EMS Master Calendar

Configuration Guide

V7

April 2019

Introduction to Master Calendar Legacy Documentation

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

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

INTERESTED IN UPGRADING?

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Preface

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

Using the manual

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

Special information about the manual

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

Conventions used in the manual

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

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

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

Assumptions for the manual

The *Master Calendar Setup Guide assumes that:*

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

Organization of the manual

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

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

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

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

Getting Started with Master Calendar

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

This chapter covers the following topics:

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

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

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

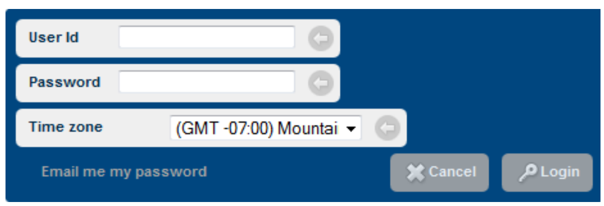
To log in to Master Calendar

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

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

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

Figure 1-1: Login dialog box



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

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

4. Press ENTER, or click Login.

   The Master Calendar Home page remains open. A User menu is available on this page. See "Master Calendar User Menu".

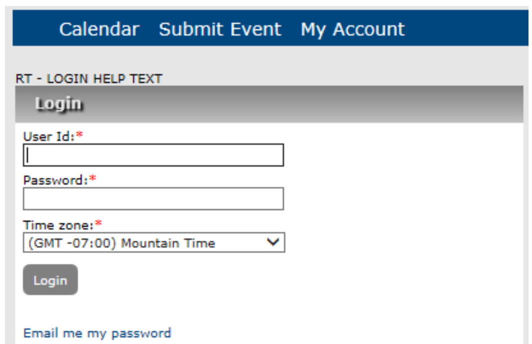
For a new installation, you are prompted to enter your organization's registration information. See "Viewing and Updating Master Calendar Registration Information".

To log out of Master Calendar

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

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

Figure 1-2: Master Calendar Login page

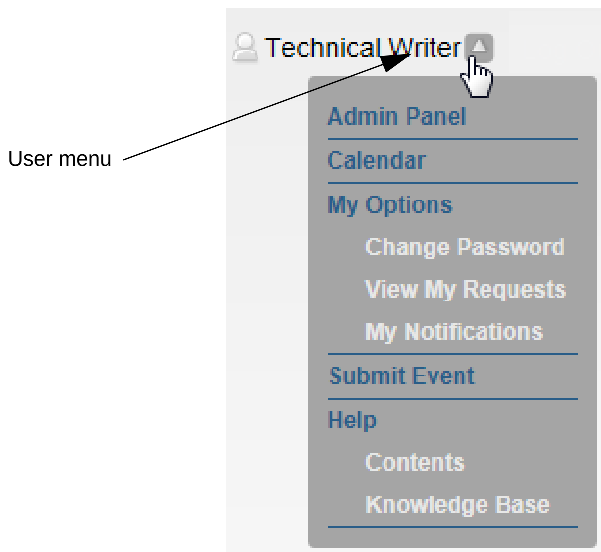


Master Calendar User Menu

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

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

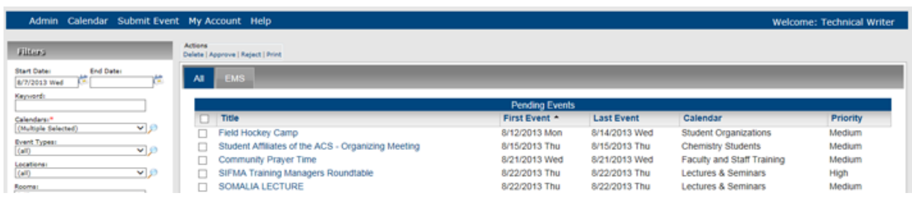
Figure 1-3: User menu, Calendar Manager or administrator user



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

Option	Description
Submit Event	Opens the Add Event page. Users and guests use this page to submit events to calendars to which they have been granted access. See *Submitting an Event* in the *Master Calendar User's Manual*.
Help	Displayed for standard users, Calendar Managers, and site administrators. • Contents - Opens the Master Calendar Online Help. • Knowledge Base - Opens the EMS Support Center Knowledge Base for Master Calendar.

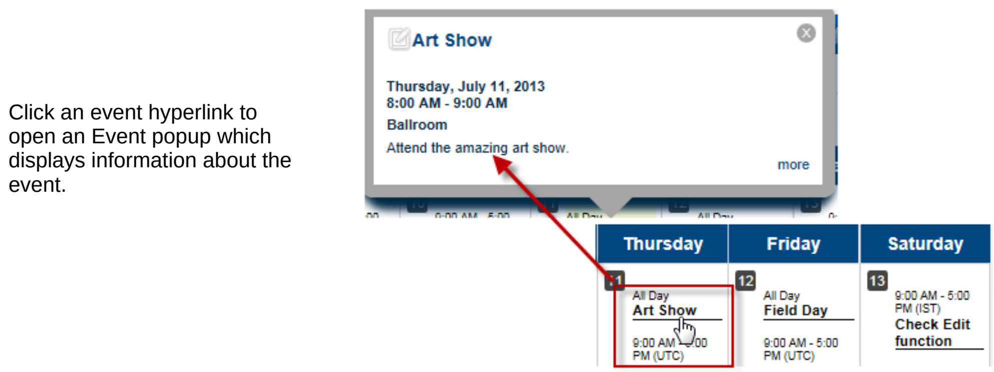
Figure 1-4: Master Calendar Manage Events page with main menu



Using Hyperlinks on a Master Calendar Page

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

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

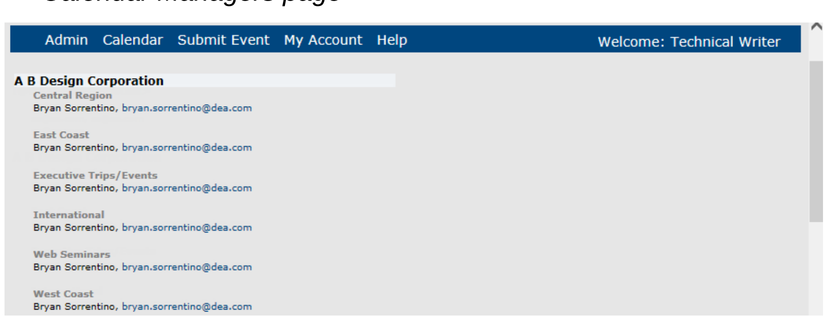


The Calendar Managers hyperlink and an RSS Feeds hyperlink are displayed at the bottom of every page in Master Calendar.

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

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

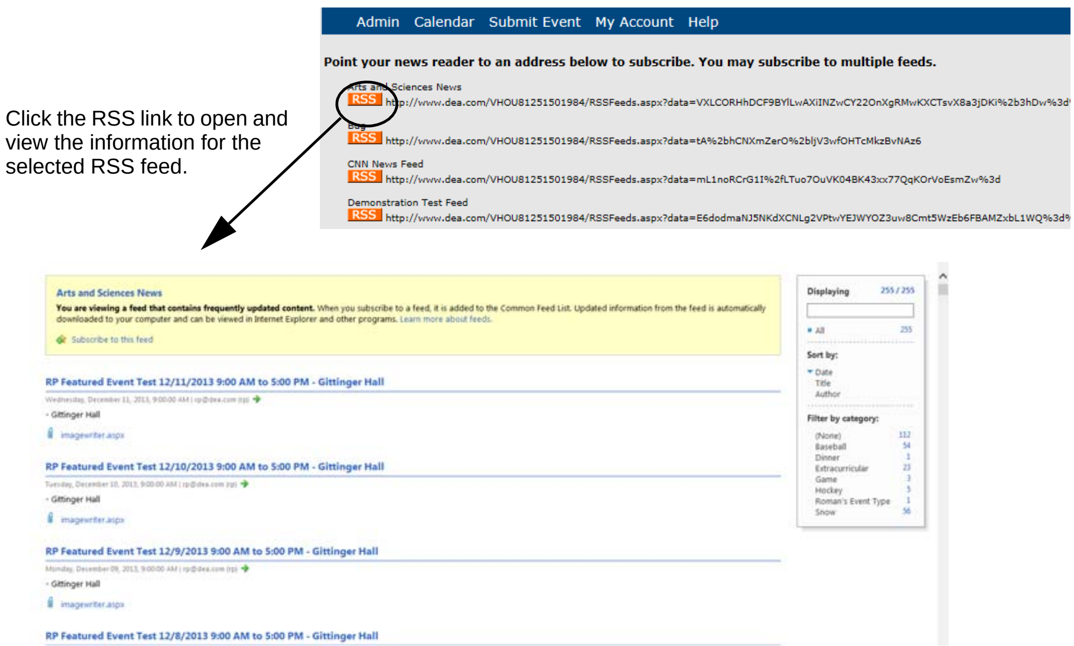
Figure 1-7: Calendar Managers page



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

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

Figure 1-8: Viewing an RSS feed



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

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

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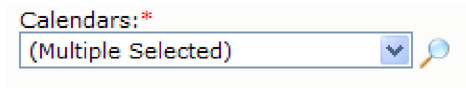
*The search is limited to the exact order of the characters in the string; however, the search string is not case-sensitive and the search string can be found anywhere in the search results. For example, the search string “mental” returns notifications that contain either Depart**mental** or **Mental**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

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

Required Fields and Using Icons to Enter Data

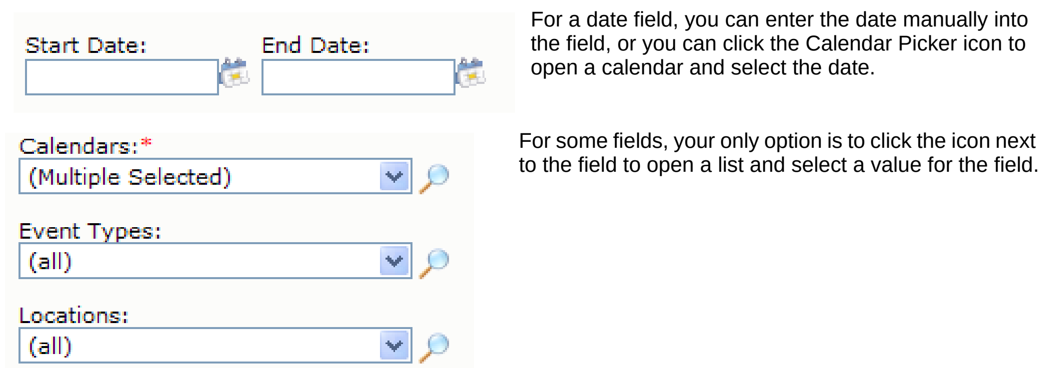
A required field is a field into which you must enter data before you can save an addition or modification in Master Calendar. A required field is denoted by a red asterisk to the right of it.

Figure 1-9: Example of a required field



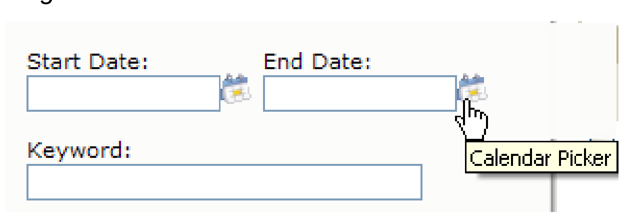
Many fields in Master Calendar, whether required or optional, have an icon next to them. For some fields with an icon next to them, you can manually enter data into the field, or you can click the icon next to the field to open a list from which you can select a value to populate the field. For other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

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



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

Figure 1-11: Viewing the name of an icon

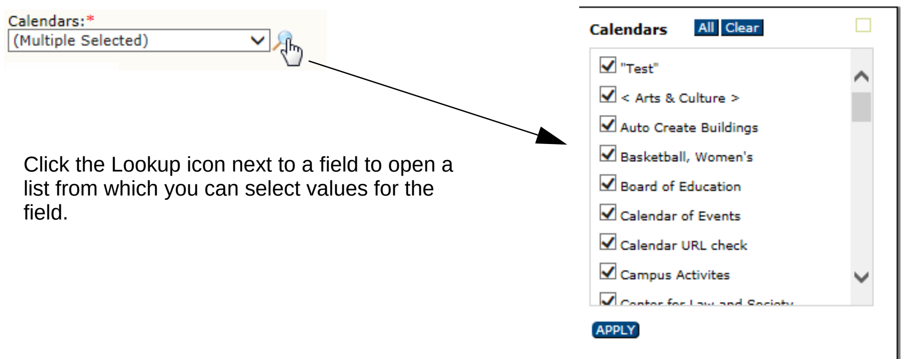


Four icons—the Lookup icon, the Calendar Picker icon, the Color Picker icon, and the Time Picker icon—are used repeatedly in Master Calendar and function the same way regardless of the page on which they are used.

Lookup icon

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

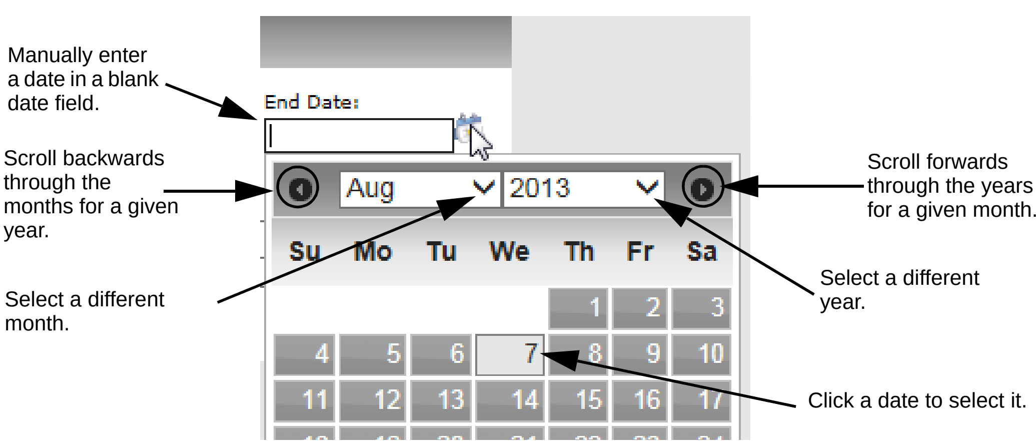
Figure 1-12: Example of using the Lookup icon to populate a field



Calendar Picker icon

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

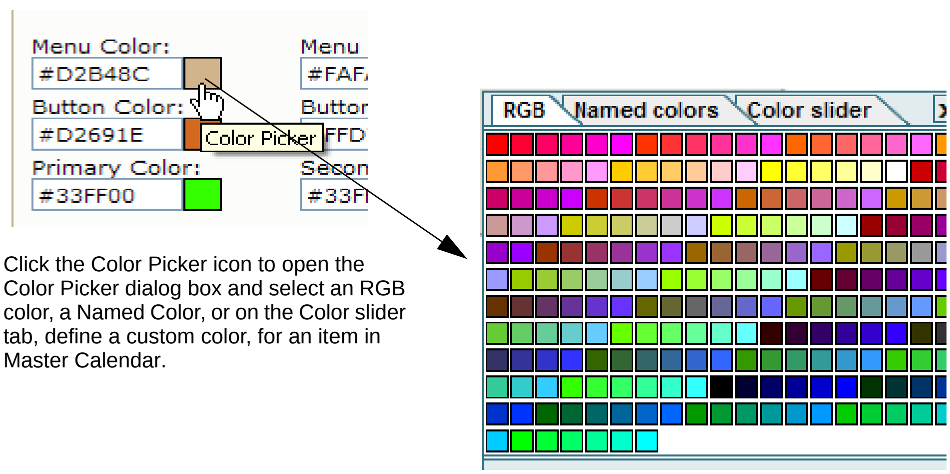
Figure 1-13: Calendar Tool



Color Picker icon

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

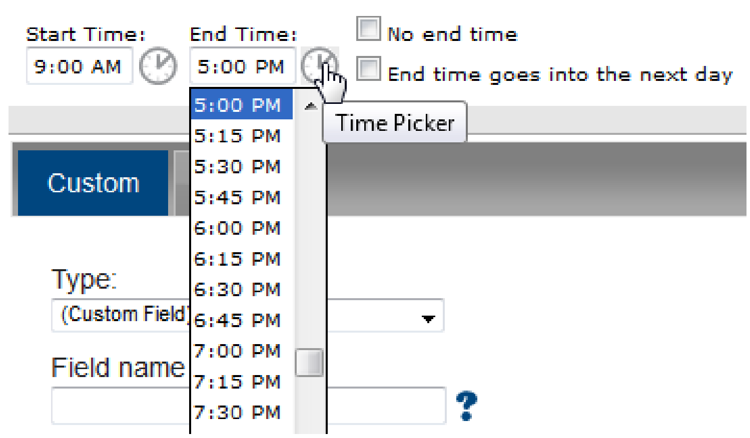
Figure 1-14: Color Picker dialog box



Time Picker icon

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

Figure 1-15: Time Picker list



Configuring Groupings and Calendars

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

This chapter covers the following topics:

- "Managing Groupings in Master Calendar"
- "Managing Calendars in Master Calendar"
- "Managing Calendar URLs"

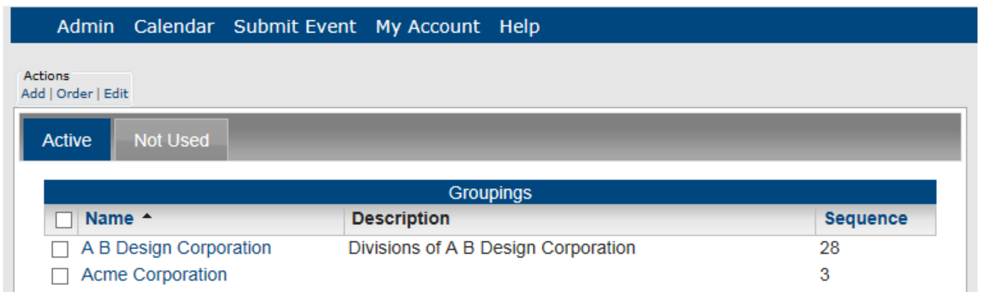
The option External Links is displayed on the Groupings and Calendars menu; however, it is currently not functional.

Managing Groupings in Master Calendar

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

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

Figure 2-1: Groupings page, Active tab



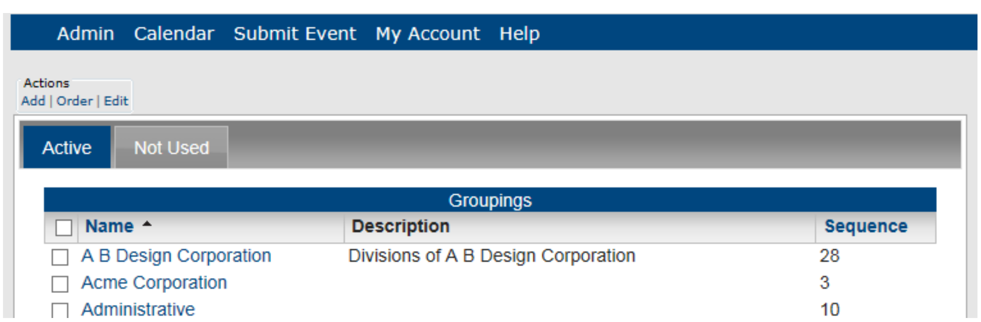
You can view calendars in a single grouping or from multiple groupings together. If appropriate, you can add an event to multiple calendars in multiple groupings. Managing groupings consists of adding groupings, ordering groupings, editing groupings, and deleting groupings. You can also view the history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

To add a grouping

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

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

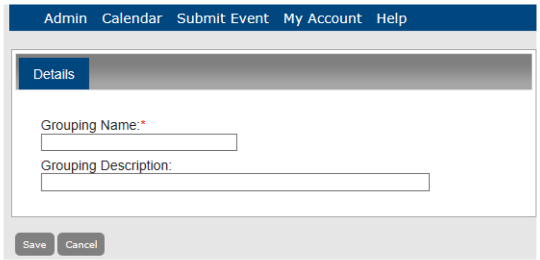
Figure 2-2: Manage Groupings page, Active tab



2. Under Actions, click Add.

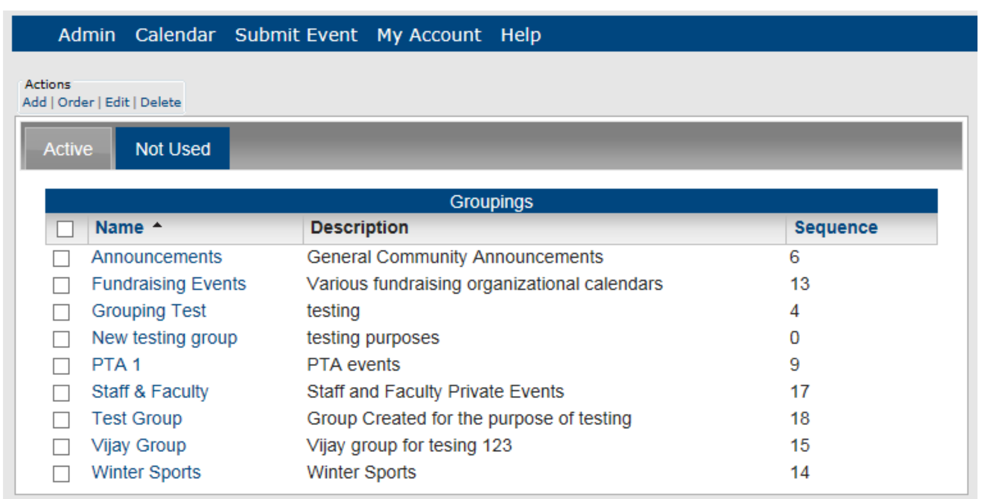
   The Add Grouping page opens. The Details tab is the only tab on this page. You use the options on this tab to add the information for the grouping.

Figure 2-3: *Details tab*



3. Enter the grouping name.
4. Optionally, enter a description of the grouping.
5. Click Save.
   The grouping is added as an *inactive* item to the Master Calendar and is displayed on the Not Used tab on the Manage Groupings page. The grouping is not displayed on the Active tab on the Manage Groupings page until you add at least one calendar to it. Also, until you change the default order of the groupings, the sequence for every grouping is zero. (See “To order groupings”.)

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



To order groupings

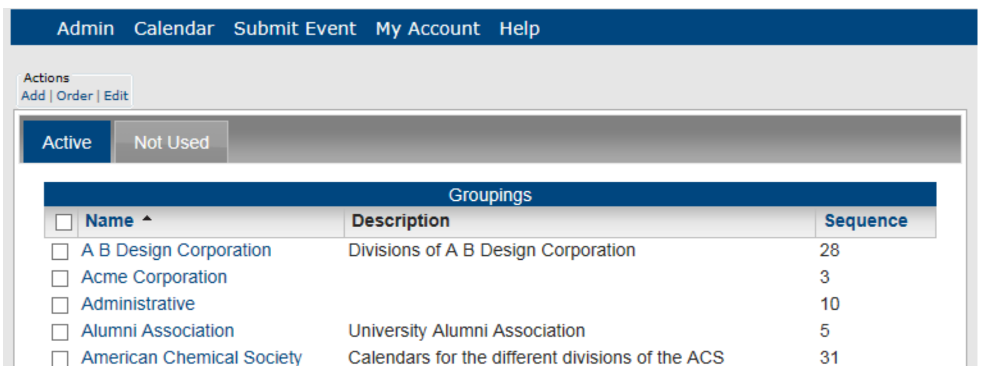
By default, groupings are initially displayed on both tabs on the Manage Groupings page in alphabetical order by grouping name, regardless of a grouping's sequence. You have two options for changing the order of the groupings:

- To change the order of groupings on the Manage Groupings page, you can click the Name column header to sort the groupings by reverse alphabetical order by grouping name. (Click the Name column header again to return the sort to alphabetical order.)
- To change the order of the groupings on the Master Calendar Home page and on the various calendar pages, you can doing the following:

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

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

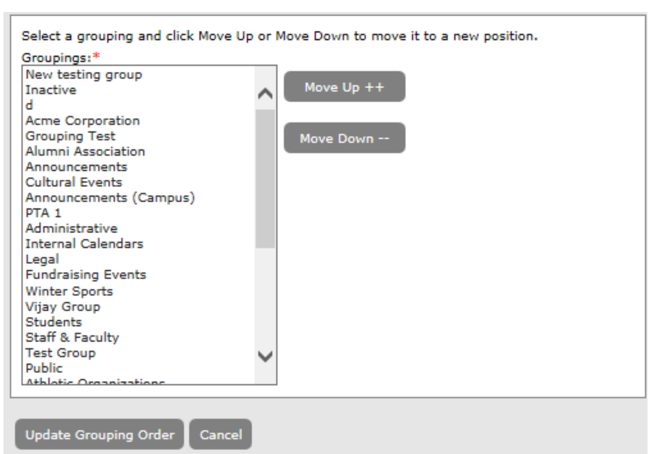
Figure 2-5: Manage Groupings page, Active tab



2. Under Actions, click Order:

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

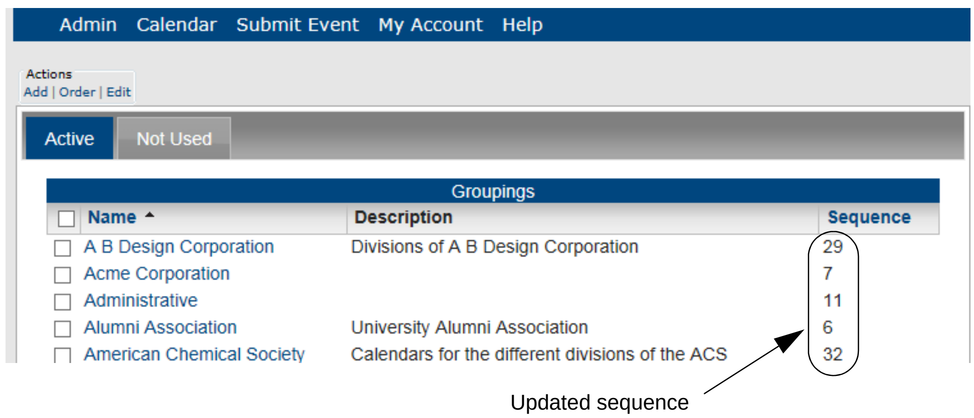
Figure 2-6: Order Groupings page



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

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

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



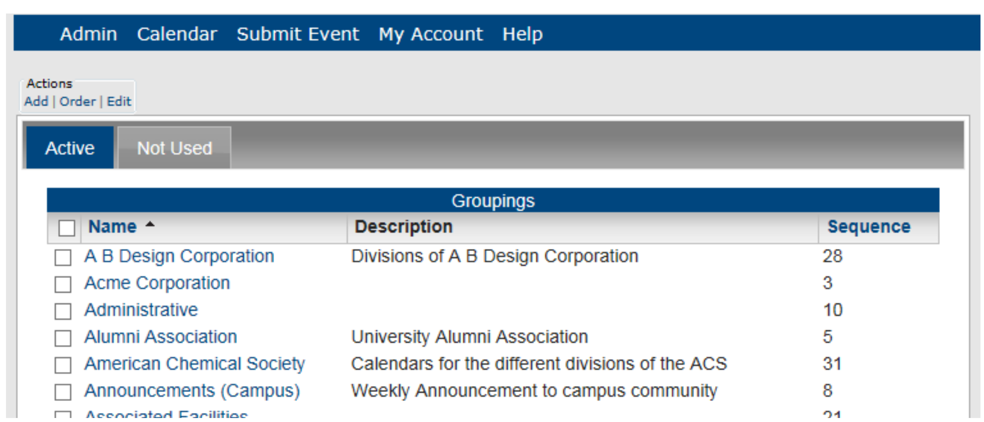
To edit a grouping

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

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

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

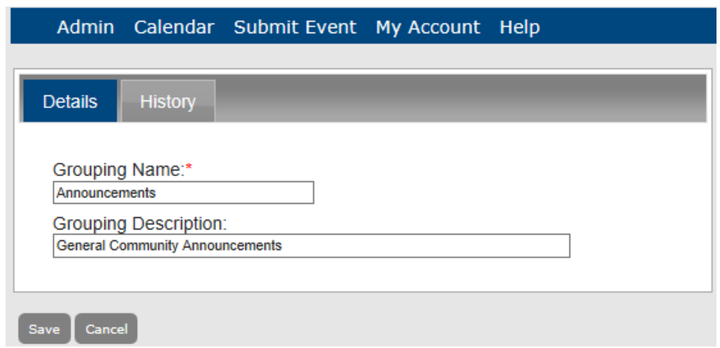
Figure 2-8: Manage Groupings page, Active tab



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

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

Figure 2-9: Add Grouping page, Details tab



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

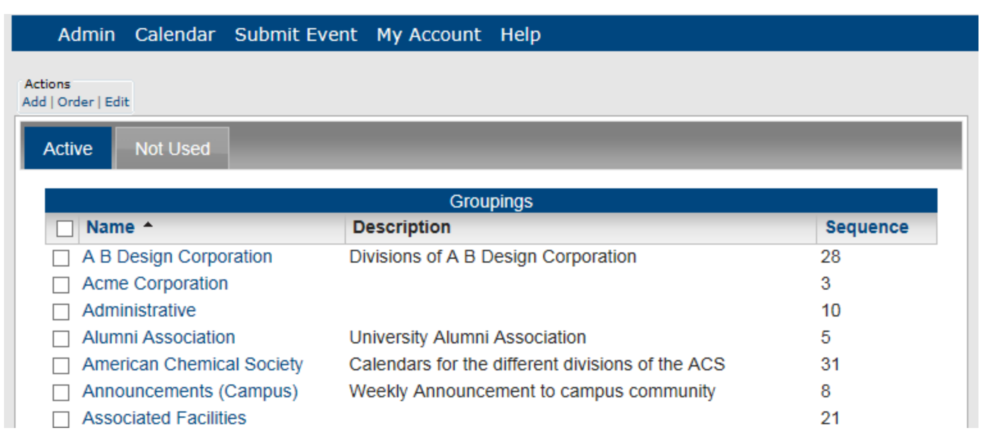
To delete a grouping

You can delete only Not Used groupings. To delete an active grouping, you must first delete all the calendars in the grouping to change the grouping's status to Not Used, and then you can delete it. See "To delete a calendar."

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

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

Figure 2-10: Manage Groupings page, Active tab



2. Click the Not Used tab to open it.

3. Select the grouping or groupings that you are deleting.

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

4. Under Actions, click Delete.

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

5. Click OK in the message.

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

6. Click OK in the message.

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

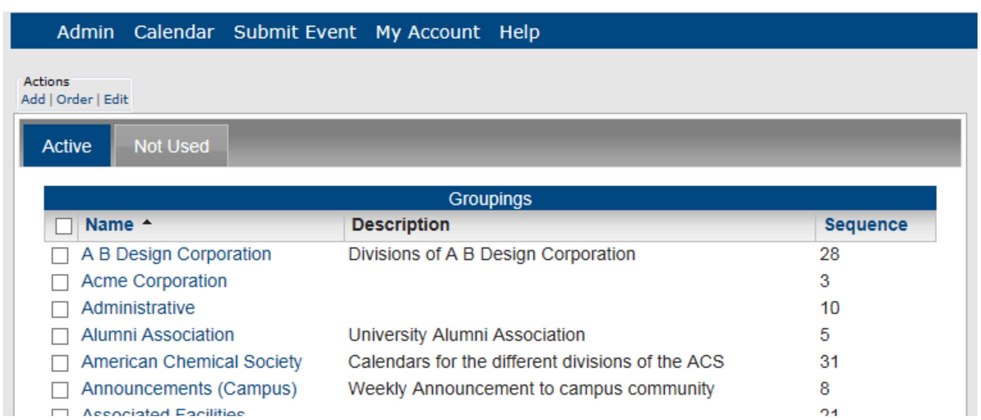
To view the history for a grouping

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

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

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

Figure 2-11: Manage Groupings page, Active tab



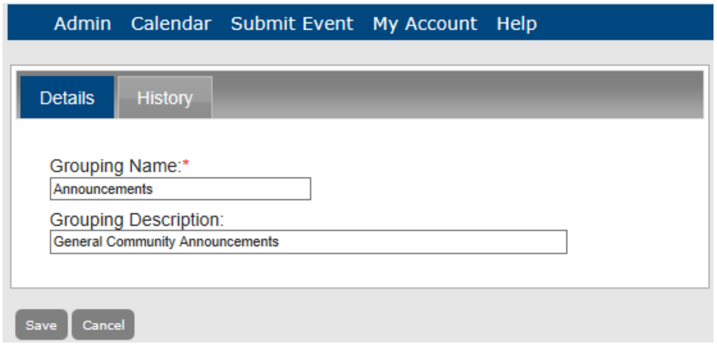
2. If needed, click the Not Used tab to open it.

3. Select the grouping for which you are viewing the history.

4. Under Actions, select Edit.

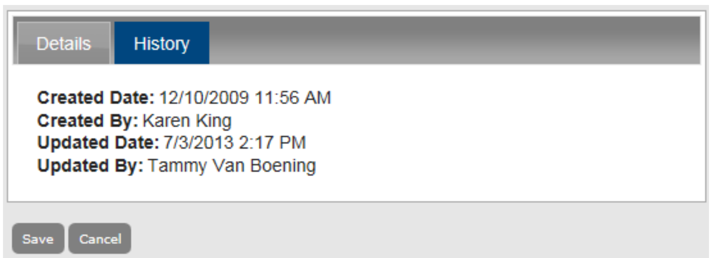
   The Add Grouping page opens. The Details tab is the opened tab.

Figure 2-12: Add Grouping page, Details tab



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

Figure 2-13: Add Grouping page, History tab



Managing Calendars in Master Calendar

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

The default settings for Master Calendar determine how the information is displayed for events on a combined calendar. See "Managing Default Settings for Master Calendar"

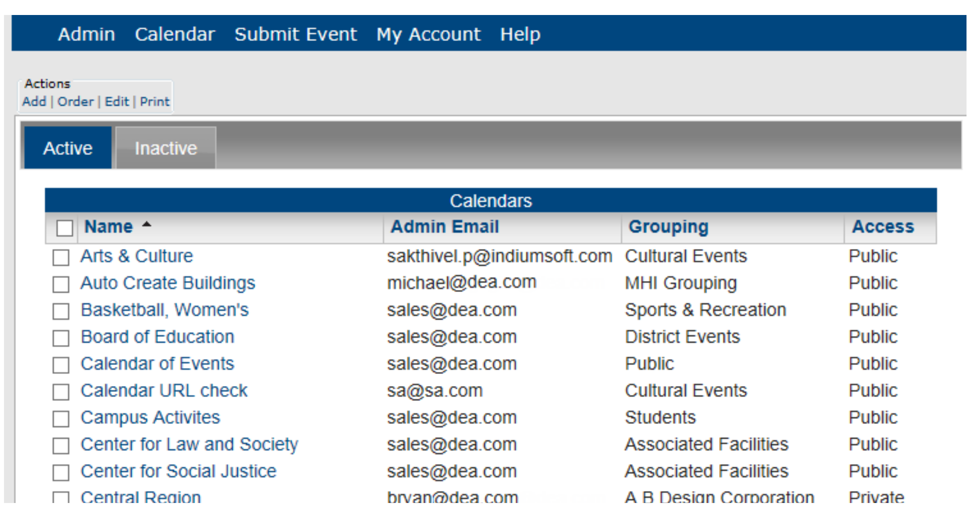
To add a calendar, at a minimum, you must add the required Details information. Optionally, you can specify the users who have access to the calendar, and you can add user-defined questions (UDQs) for the calendar, or you can add this information at a later date. Managing a calendar consists of adding,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

To add a calendar

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

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

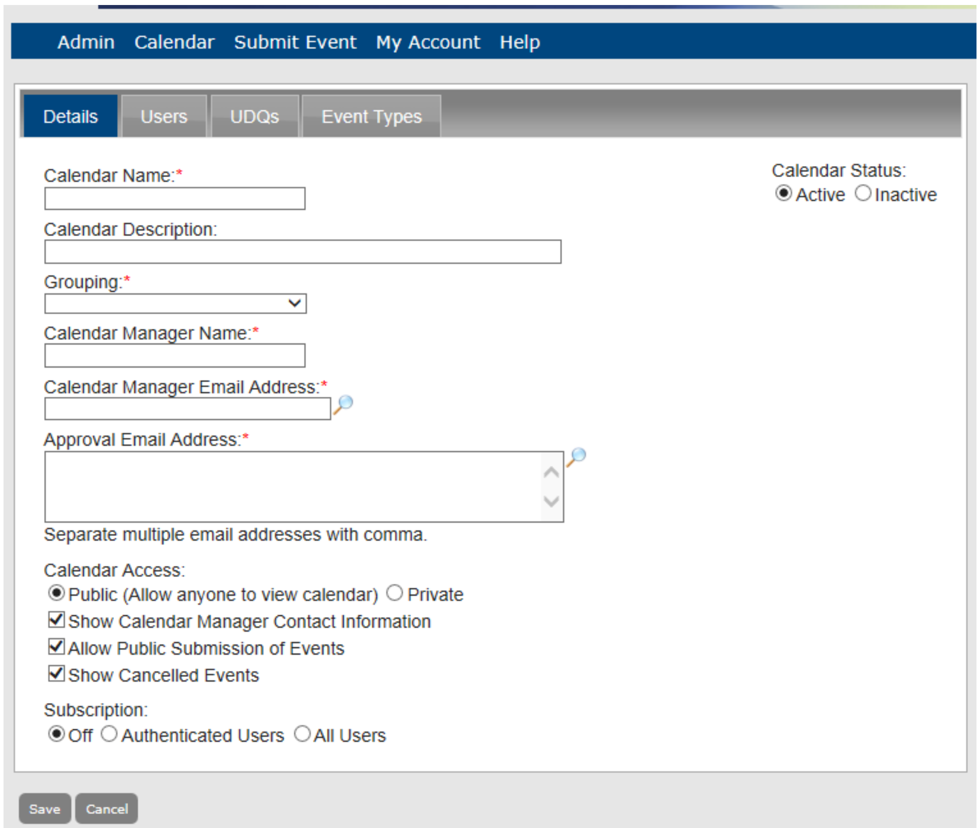
Figure 2-14: Manage Calendars page, Active tab



2. Under Actions, click Add.

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

Figure 2-15: Add Calendar page, Details tab



3. Enter the information for the calendar.

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

Field	Description
Approval Email Address	The email addresses for any additional persons who are responsible for approving or denying requests to submit events to the calendar. Separate multiple email addresses with a comma.
Calendar Access	Determines who has access to view the calendar: • 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 be displayed on the Calendar Managers list.
Allow Public Submission of Events	Selected by default. Indicates whether anybody who can view the calendar can submit events to the calendar.
Show Cancelled Events	Selected by default. Indicates whether canceled events should be displayed on the calendar.
Subscription	Indicates whether: • Only users can subscribe to receive information about additions or modifications to the calendar (Authenticated Users) or • Both guests and users can subscribe (All Users). The default is Off, which means no subscriptions for either guests or users.

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

To add users to a calendar

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

A user must be defined in Master Calendar before you can add them to a calendar. To add users to Master Calendar, see "To add a user".

