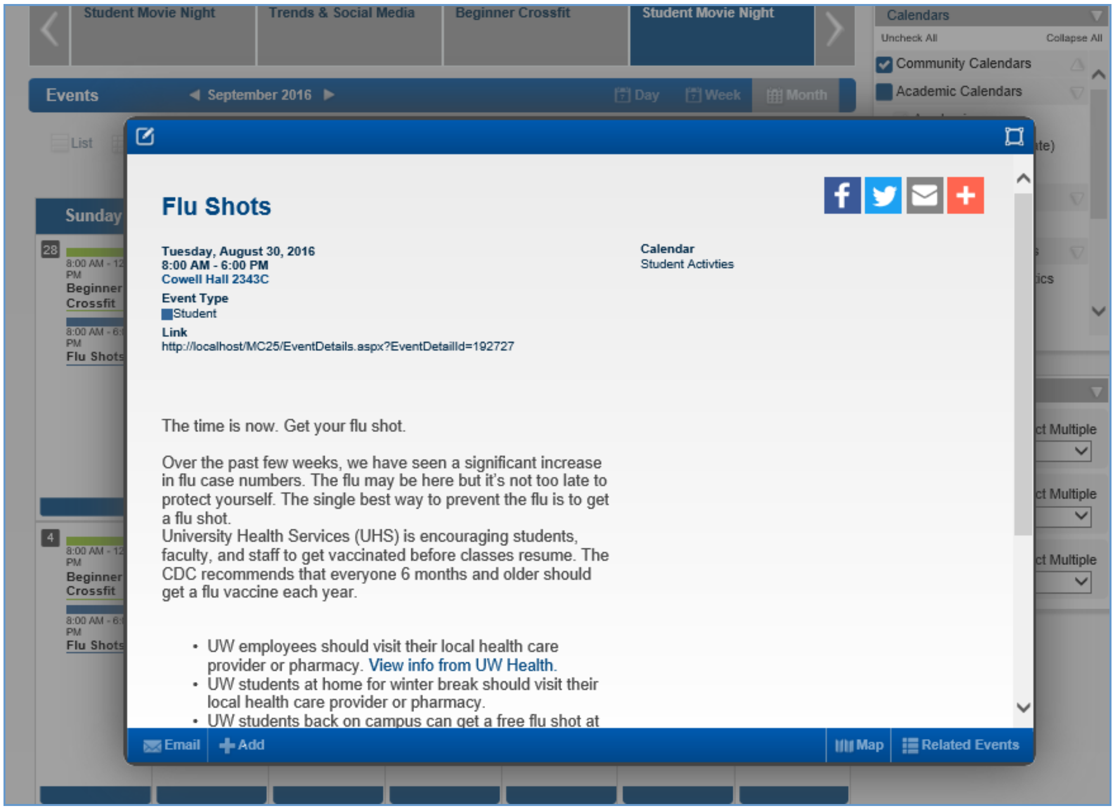
CHAPTER 96: Open Events from EMS Master Calendar

To see more detailed information about an event, click on its title in the calendar.

- **To view a summary** of the event details for an event that is displayed on a calendar, click on the event title to open the Event Details Summary page.



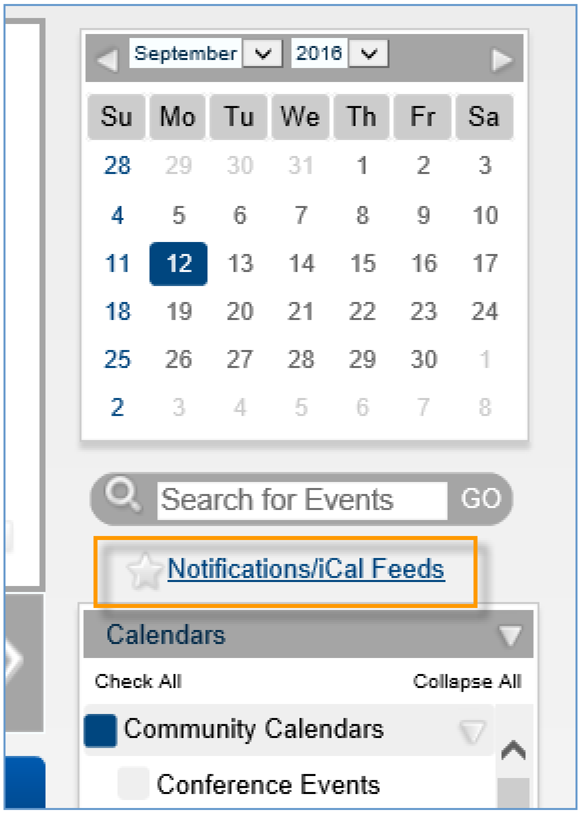
- **To view the event details** in full on the Event Details page, including related events, click **more**.



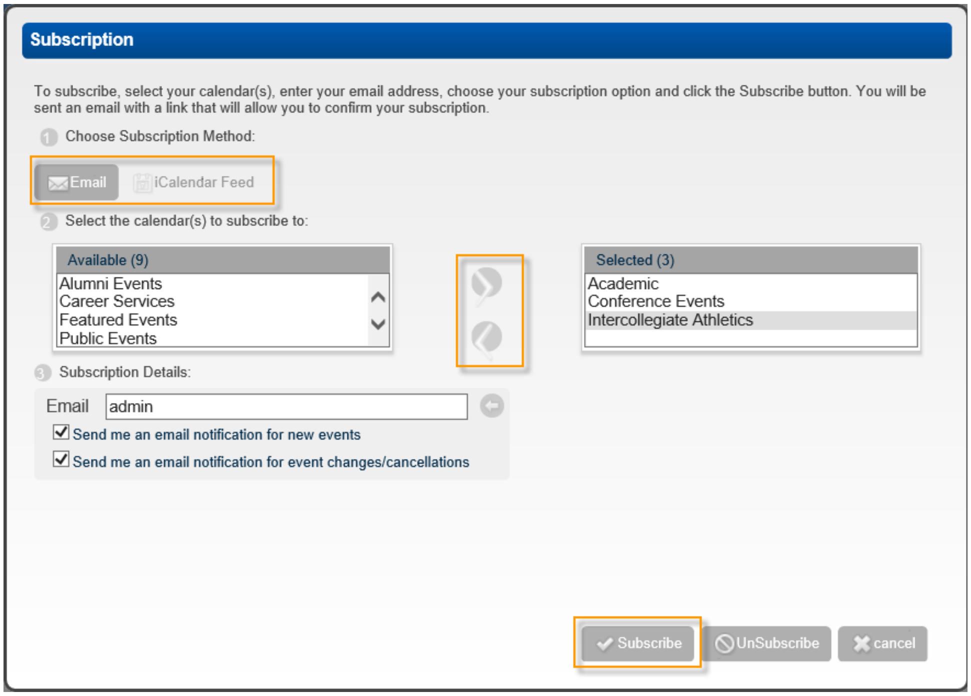
CHAPTER 97: Subscribe to a Calendar

You can subscribe to a calendar so that you are notified of changes to events. This enables you to receive a system-generated email or automatically update calendars in your email system when events are added, modified, or canceled.

1. In the Calendars section, click **Notifications/iCal Feeds**.



2. Click the **Subscribe** icon. The Subscription page opens. The calendars to which you can subscribe appear in the Available Calendars list.