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

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

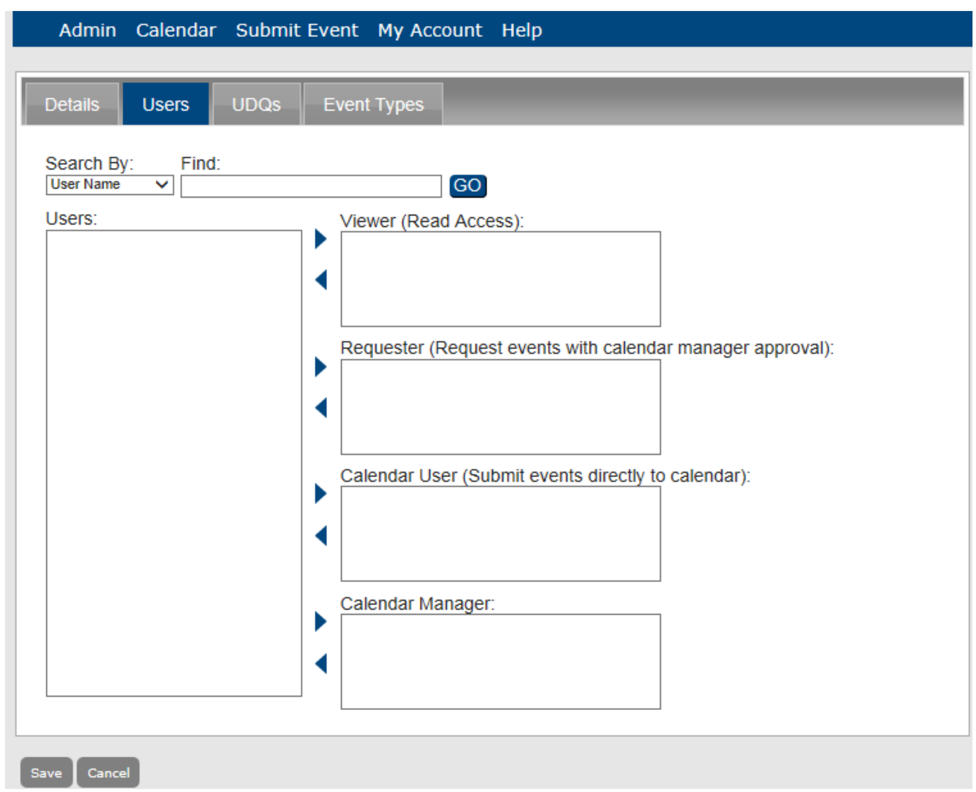
2. Select the calendar to which you are adding users, and under Actions, click Edit.

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

3. Click the Users tab to open it.

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

Figure 2-16: Add Calendar page, Users tab



4. 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.

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

---

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

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

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

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

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

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

To add UDQs to a calendar

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

A UDQ must be defined in Master Calendar before you can add it to a calendar. To add a UDQ to Master Calendar, see *"Managing User Defined Questions".*

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

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

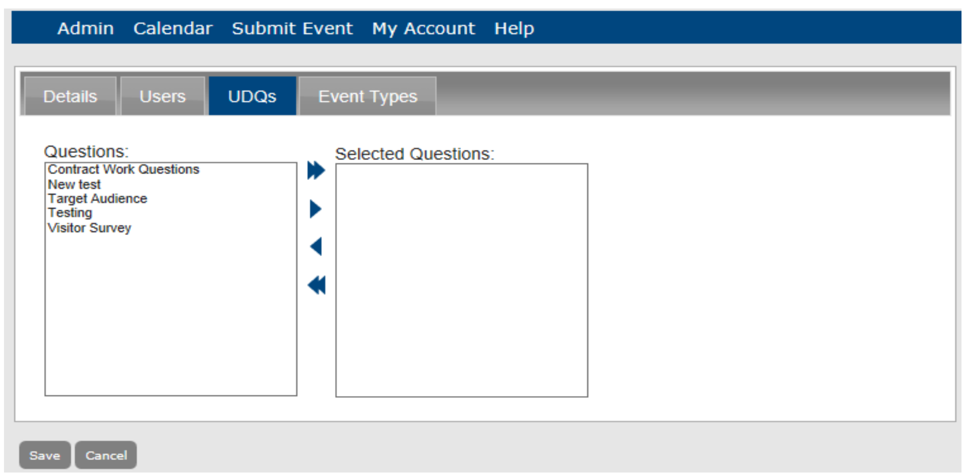
2. Select the calendar to which you are adding UDQs, and under Actions, click Edit.

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

3. Click the UDQs tab to open it.

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

Figure 2-17: Add Calendar page, UDQs tab



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

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

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

To add the event types for a calendar

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

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

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

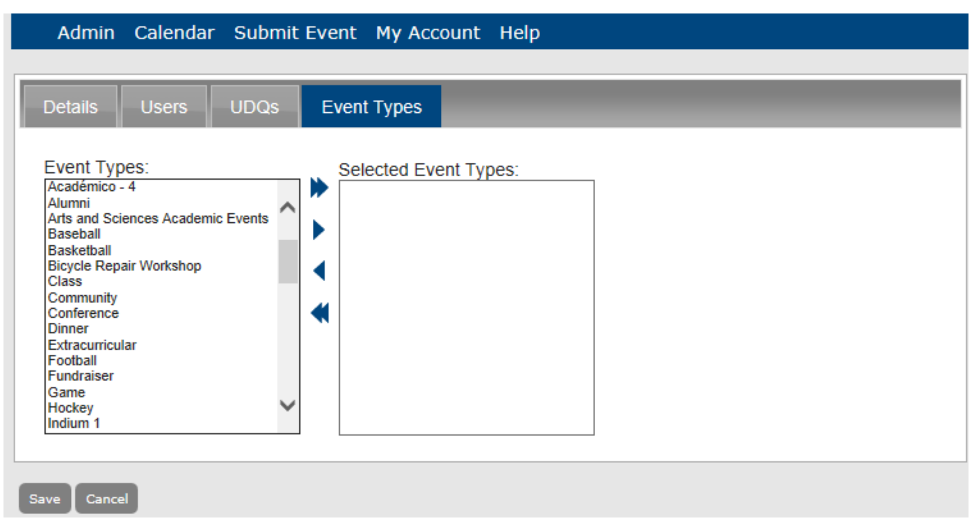
2. Select the calendar to which you are adding event types, and under Actions, click Edit.

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

3. Click the Event Types tab to open it.

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

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



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

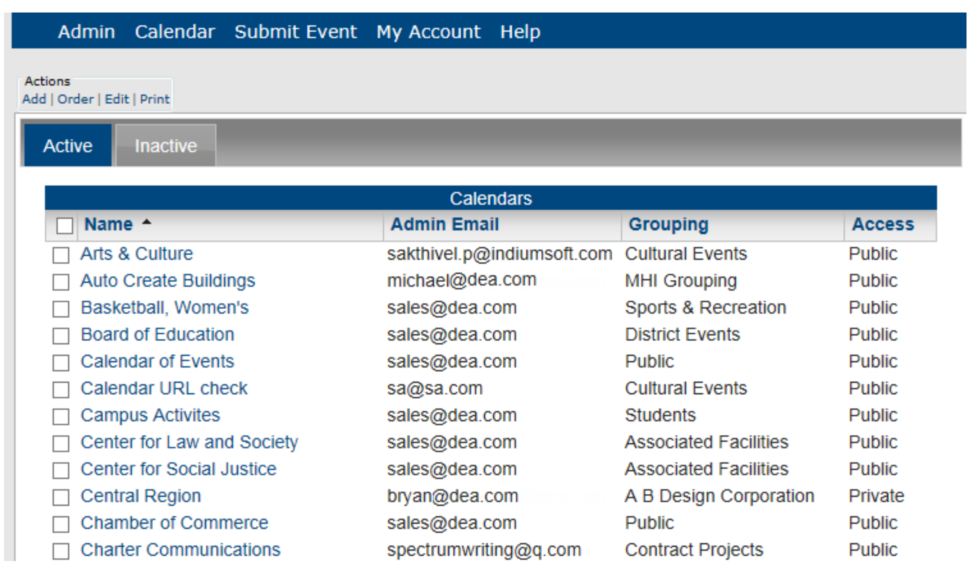
To edit a calendar

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

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

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

Figure 2-19: Manage Calendars page, Active tab

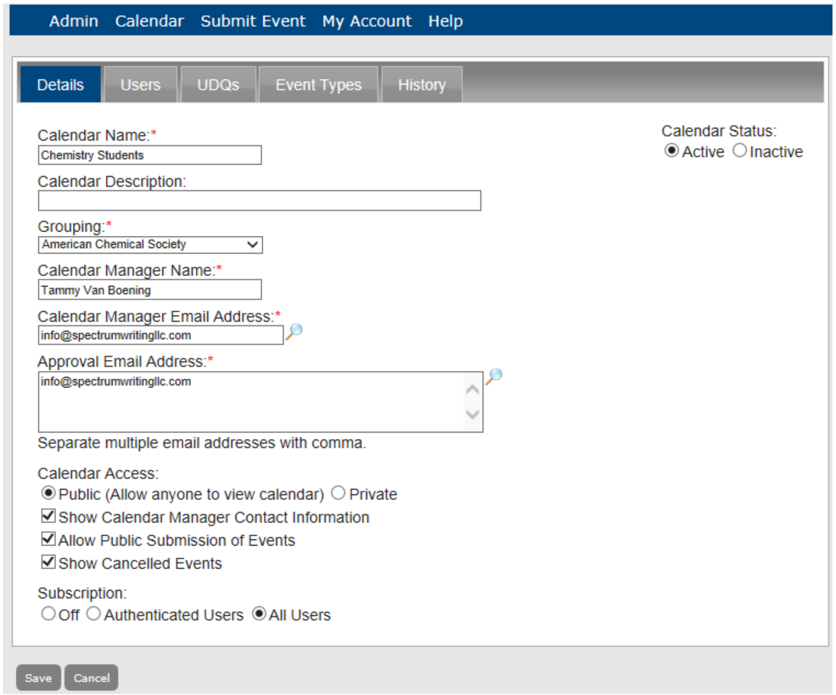


2. Select the calendar that you are editing.

3. Under Actions, select Edit.

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

Figure 2-20: Add Calendar page, Details tab



4. Edit the information for the calendar.

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

Field	Description
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 be displayed on the Calendar Managers list.
Allow Public Submission of Events	Selected by default. Indicates whether anybody who can view the calendar can submit events to the calendar.
Show Cancelled Events	Selected by default. Indicates whether canceled events should be displayed on the calendar.
Subscription	Indicates whether: • Only users can subscribe to receive information about additions or modifications to the calendar (Authenticated Users) or • Both guests and users can subscribe (All Users). The default is Off, which means no subscriptions for either guests or users.

5. Edit the information on this tab as needed, or click on any of the other tabs (Users or UDQs) to open them and edit the information on these tabs as needed. See “To add users to a calendar” and/or “To add UDQs to a calendar.”

6. Click Save to save the edited calendar in Master Calendar.

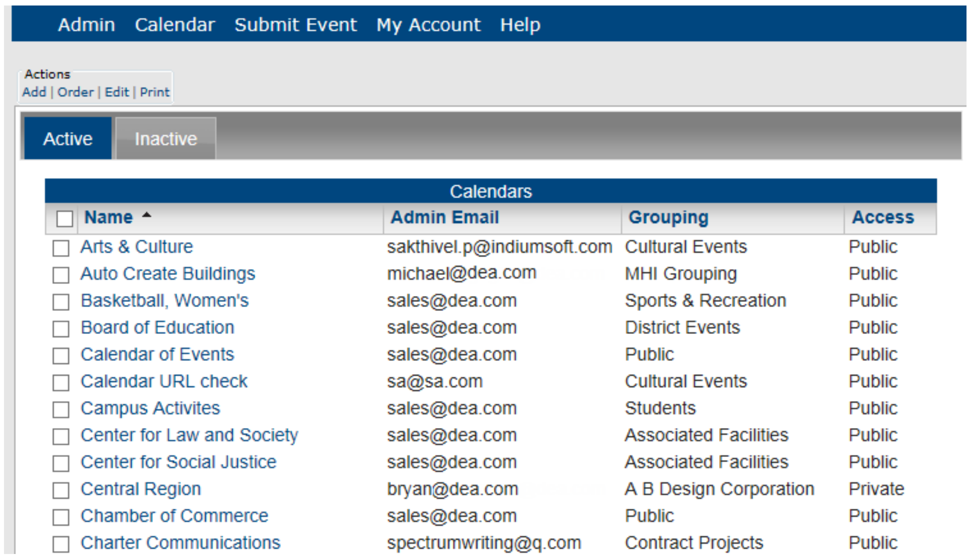
To delete a calendar

You can delete both active and inactive calendars.

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

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

Figure 2-21: Manage Calendars page, Active tab



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

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

4. Under Actions, click Delete.

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

5. Click OK in the message.

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

6. Click OK in the message.

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

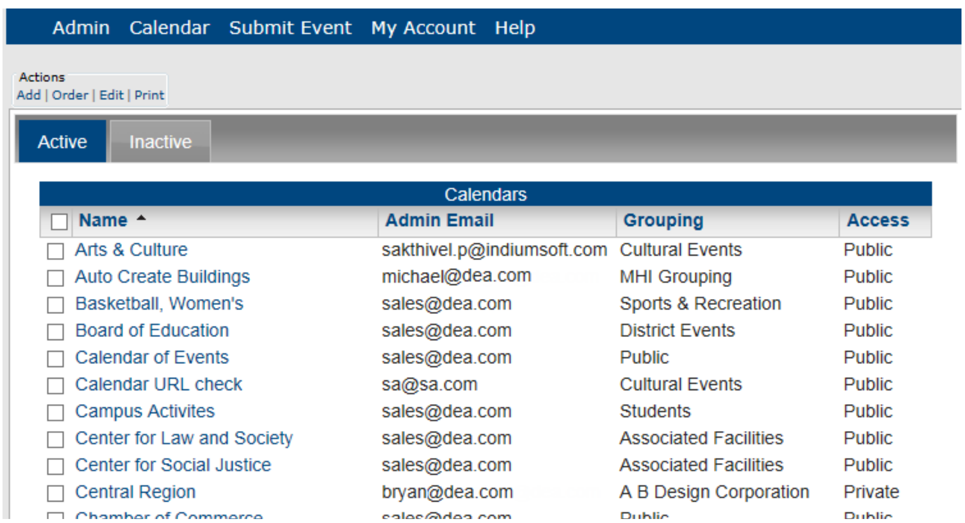
To generate a Calendars List report

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

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

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

Figure 2-22: Manage Calendars page, Active tab



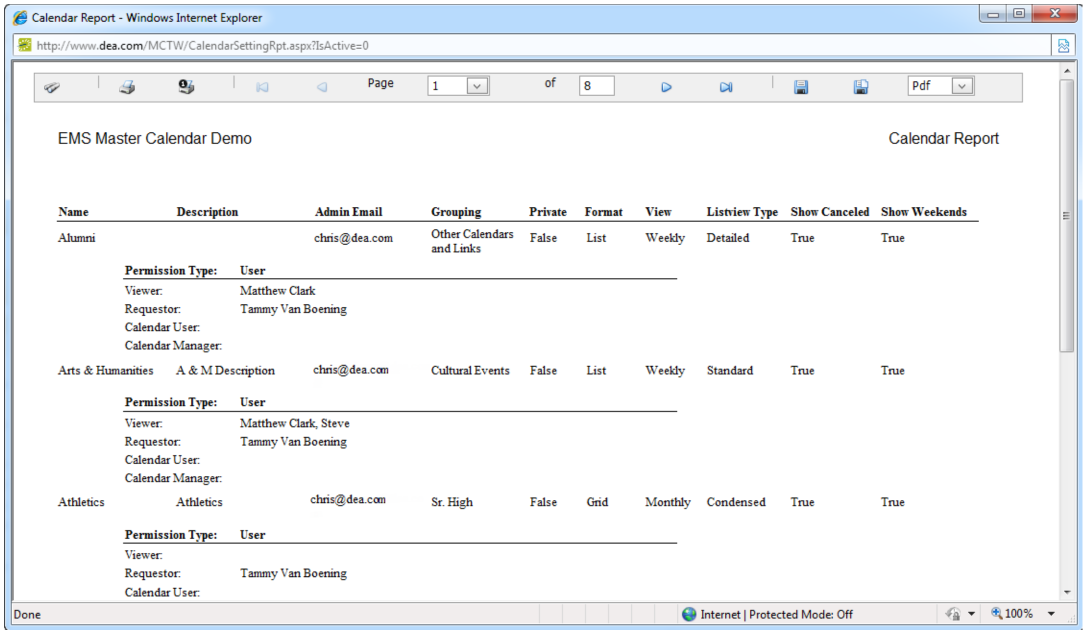
2. Do one of the following:

   - If you are generating a Calendars List report for all *active* calendars in your Master Calendar, under Actions, click Print.

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

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

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



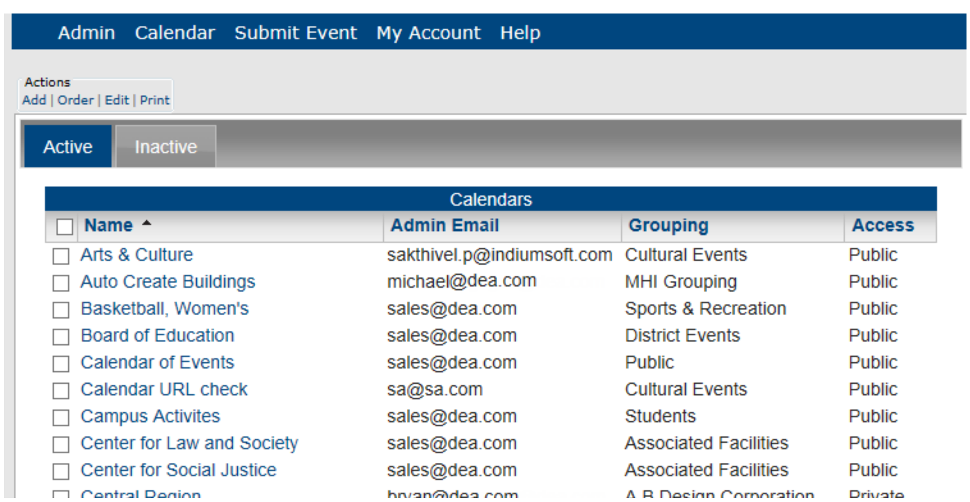
To view the history for a calendar

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

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

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

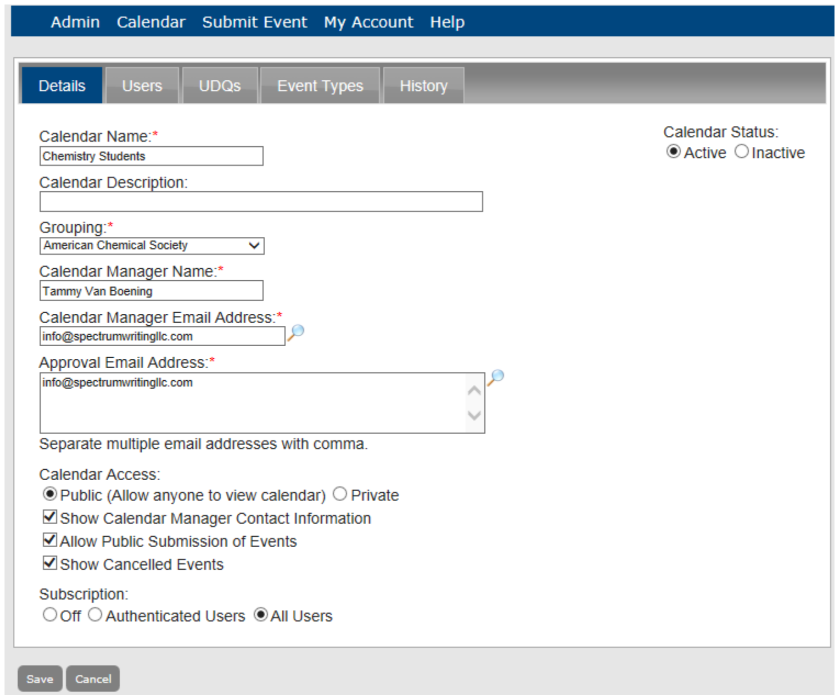
Figure 2-24: Manage Calendars page, Active tab



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

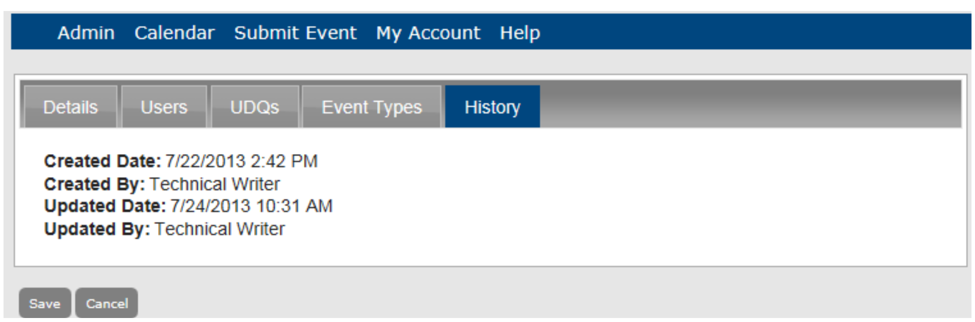
   The Add Calendar page opens. The Details tab is the opened tab.

Figure 2-25: Add Calendar page, Details tab



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

Figure 2-26: Add Calendar page, History tab



Managing Calendar URLs

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

To add or edit a calendar URL

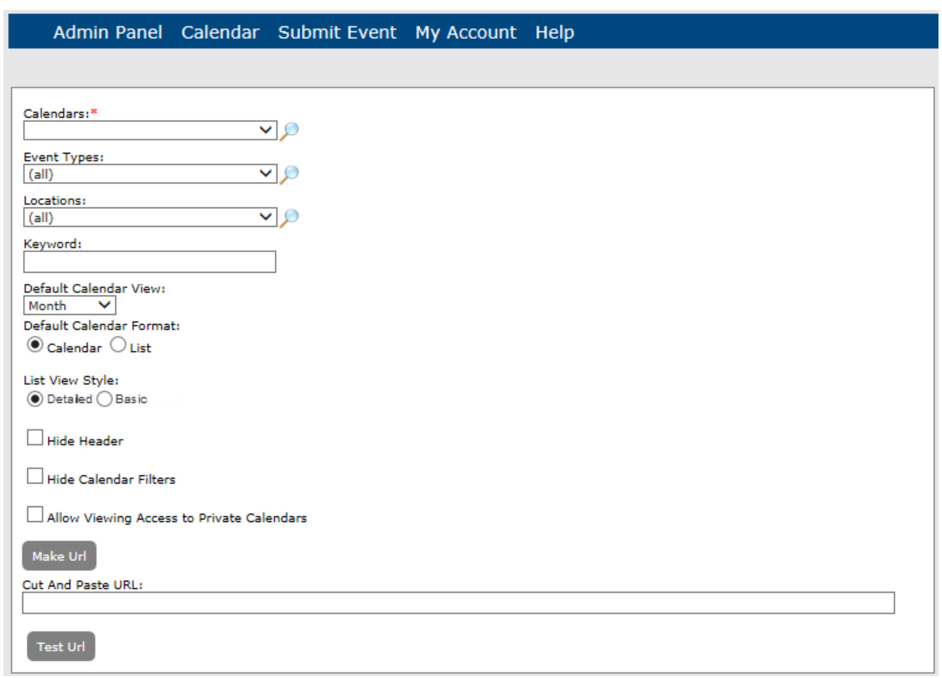
When you are adding a calendar URL, the fields that are displayed on the URL page are determined by what is currently configured and active in Master Calendar. For example, if you do not have any event types currently configured and active in Master Calendar, then the Event Types dropdown list is not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

For procedures that detail how to configure optional information such as event types, see "Configuring Optional Information".

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

   The Calendar URL page opens.

Figure 2-27: Calendar URL page



2. Enter or edit the information for the URL.

Field	Description
Calendars	A list of all active calendars to which you have access as Calendar Manager. Click the Lookup icon to open the Calendars dialog box and select the calendar or calendars.
Event Types	A list of all active event types that are currently configured in Master Calendar. Click the Lookup icon to open the Event Types dialog box and select the event types by which to search.
Locations	A list of all active event locations that are currently configured in Master Calendar. Click the Lookup icon to open the Locations dialog box and select the locations by which to search.
Keyword	Enter the search string by which to search for specific events. **Note:** The search is limited to the exact order of the characters in the string; however, the search string is not case-sensitive and the search string can be found anywhere in the search results. For example, the search string “ball” can return Foot**ball**, Base**ball**, **Ball**game, and so on. These search results can be found in the event name, the event description, and so on.
Default Calendar View	Dropdown list. Available values for how the calendar is displayed to a viewer are: • Month—The default value, which is a single month at a time. • Day—The current day. • Week—The current week.
List View Style	Applicable only if the calendar display is in the List view. • Detailed List—The default value. • Basic List—Omits some of the details regarding the actual event that are displayed in the Detailed List view.

3. Optionally, if you intend to display the calendar in an iFrame on your organization’s website, for a cleaner, more integrated display, select one or both of the following:
   - Hide Header
   - Hide Calendar Filters
4. Optionally, if guests or users are to have access to calendars that are marked as Private, then select Allow Viewing Access to Private Calendars.
5. Click Make URL.

   Master Calendar creates the calendar URL. It is displayed in the Cut and Paste URL field.
6. Optionally, to verify that the system displays the correct calenders with the correct information, click Test Url.

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

Configuring Optional Information

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

This chapter covers the following topics:

- "Managing Event Types"
- "Managing Event Type Views"
- "Managing Event Locations"
- "Managing Event Sub-Locations"
- "Managing Departments"
- "Managing Custom Field Hints"
- "Managing User Defined Questions"
- "Managing Event Icons"
- "Managing Cultures"

Managing Event Types

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

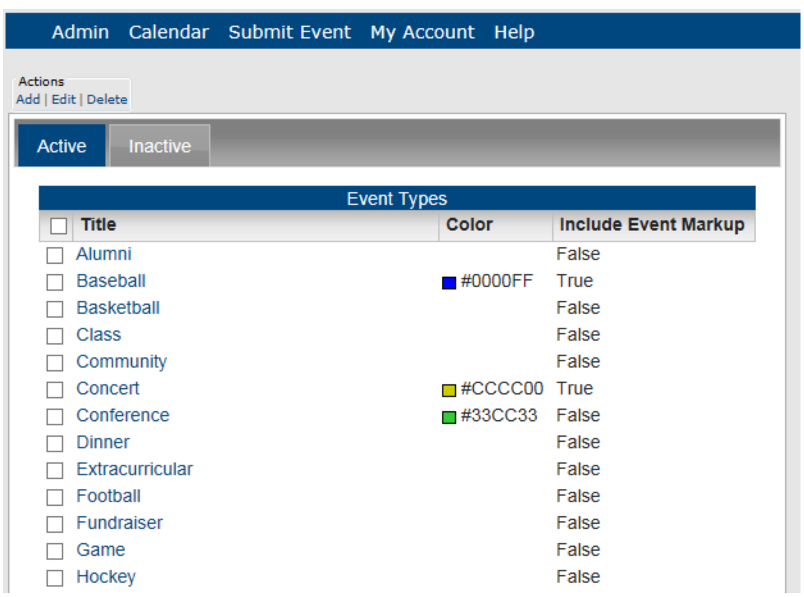
To add an event type

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

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

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

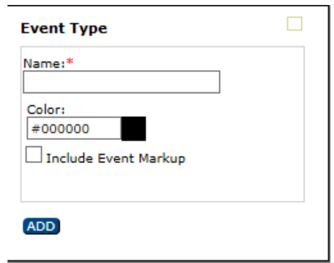
Figure 3-1: Event Types page, Active tab



2. Under Actions, click Add.

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

Figure 3-2: Event Type dialog box



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

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

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

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

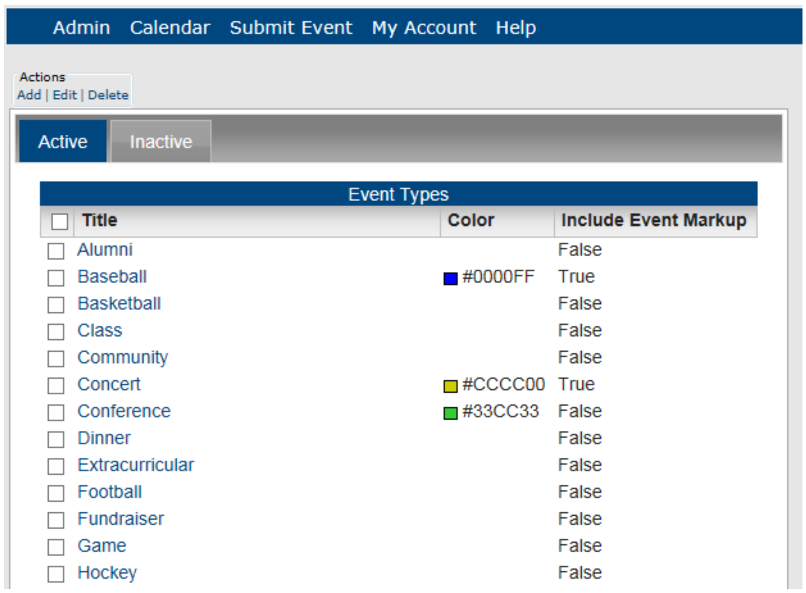
   The Event Type is added to Master Calendar as an *active* event type.

To activate an event type

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

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

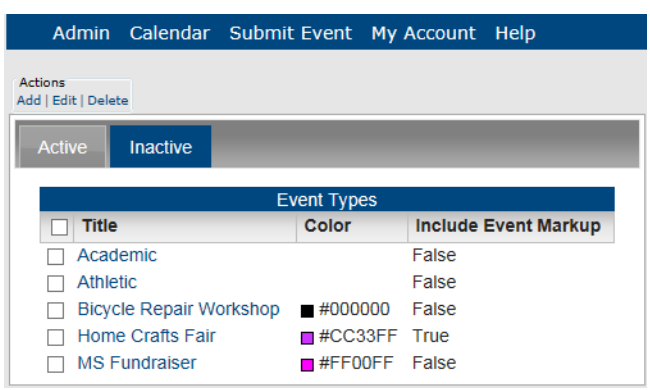
Figure 3-3: Event Types page, Active tab



2. Click the Inactive tab to open it.

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

Figure 3-4: Event Types page, Inactive tab

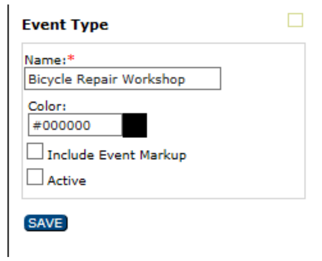


3. Select the event type that you are activating.

4. Under Actions, select Edit.

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

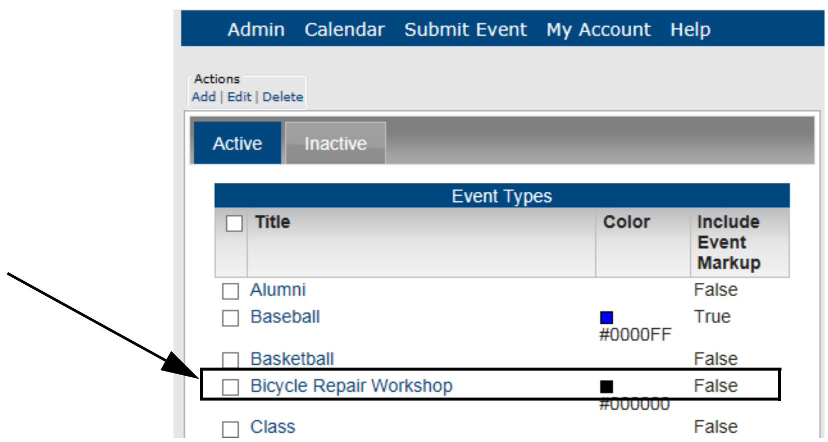
Figure 3-5: Event Type dialog box, Inactive event type



5. Select Active.
6. Click Save.

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

Figure 3-6: Event Types page, Active tab

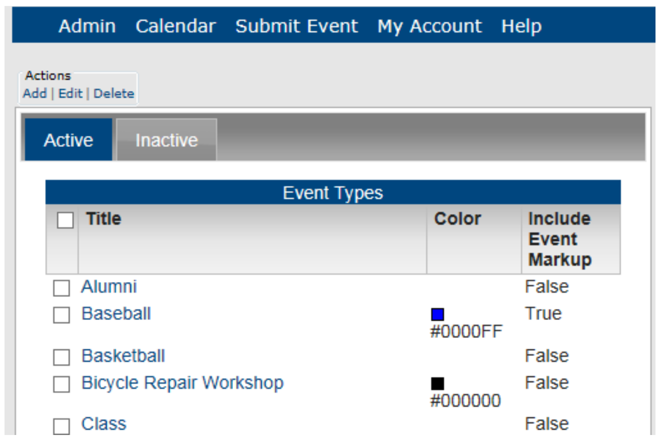


To inactivate an event type

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

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

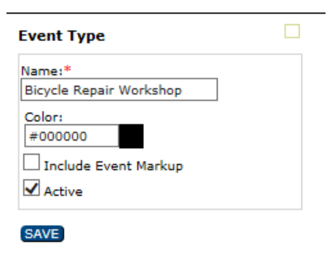
Figure 3-7: Event Types page, Active tab



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

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

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

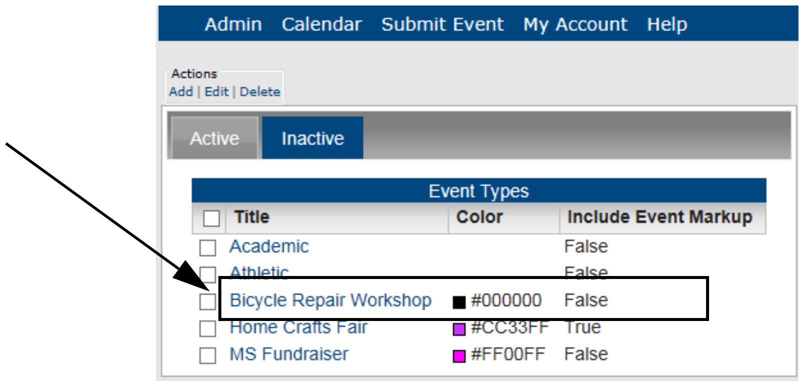


4. Clear the Active option.

5. Click Save.

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

Figure 3-9: Event Types page, Inactive tab



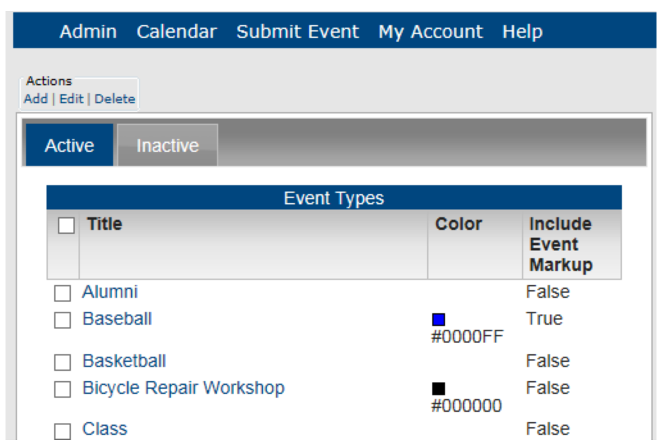
To edit an event type

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

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

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

Figure 3-10: Event Types page, Active tab

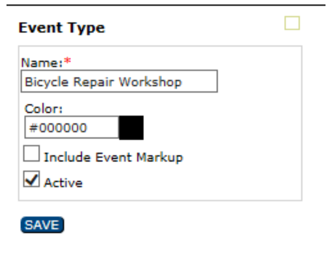


2. If needed, click the Inactive tab to open it.
3. Select the event type that you are editing.

4. Under Actions, select Edit.

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

Figure 3-11: Event Type dialog box



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

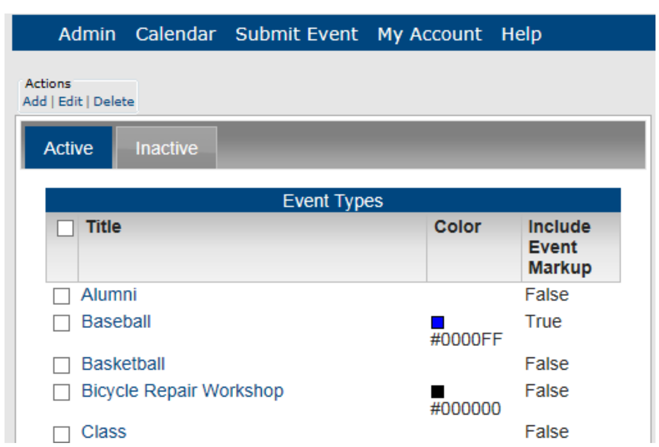
To delete an event type

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

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

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

Figure 3-12: Event Types page, Active tab



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

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

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

4. Under Actions, click Delete.

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

5. Click OK in the message.

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

6. Click OK in the message.

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

Managing Event Type Views

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

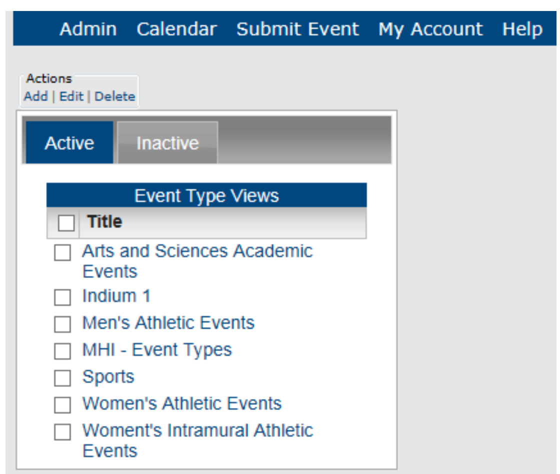
To add an event type view

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

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

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

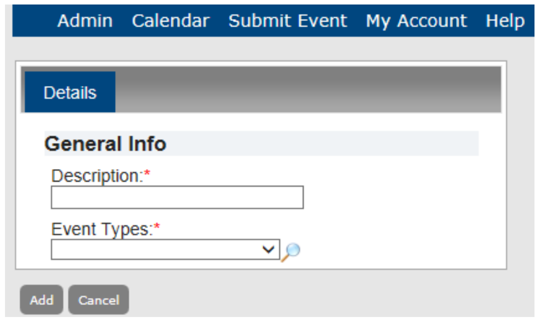
Figure 3-13: Manage Event Type Views page, Active tab



2. Under Actions, click Add.

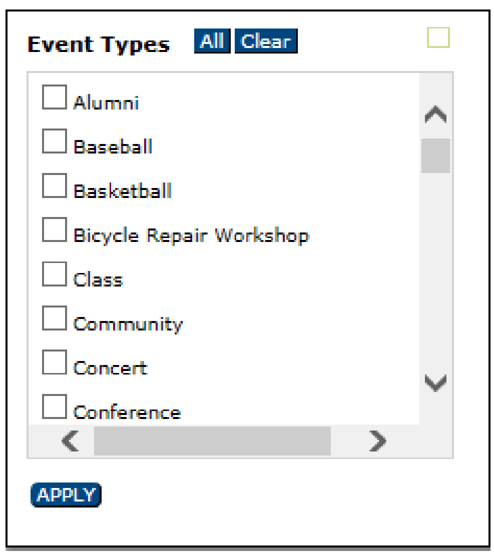
   The Add Event Type Views page opens. The Details tab is the only tab on this page.

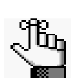
Figure 3-14: Add Event Type Views page, Details tab



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

Figure 3-15: Event Types dialog box





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

5. Click Add.

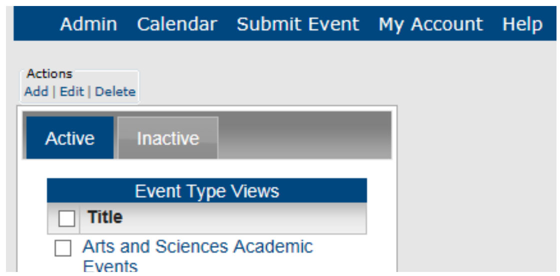
   The Event Type View is added as an *active* item in Master Calendar.