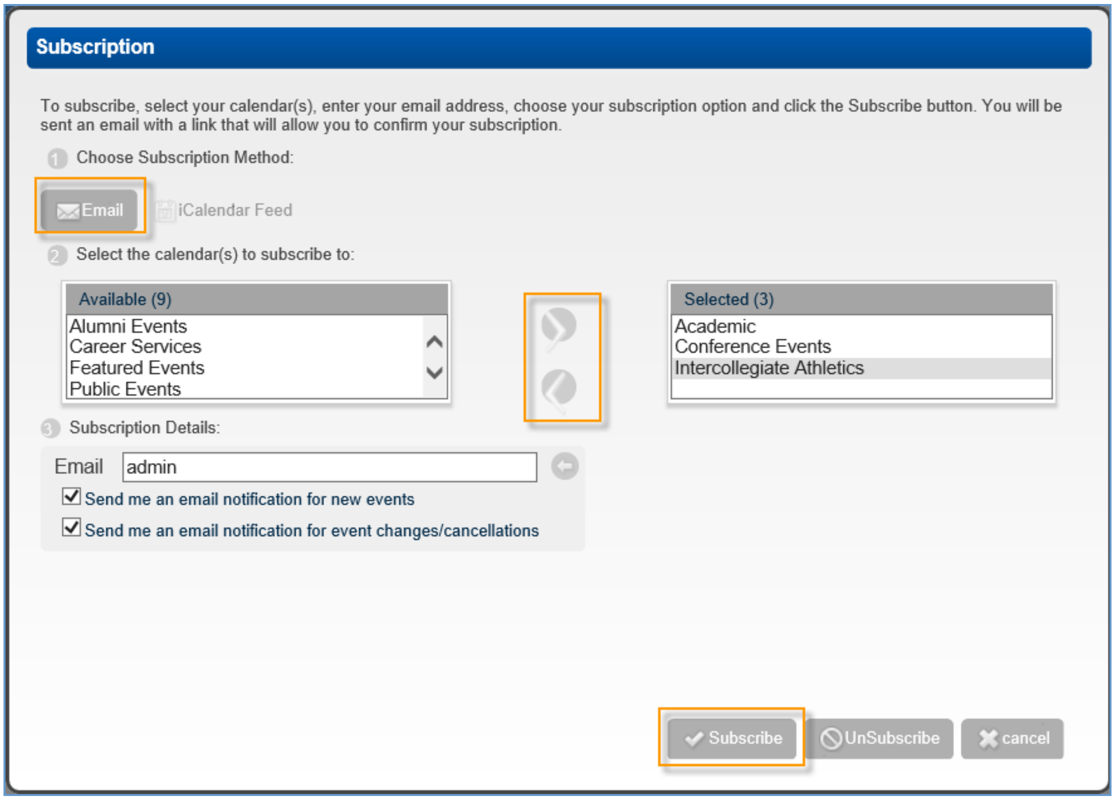


3. Choose your subscription method—Email (the default value) or iCalendar feed.
   - **Email**—To receive a confirmation email that contains a link that you must click to activate or edit your subscription. If you select this option, go to “To subscribe using email.”
   - **iCalendar feed**—To automatically add the selected calendars to your email program and subscribe to updates to the calendar. If you select this option, the Email field and email options are removed from the page.
4. Use the right and left arrows to move calendars from and to your Selected list.

See Also: Subscribe to a Calendar Using Email and Subscribe to a Calendar Using iCal.

CHAPTER 98: Subscribe to a Calendar Using Email

Once you have begun the process of subscribing to a calendar, you can subscribe using email as follows.
See Also: Subscribe to a Calendar.