To activate an event type view

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

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

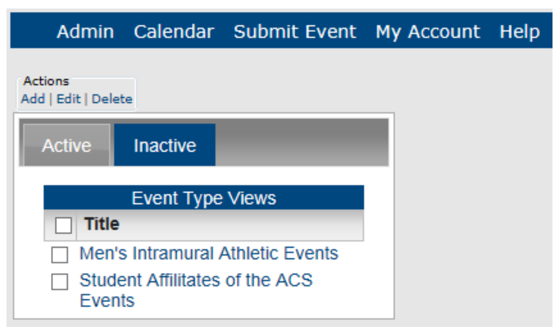
Figure 3-16: Manage Event Type Views page, Active tab



2. Click the Inactive tab to open it.

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

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

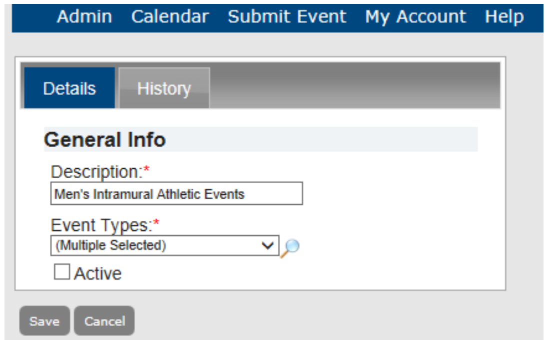


3. Select the event type view that you are activating.

4. Under Actions, click Edit.

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

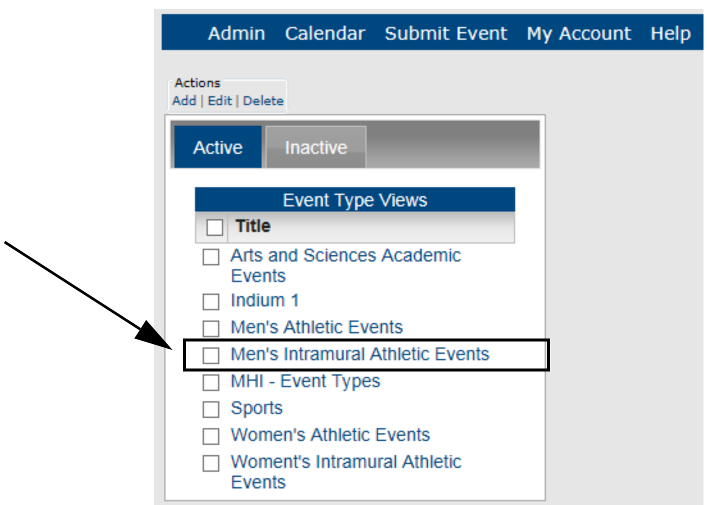
Figure 3-18: Add Event Type Views page, Details tab, Inactive event type view



5. Select Active.
6. Click Save.

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

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

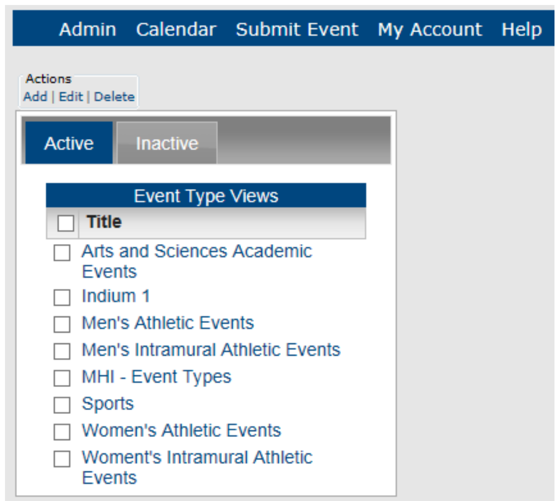


To inactivate an event type view

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

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

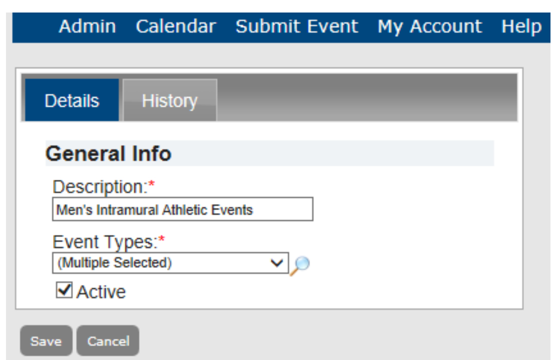
Figure 3-20: Manage Event Type Views page, Active tab



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

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

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

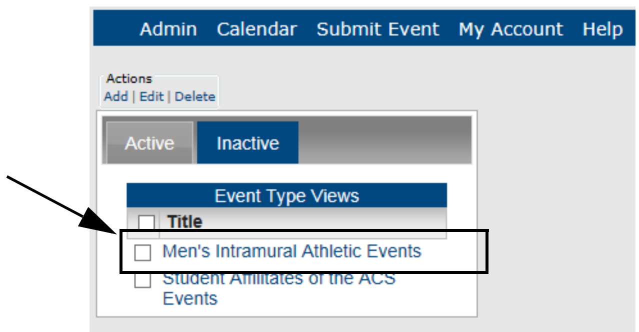


4. Clear the Active option.

5. Click Save.

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

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



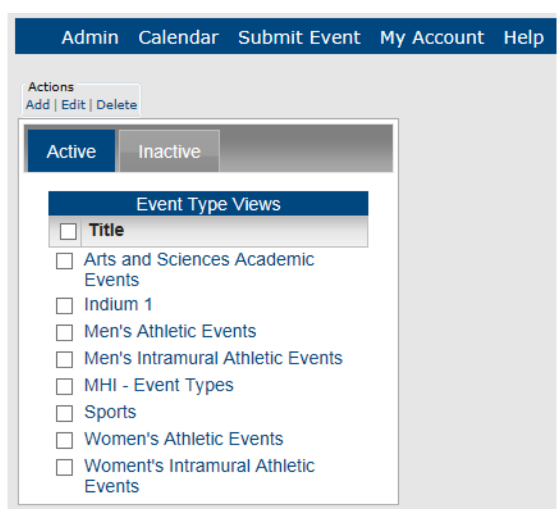
To edit the description or event types for an event type view

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

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

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

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



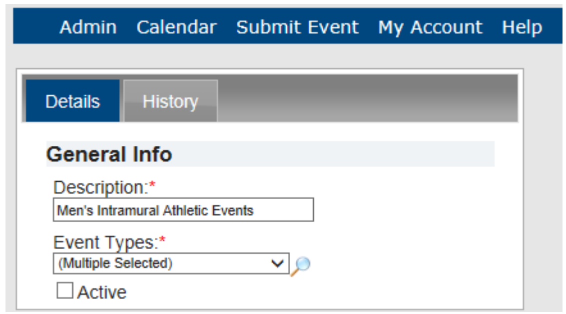
2. If needed, click the Inactive tab to open it.

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

4. Under Actions, click Edit.

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

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



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

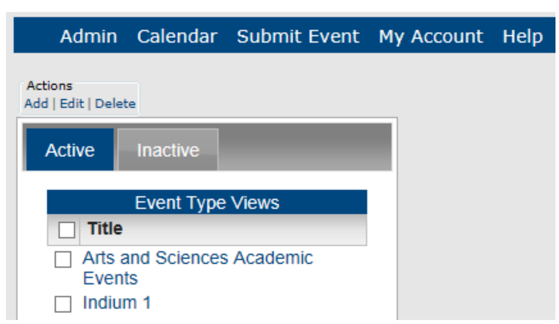
To delete an event type view

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

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

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

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



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

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

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

4. Under Actions, click Delete.

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

5. Click OK in the message.

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

6. Click OK in the message.

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

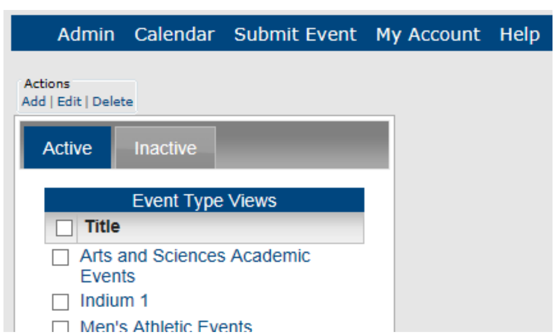
To view the history for an event type view

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

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

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

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



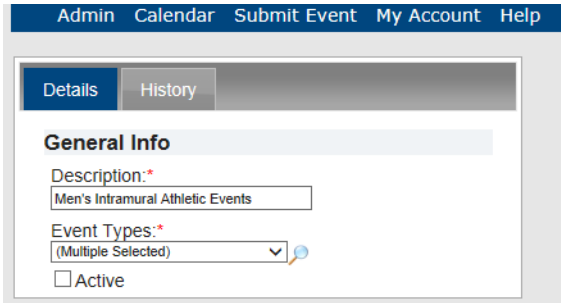
2. If needed, click the Inactive tab to open it.

3. Select the event type view for which you are viewing the history.

4. Under Actions, click Edit.

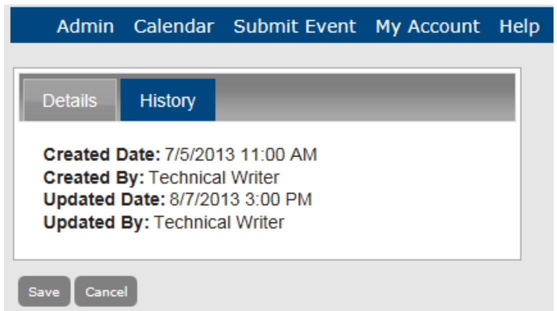
   The Add Event Type Views page opens. The Details tab is the opened tab.

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



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

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



Managing Event Locations

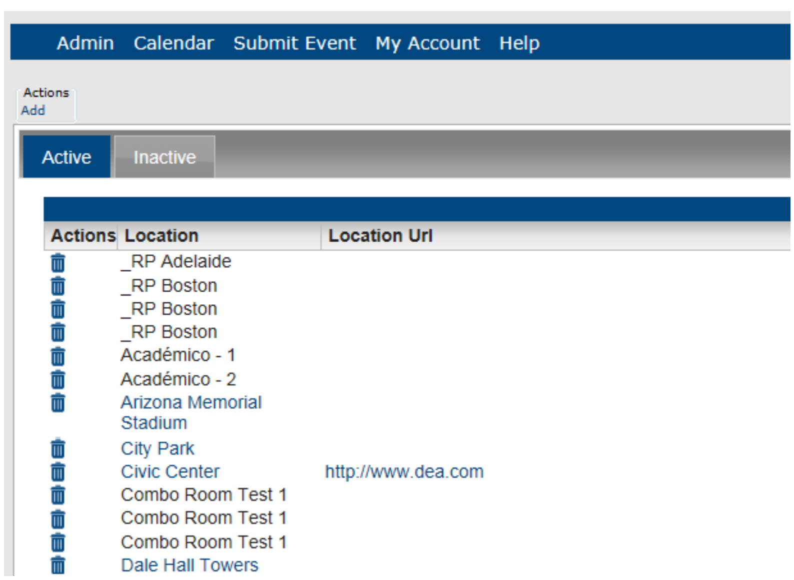
The *event location* is the location where the event is to take place. For example, if you are managing a calendar for a university's athletic events, you could set up a list of possible locations for the event, such as the stadium, the field house, the sports arena, and so on. When you set up a location in Master Calendar, you can also provide a URL, an address, the hours of operation, and a phone number for the location. For example, if you are managing a university's athletic calendar, and you add the football stadium as a location, you can also provide a URL to a webpage that shows a map of the stadium. The Location field for an event can be an optional field, or it can be a required field, depending upon your Master Calendar parameter settings. (See Appendix A, "Site Configuration Settings.") Managing event locations consists of consists of adding event locations, activating and inactivating event locations, editing event locations, and deleting event locations.

To add an event location

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

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

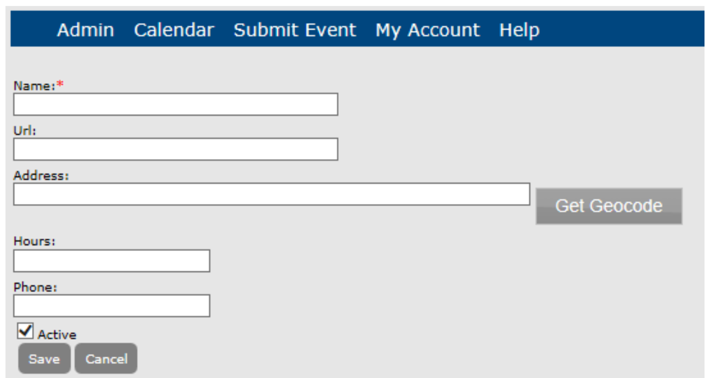
Figure 3-29: Manage Locations page, Active tab



2. Under Actions, click Add.

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

Figure 3-30: Add Location page



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

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

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

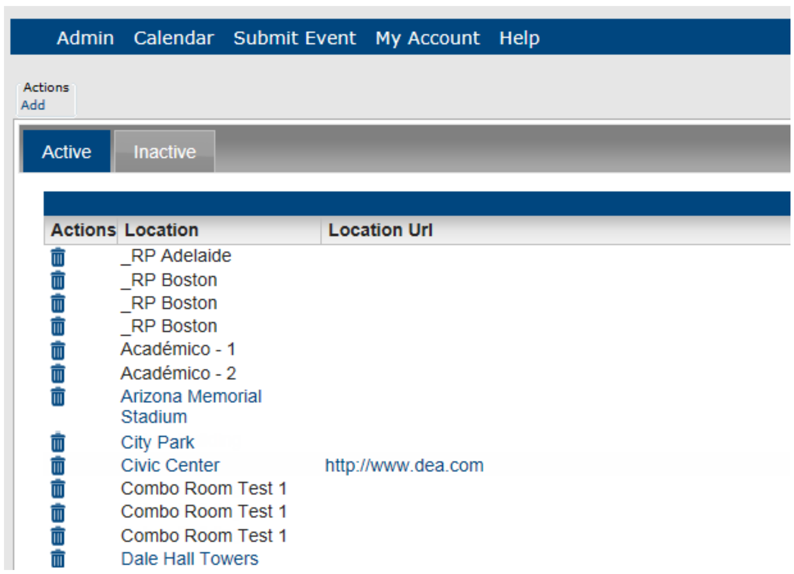
   The location is added in Master Calendar.

To activate an event location

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

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

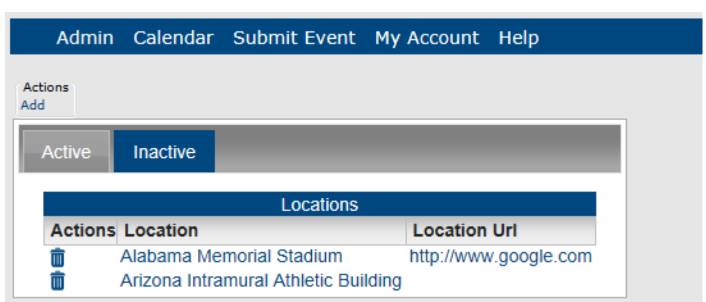
Figure 3-31: Manage Locations page, Active tab



2. Click the Inactive tab to open it.

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

Figure 3-32: Manage Locations page, Inactive tab

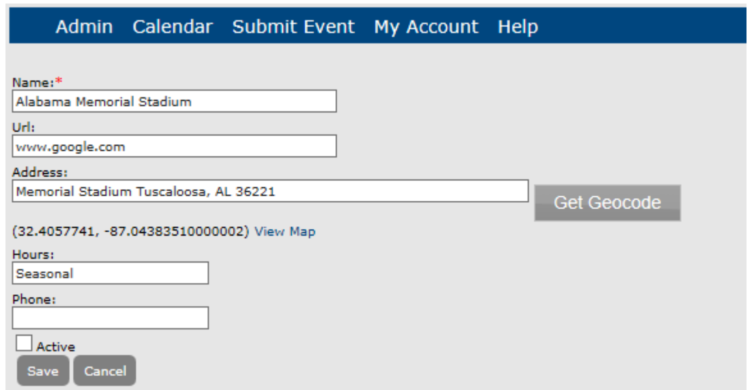


3. Select the event location that you are activating.

4. Under Action, click Edit.

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

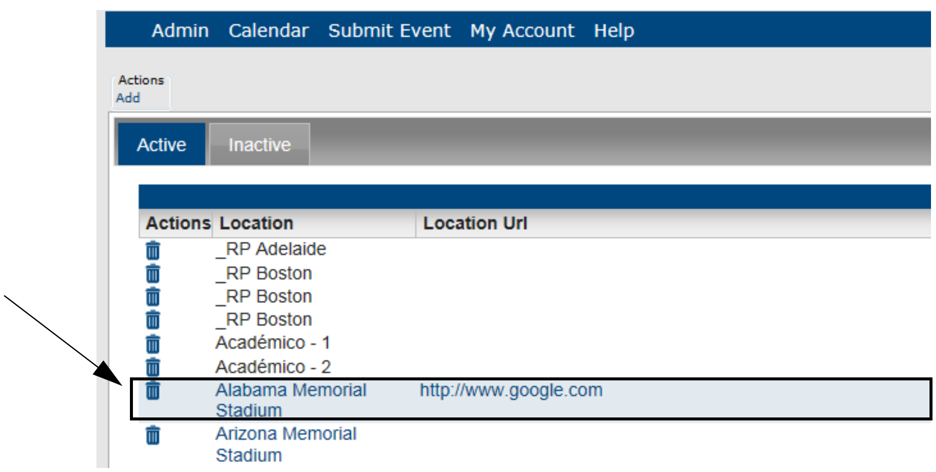
Figure 3-33: Add Location page, Inactive location



5. Select Active.
6. Click Save.

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

Figure 3-34: Manage Locations page, Active tab

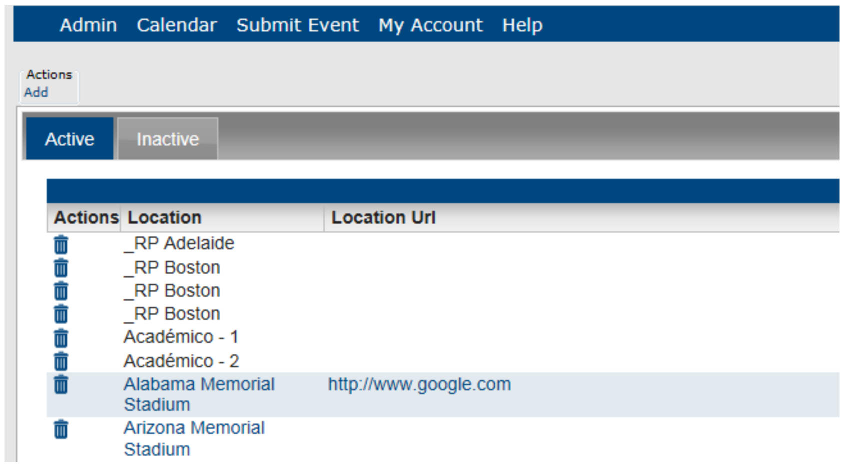


To inactivate an event location

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

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

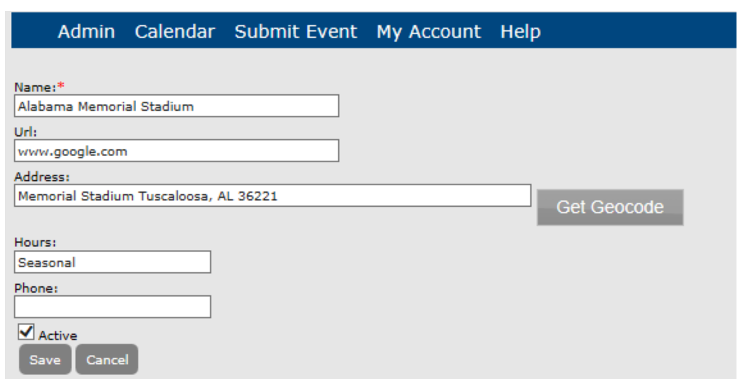
Figure 3-35: Manage Locations page, Active tab



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

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

Figure 3-36: Add Location page, Active location

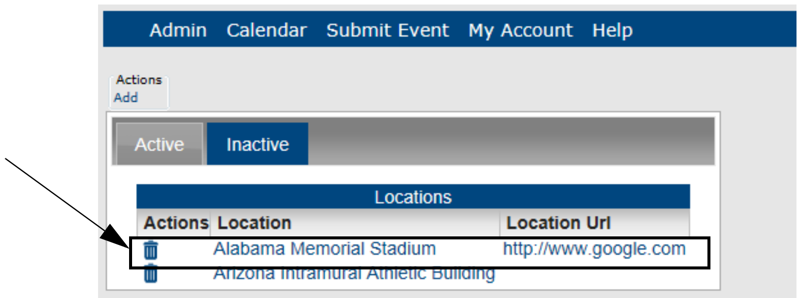


4. Clear the Active option.

5. Click Save.

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

Figure 3-37: Manage Locations page, Inactive tab



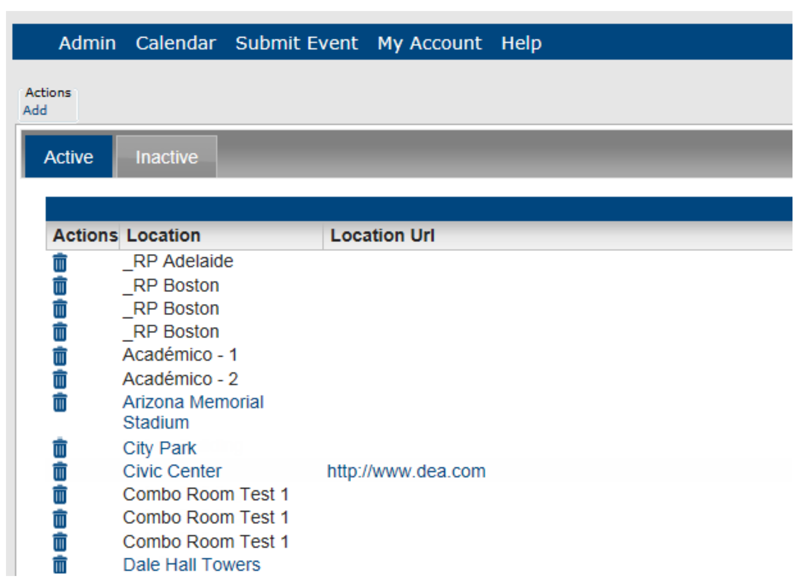
To edit an event location

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

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

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

Figure 3-38: Manage Locations page, Active tab

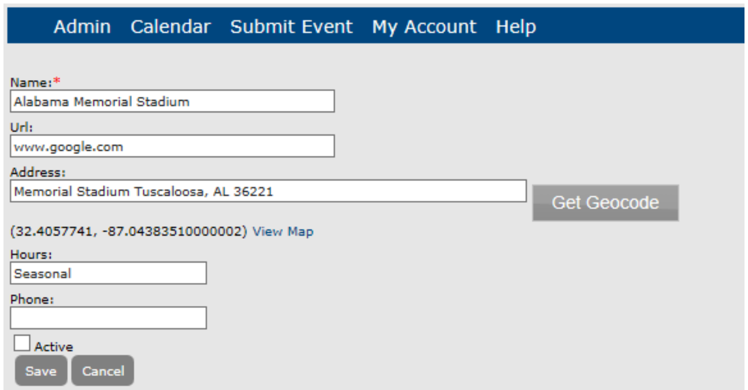


2. If needed, click the Inactive tab to open it.

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

   The Add Location page opens.

Figure 3-39: Add Location page



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

To delete an event location

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

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

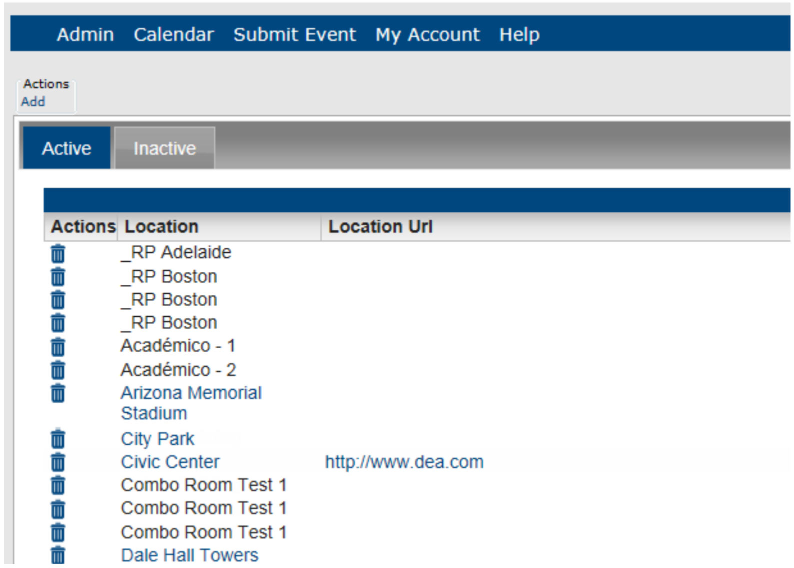
If you delete an active event location, any current events that use this location are not affected. The deletion simply means that going forward, the location is not available for use.

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

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

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

Figure 3-40: Manage Locations page, Active tab



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

3. Click the Delete icon that is next to the location that you are deleting. Two results are possible:

   - If any sub-locations reference the selected location, a dialog box opens indicating the number of sub-locations that reference it. You must first delete these sub-locations before you can delete the location. See "Managing Event Sub-Locations".

   - If no sub-locations reference the selected location, a message opens asking you if you are sure that you want to delete the selected location. Continue to Step 4.

4. Click OK in the message.

   A message opens indicating that the selected location was deleted.

5. Click OK in the message.

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

Managing Event Sub-Locations

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

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

To add an event sub-location

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

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

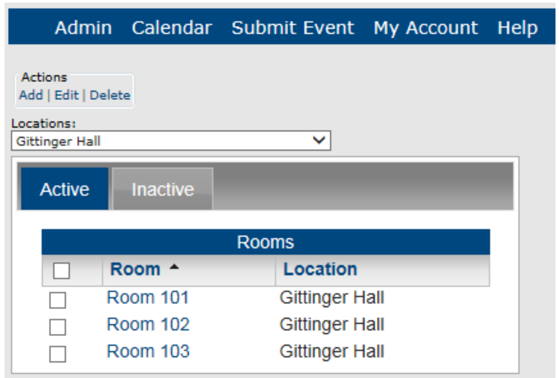
   The Manage Sub-Locations page opens. The Active tab is the opened tab. When this tab first opens, it is blank.

2. On the Locations dropdown list, select the active location to which you are adding the sub-location.

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

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

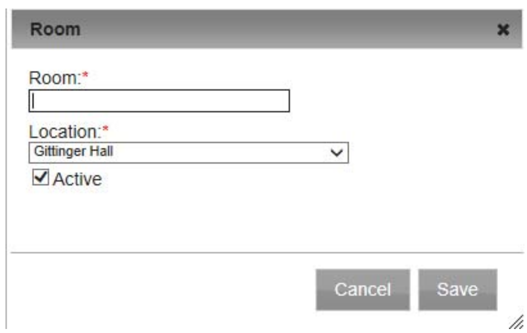
Figure 3-41: Manage Sub-Locations page, Active tab



3. Under Actions, click Add.

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

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



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

   The sub-location is added in Master Calendar.

To activate an event sub-location

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

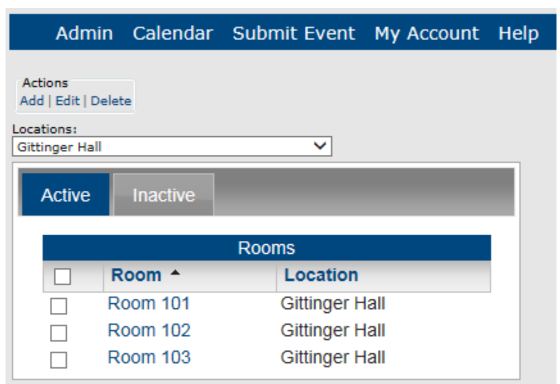
1. Under the Admin Panel main menu option, point to Configuration, and then click <Sub-Locations>, where <Sub-Locations> is the name or phrase that you used to identify sub-locations in Master Calendar, for example, Rooms.

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

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

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

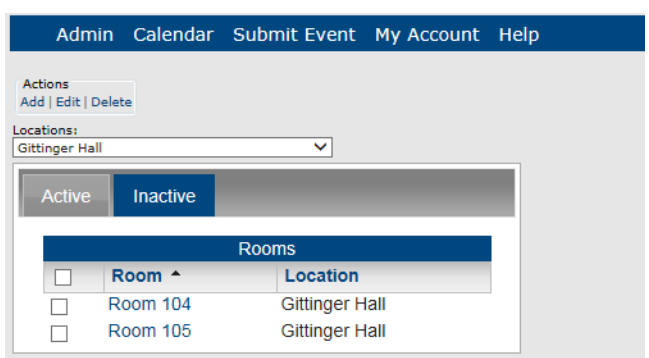
Figure 3-43: Manage Sub-Locations page, Active tab



3. Click the Inactive tab to open it.

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

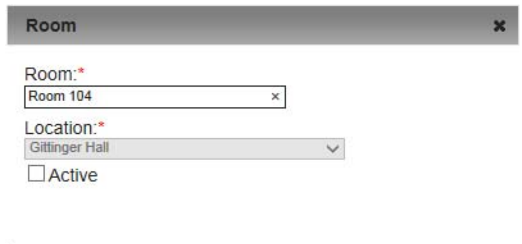
Figure 3-44: Manage Sub-Locations page, Inactive tab



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

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

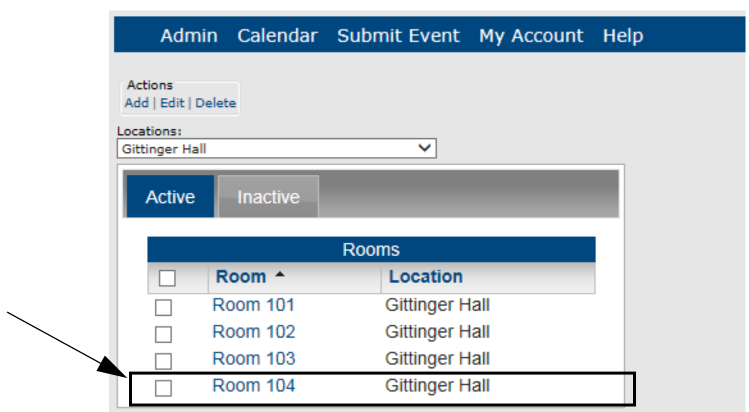
Figure 3-45: Sub-Location dialog box, Inactive location



6. Select Active.
7. Click Save.

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

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



To inactivate an event sub-location

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

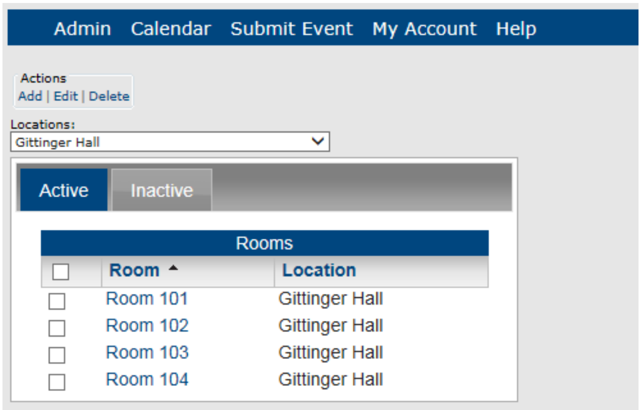
1. Under the Admin Panel main menu option, point to Configuration, and then click <Sub-Locations>, where <Sub-Locations> is the name or phrase that you used to identify sub-locations in Master Calendar, for example, Rooms.

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

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

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

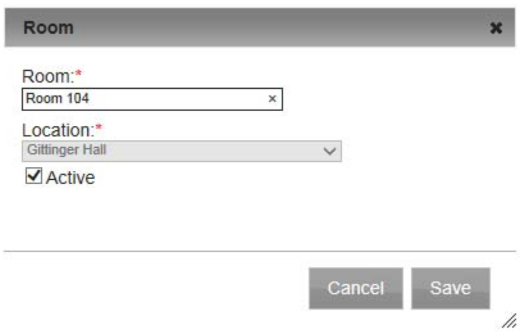
Figure 3-47: Manage Sub-Locations page, Active tab



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

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

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

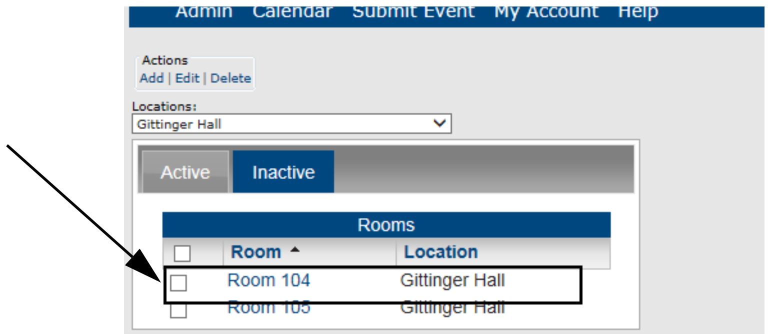


5. Clear the Active option.

6. Click Save.

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

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



To edit an event sub-location

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

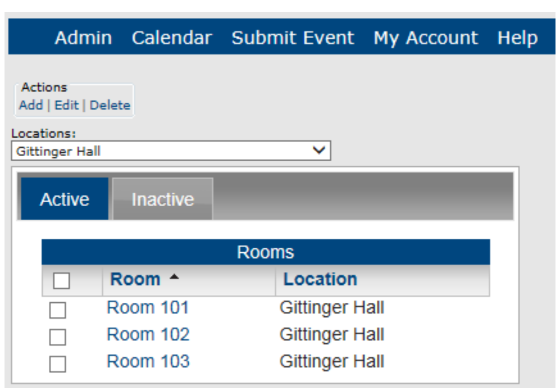
1. Under the Admin Panel main menu option, point to Configuration, and then click <Sub-Locations>, where <Sub-Locations> is the name or phrase that you used to identify sub-locations in Master Calendar, for example, Rooms.

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

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

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

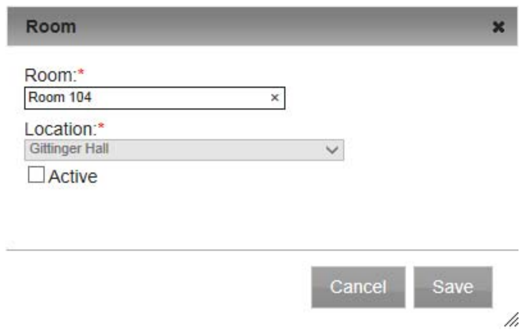
Figure 3-50: Manage Sub-Locations page, Active tab



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

   The <Sub-Location> dialog box opens.

Figure 3-51: Sub-Location dialog box



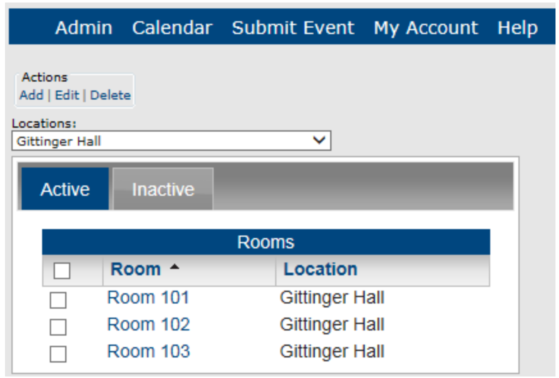
6. Edit the name of the sub-location, its location, or both as needed.
7. Click Save to save the edited event sub-location in Master Calendar.

To delete an event sub-location

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

1. Under the Admin Panel main menu option, point to Configuration, and then click <Sub-Locations>, where <Sub-Locations> is the name or phrase that you used to identify sub-locations in Master Calendar, for example, Rooms.
   The Manage Sub-Locations page opens. The Active tab is the opened tab. When this tab first opens, it is blank.
2. On the Locations dropdown list, select the location for which you are deleting the sub-locations.
   All currently active event sub-locations for the selected location in Master Calendar are displayed on the Active tab. See Figure 3-52.

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



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

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

5. Under Actions, click Delete.

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

6. Click OK in the message.

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

7. Click OK in the message.

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

Managing Departments

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

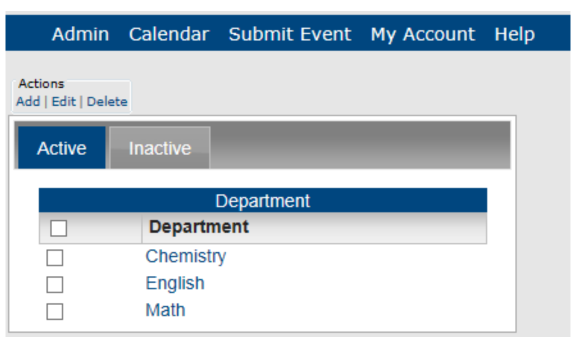
"Departments" is a default label. To change this label to better suit your organization's business needs, see "Managing Default Settings for Master Calendar".

To add a department

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

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

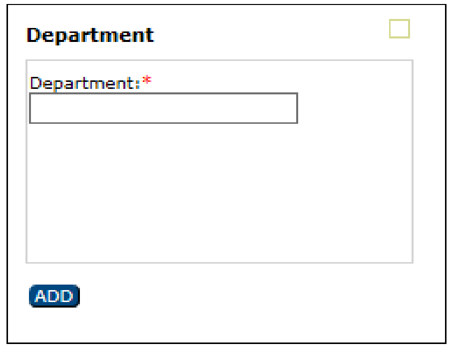
Figure 3-53: Departments page, Active tab



2. Under Actions, click Add.

   The Department dialog box opens. You use this dialog box to name the department. See Figure 3-54.

Figure 3-54: Department dialog box



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

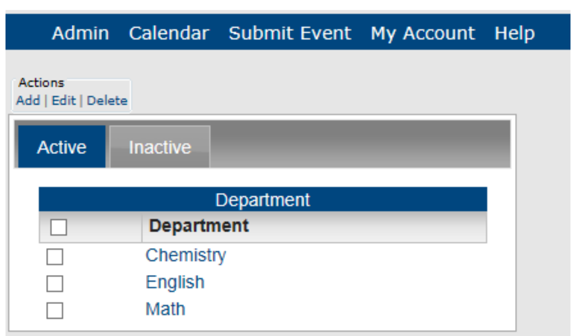
   The Department is added to Master Calendar as an *active* department.

To activate a department

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

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

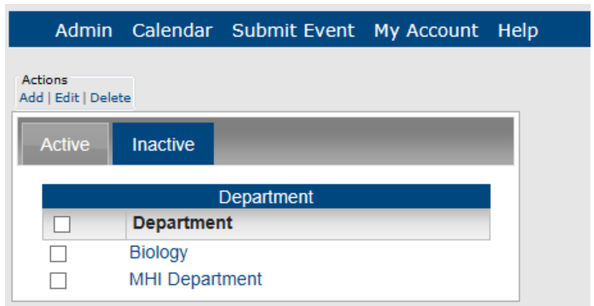
Figure 3-55: Departments page, Active tab



2. Click the Inactive tab to open it.

   All currently inactive departments in Master Calendar are displayed on this tab. See Figure 3-56.

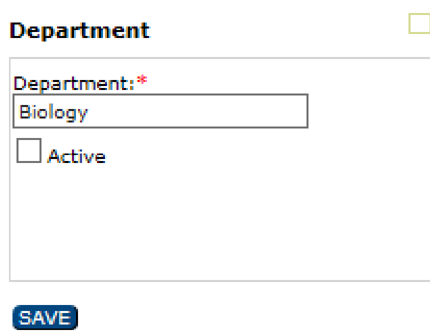
Figure 3-56: Departments page, Inactive tab



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

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

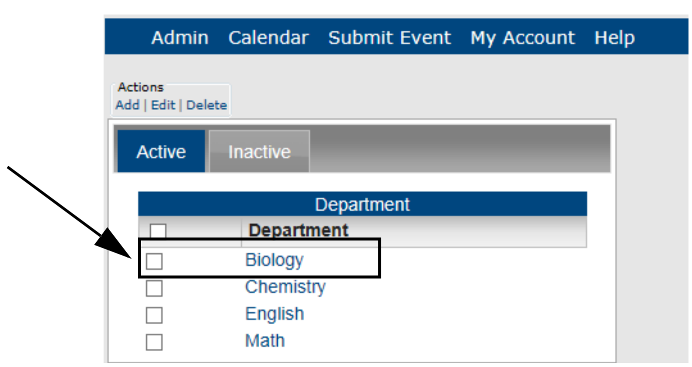
Figure 3-57: Department dialog box, Inactive department



5. Select Active.
6. Click Save.

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

Figure 3-58: Departments page, Active tab

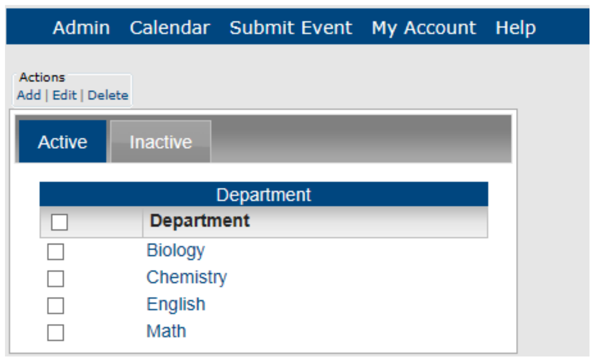


To inactivate a department

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

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

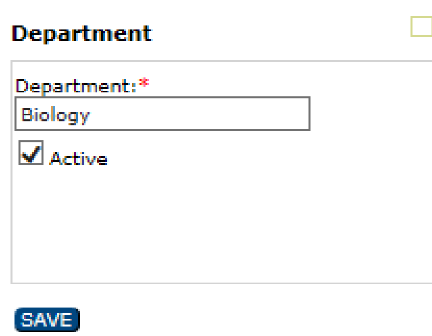
Figure 3-59: Departments page, Active tab



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

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

Figure 3-60: Department dialog box, Active department

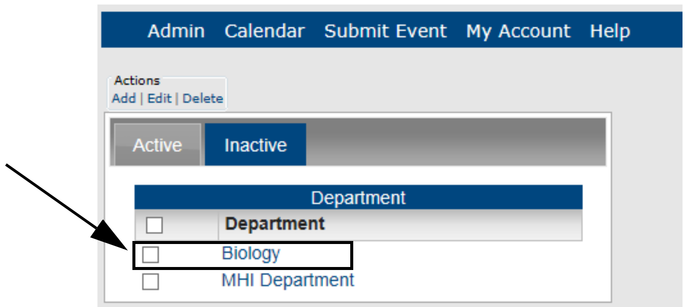


4. Clear the Active option.

5. Click Save.

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

Figure 3-61: Departments page, Inactive tab



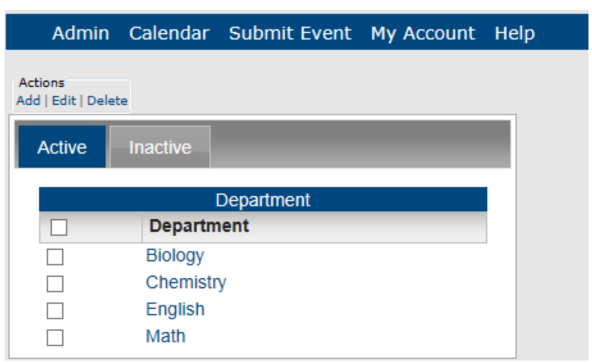
To edit a department name

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

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

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

Figure 3-62: Departments page, Active tab

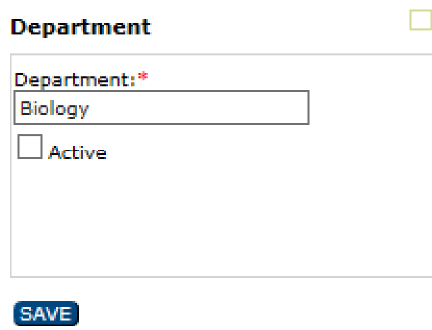


2. If needed, click the Inactive tab to open it.
3. Select the department that you are editing.

4. Under Actions, select Edit.

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

Figure 3-63: Department dialog box



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

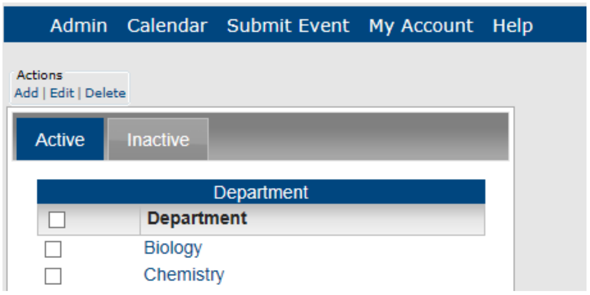
To delete a department

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

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

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

Figure 3-64: Departments page, Active tab



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

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

4. Under Actions, click Delete.

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

5. Click OK in the message.

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

6. Click OK in the message.

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

Managing Custom Field Hints

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

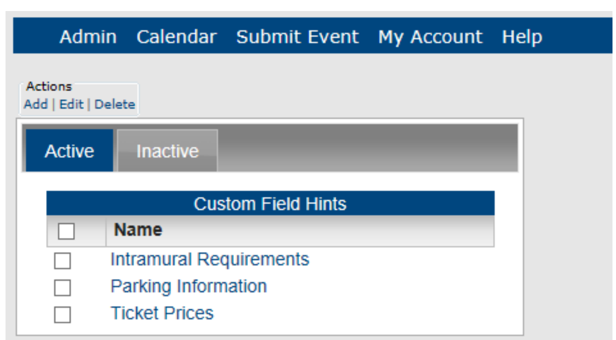
To add a custom field hint

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

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

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

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



2. Under Actions, click Add.

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

Figure 3-66: Custom Field Hint dialog box

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

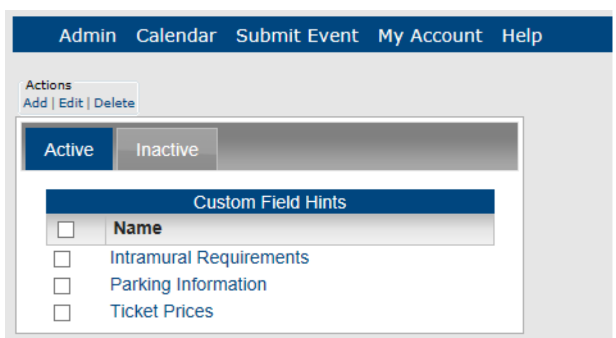
   The hint is added as an *active* custom field hint in Master Calendar.

To activate a custom field hint

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

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

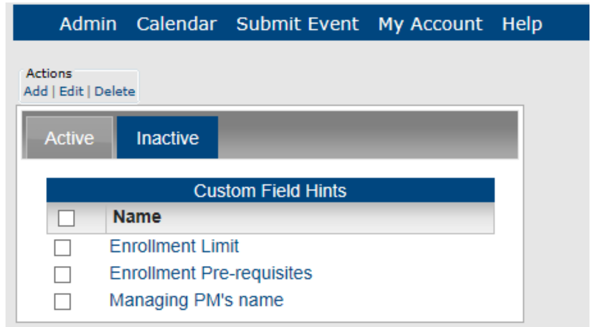
Figure 3-67: Custom Field Hints page, Active tab



2. Click the Inactive tab to open it.

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

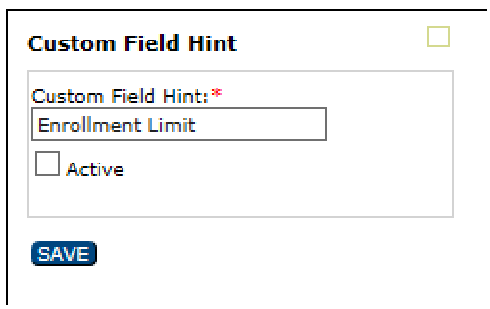
Figure 3-68: Custom Field Hints page, Inactive tab



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

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

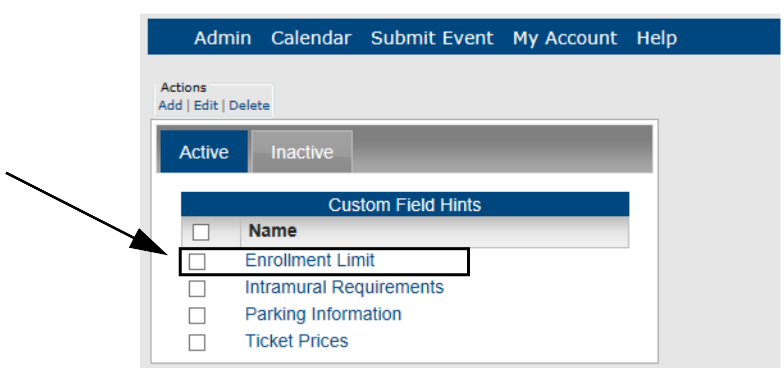
Figure 3-69: Custom Field Hint dialog box, Inactive custom field hint



5. Select Active.
6. Click Save.

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

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

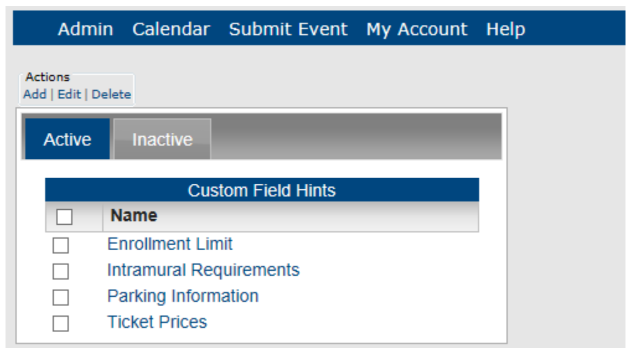


To inactivate a custom field hint

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

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

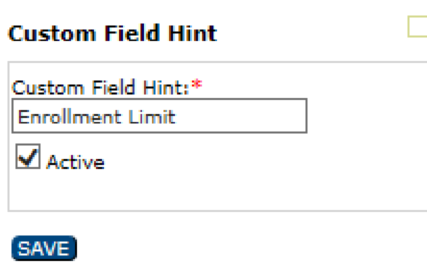
Figure 3-71: Custom Field Hints page, Active tab



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

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

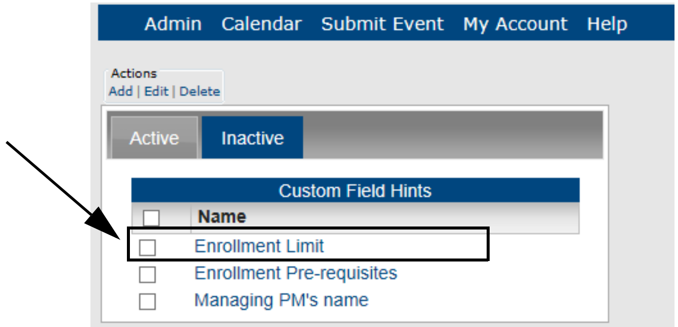
Figure 3-72: Custom Field Hint dialog box, Active hint



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

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

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



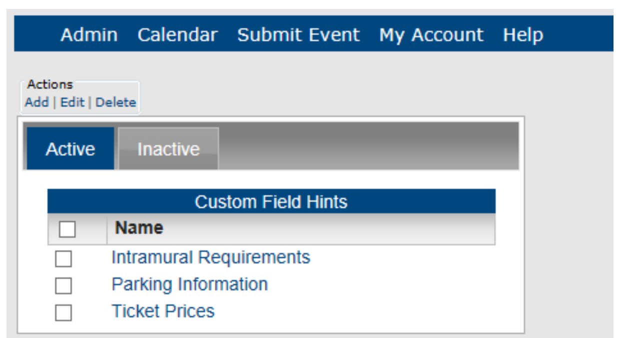
To edit the name for a custom field hint

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

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

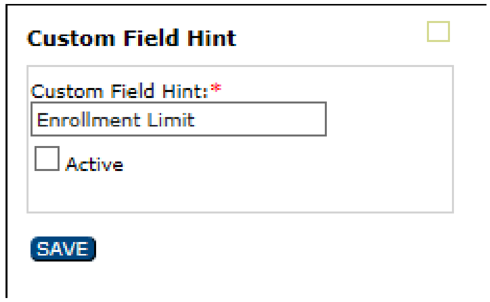
   The Custom Field Hints page opens. The Active tab is the opened tab. All currently active custom field hints in Master Calendar are displayed on this tab.

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



2. If needed, click the Inactive tab to open it.
3. Select the custom field hint that you are editing.
4. Under Actions, select Edit.
   The Custom Field Hint dialog box opens. The dialog box shows the custom field hint name. See Figure 3-75.

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



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

   The edited custom field hint is saved in Master Calendar.

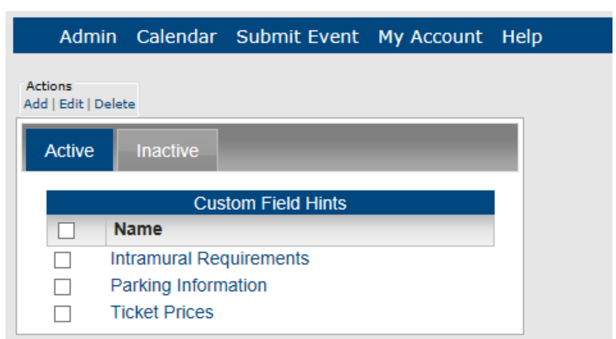
To delete a custom field hint

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

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

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

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



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

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

4. Under Actions, click Delete.

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

5. Click OK in the message.

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

6. Click OK in the message.

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

Managing User Defined Questions

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

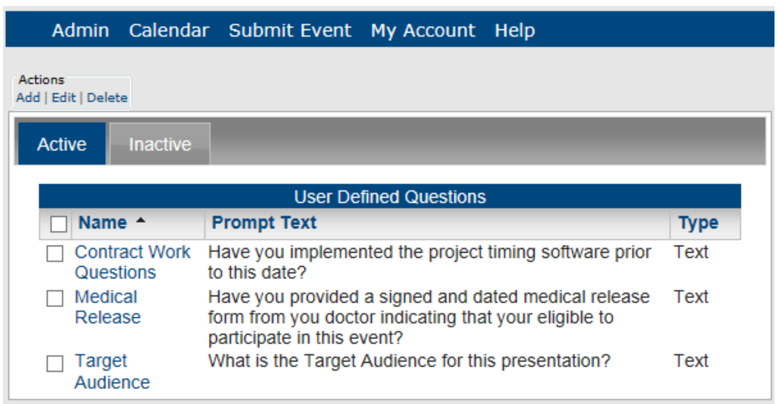
To add a UDQ

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

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

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

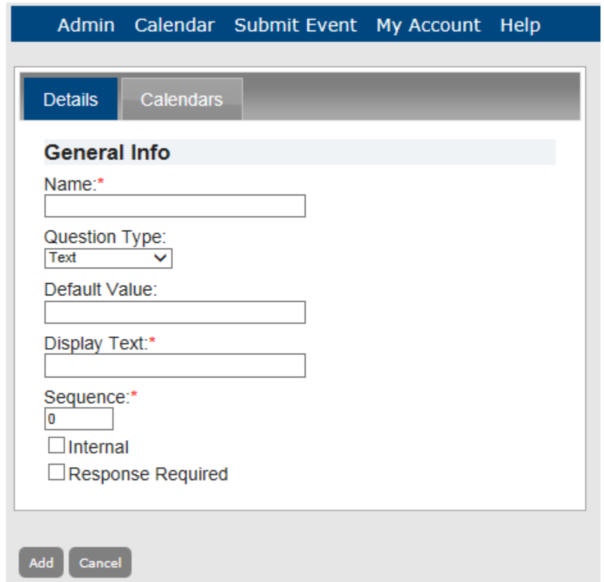
Figure 3-77: Manage UDQs, Active tab



2. Under Actions, click Add.

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

Figure 3-78: Add UQD page, Details tab

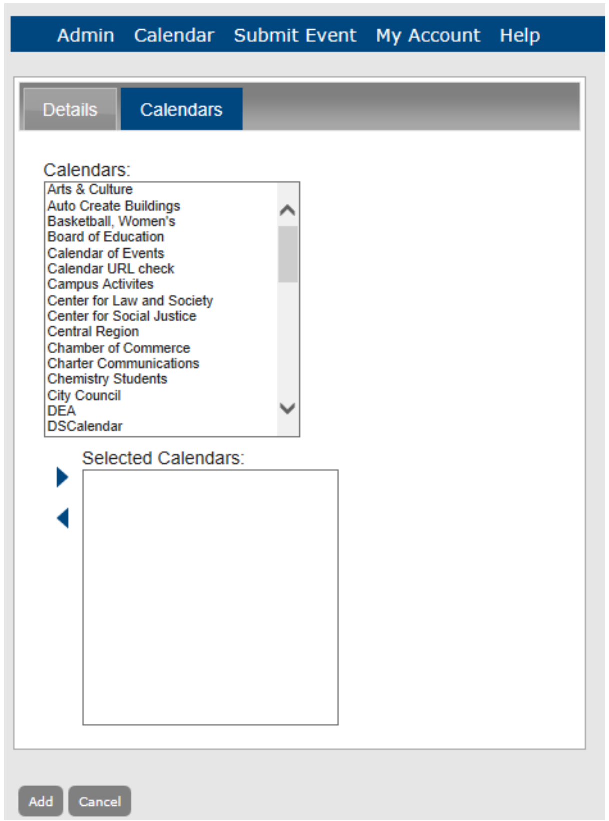


3. Enter the information for the UDQ.

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

4. Click the Calendars tab to open it.

Figure 3-79: Add UDQ page, Calendars tab



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

6. Click Add.

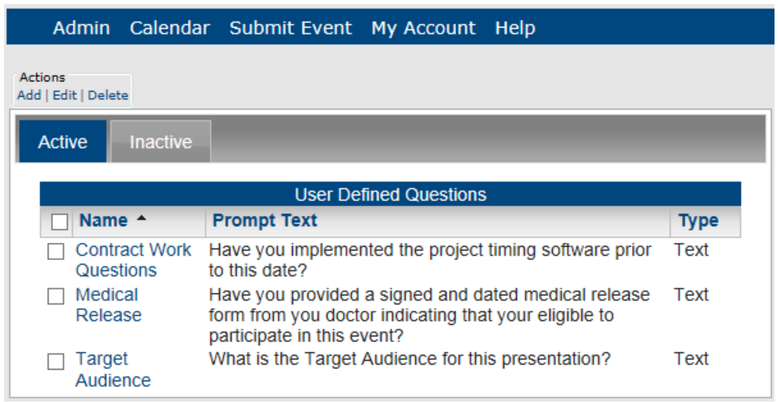
   The UDQ is saved as an *active* UDQ in Master Calendar.

To activate a UDQ

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

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

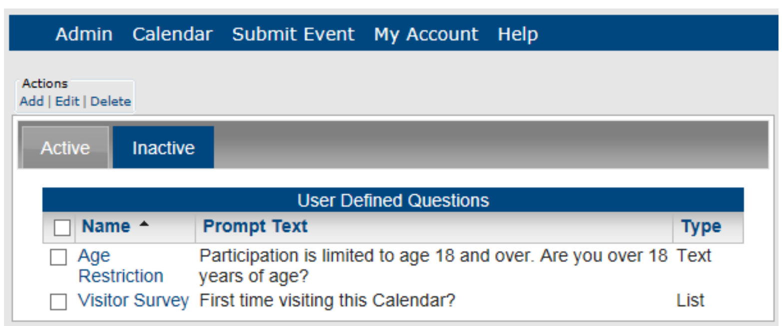
Figure 3-80: Manage UDQs page, Active tab



2. Click the Inactive tab to open it.

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

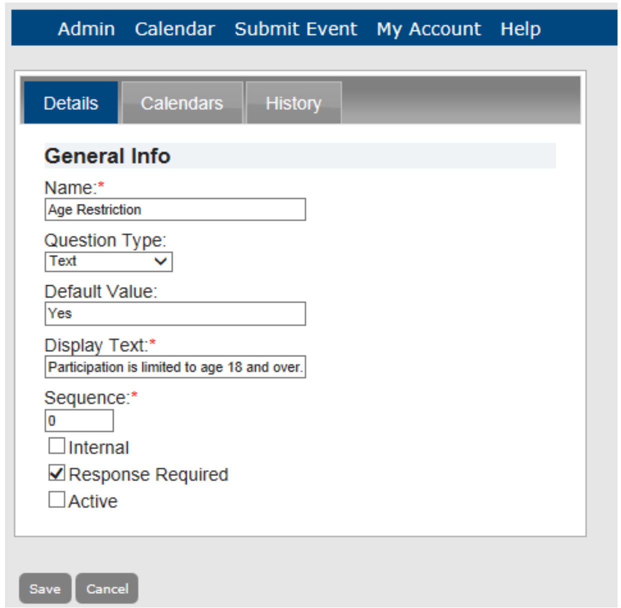
Figure 3-81: Manage UDQs page, Inactive tab



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

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

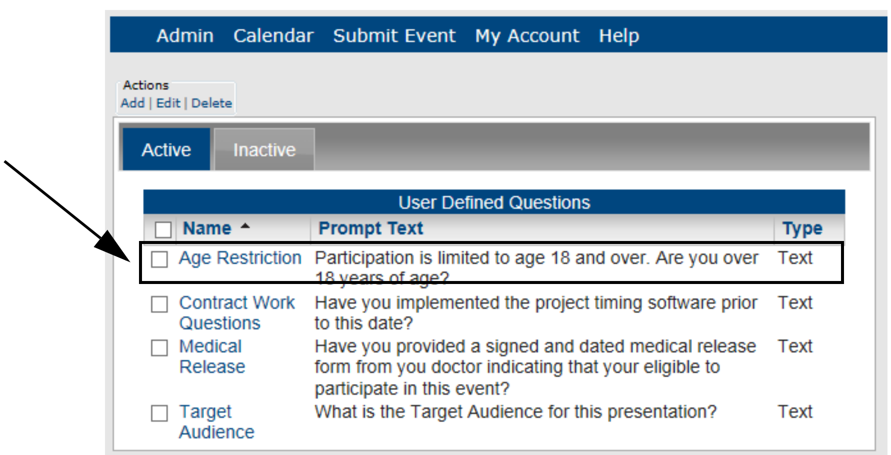
Figure 3-82: Add UDQ page, Details tab, Inactive UDQ



5. Select Active.
6. Click Save.

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

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

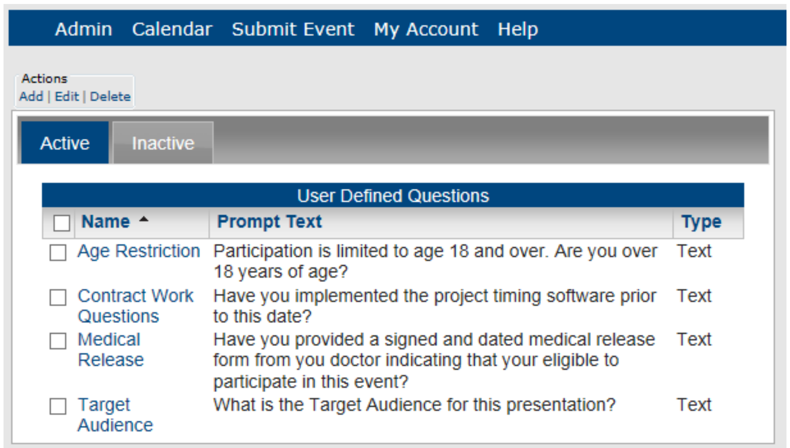


To inactivate a UDQ

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

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

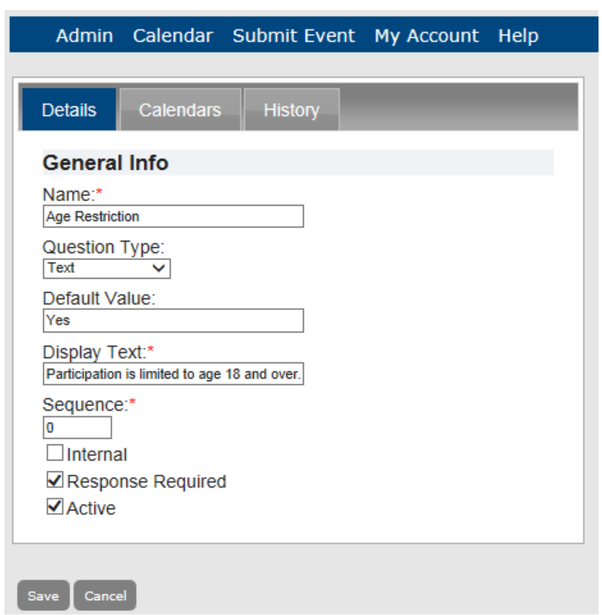
Figure 3-84: Manage UDQs page, Active tab



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

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

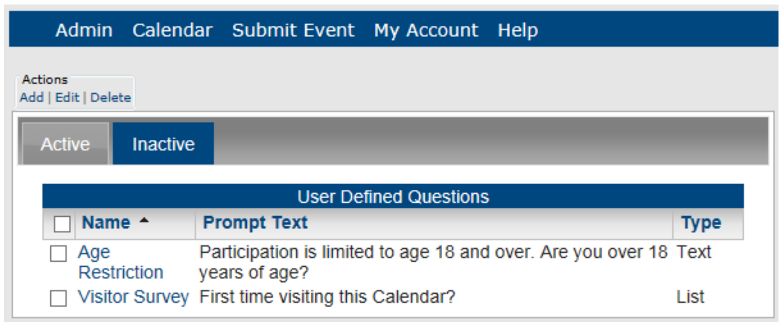
Figure 3-85: Add UDQ page, Details tab, Active UDQ



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

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

Figure 3-86: Manage UDQs page, Inactive tab



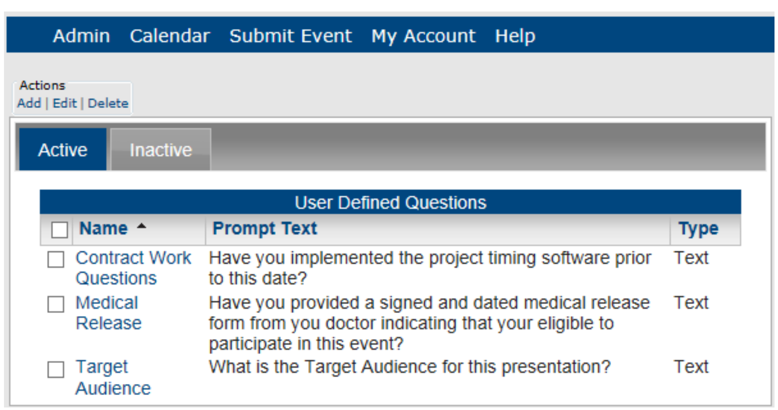
To edit a UDQ

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

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

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

Figure 3-87: Manage UDQs page, Active tab

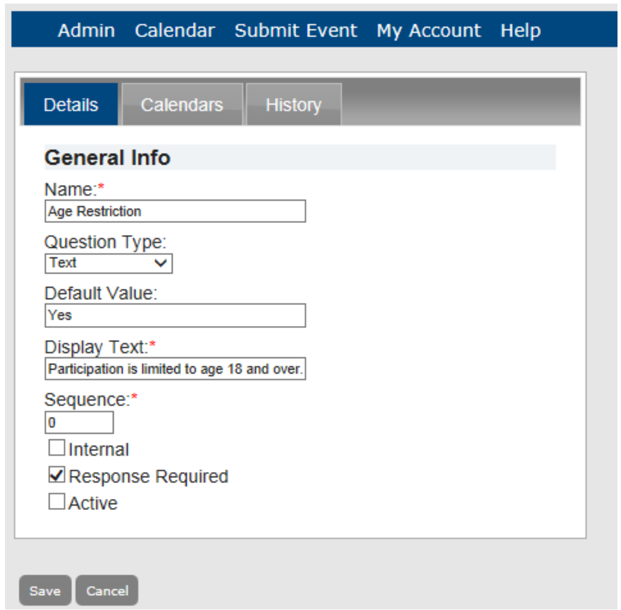


2. If needed, click the Inactive tab to open it.
3. Select the UDQ that you are editing.

4. Under Actions, click Edit.

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

Figure 3-88: Add UDQ page, Details tab



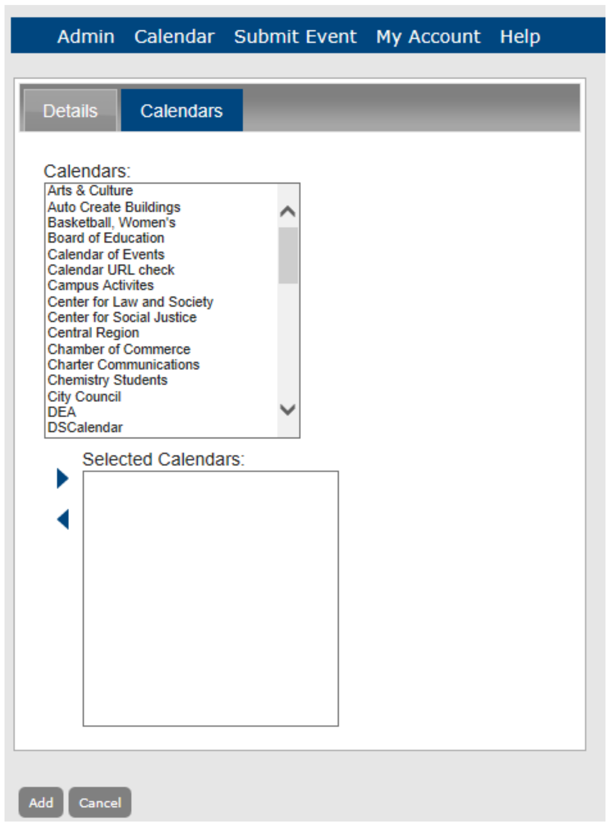
5. Edit the information for the UDQ as needed.

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

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

6. Click the Calendars tab to open it.

Figure 3-89: Add UDQ page, Calendars tab



7. Do one of the following:
   - In the Calendars list, click the calendar to which you are assigning the UDQ (CTRL-click to select multiple calendars), and then click the Add button to add the selected calendars to the Selected Calendars list.
   - In the Selected Calendars list, click the calendar from which you are removing the UDQ (CTRL-click to select multiple calendars), and then click the Remove button to return the calenders to the Calendars list.
8. Click Save to save the edited UDQ in Master Calendar.

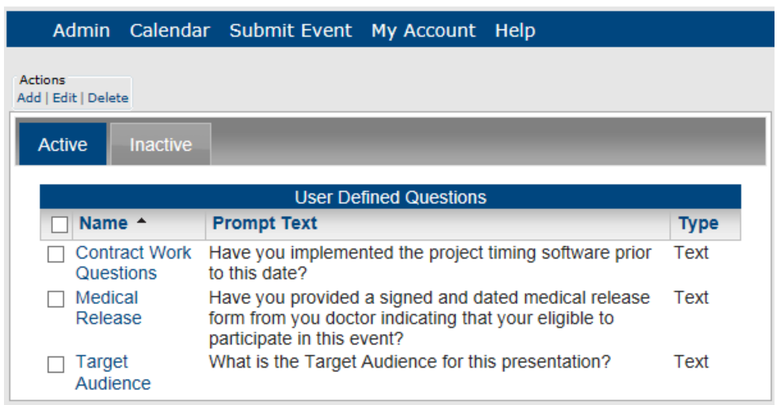
To delete a UDQ

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

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

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

Figure 3-90: Manage UDQs page, Active tab



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

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

4. Under Actions, click Delete.

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

5. Click OK in the message.

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

6. Click OK in the message.

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

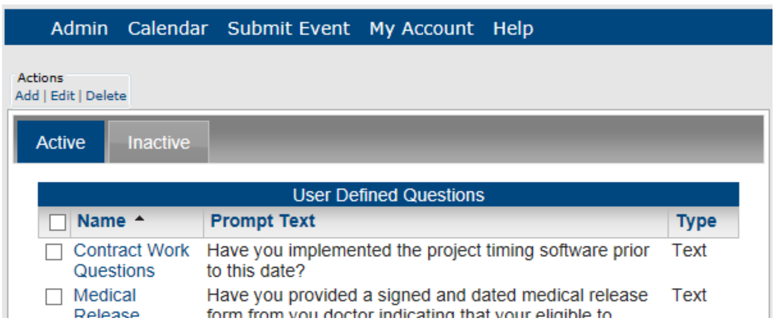
To view the history for a UDQ

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

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

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

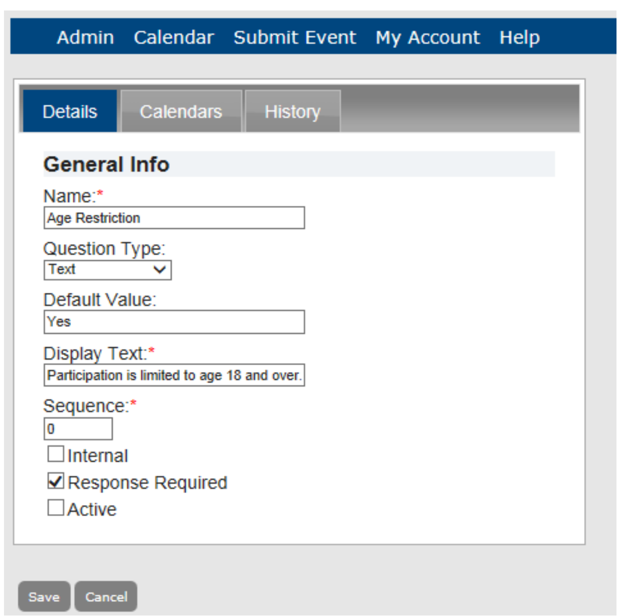
Figure 3-91: Manage UDQs page, Active tab



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

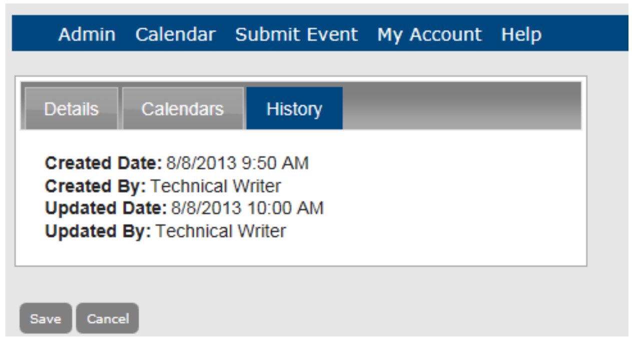
   The Add UDQ page opens. The Details tab is the opened tab.

Figure 3-92: Add UDQ page, Details tab



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

Figure 3-93: Add UDQ page, History tab



Managing Event Icons

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

To add a large event icon

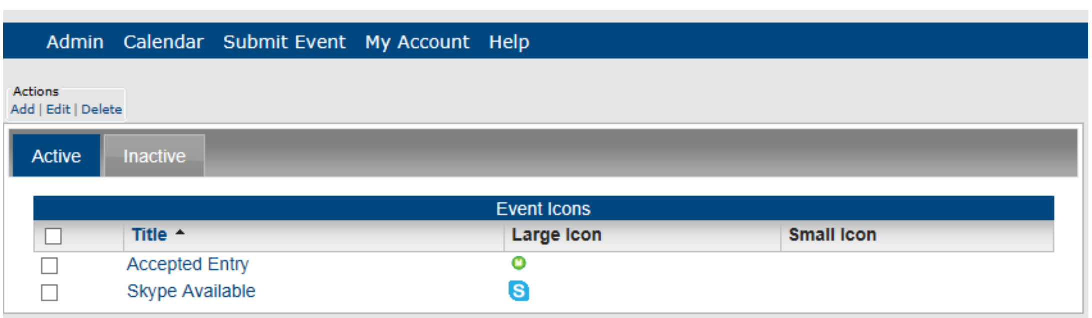
When you add an event icon, you must, at a minimum, add a large icon. You can also add a small icon at the same time, or you can save the event icon and, if needed, add a small icon at a later date.

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

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

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

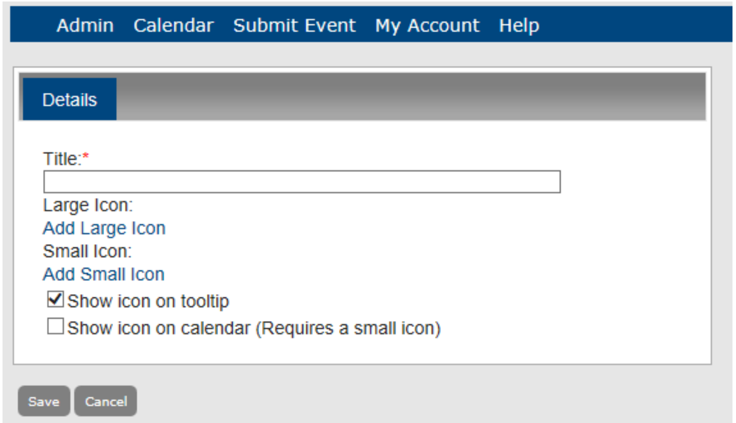
Figure 3-94: Manage Event Icons page, Active tab



2. Under Actions, click Add.

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

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



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

   The Upload Attachment dialog box opens.

Figure 3-96: Upload Attachment dialog box

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

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

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

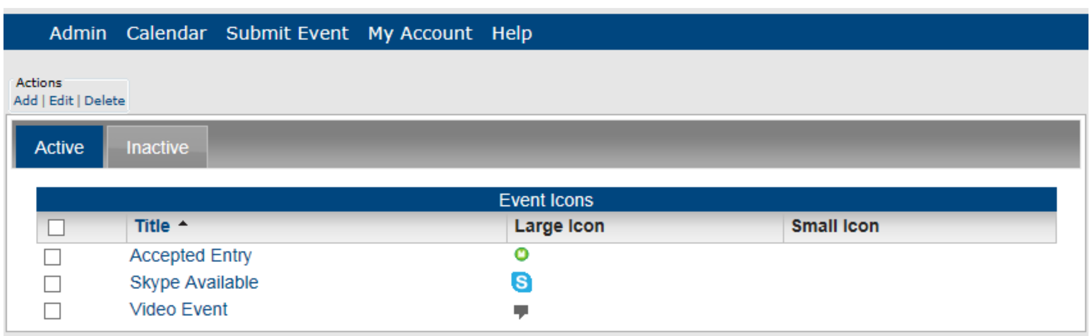
   The Upload Attachment dialog box closes, and the Details tab is updated to reflect the addition of the large event icon. In addition, a “remove” option is displayed next to the name of the event icon. You can click this option to remove an icon if you added an icon in error, or if you want to replace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

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

8. Do one of the following:

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

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



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

To add a small event icon

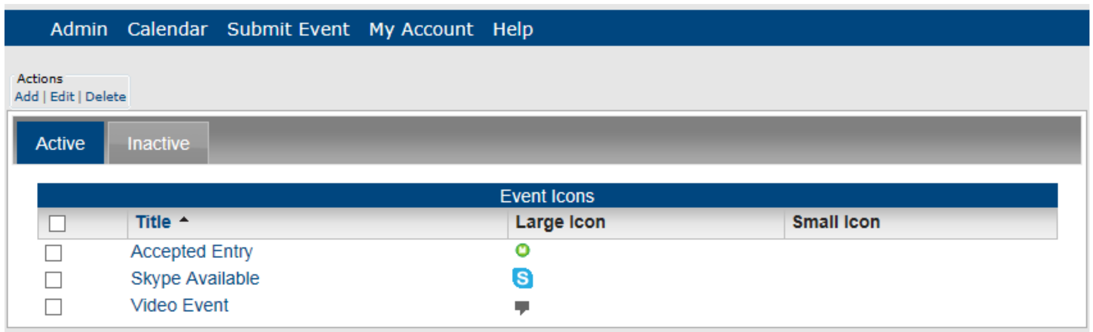
You can add a small icon for both active and inactive event icons.