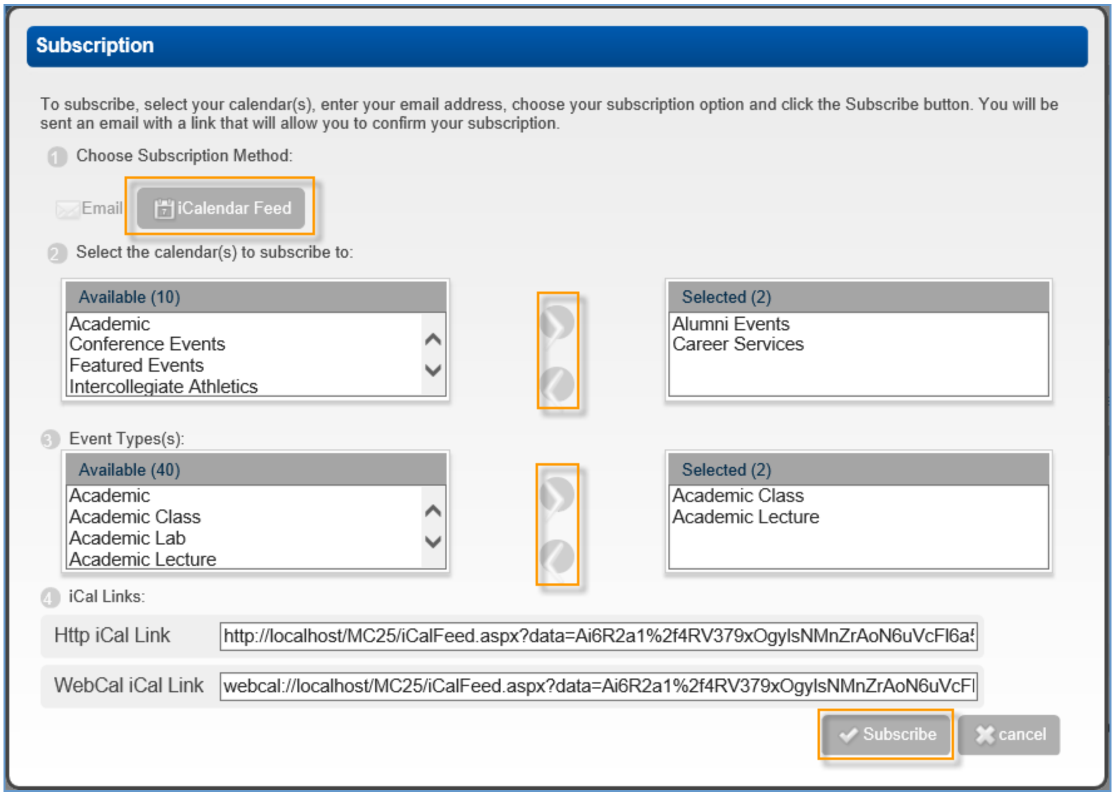


1. If you are a guest, enter the email that is to be used for your subscription in the Email field. Optionally, as a user, you can edit this email address if needed.
2. Select one or both of the options that are available for email subscriptions—email notifications for new events and email notifications for changes and cancellations.
3. Click **Subscribe**. A message confirms that an email has been sent and prompt you to confirm your subscription request.
4. Click **Done** to close the message and return to the Calendar Display page.

CHAPTER 99: Subscribe to a Calendar Using iCal

Once you have begun the process of subscribing to a Calendar, you can choose to subscribe via iCal. See Also: Subscribe to a Calendar.

1. From the Subscription page, select the iCalendar option and click **Subscribe**.



2. When prompted to choose if you want to allow this website to open a program on your computer. Click **Allow**.
3. When prompted to choose if you want to add this Internet Calendar to your email program (in this example, Microsoft Outlook) and subscribe to updates.
4. Optionally, click **Advanced** to open a Subscriptions dialog box and customize the settings for your subscription on your email program.
5. Click **Yes** to add the calendar or calendars to your email program.

CHAPTER 100: User Options

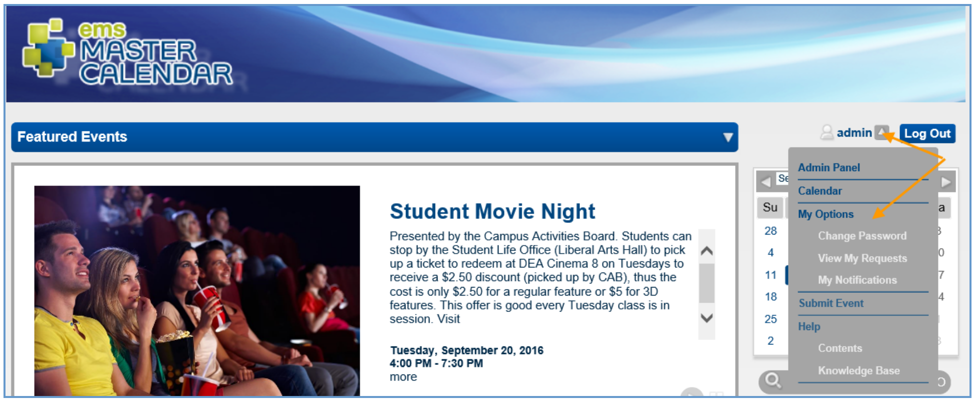
When your site administrator sets you up as a user in a Master Calendar system, you are supplied with both your User ID and password. You can change your own password, or you can have current password emailed to you if you have forgotten it. In addition, you can view a history of all the event requests that you have submitted, and you can view a summary of all your calendar subscriptions and reminders.

This section will provide information that will allow you to:

- Change Your Password
- View Your Notifications
- View Your Requests

CHAPTER 101: Change Your Password

1. Log in to EMS Master Calendar.
2. On the Master Calendar main menu, point to **My Options**, and then click **Change Password**.



The Change Password dialog box opens. Your current User ID appears at the top of the dialog box.

Change Password Dialog Box

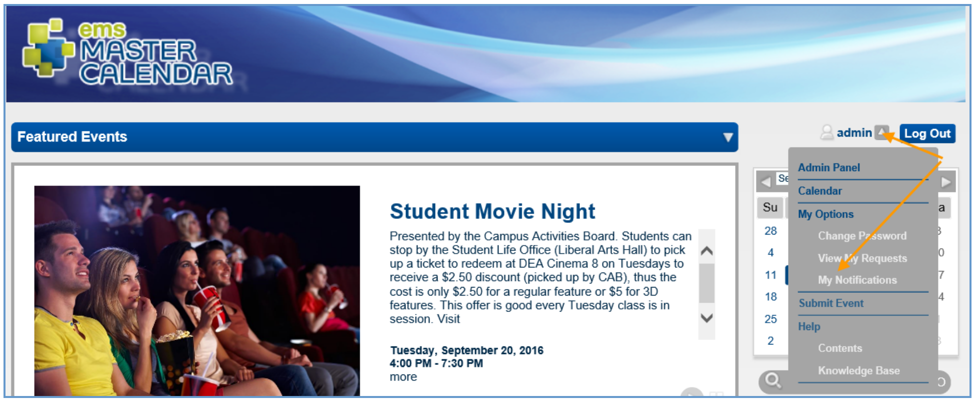
3. In the **Old Password** field, enter your current password.
4. In the **New Password** field, enter your new password.
5. In the **Confirm Password** field, re-enter your new password exactly as you entered it in the New Password field.
6. Click **Update**. Your new password is saved. The message "Password Saved" appears at the top of the dialog box.

CHAPTER 102: View Your Notifications

A notification is one of two types of Master Calendar system-generated emails that you can receive:

- **Subscriptions**—Emails about new, modified, or canceled events for a selected calendar or calendars.
- **Reminders**—Emails that alert you about the start of, or changes to, specific events.

1. On the Master Calendar main menu, point to **My Options** > **My Notifications**. The My Notifications page opens. By default, the Subscriptions tab is open.



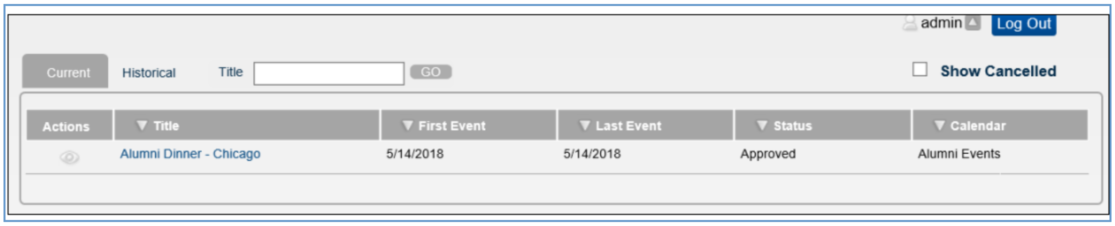
Note:

Your notifications are determined by your Calendar Subscriptions.

2. To narrow down the information you see:
   - Sort your notifications based on a particular characteristic (for example, Event Title).
   - Click the Delete icon next to the notification to delete a subscription or a reminder.

CHAPTER 103: View Your Requests

1. Log in to EMS Master Calendar.
2. On the Master Calendar main menu, point to **My Options**, and then click **View My Requests**. The View Request page opens. By default, the Current tab is the opened tab. The Current tab shows all your event requests going forward from the current day’s date. The Historical tab shows all your past event requests.



View Request Page

If	Status
The request was approved for all calendars to which you submitted it	Approved
The request was denied for all calendars to which you submitted it	Disapproved
The request has not previously been approved for any calendar, or it was previously denied for any calendar, *and* it is currently pending on one or more calendars	Pending

3. Optionally, you can do one or more of the following to customize the information that you are viewing to better suit your needs:
   a. Click **Show Canceled** to also view all canceled events on this page.
   b. Click the event title to open the Event Summary page and edit an event request.
   c. Sort your request based on a particular characteristic (for example, Event Title).
   d. Enter complete or partial search criteria in the Title field and click Quick Search to search for a particular event.

CHAPTER 104: Publicize an Event in EMS Master Calendar

There are several ways to publicize an event:

- If your Master Calendar implementation allows anyone to request an event, it has to be submitted for approval first.
- Authorized (administrative) users, however, often have permissions to submit an event directly to a calendar without requiring approval.

Whether you are an everyday user or administrative user, the process is the same:

1. Submit an event in Master Calendar (specifying all necessary event information).

> **Note:**
> Choose "Featured Event" if your event needs to be featured on the calendar. Be sure to include an event image and a catchy description to catch people's interest. Choose the calendar(s) you want the event to appear on.

2. Check your event on the calendar. Once the event is approved by the Calendar Manager (if approval is required), it will show on the calendar(s) you selected. People who subscribe to the calendar will be alerted to the new event.

CHAPTER 105: Manage Your Events

This section guides you in viewing and submitting in Master Calendar efficiently and effectively.

Administrative users such as calendar managers should refer to Managing Calendars for guidance in configuring and managing calendars and approving event requests.