1. If the Details tab for a selected event icon is already open, continue to Step 4; otherwise, continue to Step 2.

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

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

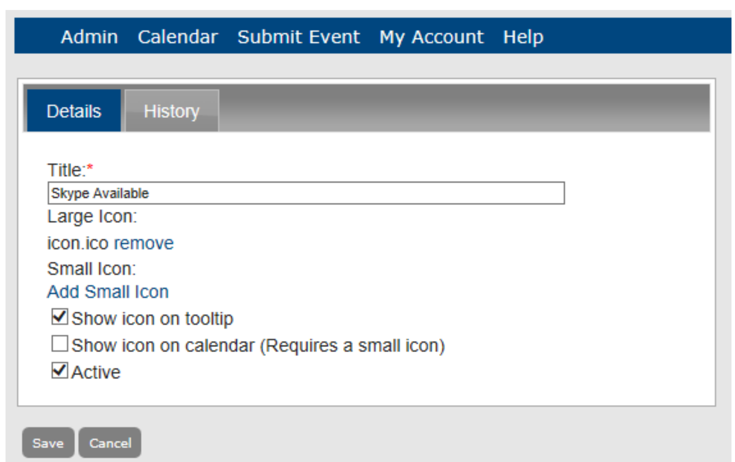
Figure 3-98: Manage Event Icons page, Active tab



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

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

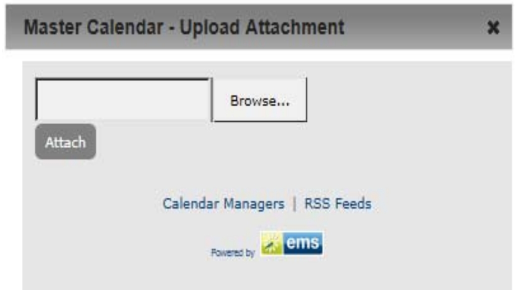
Figure 3-99: Add Event Icon page, Details tab



6. Click Add Small Icon.

   The Upload Attachment dialog box opens.

Figure 3-100: Upload Attachment dialog box



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

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

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

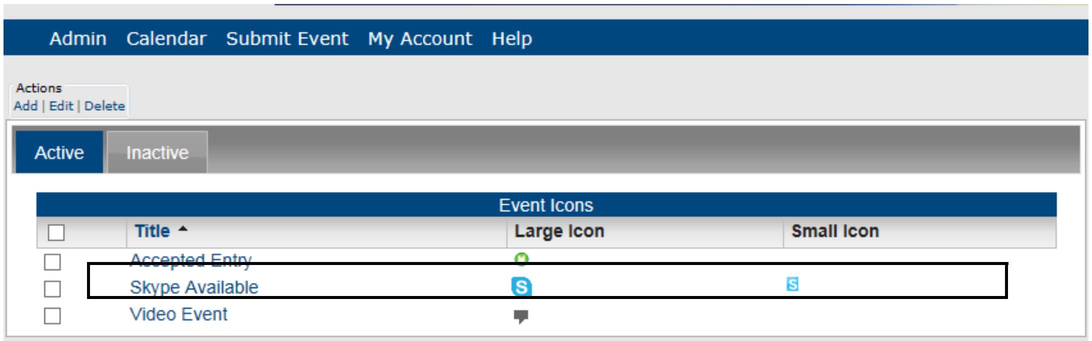
If the icon that you are attempting to add as the small icon exceeds the allowed dimensions (12 pixels x 12 pixels), then after you click Attach, the Browse field in the Upload Attachment dialog box is not automatically populated. Instead, it remains blank and a message is displayed above the Browse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

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

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

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

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

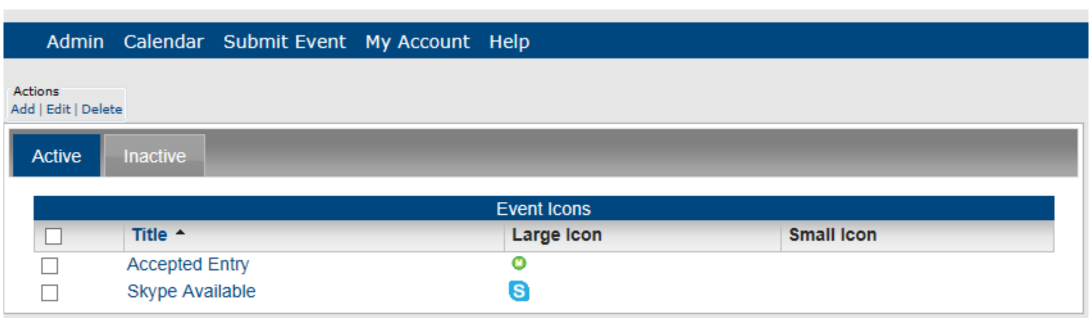


To activate an event icon

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

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

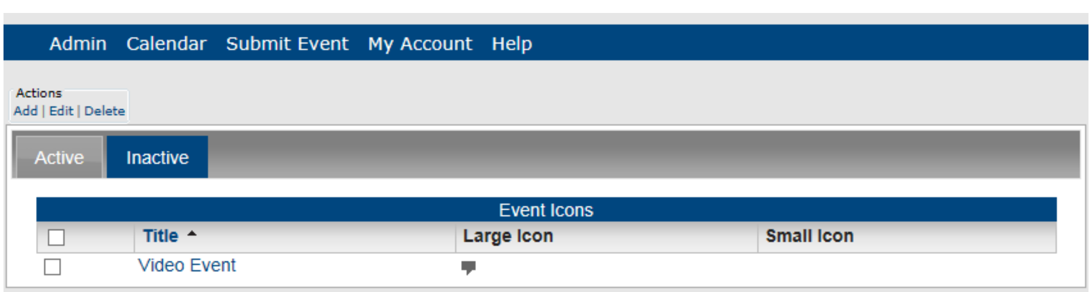
Figure 3-102: Manage Event Icons page, Active tab



2. Click the Inactive tab to open it.

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

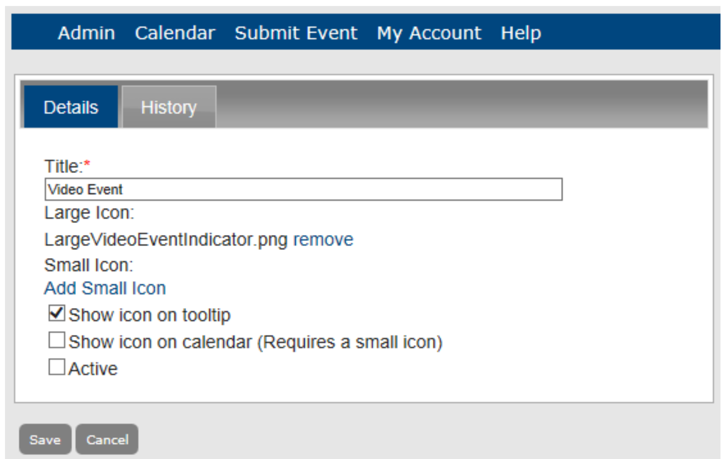
Figure 3-103: Manage Event Icons page, Inactive tab



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

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

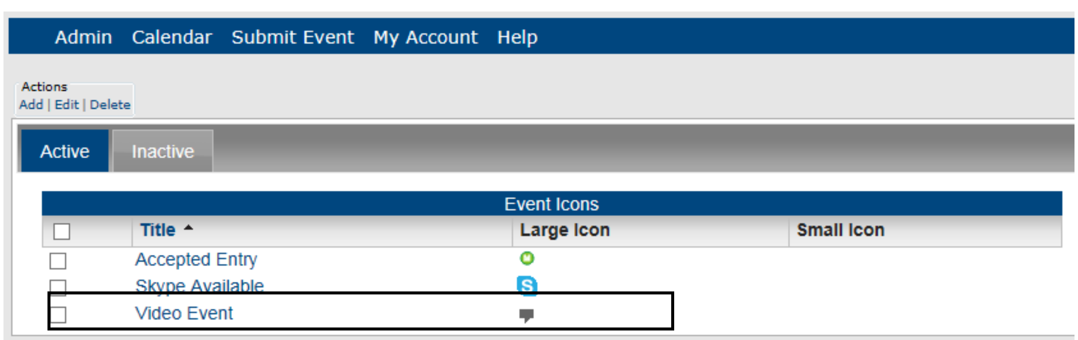
Figure 3-104: Add Event Icon page, Details tab



5. Select Active.
6. Click Save.

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

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

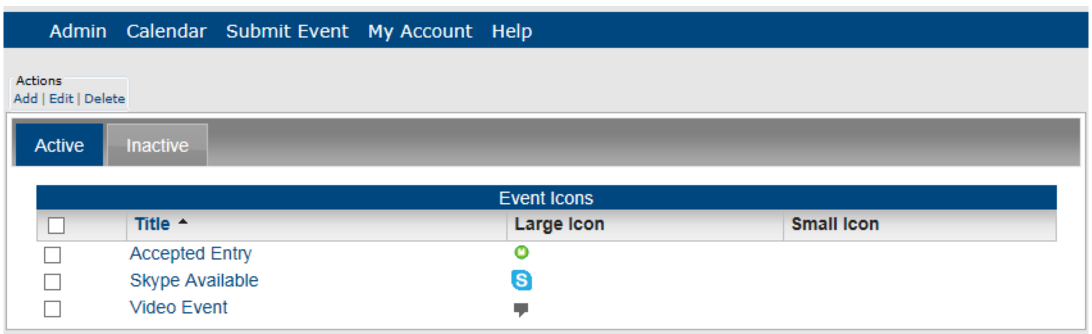


To inactivate an event icon

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

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

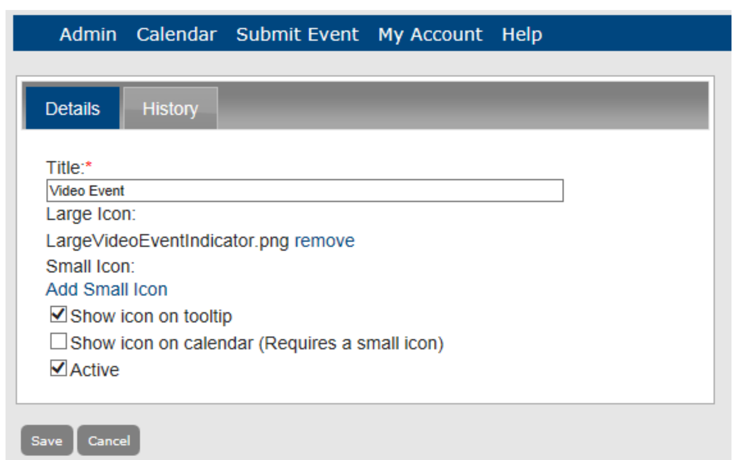
Figure 3-106: Manage Event Icons page, Active tab



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

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

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

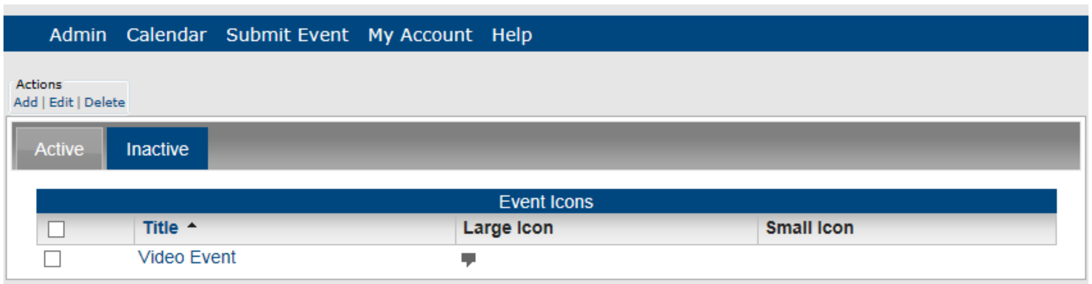


4. Clear the Active option.

5. Click Save.

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

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



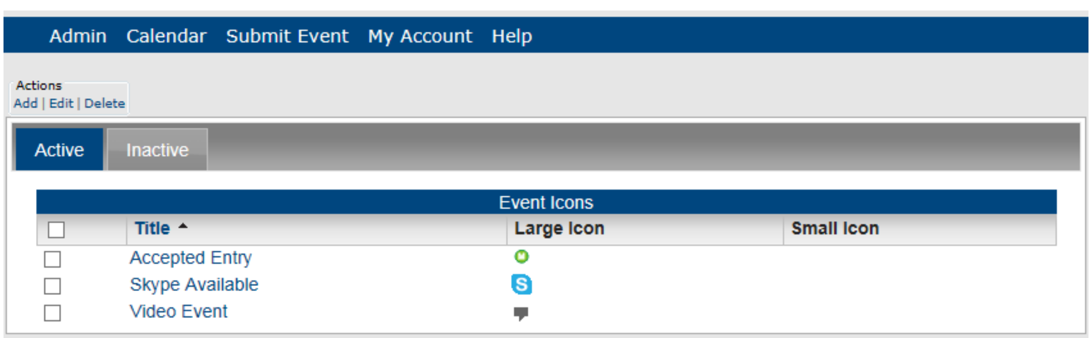
To edit an event icon

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

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

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

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

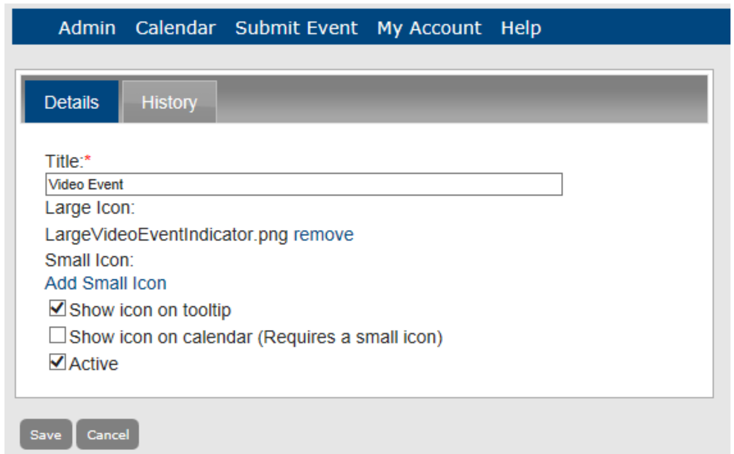


2. If needed, open the Inactive tab.
3. Select the event icon that you are editing.

4. Under Actions, click Edit.

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

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



5. Edit the event icon as needed:
   - You can edit the title.
   - You can click remove to remove the large icon and replace it with another. (See “To add a large event icon”.)
   - You can click remove to remove the small icon and replace it another. (See “To add a small event icon”.)
   - You can select or clear the Show icon on tooltip option and the Show icon on calendar option.
6. Click Save to save the edited event icon in Master Calendar.

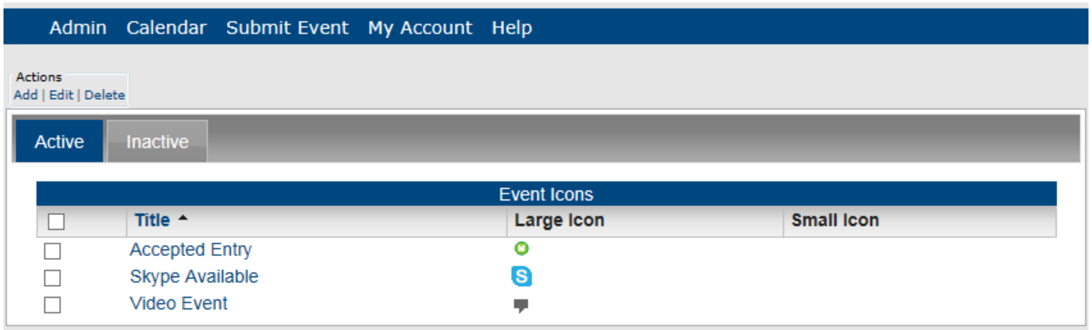
To delete an event icon

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

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

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

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



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

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

4. Under Actions, click Delete.

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

5. Click OK in the message.

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

6. Click OK in the message.

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

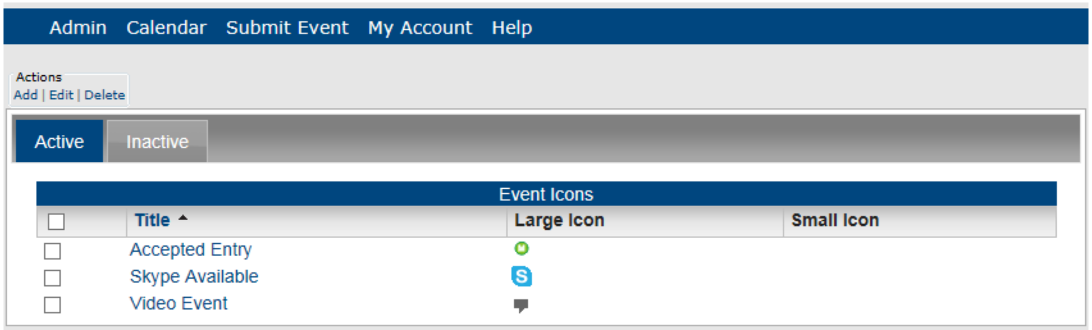
To view the history for an event icon

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

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

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

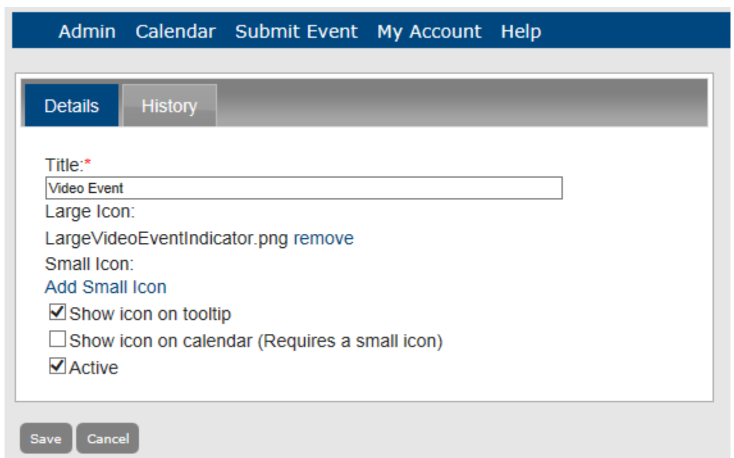
Figure 3-112: Manage Event Icons page, Active tab



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

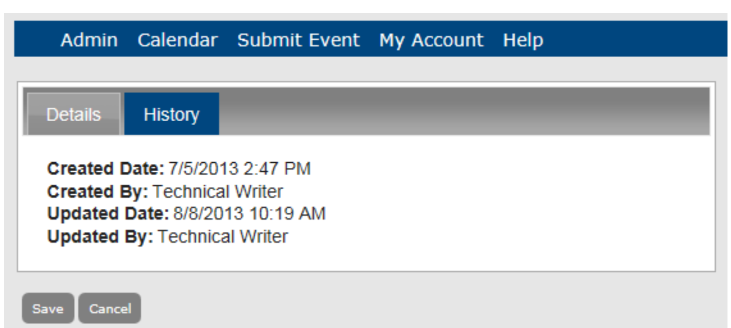
   The Add Event Icon page opens. The Details tab is the opened tab.

Figure 3-113: Details tab



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

Figure 3-114: Add Event Icon, History tab



Managing Cultures

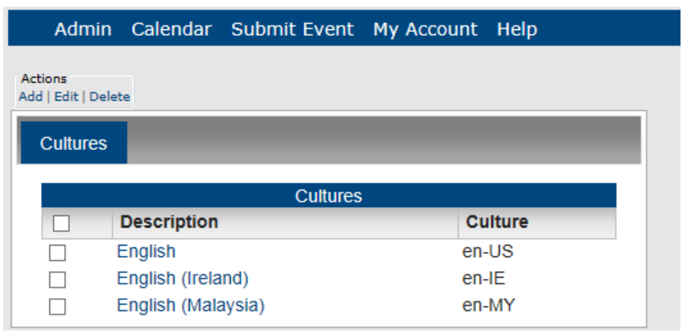
If you need to add language translation capability for your Master Calendar pages (menu text, menu options, field labels, and help text), then you must configure cultures. Each *culture* represents a foreign language for which you must provide translations in Master Calendar. You can also edit the description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

To configure a culture

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

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

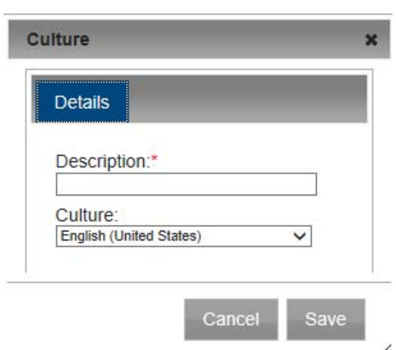
Figure 3-115: Manage Cultures page



2. Under Actions, click Add.

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

Figure 3-116: Culture dialog box, Details tab



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

   A message opens indicating that the culture was saved.
6. Click OK in the message.

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

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

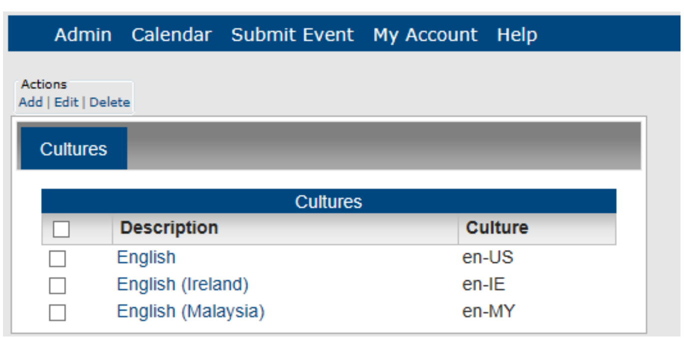
To edit a culture

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

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

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

Figure 3-117: Manage Cultures page



2. Select the culture that you are editing.

3. Under Actions, click Edit.

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

Figure 3-118: Culture dialog box

4. Edit the description for the culture.
5. Click Save.

   A message opens indicating that the culture was saved.
6. Click OK in the message.

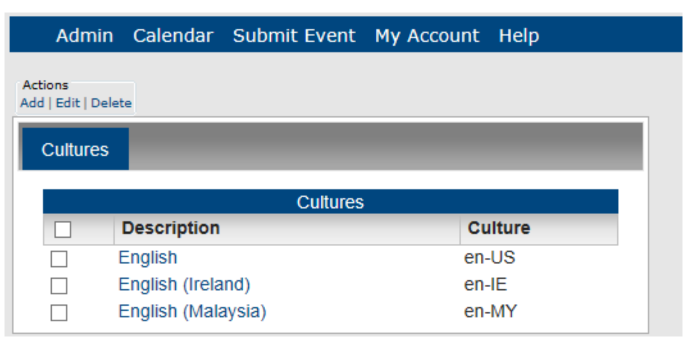
   The message closes and the newly edited culture is displayed on the Manage Cultures page.

To delete a culture

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

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

Figure 3-119: Manage Cultures page



2. Select the culture that you are deleting.

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

3. Under Actions, click Delete.

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

4. Click OK in the message.

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

5. Click OK in the message.

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

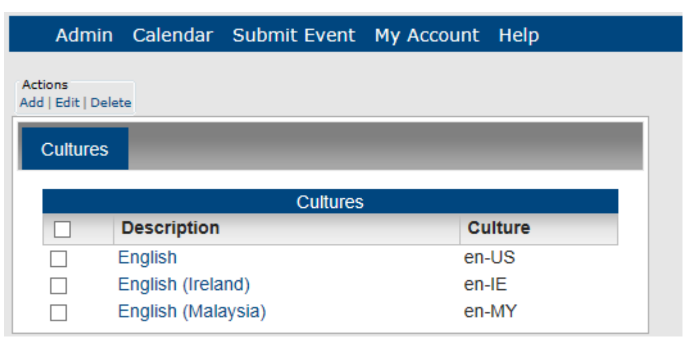
To view the history for a culture

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

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

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

Figure 3-120: Manage Cultures page



2. Select the culture that you are editing.

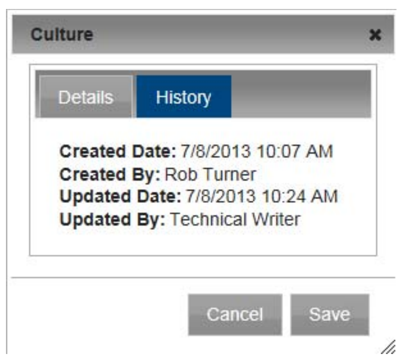
3. Under Actions, click Edit.

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

Figure 3-121: Culture dialog box

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

Figure 3-122: History tab



Configuring Special Dates and Announcements

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

This chapter covers the following topics:

- "Managing Special Dates"
- "Managing Announcements"
- "Importing Events into Master Calendar"

Managing Special Dates

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

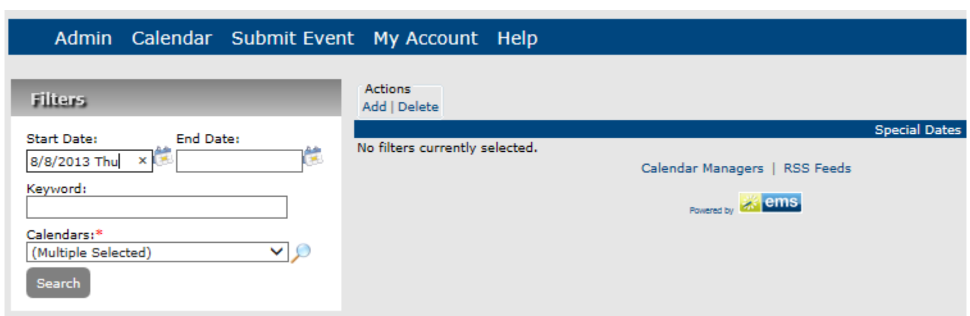
To search for a special date

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

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

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

Figure 4-1: Manage Special Dates page



2. Enter the search criteria for the special date.

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

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

3. Click Search.

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

Figure 4-2: Special Dates search results

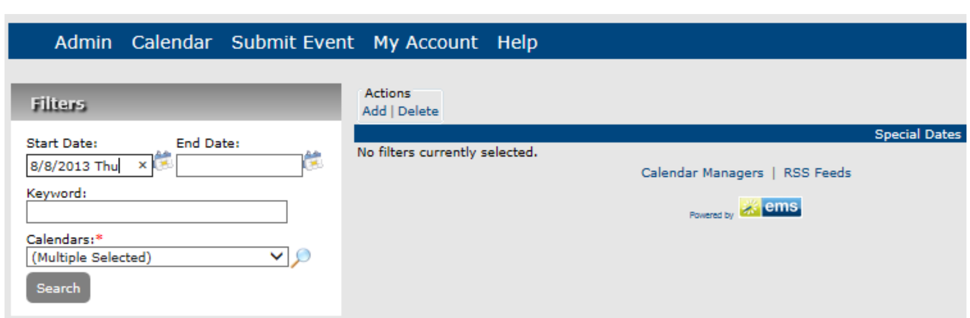
To add a special date

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

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

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

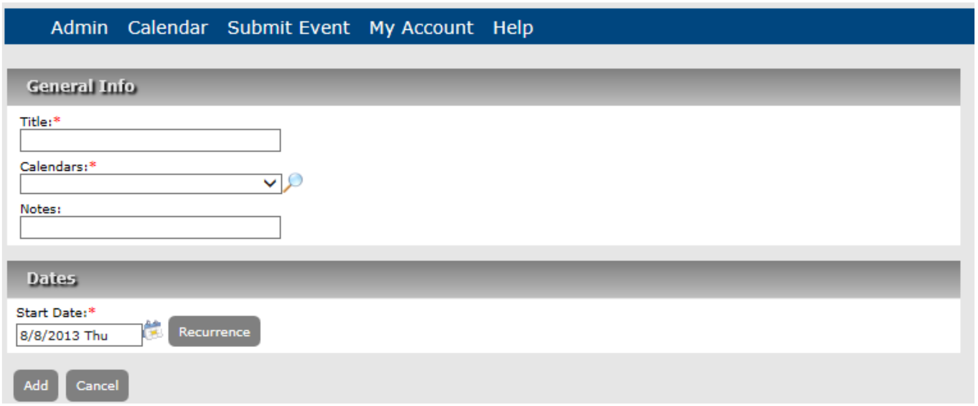
Figure 4-3: Manage Special Dates page



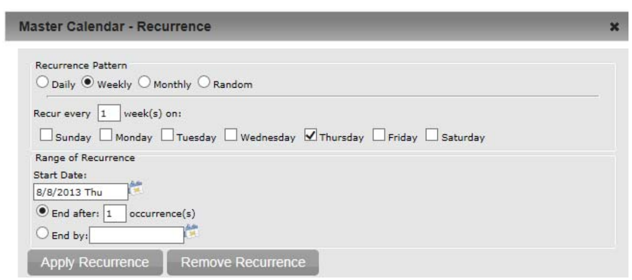
2. Under Actions, click Add.

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

Figure 4-4: Add Special Dates page



3. Add the information for the special date.

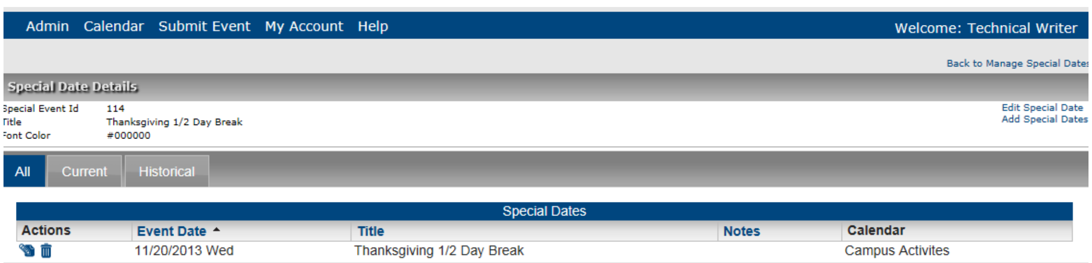
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Title</td><td>The title or name of the special date.</td></tr>
<tr><td>Calendars</td><td>A list of all active calendars to which you have access as a Calendar Manager. Click the Lookup icon to open the Calendars dialog box and select the calendars to which you are adding the special date.</td></tr>
<tr><td>Notes</td><td>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.</td></tr>
<tr><td>Dates</td><td>The date for the special date. The date can be a one-time date, or the date can be recurring. If the date is recurring, click Recurrence to open the Recurrence dialog box and specify the information for the recurring date.
Note: Make sure to click Apply Recurrence in this dialog box after you have completed the recurrence information.
Figure 4-5: Recurrence dialog box

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

4. Click Add.

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

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

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



To edit a special date

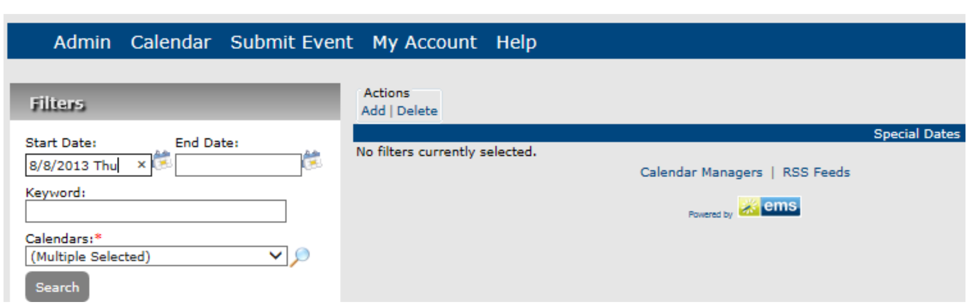
You can edit a one time special date, a recurring special date, or a single instance of a recurring special date. To edit the title and calendars for a special date, you must use the Edit Special Date option. To edit the title, notes, and the date itself, you must use the Edit icon.

To edit the title and calendar for a special date

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

   The Manage Special Dates page opens.

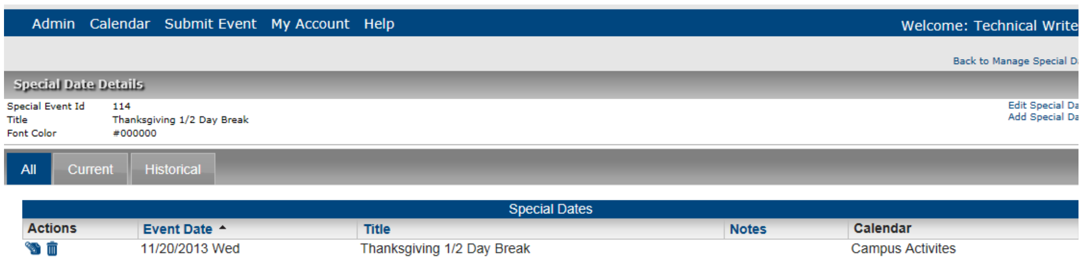
Figure 4-7: Manage Special Dates page



2. Search for the special date. See "To search for a special date".
3. Click on the title of the special date that you are editing.

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

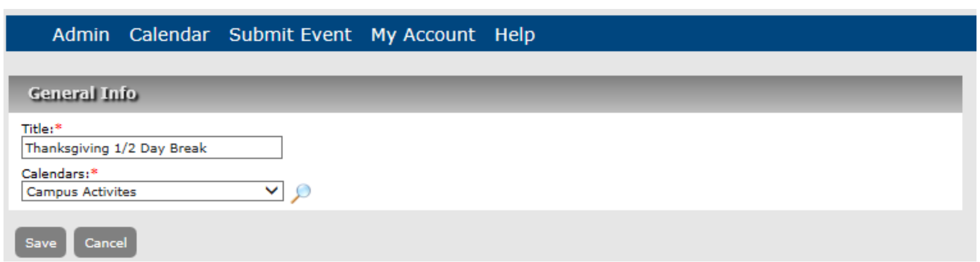
Figure 4-8: Special Date Summary page, All tab



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

   The Edit Special Date page opens.

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



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

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

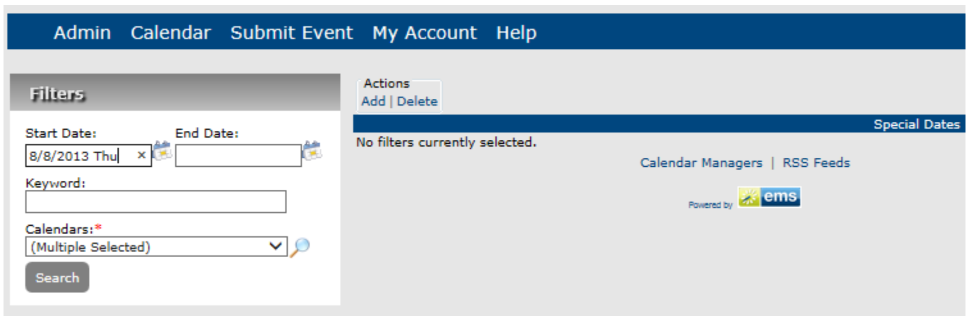
7. Click Save to save the edited special date in Master Calendar.
8. To return to the Manage Special Dates page, click Back to Manage Special Dates.

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

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

   The Manage Special Dates page opens.

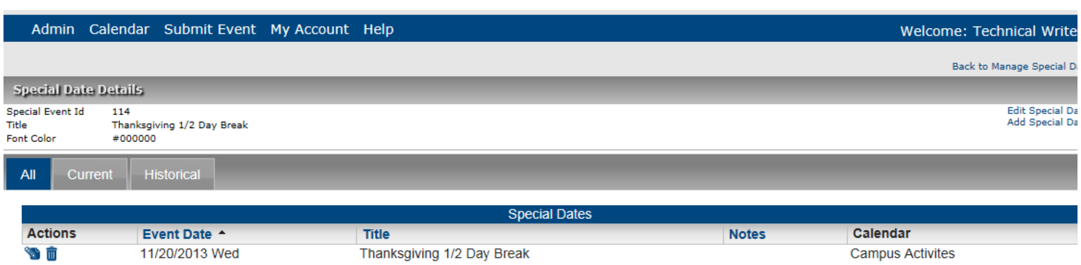
Figure 4-10: Manage Special Dates page



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

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

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

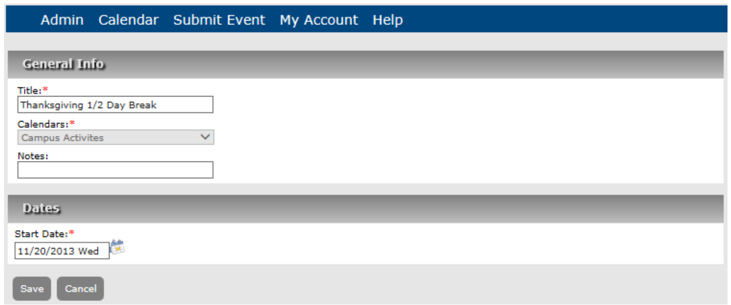


4. If needed, open the Current tab or the Historical tab.

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

   The Edit Special Date page opens.

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



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

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

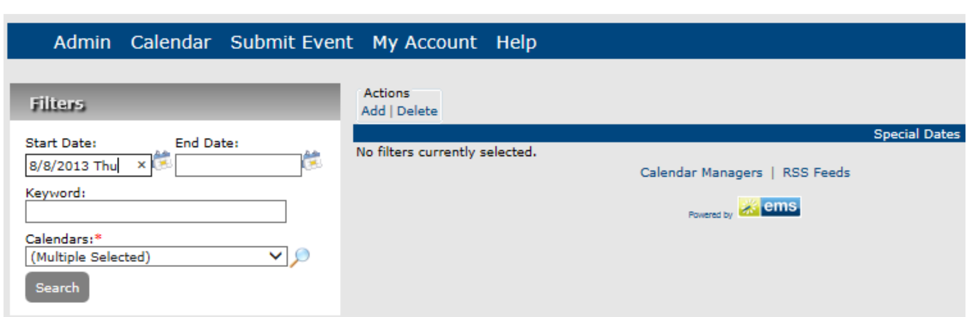
7. Click Save to save the edited occurrence of the special date in Master Calendar.
8. To return to the Manage Special Dates page, click Back to Manage Special Dates.

To add more dates to a special date

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

   The Manage Special Dates page opens.

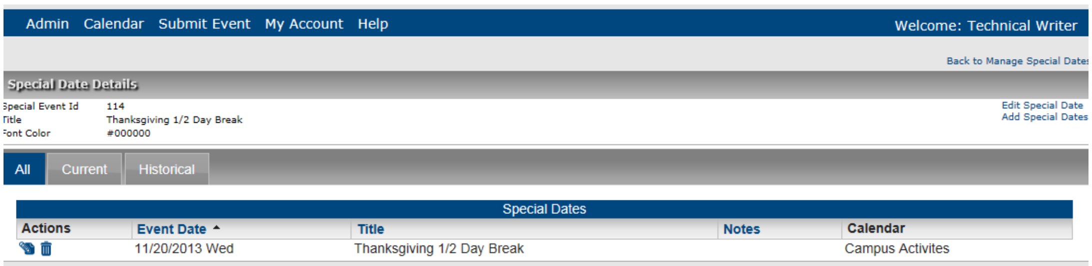
Figure 4-13: Manage Special Dates page



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

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

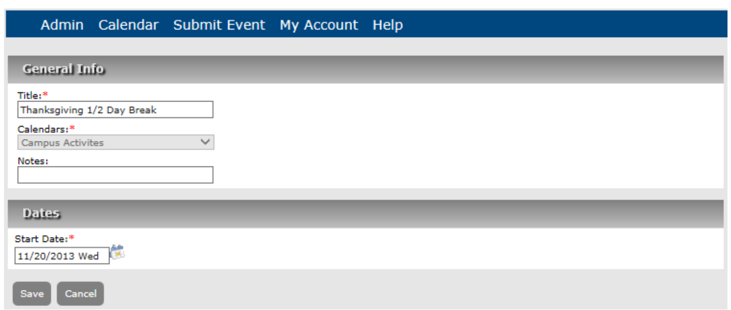
Figure 4-14: Special Date Summary page, All tab



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

   The Add Special Date page opens.

Figure 4-15: Add Special Date page



6. Select the new date that is to be added to the existing special date.

Depending on the date that you add, the new date is displayed on either the Current tab or the Historical tab. It is always displayed on the All tab.

7. Optionally, edit the title, the notes, or both as needed for the new dates.

Field	Description
Title	The title or name of the special date.
Dates	The date for the special date.

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

To delete a special date

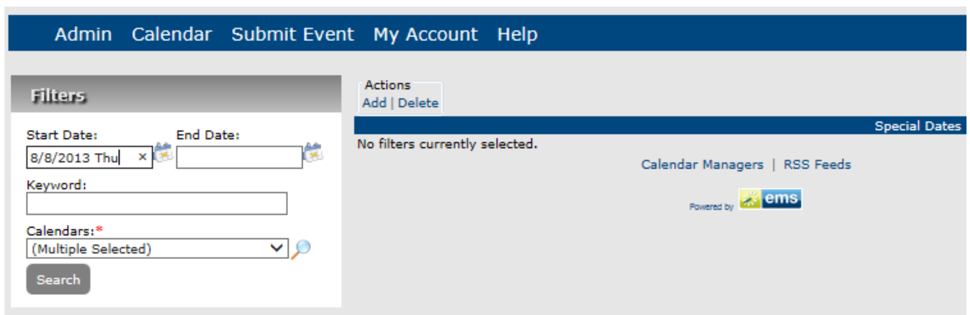
You can delete a one time special date, or you can delete all instances of a recurring special date in a single step. You can also delete a single instance of a recurring special date.

To delete a one time special date or a recurring special date (series)

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

   The Manage Special Dates page opens.

Figure 4-16: Manage Special Dates page



2. Search for the special date. See “To search for a special date”.
3. Select the special dates that you are deleting.

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

4. Under Actions, click Delete.

   A message opens asking you if you are sure that you want to delete all selected dates.
5. Click OK in the message.

   A message opens indicating that all selected dates were deleted.
6. Click OK in the message.

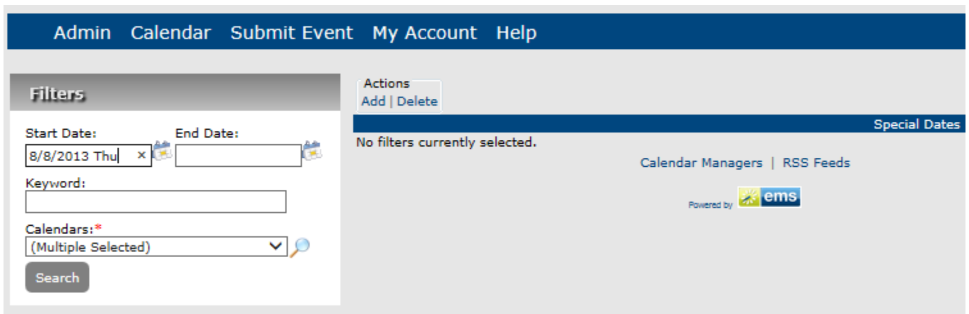
   The special dates are deleted and the Manage Special Dates page is updated to show the remaining, if any, special dates.
7. To return to the Manage Special Dates page, click Back to Manage Special Dates.

To delete a single instance of a recurring special date

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

   The Manage Special Dates page opens.

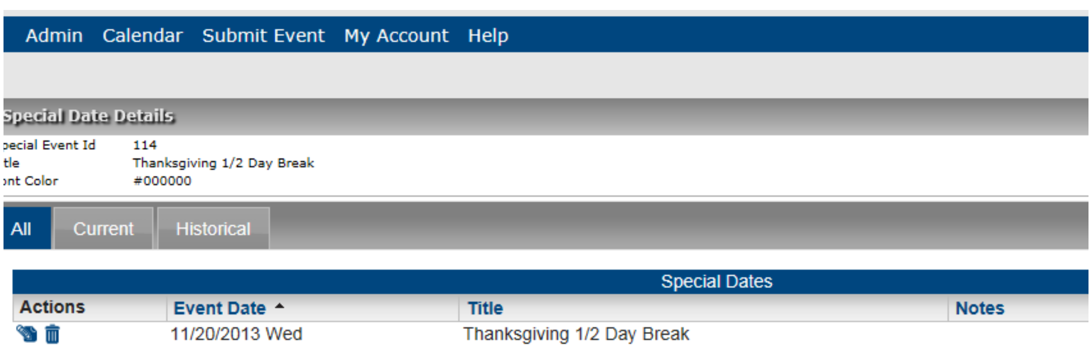
Figure 4-17: Manage Special Dates page



2. Search for the special date. See “To search for a special date”.
3. Click on the title of the recurring special date for which you are deleting dates.

   The Special Date Summary page opens. The All tab is the opened tab.

Figure 4-18: Special Date Summary page, All tab



4. If needed, open the Current tab or the Historical tab.
5. Click the Delete icon next to the single instance of the recurring date that you are deleting.

   A message opens asking you if you are sure that you want to delete the selected date.
6. Click OK in the message.

   The selected date is deleted and no longer is displayed on its corresponding tab (All, Current, or Historical).
7. Click Save to save the deletion of the date instance in Master Calendar.
8. To return to the Manage Special Dates page, click Back to Manage Special Dates.

Managing Announcements

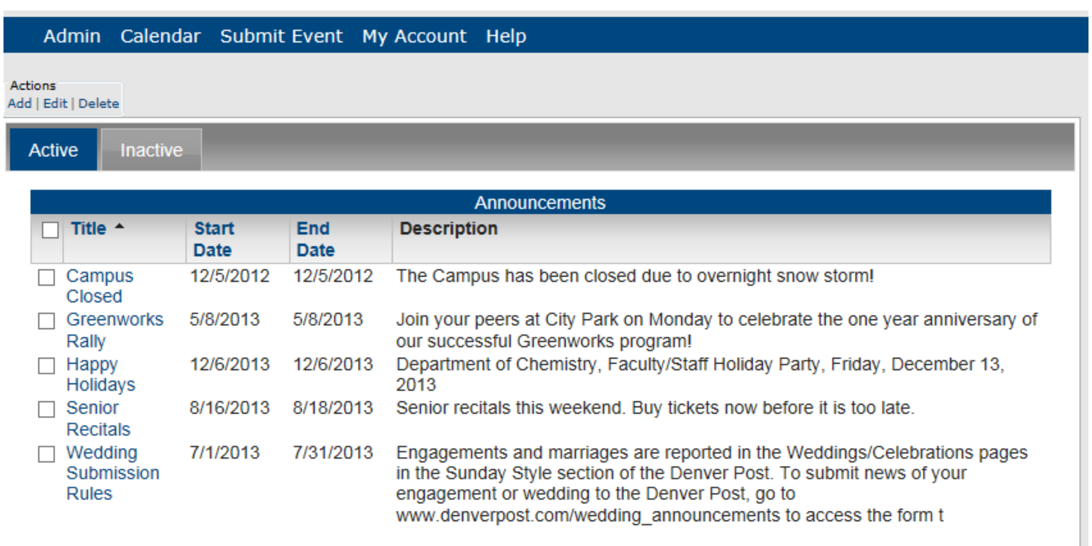
An *announcement* in Master Calendar is a message that is broadcast across the top of the Master Calendar Home page. You might want to use an announcement to call special attention to an event or events on a calendar. For example, if you are managing calendars for a university campus, and one of the calenders is used for invited speaker events, you might want to have an announcement at the top of the Home page that emphasizes when a particularly prominent speaker will be on campus. When you configure an announcement, you can indicate if the announcement is to be displayed as an *alert.* An alert is an announcement that is marked with a special Alert icon to emphasize the importance or criticality of the announcement. Managing announcements consists of adding announcements, activating and inactivating announcements, editing announcements, and deleting announcements. You can also view the history for an announcement.

To add an announcement

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

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

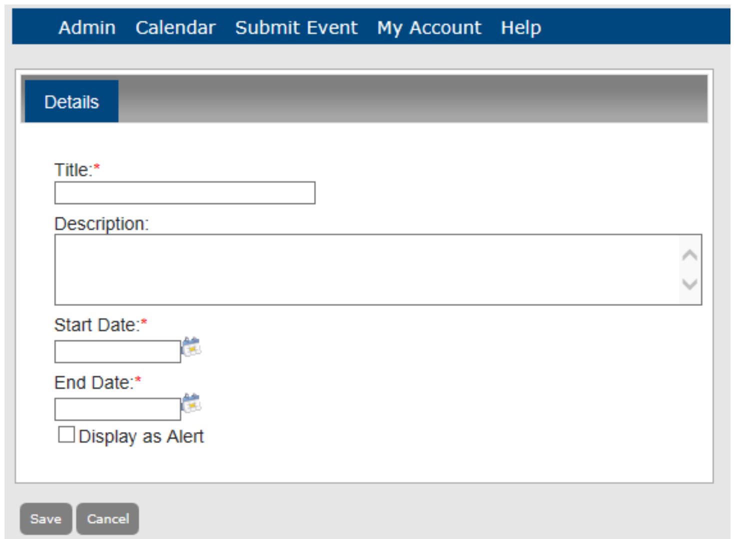
Figure 4-19: Manage Announcements page, Active tab



2. Under Actions, click Add.

   The Add Announcement page opens. The Details tab is the only tab on this page. You use the options on this tab to add the information for the new announcement.

Figure 4-20: Add Announcement page, Details tab



3. Add the information for the announcement.

Field	Description
Title	The title or name of the announcement.
Description	A description of the event.
Start Date/End Date	The first date that you want the announcement to be displayed at the top of the Master Calendar Home page and the last date that you want the announcement to be displayed at the top of the Master Calendar Home page.
Display as Alert	Select this option if the announcement is to be displayed as an alert at the top of the Master Calendar Home page.

4. Click Save.

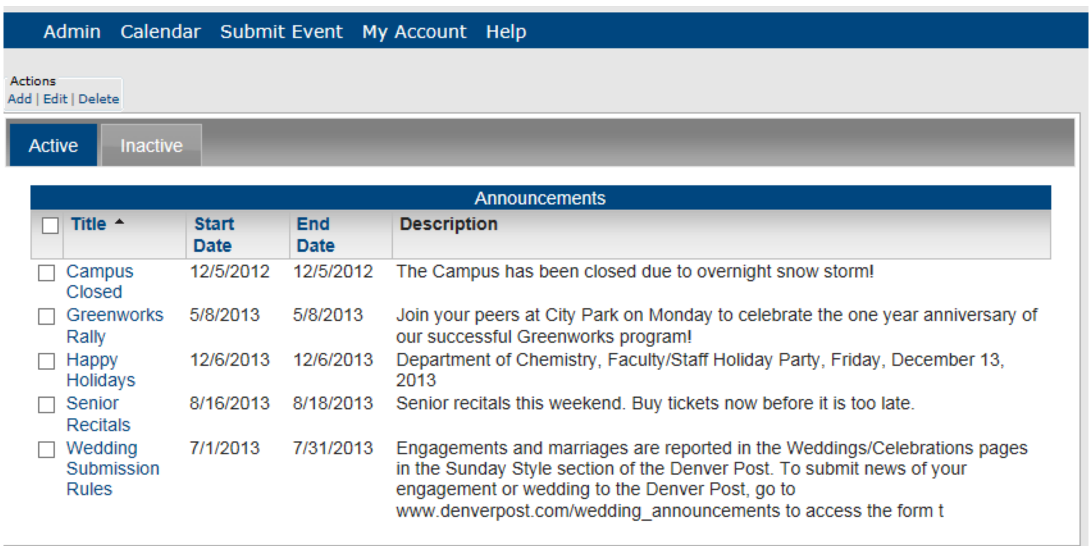
   The announcement is added to Master Calendar as an *active* announcement.

To activate an announcement

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

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

Figure 4-21: Manage Announcements page, Active tab

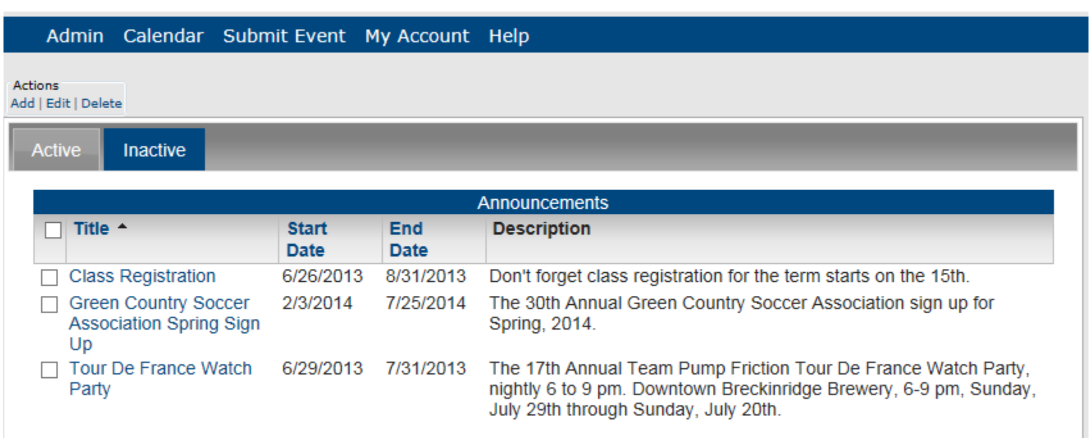


Title	Start Date	End Date	Description
Campus Closed	12/5/2012	12/5/2012	The Campus has been closed due to overnight snow storm!
Greenworks Rally	5/8/2013	5/8/2013	Join your peers at City Park on Monday to celebrate the one year anniversary of our successful Greenworks program!
Happy Holidays	12/6/2013	12/6/2013	Department of Chemistry, Faculty/Staff Holiday Party, Friday, December 13, 2013
Senior Recitals	8/16/2013	8/18/2013	Senior recitals this weekend. Buy tickets now before it is too late.
Wedding Submission Rules	7/1/2013	7/31/2013	Engagements and marriages are reported in the Weddings/Celebrations pages in the Sunday Style section of the Denver Post. To submit news of your engagement or wedding to the Denver Post, go to www.denverpost.com/wedding_announcements to access the form t

2. Click the Inactive tab to open it.

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

Figure 4-22: Manage Announcements page, Inactive tab



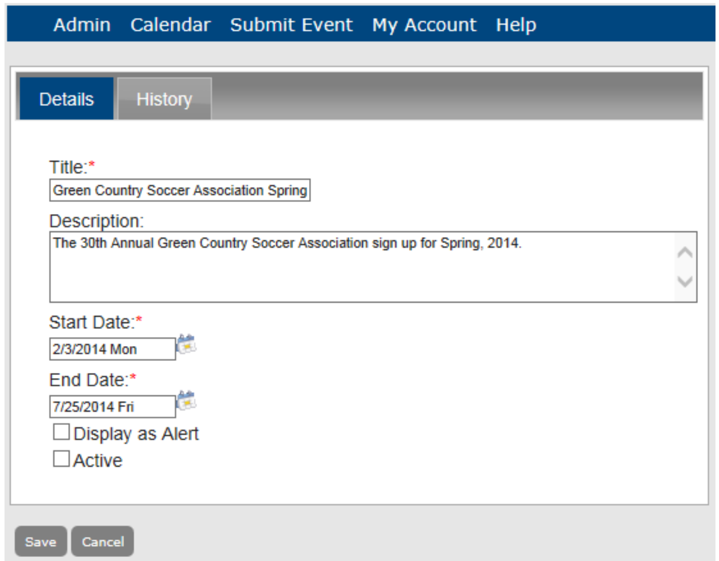
Title	Start Date	End Date	Description
Class Registration	6/26/2013	8/31/2013	Don't forget class registration for the term starts on the 15th.
Green Country Soccer Association Spring Sign Up	2/3/2014	7/25/2014	The 30th Annual Green Country Soccer Association sign up for Spring, 2014.
Tour De France Watch Party	6/29/2013	7/31/2013	The 17th Annual Team Pump Friction Tour De France Watch Party, nightly 6 to 9 pm. Downtown Breckinridge Brewery, 6-9 pm, Sunday, July 29th through Sunday, July 20th.

3. Select the announcement that you are activating.

4. Under Actions, click Edit.

   The Add Announcement page open. The Details tab is the opened tab. The tab shows the title, description, and start and end dates for the announcement. The Active option is not selected.

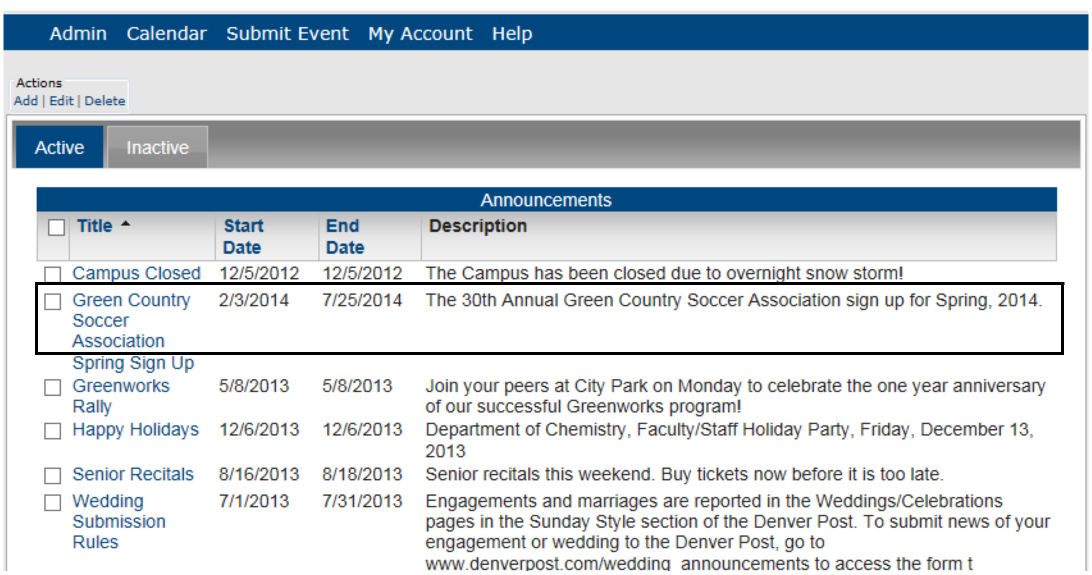
Figure 4-23: Add Announcement page, Details tab, Inactive announcement



5. Select Active.
6. Click Save.

   The announcement is activated and is displayed on the Active tab on the Manage Announcements page.

Figure 4-24: Manage Announcements page, Active tab

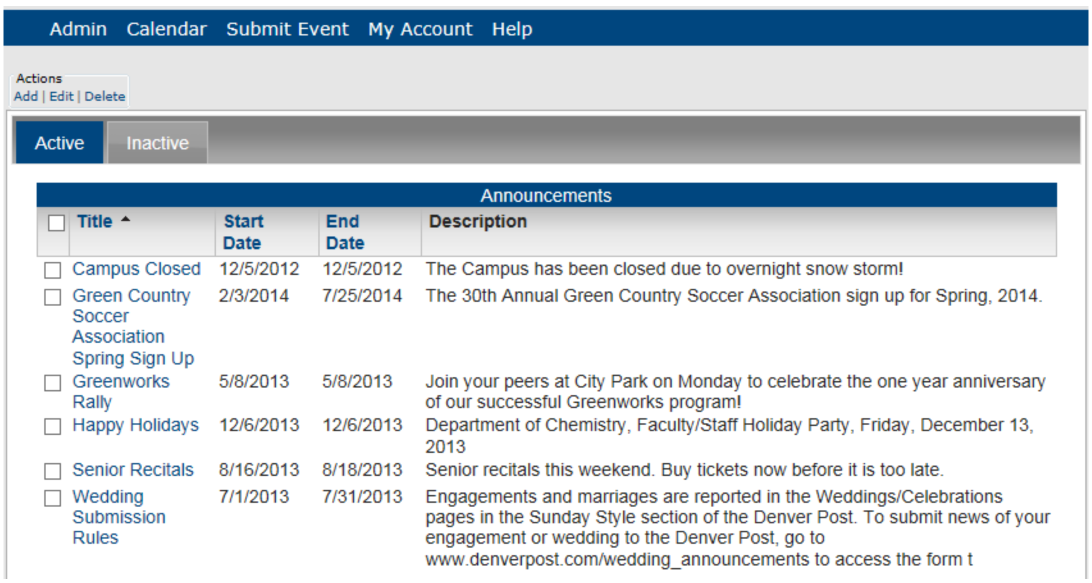


To inactivate an announcement

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

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

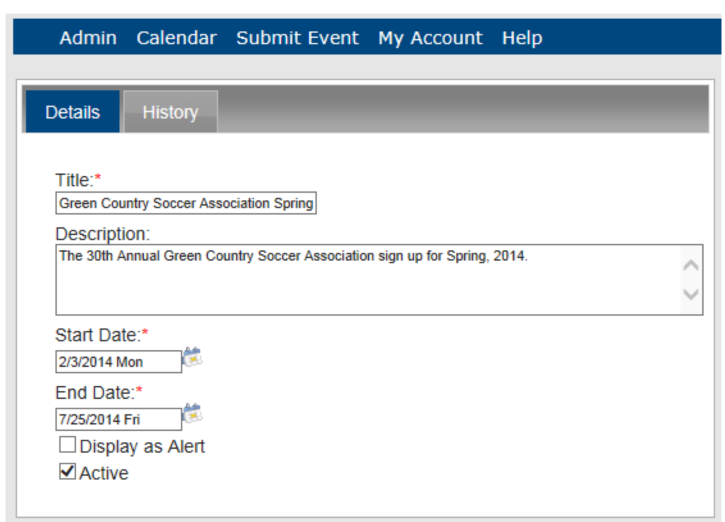
Figure 4-25: Manage Announcements page, Active tab



2. Select the announcement that you are inactivating.
3. Under Actions, click Edit.

   The Add Manage Announcements page opens. The Details tab is the opened tab.

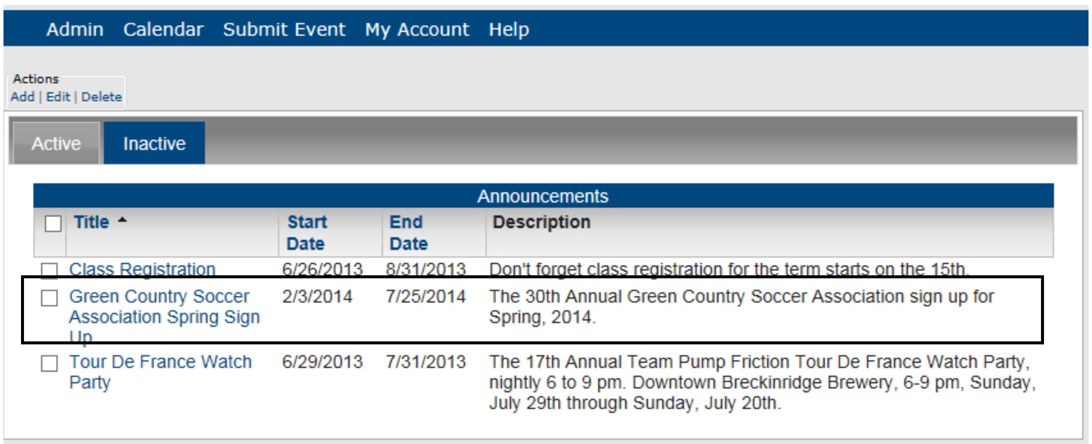
Figure 4-26: Add Announcement page, Details tab, Active announcement



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

   The announcement is inactivated and is displayed on the Inactive tab on the Manage Announcements page. The announcement is also removed the Master Calendar Home page.

Figure 4-27: Manage Announcements page, Inactive tab



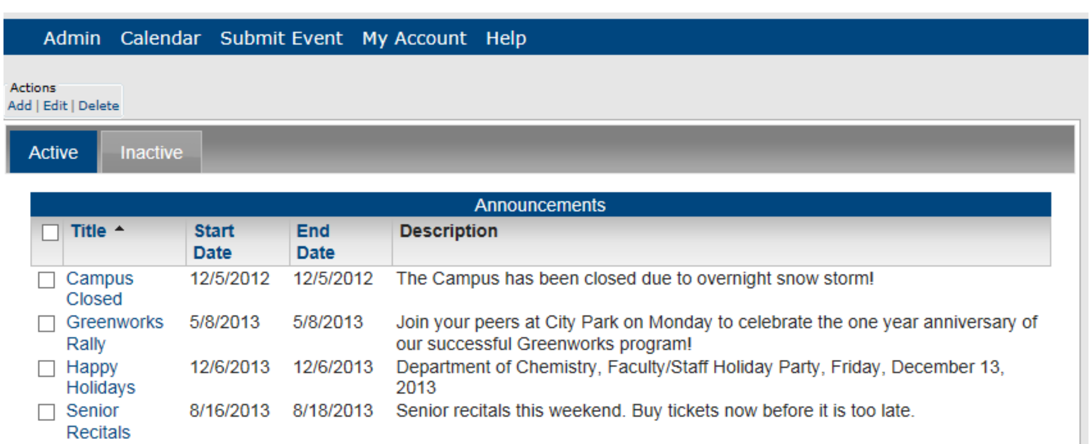
To edit the information for an announcement

You can edit the title, description, or the start and end dates, or any combination of this information for an announcement. You can edit this information for both active and inactive announcements.

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

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

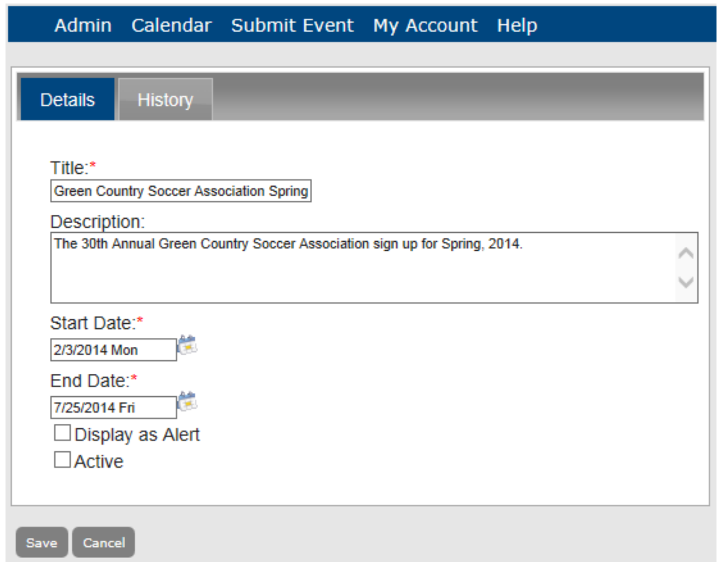
Figure 4-28: Manage Announcements page, Active tab



2. If needed, click the Inactive tab to open it.
3. Select the announcement for which you are editing the information.
4. Under Actions, click Edit.

   The Add Announcements page opens. The Details tab is the opened tab. The tab shows the title, description, and start and end dates for the announcement.

Figure 4-29: Add Announcement page, Details tab



5. Edit the title, description, or the start and end dates, or any combination of this information for the announcement as needed.
6. Click Save to save the edited announcement in Master Calendar.

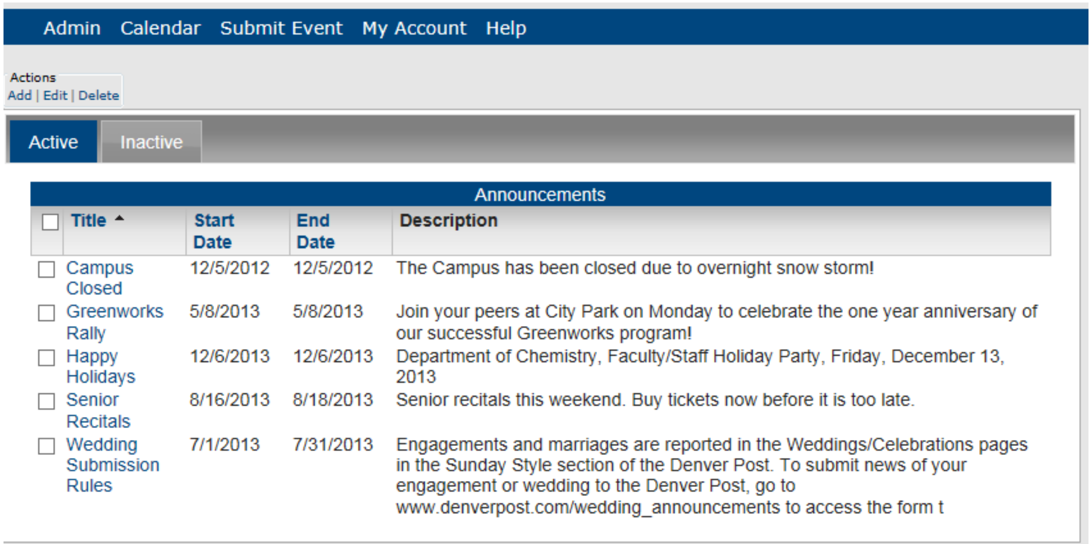
To delete an announcement

You can delete both active and inactive announcements.

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

   The Manage Announcements page opens. The Active tab is the opened tab. All currently active announcements in Master Calendar are displayed on this tab. See Figure 4-30.

Figure 4-30: Manage Announcements page, Active tab



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

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

4. Under Actions, click Delete.

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

5. Click OK in the message.

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

6. Click OK in the message.

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

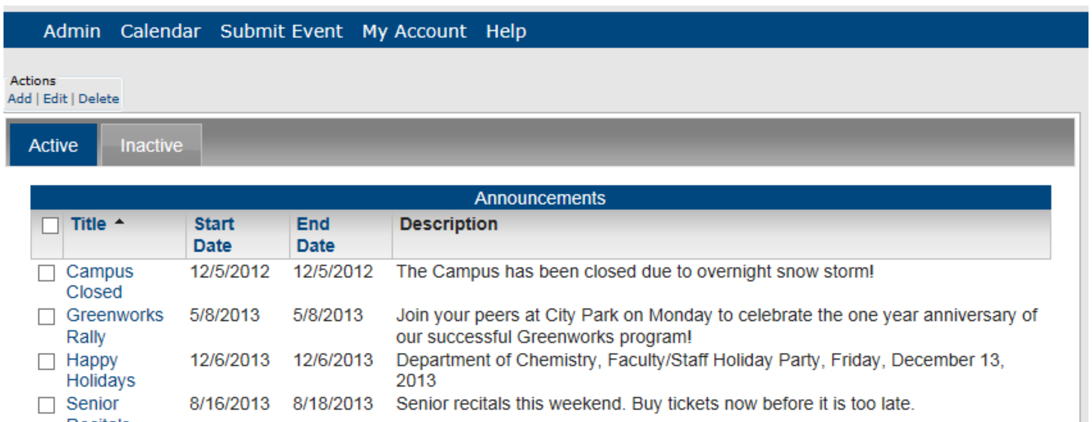
To view the history for an announcement

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

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

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

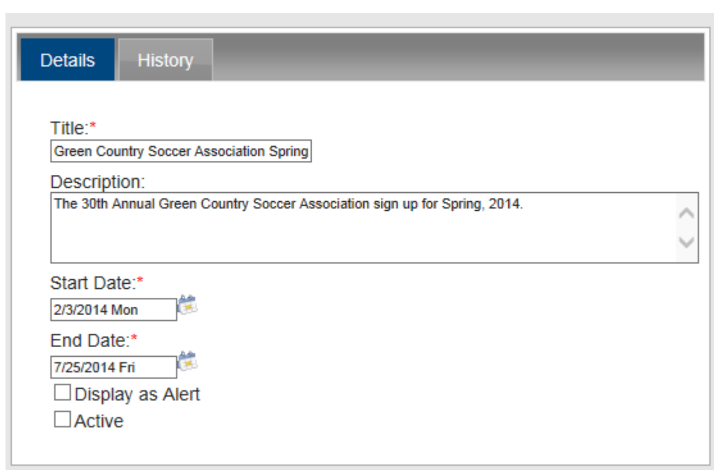
Figure 4-31: Manage Announcements page, Active tab



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

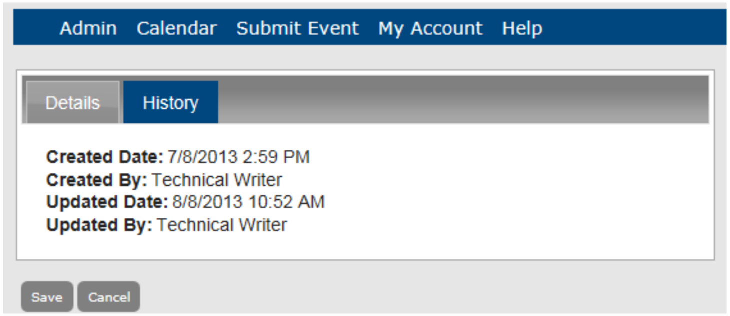
   The Add Announcements page opens. The Details tab is the opened tab.

Figure 4-32: Add Announcement page, Details tab



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

Figure 4-33: Add Announcement page, History tab



Importing Events into Master Calendar

You use the Import Events function to import events into Master Calendar. The file that contains the events can be a tab-delimited file that has been created in another system such as Microsoft Excel or it can be an XML file. You can import a tab-delimited file or an XML file into Master Calendar only if it adheres to file specifications that EMS Software has defined for Master Calendar.

To obtain file specifications and view examples of allowed files, click the Import file specifications link on the Details tab of the Manage Imports page. To access this link, do one of the following:

- *Under the Admin Panel main menu option, point to Event and Special Dates, click Import Events, and then click Add.*
- *Select an imported event, and then click Edit.*

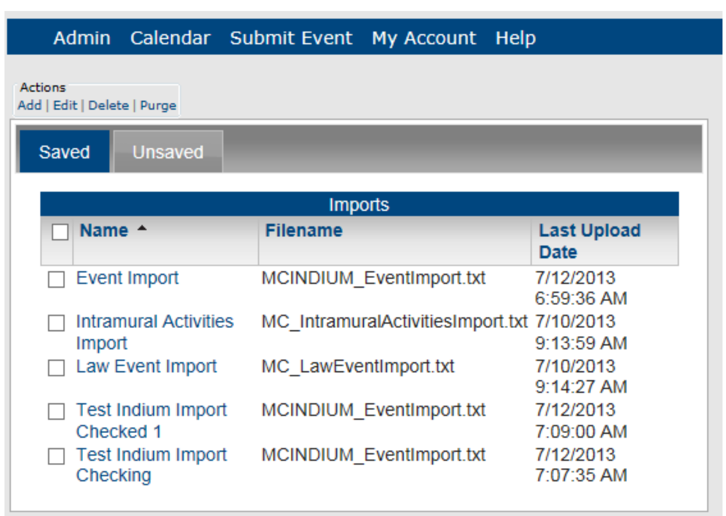
Managing imported events consists of importing an event, editing an imported event, deleting imported events, and purging imported events. You can also view the history for an imported event.

To import an event

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

   The Manage Imports page opens. The Saved tab is the opened tab. All imported files that were saved in Master Calendar are displayed on this tab.

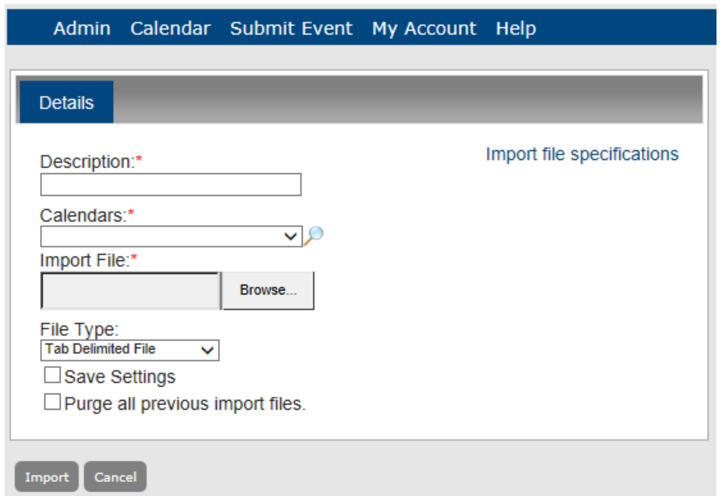
Figure 4-34: Manage Imports page, Saved tab



2. Under Actions, click Add.

   The Add Import page opens. The Details tab is the only tab on this page. You use the options on this tab to specify the calendar to which you are importing the external events and to select the file that you are importing.

Figure 4-35: Add Import page, Details tab



3. Enter the information for the imported file.

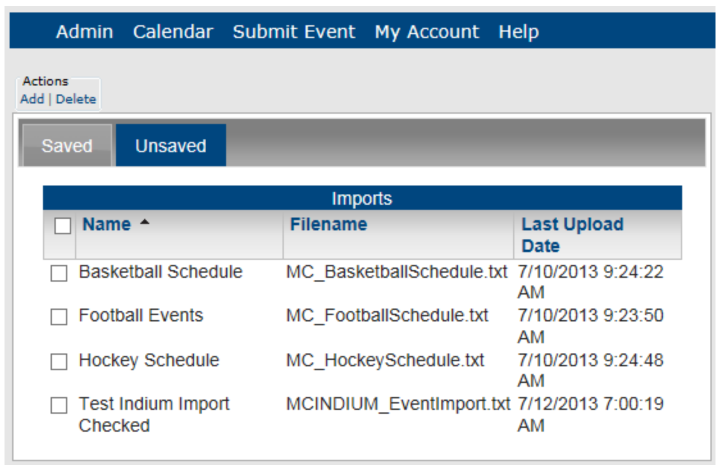
Field	Description
Description	A description of the file or the information that you are importing.
Calendars	A list of all active calendars to which you have access as a Calendar Manager. Click the Lookup icon to open the Calendars dialog box and select the calendars to which the information is being imported.
Import File	Click Browse to open the Choose File dialog box to browse to and select the file that is to be imported.
File Type	Dropdown list from which you can select one of two options: • Tab delimited file (the default value) • XML file
Save Settings	Optional. Select this value to save the imported file in Master Calendar.
Purge all previous import file	Optional. Select this value to purge all previously imported events that were saved in Master Calendar.

4. Click Import.

   If the import is successful, the information for the import is displayed and if:

   - You selected Save Settings, the import is displayed on the Save tab. An automated email from www.emssoftware.com is sent to the address that you used to log in to Master Calendar. The email is titled “Master Calendar File Import Process” and the message states that “The file for the import named < > was successfully imported.”
   - You did *not* select Save settings, the import is displayed on the Unsaved tab. An automated email from www.emssoftware.com is sent to the address that you used to log in to Master Calendar. The email is titled “Master Calendar File Import Process” and the message states that “The file for the import named < > was successfully imported.”