This section provides information on the following:

- Types of Master Calendar Users
- Submitting an Event
  - Additional Info Fields
  - Custom, Email, and Attachment Fields
  - Event Times Fields
  - General Info Fields

CHAPTER 106: Types of EMS Master Calendar Users

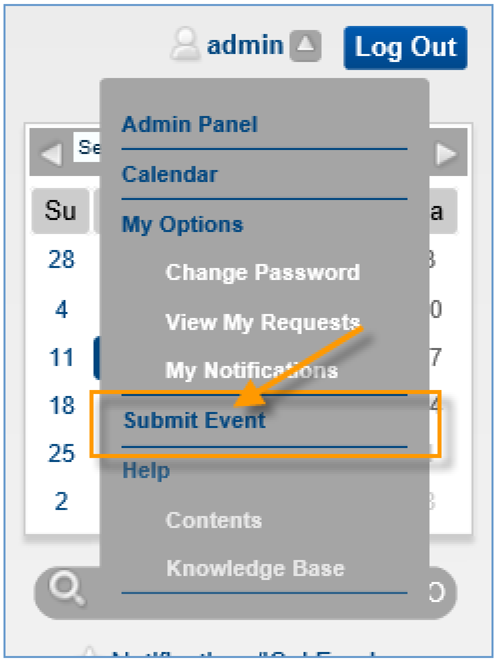
Your system administrator establishes different types of users, who can perform different actions in EMS Master Calendar.

- A **guest user** can submit a request to post an event to a public calendar.
- A **calendar requester** can submit a request to post an event to a public calendar and to any private calendars to which they have been granted access.
- If the **calendar manager** approves the request, the event is posted to the calendar. The calendar manager can also deny the request. After the calendar manager approves or denies request, the system automatically generates an email to the requestor, informing the requestor of the calendar manager's decision.
- A **calendar user** can post events directly to a public calendar and to any private calendars to which they have been granted access without the calendar manager's approval.