Figure 4-36: Manage Imports page, Unsaved tab



Otherwise, a message is displayed at the top of the Manage Imports page indicating that the import was not successful and details the problems with the file that prevented the import from being successful. You must correct the problems that are indicated for the file and carry out the import process again.

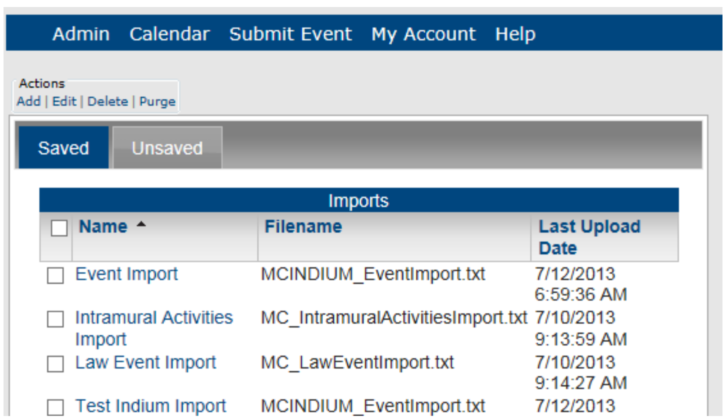
To edit an import file

You can edit an import file only if you saved the file in Master Calendar.

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

   The Manage Imports page opens. The Saved tab is the opened tab. All imported files that were saved in Master Calendar are displayed on this tab.

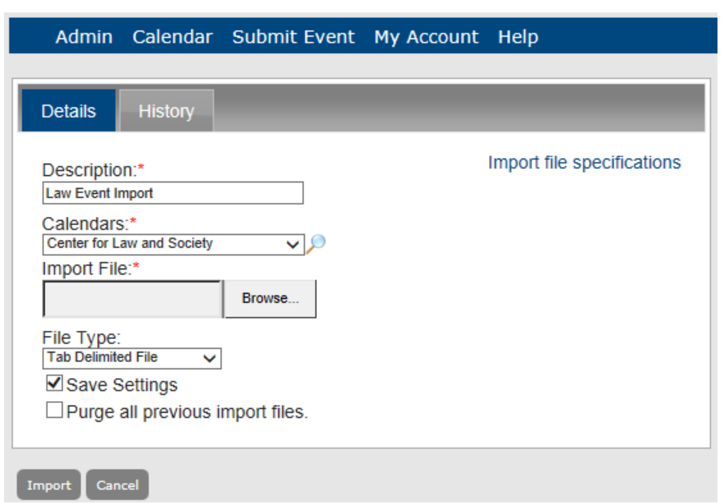
Figure 4-37: Manage Imports page, Saved tab



2. Under Actions, click Edit.

   The Add Import page opens. The Details tab is the opened tab. You use the options on this tab to edit the information for the import including its description, the calendars to which you are importing the external events, the file that is to be used for the import, and the file type. You can also indicate whether you want to save this edited import and whether at the time that you are importing this file, you also want to purge all previously imported files that were saved in Master Calendar.

Figure 4-38: Add Import page, Details tab



3. Click Import.

   If the import is successful, the information for the import is displayed and if:

   - You selected Save Settings, the import is displayed on the Save tab. An automated email from www.emssoftware.com is sent to the address that you used to log in to Master Calendar. The email is titled “Master Calendar File Import Process” and the message states that “The file for the import named < > was successfully imported.”
   - You did *not* select Save settings, the import is displayed on the Unsaved tab. An automated email from www.emssoftware.com is sent to the address that you used to log in to Master Calendar. The email is titled “Master Calendar File Import Process” and the message states that “The file for the import named < > was successfully imported.”

   Otherwise, a message is displayed at the top of the Manage Imports page indicating that the import was not successful and details the problems with the file that prevented the import from being successful. You must correct the problems that are indicated for the file and carry out the import process again.

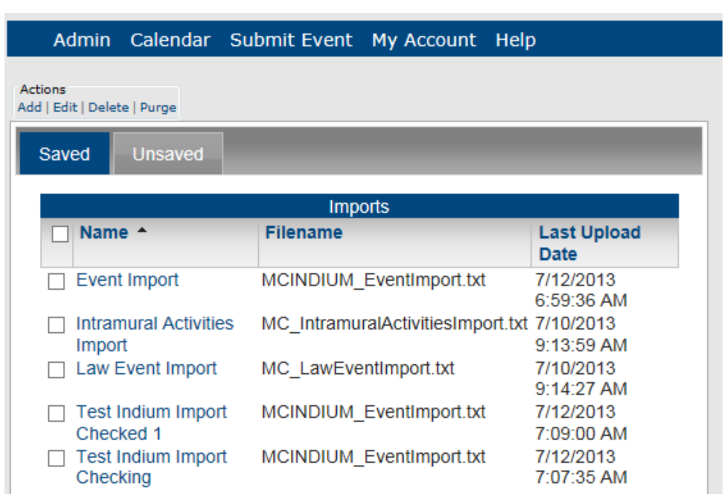
To delete an imported event

You can delete both saved and unsaved import files in Master Calendar. When you delete a saved import file, you are deleting not only the import file, but also, all the events that were added to the calendars as a result of the import. When you delete an unsaved import file, you are not truly deleting a file. Instead, you are simply deleting all the events that were added to the calendars as a result of the import.

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

   The Manage Imports page opens. The Saved tab is the opened tab. All imported files that were saved in Master Calendar are displayed on this tab.

Figure 4-39: Manage Imports page, Saved tab



2. If needed, click the Unsaved tab to open it.
3. Select the import files that you are deleting.

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

4. Under Actions, click Delete.

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

5. Click OK in the message.

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

6. Click OK in the message.

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

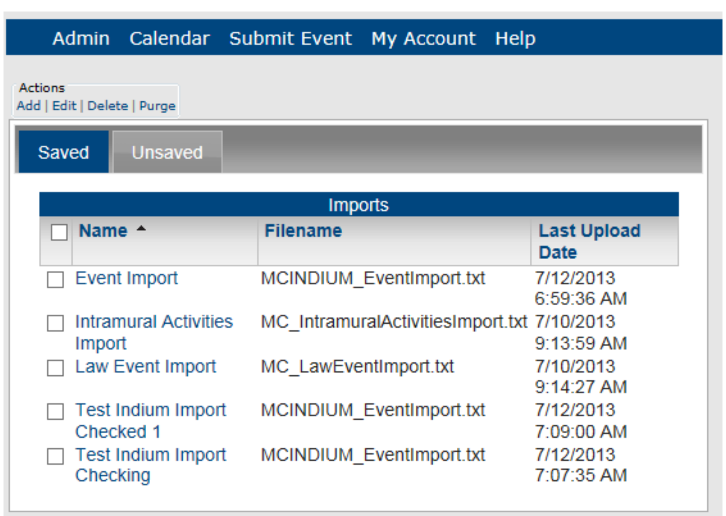
To purge an imported event

You can purge an import file only if you saved the file in Master Calendar.

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

   The Manage Imports page opens. The Saved tab is the opened tab. All imported files that were saved in Master Calendar are displayed on this tab.

Figure 4-40: Manage Imports page, Saved tab



2. Select the import files that you are purging.

To select all saved import files on the currently opened page for purging in a single step, select Description. If you have multiple pages of saved import files to purge, you must repeat this entire process on each page.

3. Under Actions, click Purge.

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

4. Click OK in the message.

   A message opens indicating that all the selected imports were successfully purged.

5. Click OK in the message.

   The Active tab is updated to reflect the purging of the imports.

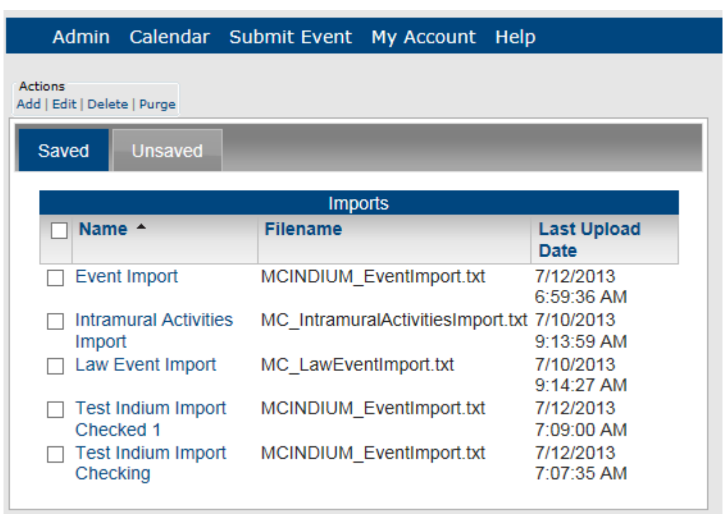
To view the history for an import file

The history for an import consists of the original creation date of the import, the name of the user who created the import, the last date that the import was edited, and the name of the user who last edited the import.You can view the history only for *saved* imports.

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

   The Manage Imports page opens. The Saved tab is the opened tab. All imported files that were saved in Master Calendar are displayed on this tab.

Figure 4-41: Manage Imports page, Saved tab

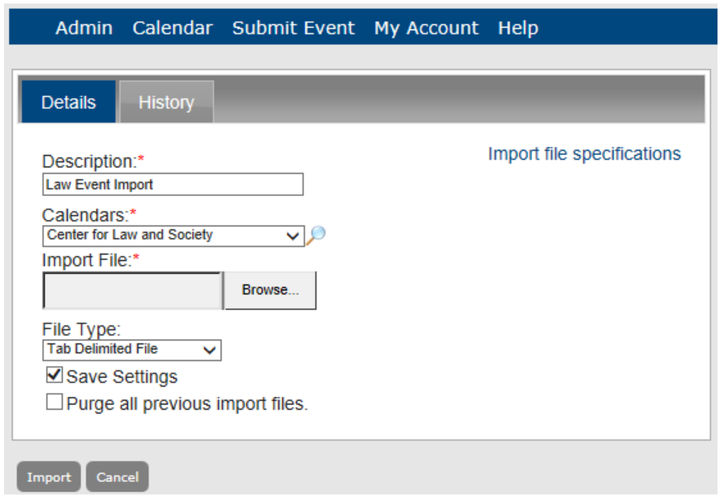


2. Select the import file for which you are viewing the history.

3. Under Actions, click Edit.

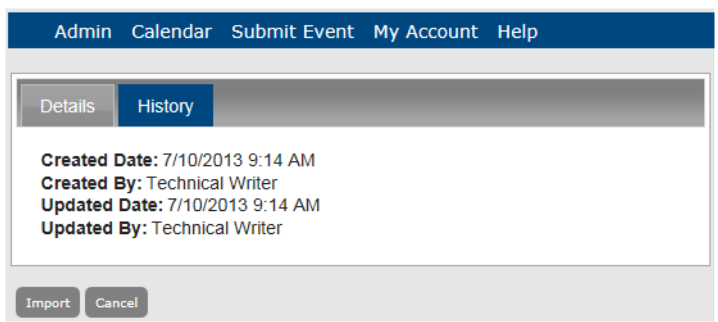
   The Add Import page opens. The Details tab is the opened tab.

Figure 4-42: Add Import page, Details tab



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

Figure 4-43: Add Import page, History tab



Configuring Users and Templates

Managing users and templates in Master Calendar consists of a variety of activities, including searching for, adding, deleting, and adding user record, adding user templates and assigning permissions and users to the templates, and activating and inactivating user templates.

This chapter covers the following topics:

- "Managing Users"
- "Managing User Templates"

Managing Users

A *user* in Master Calendar is anyone who can log in to Master Calendar and who has a predefined level of access to specific calendars. For example, User A has requestor access to Calendar A, and view only access to Calendar B, User B has view only access to all calendars in Master Calendar, and so on. The user's record that you define specifies this level of access. Managing users in Master Calendar consists of searching for users, adding new users, editing user accounts, activating and inactivating users, and deleting inactive users. You can also generate a Users report and you can view the history for a user account.

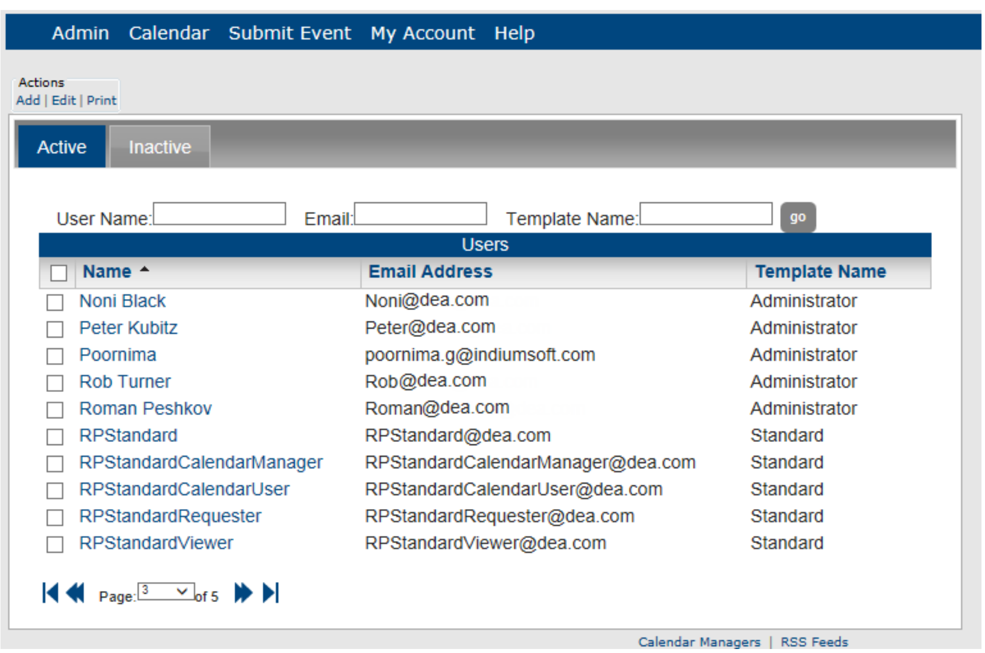
To search for a user

When the Users page first opens, the Active tab is the opened tab. *All* currently active users in Master Calendar are displayed on this tab. You can refine this list of users before you carry out any work from either tab by searching for users that meet only specific criteria—User Name, Email, and if applicable, Template Name.

1. Under the Admin Panel main menu option, point to Security, and then click Users.

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

Figure 5-1: Users page, Active tab



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

3. In the Search fields at the top of the tab (User Name, Email, Template Name), enter partial or complete search criteria, and then click Go.

The search is limited to the exact order of characters in the search string, however, the string is not-case sensitive and it can appear anywhere in the search results. For example, if you enter "Rob" as your search string for User Name, search results can include ***Rob****ert,* ***Rob****,* ***Rob****ertson, Jar****rob****, and so on.*

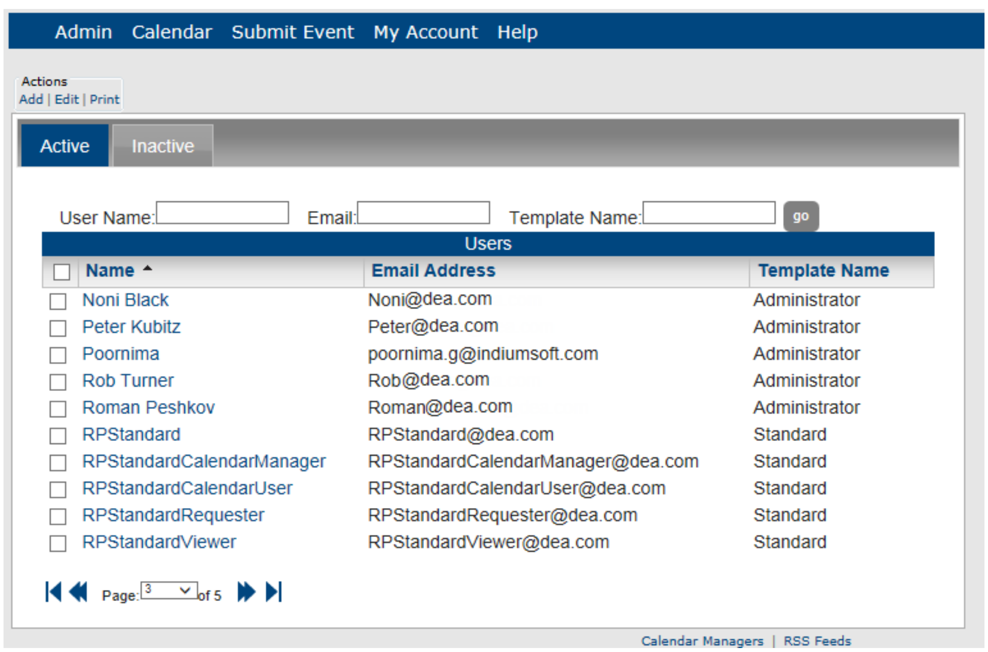
A list of all users that meets the search criteria is displayed on the tab.

To add a user

1. Under the Admin Panel main menu option, point to Security, and then click Users.

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

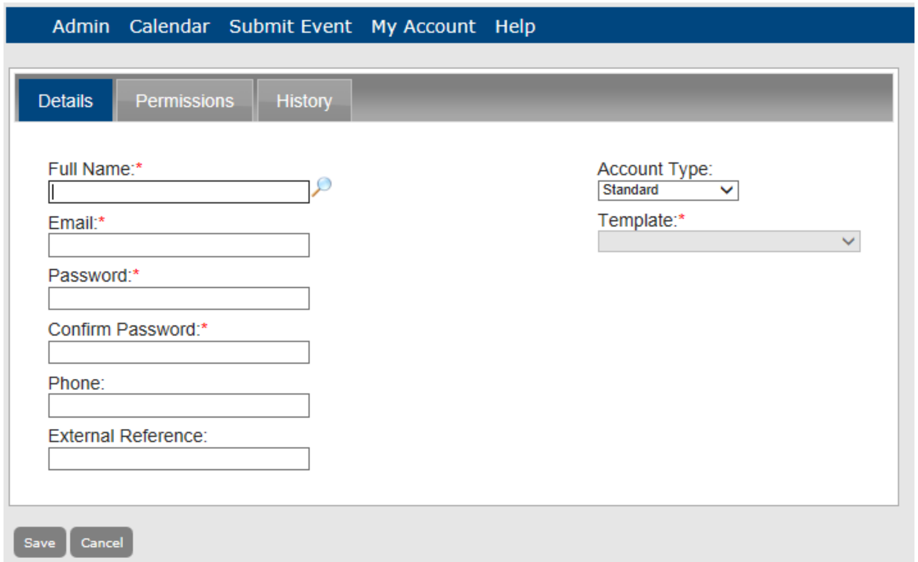
Figure 5-2: Users page, Active tab



2. Under Actions, click Add.

   The Add User page opens. The Details tab is the opened tab. You use the options on this tab to add the information for the user. See Figure 5-3.

Figure 5-3:   Add User page, Details tab



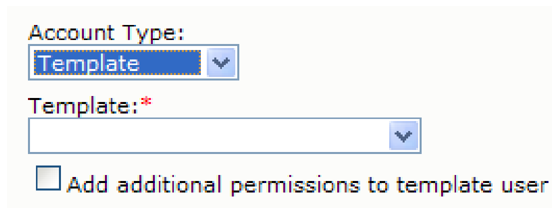
3. Add the information for the new user.

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

Field	Description
Full Name	The full name for the user.
Email	The email address for the user.
Password	The login password for the user. **Note:** The password does not have any special rules.
Confirm Password	Re-enter the password exactly as you entered it in the Password field.
Phone	The phone number for the user.
External Reference	Required only if you have LDAP security. Used to enable single sign-on through the separately purchased Integrated Authentication module.

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

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

User Type	Description
Standard	This is the default value for a user type. You must manually apply permissions for this type of user.
Template	**Note:** This type of user is available only if you have active templates defined in Master Calendar. See “Managing 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. *Figure 5-4: Template user options*  • Optionally, if you want to add permissions for the user in addition to the ones that are defined by the selected template, select Add additional permissions to template user to make the Permissions tab available again.
Administrator	This type of user (a site administrator) has full access to all calendars in Master Calendar as well as to all system areas and functions.

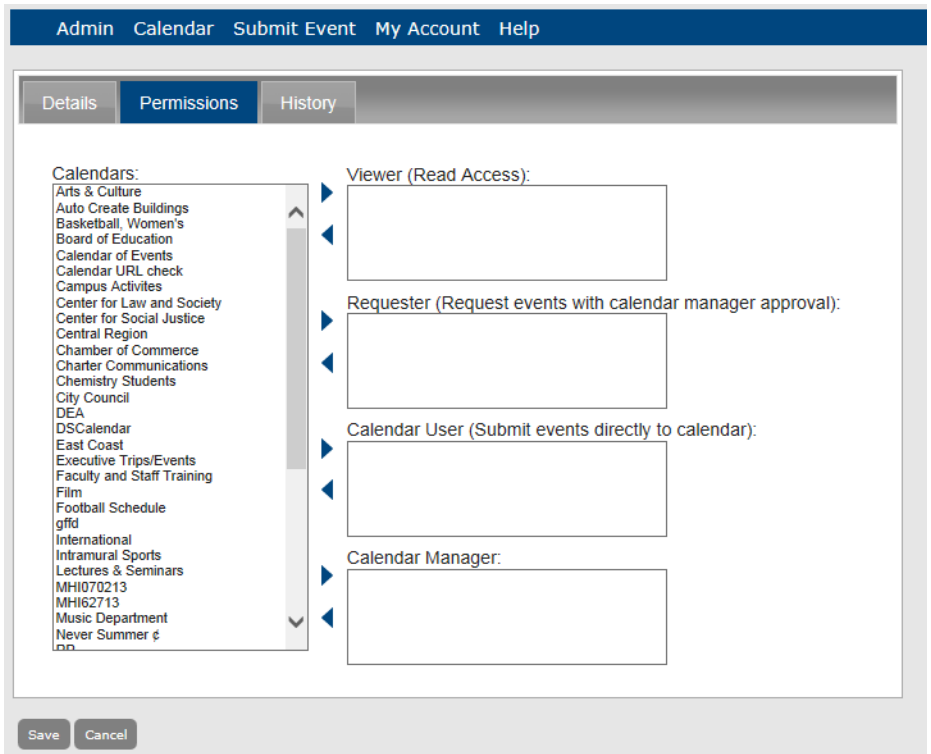
5. Do one of the following:
   - If the user is an administrator, or a template user who does *not* have additional permissions, click Save.
     The user is saved as an *active* user in Master Calendar.
   - If the user is a standard user, or a template user to whom you are adding more permissions, continue to “To define user permissions”.

To define user permissions

1. Click the Permissions tab to open it.

   A list of all currently active calendars in Master Calendar is displayed on this tab.

Figure 5-5: Add User page, Permissions tab



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

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

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

3. Click Save.

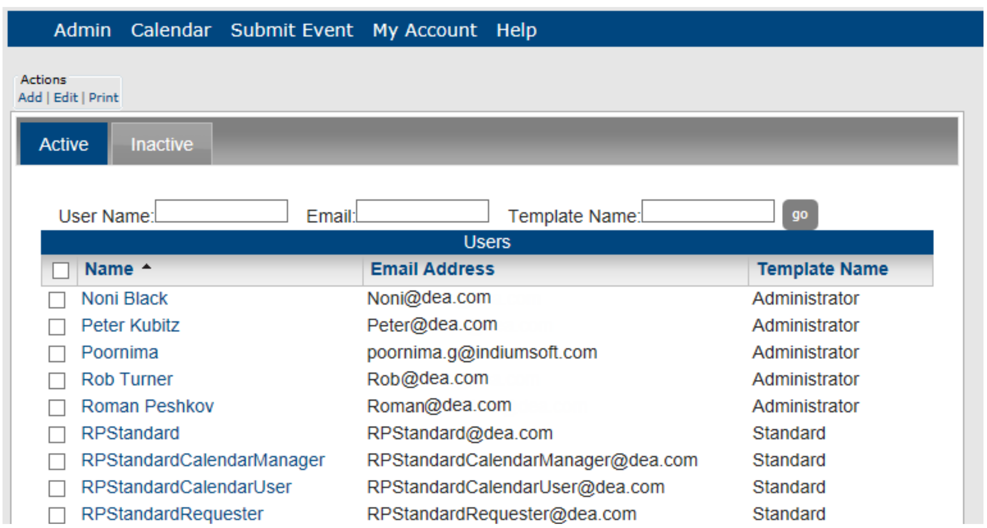
   The user is saved as an *active* user in Master Calendar.

To activate a user

1. Under the Admin Panel main menu option, point to Security, and then click Users.

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

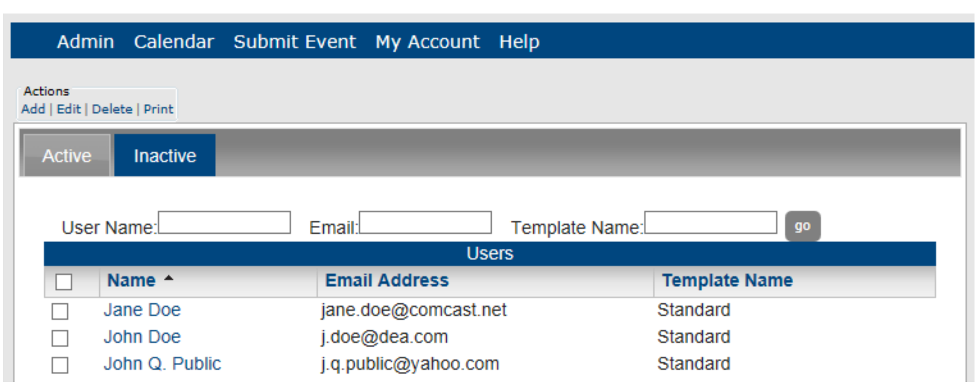
Figure 5-6: Users page, Active tab



2. Click the Inactive tab to open it.

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

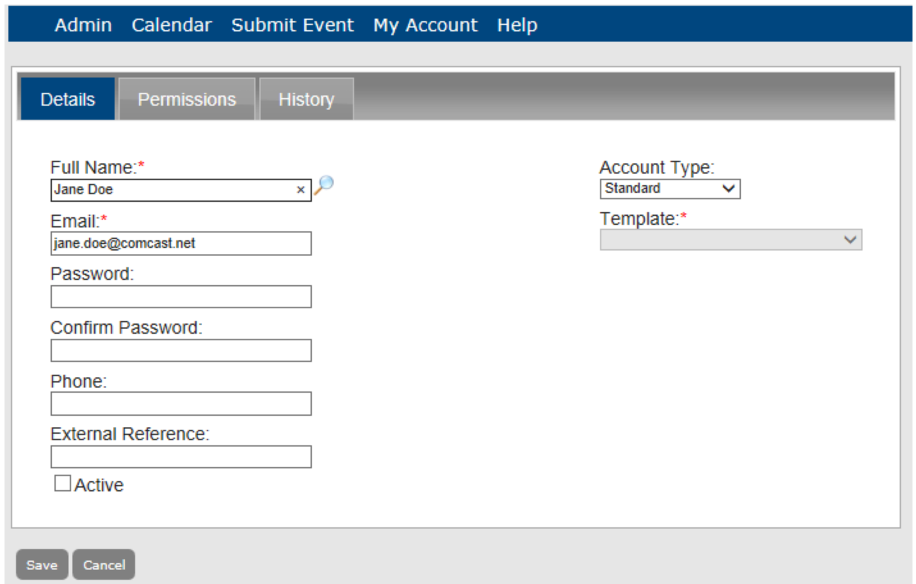
Figure 5-7: Users page, Inactive tab



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

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

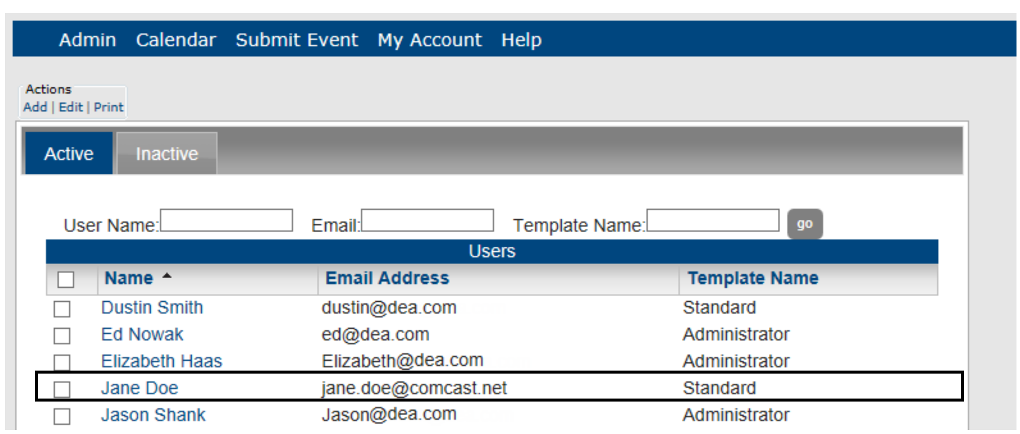
Figure 5-8: Add User page, Details tab, Inactive user



5. Select Active.
6. Click Save.

   The user is activated and is displayed on the Active tab on the Users page.

Figure 5-9: Users page, Active tab

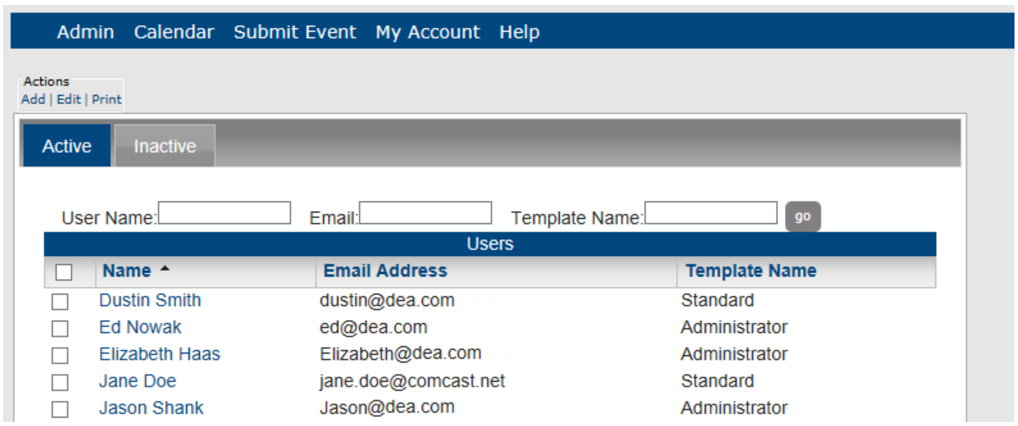


To inactivate a user

1. Under the Admin Panel main menu option, point to Security, and then click Users.

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

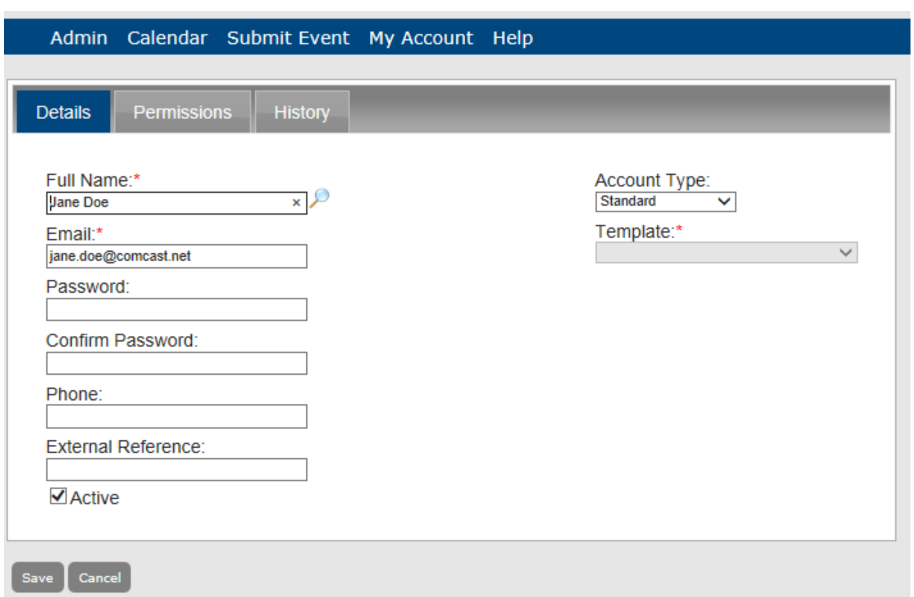
Figure 5-10: Users page, Active tab



2. Select the user that you are inactivating.
3. Under Actions, click Edit.

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

Figure 5-11: Add User page, Details tab, Active user

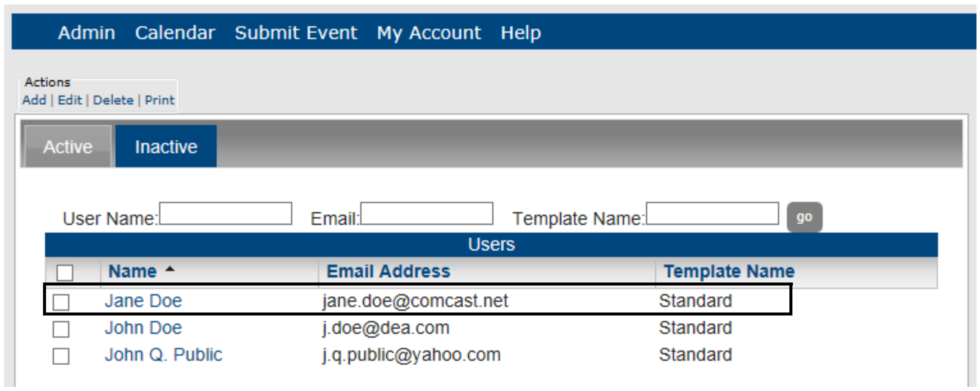


4. Clear the Active option.

5. Click Save.

   The user is inactivated and is displayed on the Inactive tab on the Users page.

Figure 5-12: Users page, Inactive tab



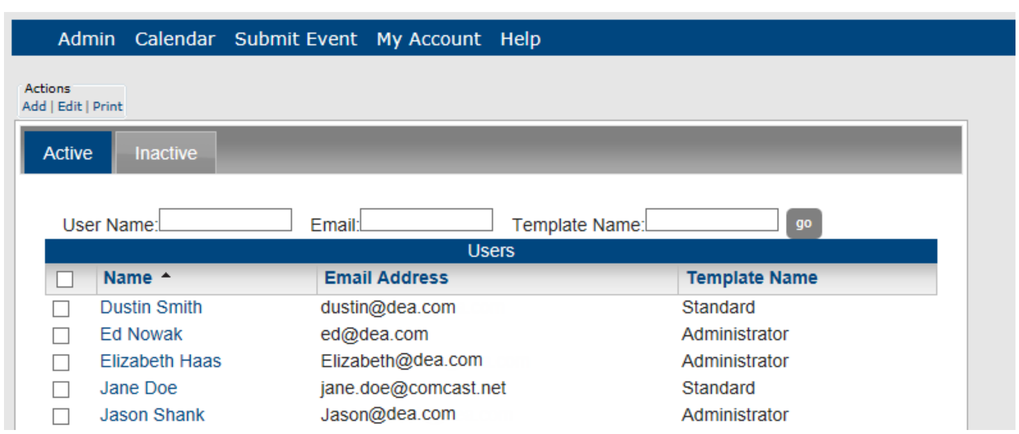
To edit a user

You can edit an account for both active and inactive users. When you edit an account, you can edit the user name, the email address, the user password, the user type, and any optional user information such as the user phone number. You can also edit the user account type and for a standard user or a template user, the user permissions.

1. Under the Admin Panel main menu option, point to Security, and then click Users.

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

Figure 5-13: Users page, Active tab

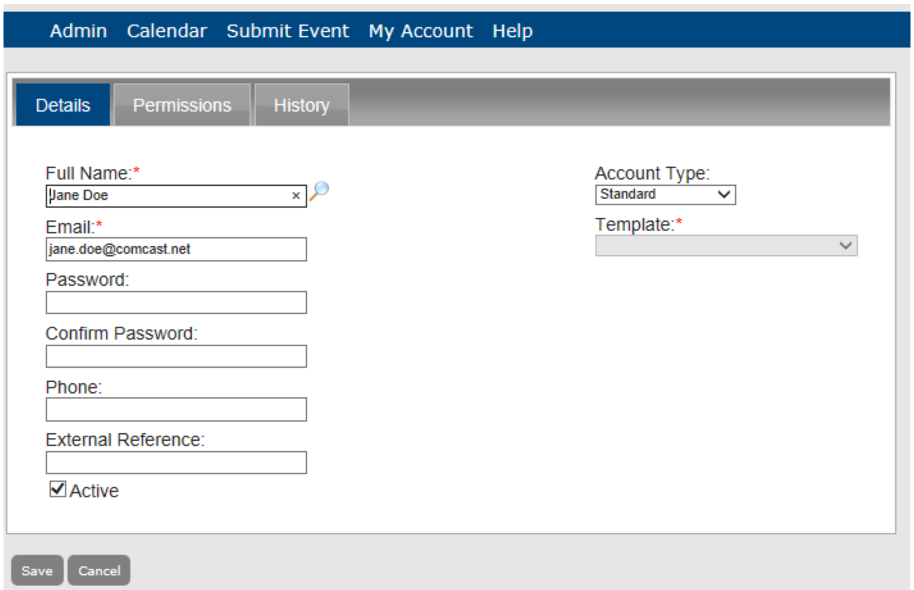


2. If needed, click the Inactive tab to open it.
3. Select the user whom you are editing.

4. Under Actions, click Edit.

   The Add User page opens. The Details tab is the opened tab. At a minimum, this tab shows the user name, the user email, and the user account type. Although the user has been assigned a password, it does *not* show the password in either the Password field or the Confirm Password field.

Figure 5-14: Add User page, Details tab

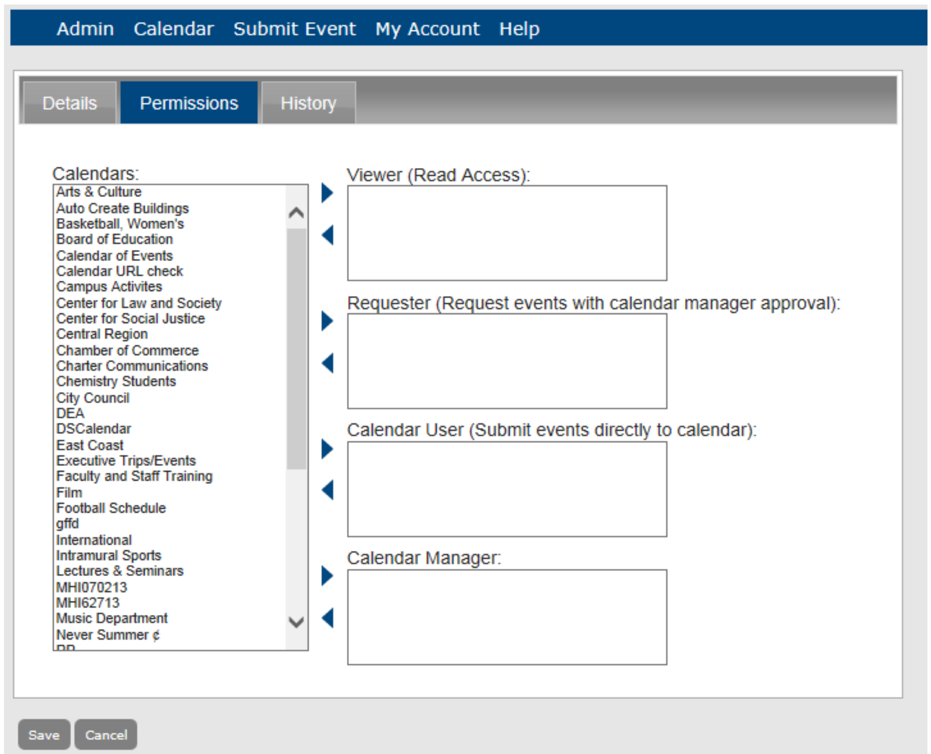


5. Edit the information as needed for the user.

Field	Description
Full Name	The full name for the user.
Email	The email address for the user.
Password	The logon password for the user. Note: The password does not have any special rules.
Confirm Password	Re-enter the password exactly as you entered it in the Password field.
Phone	The phone number for the user.
External Reference	Required only if you have LDAP security. Used to enable single sign-on through the separately purchased integrated Authentication module.
Account Type	Standard, Template, or Administrator. **Note:** For information about account types, see Template.