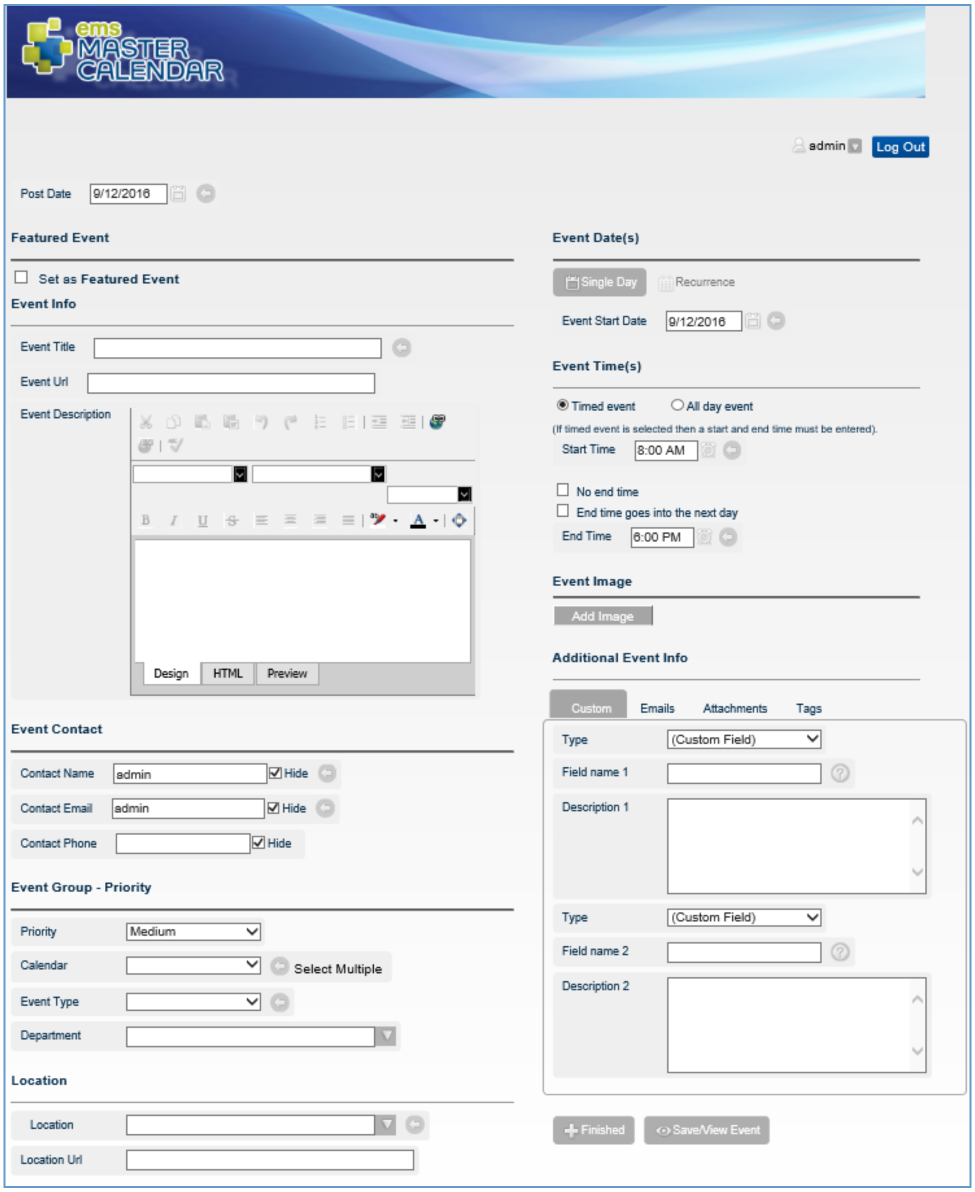
CHAPTER 107: Submit an Event

See Also: Types of EMS Master Calendar Users.

1. On the Master Calendar main menu, click **Submit Event**.



2. The Submit Event page opens. Enter the event information on the Submit Event page.



See Also:

- General Info Fields
- Event Times Fields
- Additional Info Fields
- Custom, Email, and Attachment Fields

3. Optionally, click **Save/View Event** for a preview of the event to determine if you are satisfied with the event request.
4. After you have entered all the information for the event and are satisfied with the entry, click **Finished**. The system processes your submission and returns you to the calendar. If you are a Calendar

User, then the event is automatically posted to the selected calendars. If you are a Calendar Requester, then after the Calendar Manager approves or denies your request, the system automatically generates an email to you, informing you of the Calendar Manager's decision. If the Calendar Manager approves your request, the event is posted to the selected calendars.

CHAPTER 108: Additional Info Fields

Field Name	Description
Additional Info	Appears on the Submit Events page only if the Calendar Manager has associated User Defined Questions (UDQs) with the calendar. If needed, you can modify the default answer for the UDQ.

CHAPTER 109: Custom, Email, and Attachment Fields

Field Name	Description
Custom Fields	This tab is opened by default when the Submit Events page first opens. • Field Name—Enter a name that describes or provides hints about the additional information that is to be entered in the Description field. For example, if the Description field is to contain information about parking at the event, you could enter Parking Info for the field name. **Note:** For a list from which you can select a preset field name, click the Hint icon to open a list of Custom Field Hints. • **Description field**—Enter additional information about the event in this field. • **URL**—Enter the URL for a website that provides additional information about the event.
Emails	Click Emails to open the Emails tab. On this tab, you can enter the email addresses for the invitees to the event. Separate multiple email addresses with either commas or semi-colons.
Attachments	To add attachments to the event, click Attachments to open the Attachments tab, and then click Browse to open the Choose File dialog box for browsing to and selecting the attachments. After you have added all of the required attachments, click OK. A list of the attachments appears on the tab. The list shows the name of each attachment, the size of the attachment, and provides an option to delete the attachment (for example, if you added the attachment in error or the attachment becomes obsolete).

CHAPTER 110: Event Times Fields

Field	Description
Start Date	The starting date for the event. The default value is the current day's date.
Time	Indicates whether the event is an untimed event, a timed event, or an all-day event. • If the event is an untimed event, you must specify only a date for the event. Depending on how your site administrator has configured your Master Calendar site, the event name and the phrase "Untimed Event" is displayed on the calendar, or only the event name is displayed on the calendar. • If the event is a timed event, you must specify a start time, and then you must do one of the following: ○ Specify an end time for the same day. ○ Select no end time. ○ Select end time goes into the next day. The event name is displayed on the calendar and if you: • Selected an end time, the beginning and end time are also displayed on the calendar. • Selected no end time, only the beginning time is displayed on the calendar. • Selected end time goes into the next day, the beginning and end time are displayed on the calendar with a Next Day icon displayed next to the ending time. • If the event is an All Day event, you must specify only a date for the event. The phrase All Day Event is displayed above the event name on the calendar.
Recurrence	If the event is a recurring date, click Recurrence to open the Recurrence dialog box and specify the information for the recurring event.
Time Zone	The time zone that is displayed is the time zone that you selected when you logged in to EMS Master Calendar. You can select a different time zone if needed.

CHAPTER 111: General Info Fields

Only the event title, date, and time are displayed on the calendar entry and on the Event Details page. You can display the event contact name, event contact phone number, and event contact email on the Event Details page, or you can hide this information. All other event information (images, email addresses, and so on) is always displayed on the Event Details page. Click Preview at any time to preview the information that is to be displayed for the event.

> **Note:**
> Use the Recurrence date to set a recurring event.

Field	Description
Event Title	The title or name of the event.
Event URL	The URL (website address) for the event's web page.
Post Date	The date that the event is to be posted to the selected calendar or calendars. The default value is the current day's date.
Event Type	Dropdown list of all currently active event types in Master Calendar.
Priority	Dropdown list. Available values are High, Medium, and Low. In conjunction with the event time (All Day, Untimed, Times), this variable determines where the event appears in a calendar display—at the top in a List view or at the top of the calendar date cell in the Calendar view. For any priority, the order is All Day Event, Untimed Event, Timed Event.
Contact Name	The name of the contact person for the event. **Note:** If you do not want this information displayed on the Event Details page, make sure that Hide is selected.
Contact Email	The email for the contact person for the event. **Note:** If you do not want this information displayed on the Event Details page, make sure that Hide is selected.

Field	Description
Contact Phone	The phone number for the contact person for the event. **Note:** If you do not want this information displayed on the Event Details page, make sure that Hide is selected.
Location	The location where the event is to take place. You can manually enter a location, or you can click the Lookup icon to open the Locations dialog box and select a location from a Locations dropdown list. **Note:** The Locations dialog box also contains an optional Sub-Locations dropdown list that is labeled in a way that best meets your organization's needs (for example, Rooms or Fields). If you want to specify both a location and a sub-location for the event, then you must use the Lookup function.
Location URL	The URL (website address) for the location's web page.
Department	The department that is hosting or sponsoring the event. **Note:** Department is a default label. Depending on how your Master Calendar site administrator has configured Master Calendar, you might see this labeled as something else, such as "Business Units" for example.
Event Description	A text description of the event. The event description is displayed in the Event Details Summary dialog when a guest or user places their mouse pointer on the event title in the calendar or on the Event Details page when a guest or user clicks on the event name for more information about the event. After you enter a description, you can select the text and then use the standard Window formatting icons (color, text size, text weight, and so on) that are above the Event Description field to customize the formatting of the text.
Add Image	Click Browse to open the Choose File dialog box for browsing to and selecting an image that is to be associated with the event.

CHAPTER 112: Glossary for EMS Master Calendar

Term	Definition
Event Title	The title or name of the event.
Title URL	The URL (website address) for the event's web page.
Post Date	The date that the event is to be posted to the selected calendar or calendars. The default value is the current day's date.
Calendars	A list of all active calendars that are currently in your EMS Master Calendar system. Click the **Lookup** icon to open the Calendars dialog box and select the calendars to which you want to post events.
Event Type	Drop-down list of all currently active event types in your EMS Master Calendar system.
Priority	Drop-down list. Available values are High, Medium, and Low. In conjunction with the event time (All Day, Untimed, Times), this variable determines where the event appears in a calendar display—at the top in a List view or at the top in the calendar date cell in the Calendar view. The order is: • **High Priority**—All Day Event, Untimed Event, Timed Event • **Medium Priority**—All Day Event, Untimed Event, Timed Event • **Low priority**—All Day Event, Untimed Event, Timed Event
Contact Name	The name of the contact person for the event. **Note:** If you do not want this information appearing for the event, select **Hide**.
Contact Phone	The phone number for the contact person for the event. **Note:** If you do not want this information appearing for the event, select **Hide**.

Term	Definition
Location	The location where the event is to take place. You can manually enter a location, or you can click the Lookup icon to open a dropdown list of locations and make a selection from this list.
Location URL	The URL (website address) for the location's web page.
Event Description	A text description of the event. The event description appears on the calendar when a guest or user clicks on the event name for more information about the event. After you enter a description, you can select the text and then use the standard Window formatting icons (color, text size, text weight, and so on) that are above the Event Description field to customize the formatting of the text.
Add Image	Click **Browse** to open the Choose File dialog box for browsing to and selecting an image that is to be associated with the event.
User Types	• **Standard**—This is the default value for a user type. You must manually apply permissions for this type of user. • **Template**—This type of user is available only if you have active templates defined in EMS Master Calendar. (See Also: Configure User Templates) If you select this type of user: ◦ The **Permissions** 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. ◦ 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 has full access to all calendars in Master Calendar as well as to all system areas and functions.

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