6. If needed, click the Permissions tab to open it.

Figure 5-15: Add User page, Permissions tab



7. To indicate the type of access that the user will have to the calendars in Master Calendar, select the calendar (CTRL-click to select multiple calendars), and then click the appropriate Add button to move the calendars to the access type. Alternately, to remove a user's access to a calendar, select the calendar CTRL-click to select multiple calendars), and then click the appropriate Remove button .

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

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

8. Click Save to save the edited user record in Master Calendar.

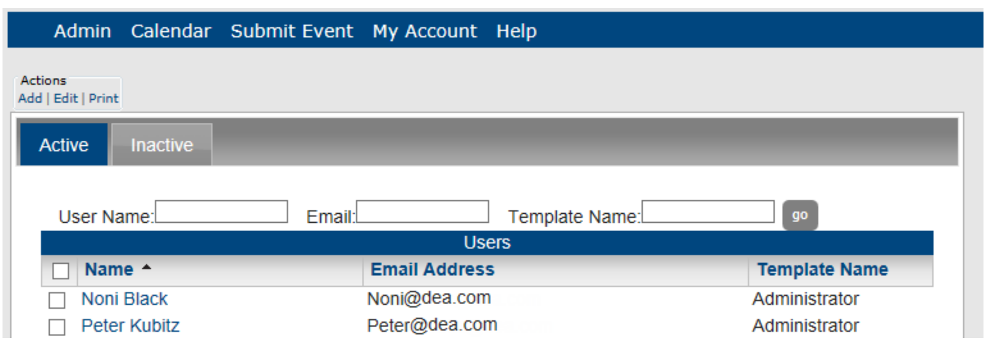
To delete a user

You can delete only inactive users. To delete a currently active user, you must first inactivate the user. (See “To inactivate a user”.) When you a delete a user, none of the events that the user has created is deleted.

1. Under the Admin Panel main menu option, point to Security, and then click Users.

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

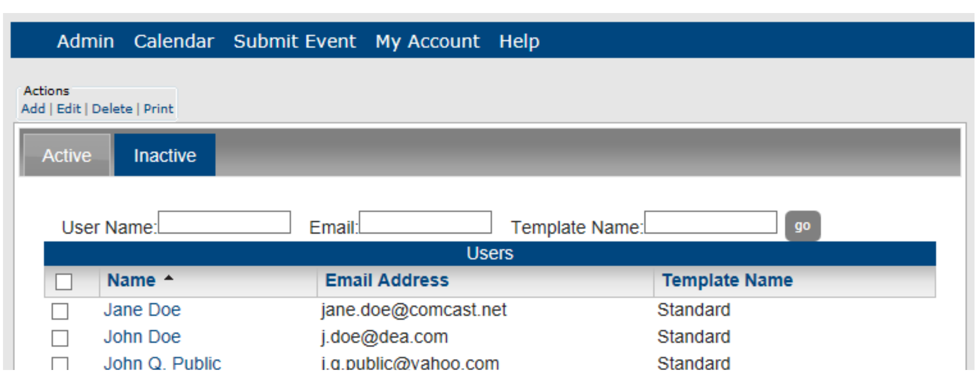
Figure 5-16: Users page, Active tab



2. Click the Inactive tab to open it.

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

Figure 5-17: Users page, Inactive tab



Remember, to refine this list, you can carry out a search for only those users that meet specific search criteria. See “To search for a user”.

3. Select the user or users whom you are deleting.

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

4. Under Actions, click Delete.

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

5. Click OK in the message.

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

6. Click OK in the message.

   The Inactive tab is refreshed to show the remaining, if any, inactive users in Master Calendar.

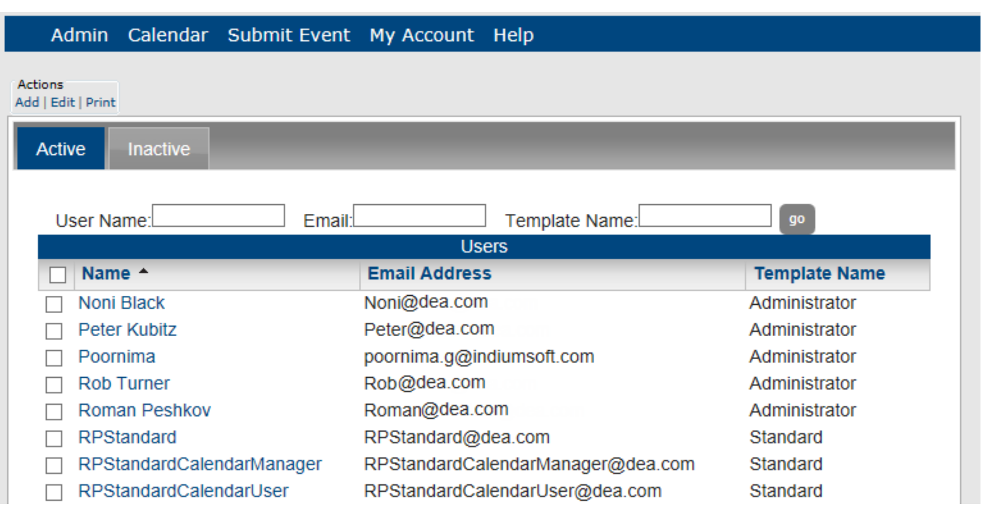
To generate a Users List report

You can generate a Users List report, which lists all the active or inactive users that are configured in Master Calendar. The report includes the user name, the user email, the user account type, and the user phone. This report also indicates whether the user is an Administrator user and it also lists the templates to which a user has been assigned.

1. Under the Admin Panel main menu option, point to Security, and then click Users.

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

Figure 5-18: Users page, Active tab



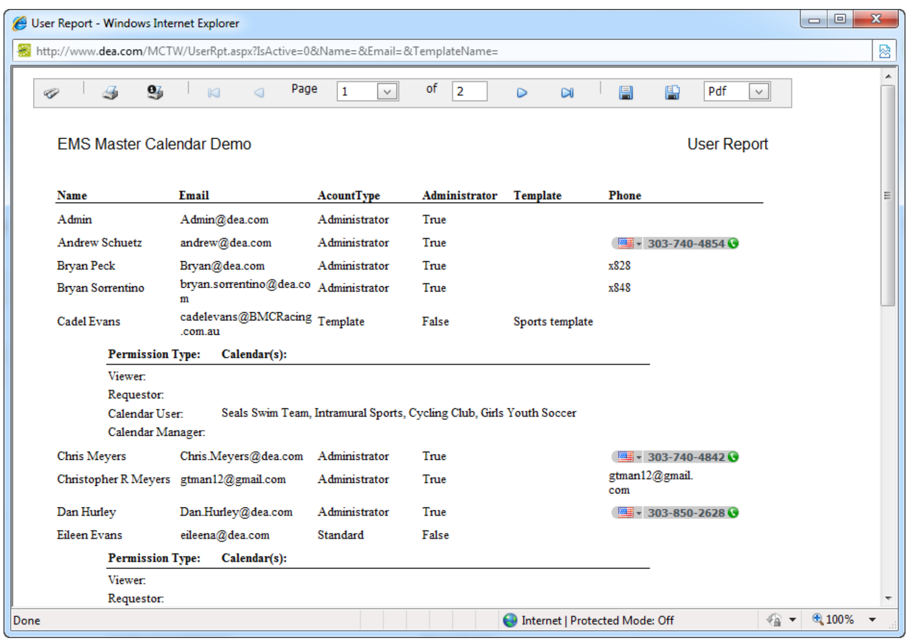
2. Do one of the following:

   - If you are generating a Users List report for all *active* users in your Master Calendar, under Actions, click Print.
   - If you are generating a Users List report for all *inactive* users in Master Calendar, click the Inactive tab to open it, and then under Actions, click Print.

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

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

Figure 5-19: Onscreen preview for a Users List report



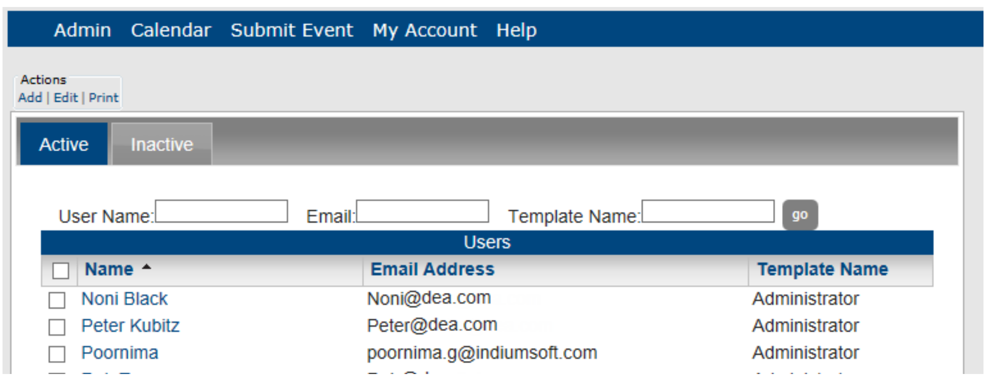
To view the history for a user

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

1. Under the Admin Panel main menu option, point to Security, and then click Users.

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

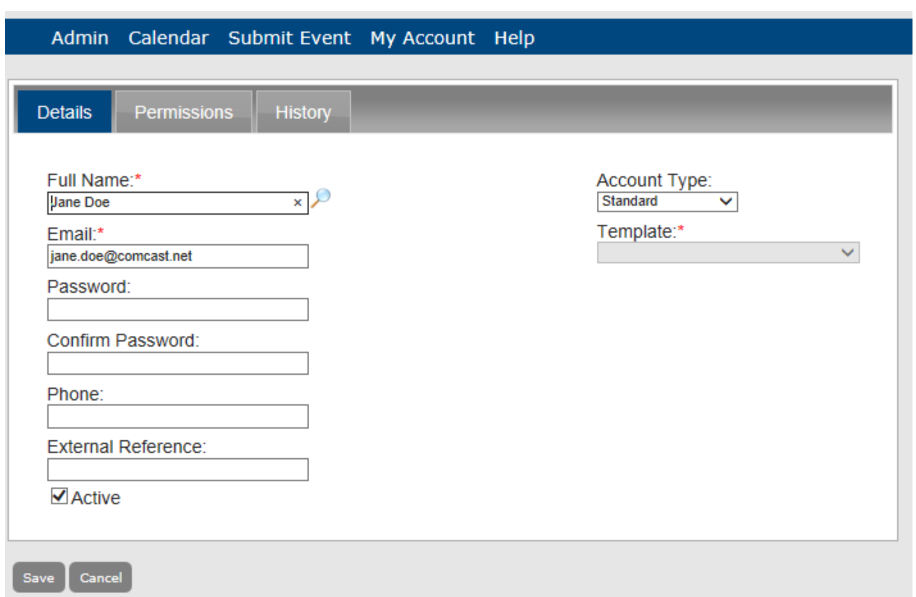
Figure 5-20: Users page, Active tab



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

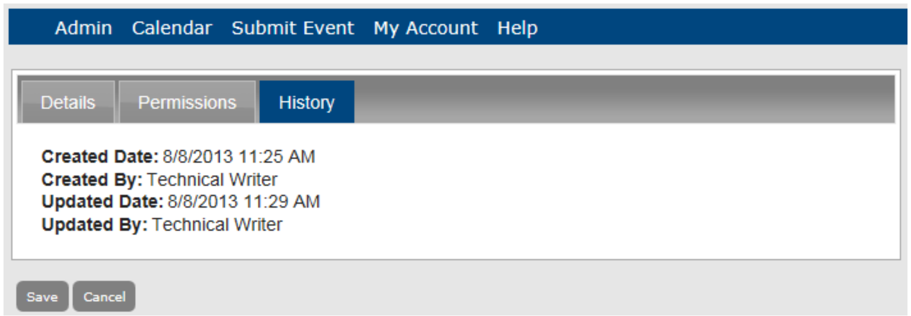
   The Add User page opens. The Details tab is the opened tab.

Figure 5-21: Add User page, Details tab



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

Figure 5-22: Add User page, History tab



Managing User Templates

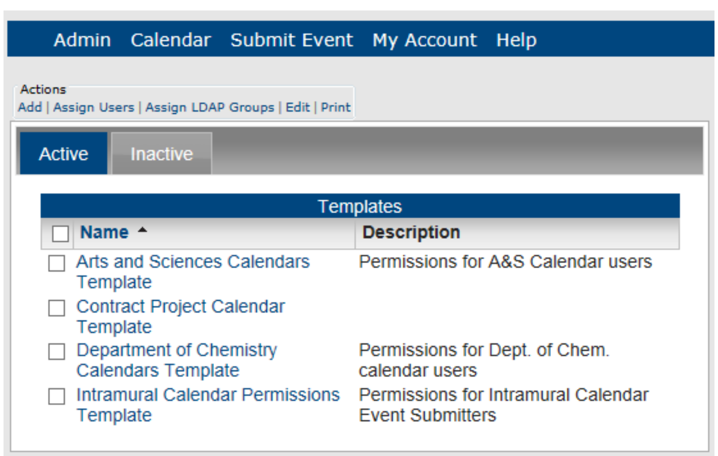
A user *template* contains a set of calendar permissions. For example, Template A specifies requestor access to Calendar A and view-only access to Calendar B, Template B specifies view-only access to all calendars in Master Calendar, and so on. User templates are always optional. You can apply a template to a group of user accounts in a single step to simplify the setup and maintenance of Master Calendar. Managing user templates consists of adding user templates, specifying template permissions, assigning users to templates, activating and inactivating templates, editing templates, and deleting templates. You can also generate a User Templates List report and you can view the history for a user template. In addition, if your organization has purchased and installed the optional Integrated Authentication module, you can select LDAP groups for assignment to a user template and you can add these selected LDAP groups to a user template.

To add a user template

1. Under the Admin Panel main menu option, point to Security, and then click User Templates.

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

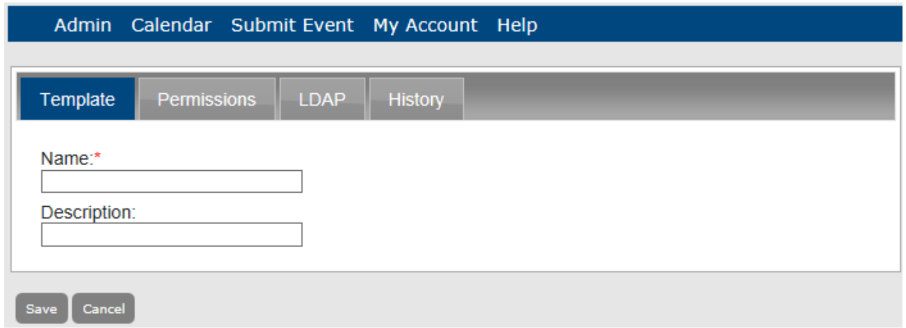
Figure 5-23: Manage Templates page, Active tab



2. Under Actions, click Add.

   The Add Template page opens. The Template tab is the opened tab. You use the options on this tab to name the user template and optionally, provide a description for it. See Figure 5-24.

Figure 5-24: Add Template page, Template tab



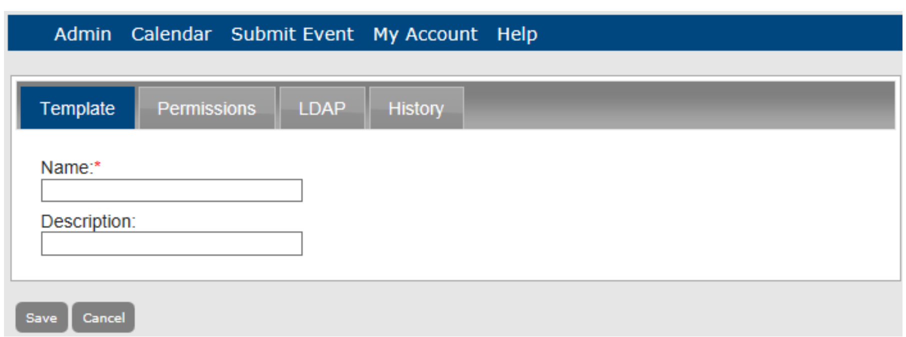
3. After you enter the name for the user template, and optionally, a description for the template, do one of the following:
   - If you want to specify the permissions for the user template at a later date, click Save to save the template as an *active* user template in Master Calendar.
   - To specify the permissions for the user template at the time that you are creating the template, continue to Step 3 for “To specify user template permissions” below.

To specify user template permissions

1. Under the Admin Panel main menu option, point to Security, and then click User Templates to open the Manage Templates page.
2. Click on the name of the user template for which you are assigning the permissions.

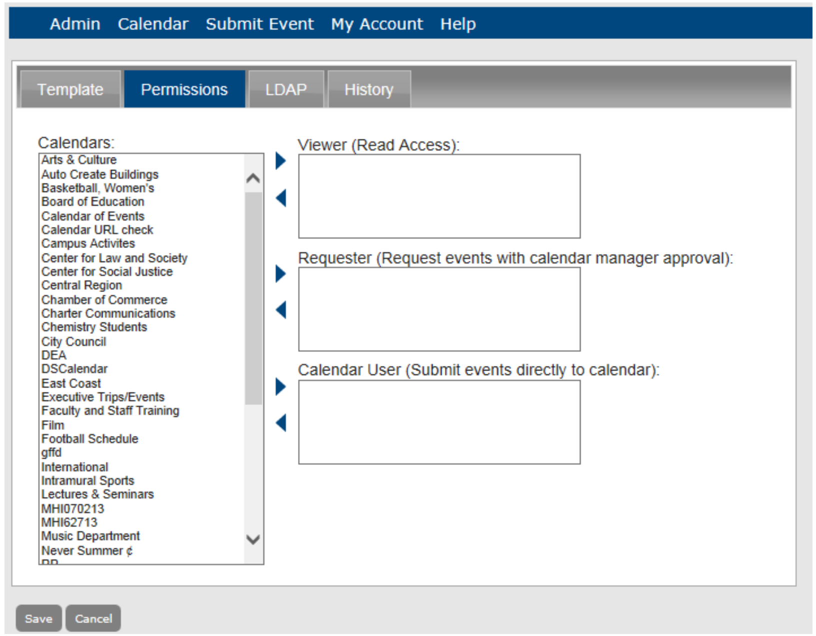
   The Add Template page opens. The Template tab is the opened tab.

Figure 5-25: Add Template page, Template tab



3. Click the Permissions tab to open it. See Figure 5-26.

Figure 5-26: Add Template page, Permissions tab



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

Field	Description
Viewer	Users can only view events on the calendar.
Requester	Users can view events on the calendar and submit events to the calendar; however, the submitted event is posted only if approved by the Calendar Manager.
Calendar User	Users can view events on the calendar and submit events to the calendar and the events are automatically posted without approval by the Calendar Manager.

Users assigned to the selected template can still view any calendar that remains in the Available Calendars column, unless the calendar is defined as a private.

Calendar Manager is not an option when you are defining user templates. It is available only when you are adding or editing a user record.

5. Click Save to save the template as an *active* template in Master Calendar.

To assign users to a user template

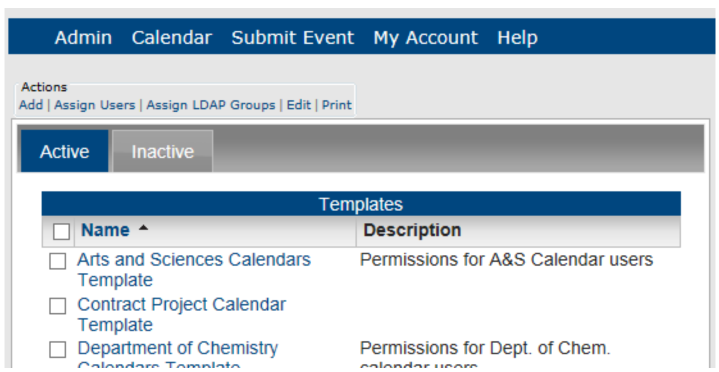
You can assign users only to an active template.

If your organization has purchased and installed the optional Integrated Authentication module, you can select LDAP groups for assignment to a template. See “To select LDAP groups for assignment to a user template”.

1. Under the Admin Panel main menu option, point to Security, and then click User Templates.

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

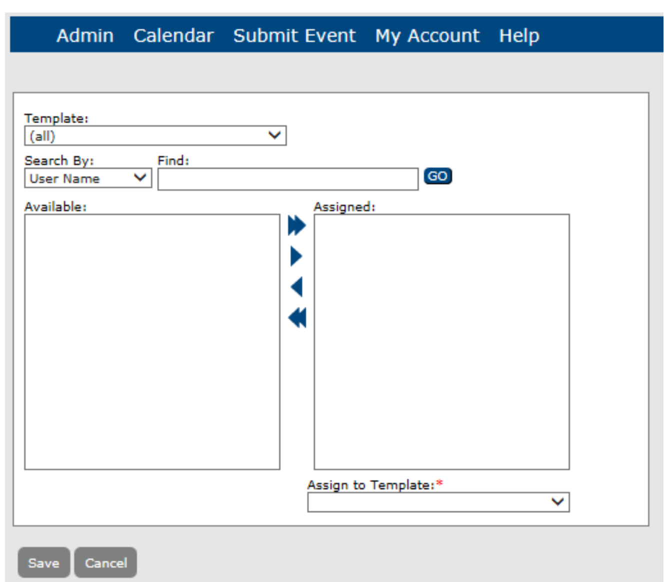
Figure 5-27: Manage Templates page, Active tab



2. Under Actions, click Assign Users.

   The Assign Users page opens.

Figure 5-28: Assign Users page



3. Enter the search criteria and then click Go to search for the users that you want to assign to a selected template.

Search Criteria	Results
Default Search Criteria: • Template Field - (all) • All other fields blank	All standard users and all template users (whether they are currently assigned to a template) who are in Master Calendar.
• Template Field - (unassigned users) • All other fields blank	All users who are currently defined in Master Calendar as a template user, but are *not* assigned to a template.
• Template Field - A specific template • All other fields left blank	All users who are currently assigned to the selected template.
• Template Field - (all) • Search by User Name or Email Address • Search criteria in the Find field	All standard users and all template users (whether they are currently assigned to a template) who are in Master Calendar *and* who match the search criteria.
• Template Field - (unassigned users) • Search by User Name or Email Address • Search criteria in the Find field	All users who are currently defined in Master Calendar as a template user who are not assigned to a template *and* who match the search criteria.
• Template Field - A specific template • Search by User Name or Email address • Search criteria in the Find field	All users who are currently assigned to the selected template *and* who match the search criteria.

*The search is limited to the exact order of characters in the search string, however, the string is not case-sensitive and it can appear anywhere in the search results. For example, if you enter "Rob" as your search string for User Name, search results can include **Rob**ert, **Rob**, **Rob**ertson, Jar**rob**, and so on.*

4. From the search results, select the user whom you are assigning to a user template (CTRL-click to select multiple users), and then click Add button to move the users to the Assigned list.

To move all the search results in a single step, click the Add All button.

5. On the Assign to Template dropdown list, select the active template to which you are assigning the selected users.

6. Click Save to assign the users to the selected user template.

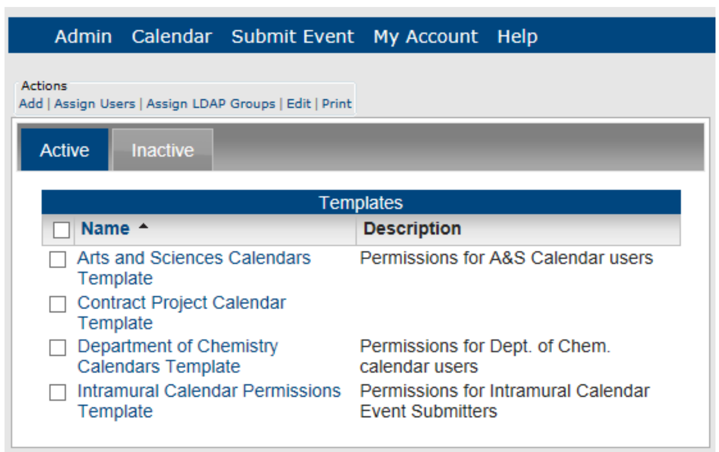
To select LDAP groups for assignment to a user template

The Assign LDAP Groups option is available only if your organization has purchased and installed the optional Integrated Authentication module. This module allows your organization to use the security group information that is maintained on its own network in conjunction with the templates in Master Calendar to set permissions for its Master Calendar users. Before you can assign LDAP groups to a user template, you must select the LDAP groups that you want to assign.

1. Under the Admin Panel main menu option, point to Security, and then click User Templates.

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

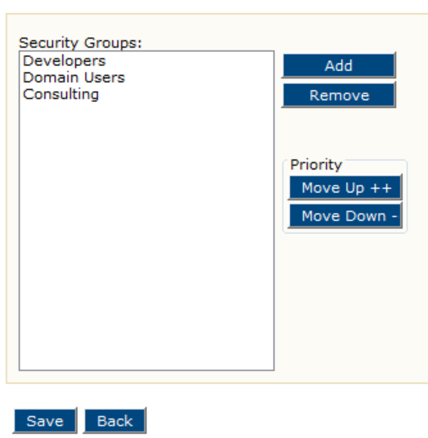
Figure 5-29: Manage Templates page, Active tab



2. Under Actions, click Assign LDAP Groups.

   The Assign Security Groups page opens. Any security groups that have been selected for assignment to a user template are displayed on this tab.

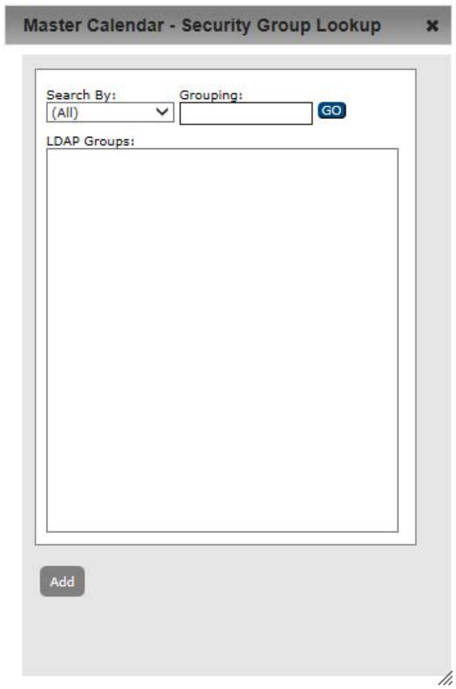
Figure 5-30: Assign Security Groups page



3. To select a security group, click Add.

   The Security Group Lookup dialog box opens. You use this dialog box to search for the security groups that you want to assign to a user template.

Figure 5-31: Security Group Lookup dialog box



4. Specify the search criteria for the security groups that you want to assign to a template and then click Go.

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*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, “**Admin**istrators” is returned in the search results, but DnsAdmins is not.*

Search Criteria	Results
Default Search Criteria: • Search By (All) • All other fields blank	All LDAP groups that are currently on your network.
• Search By (All) • Partial or complete search criteria for grouping name in the grouping field.	All LDAP groups that are currently on your network and that meet the search criteria.
• Search By Global Group or Universal Group • All other fields blank	All LDAP global groups or universal groups, respectively that are currently on your network.

Search Criteria	Results
• Search By Global Group or Universal Group • Partial or complete search criteria for grouping name in the grouping field.	All LDAP global groups or universal groups, respectively that are currently on your network and that meet the search criteria.

5. From the search results, select the security group that is to be assigned to a user template (CTRL-click to select multiple groups), and then click Add to move the groups to the Security Groups page.

6. When you add a security group to the security groups page, they are added in alphabetical order and this becomes the default priority for the groups. Do one of the following:

   - To save the security groups in their default priority order, click Save, click OK in the message that the security groups order was saved, and then click Back to return to the Templates page.
   - To change the priority of the security groups, continue to “To change the priority of LDAP security groups” below.

To remove security groups, select the group (CTRL-click to select multiple groups), and then click Remove.

7. You can now add the LDAP groups to a user template. See “To add LDAP groups to a user template”.

To change the priority of LDAP security groups

If a user exists in multiple LDAP security groups, then the user’s security settings are assigned based on the LDAP group with the highest priority. For example, if User A is assigned to both the Billing LDAP group and the Cert Publishers LDAP group, and the Billing group has a higher priority (that is, it is higher up in the list) than the Cert Publishers group, then User A’s access security settings are granted based on the Master Calendar template to which the Cert Publishers group is assigned. To change a group’s priority:

1. Select the group whose priority you want to change.

2. Click Move Up ++ or Move Down -- as necessary to change the order of the group in the list.

3. Click Save, click OK in the message that the security groups order was saved, and then click Back to return to the Templates page.

4. You can now add the LDAP groups to a user template. See “To add LDAP groups to a user template” below.

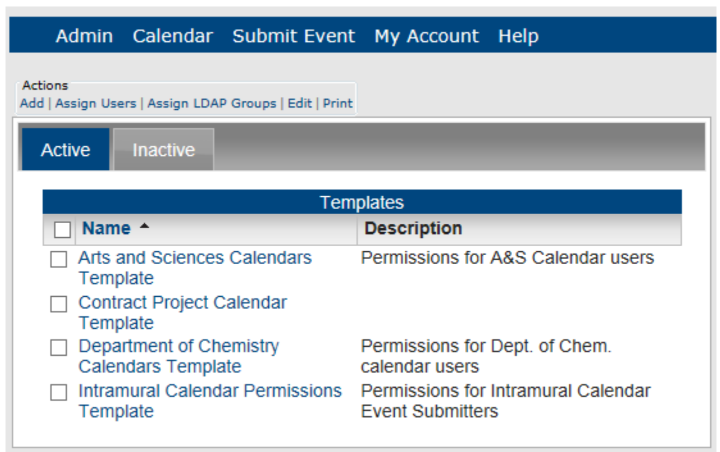
To add LDAP groups to a user template

Before you can add an LDAP group to a user template, you musts first select the group for assignment to a template. See “To select LDAP groups for assignment to a user template” .

1. Under the Admin Panel main menu option, point to Security, and then click User Templates.

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

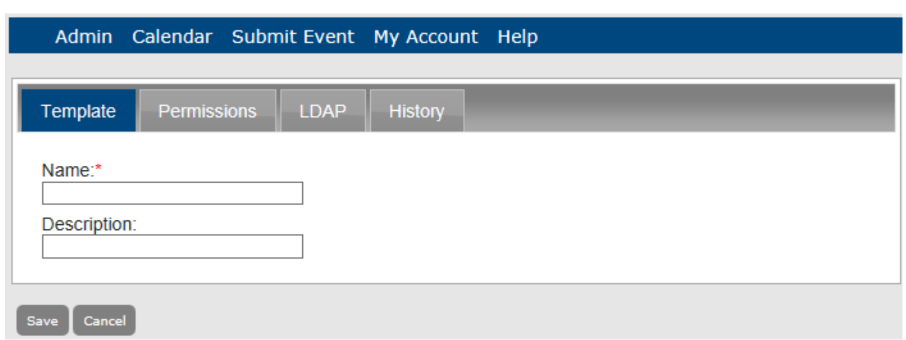
Figure 5-32: Manage Templates page, Active tab



2. Under Actions, click Add.

   The Add Template page opens. The Template tab is the opened tab.

Figure 5-33: Template tab

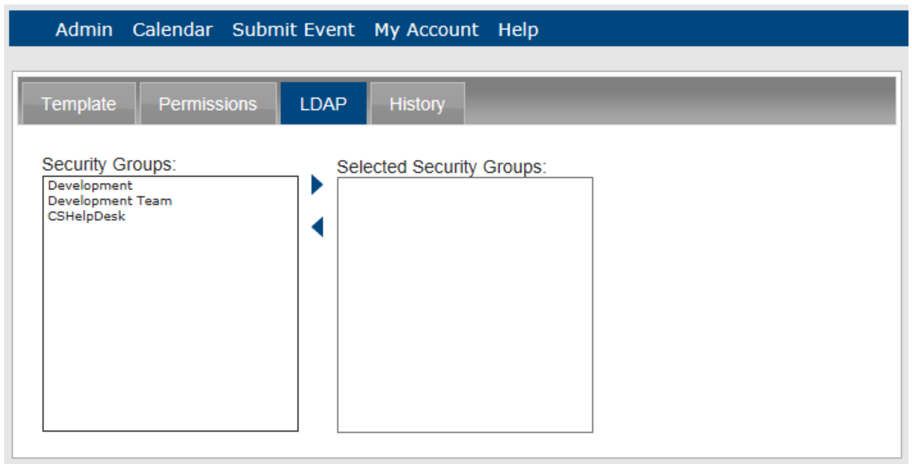


3. Enter the name for the user template, and optionally, a description for the template.

4. Click the LDAP tab to open it.

   The security groups that you selected to be available for assignment to a user template are displayed on this tab.

Figure 5-34: Add Template page, LDAP tab



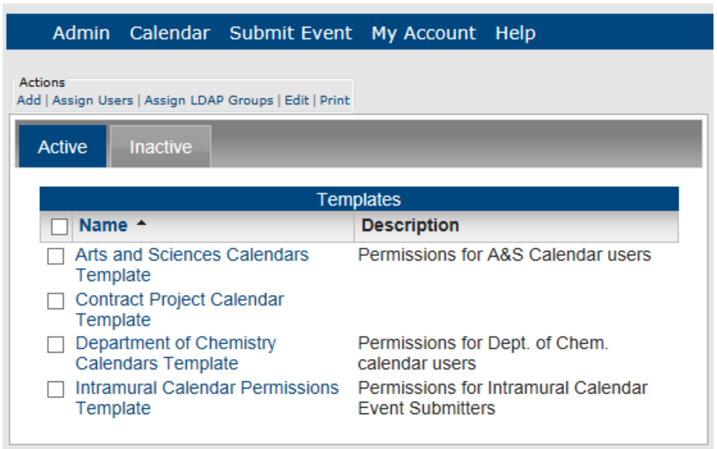
5. From the Security Groups list, select the security group that you are assigning to the user template that you just added (CTRL-click to select multiple groups), and then click then click the Add button to move the selected groups to the Selected Security Groups list.
6. Click Save to assign the selected LDAP security groups to the user template.

To activate a user template

1. Under the Admin Panel main menu option, point to Security, and then click User Templates.

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

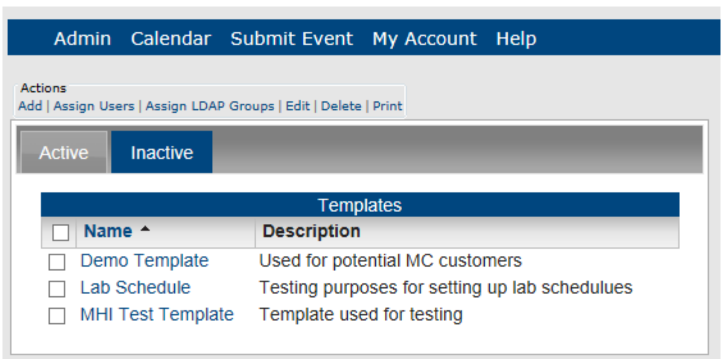
Figure 5-35: Manage Templates page, Active tab



2. Click the Inactive tab to open it.

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

Figure 5-36: Manage Templates page, Inactive tab

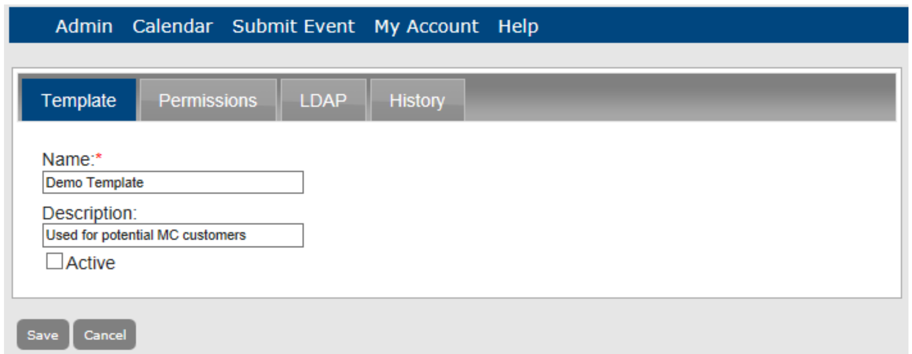


3. Select the user template that you are activating.

4. Under Actions, click Edit.

   The Add Template page opens. The Template tab is the opened tab. The Active option is not selected.

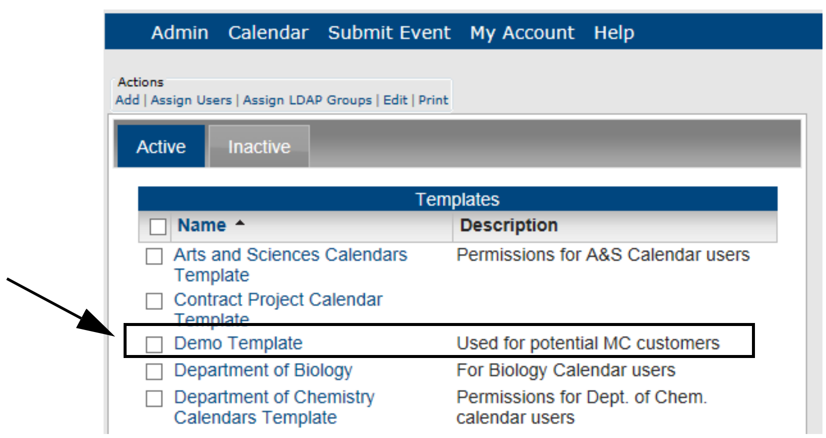
Figure 5-37: Add Template page, Template tab, Inactive template



5. Select Active.
6. Click Save.

   The user template is activated and is displayed on the Active tab on the Manage Templates page. See Figure 5-38.

Figure 5-38: Manage Templates page, Active tab

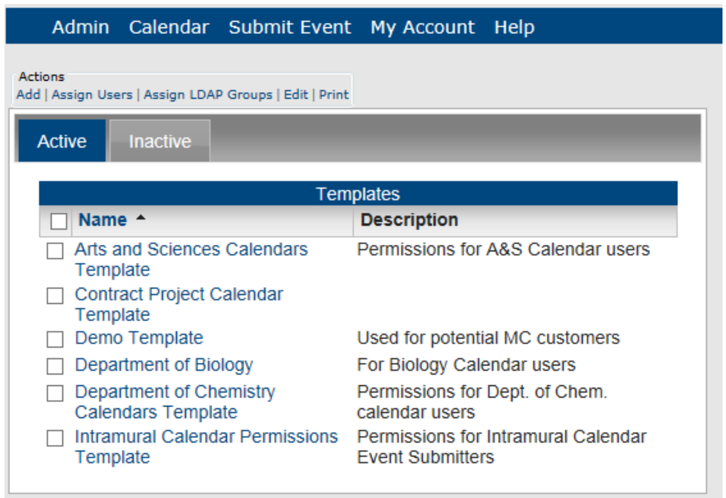


To inactivate a user template

1. Under the Admin Panel main menu option, point to Security, and then click Templates.

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

Figure 5-39: Manage Templates page, Active tab

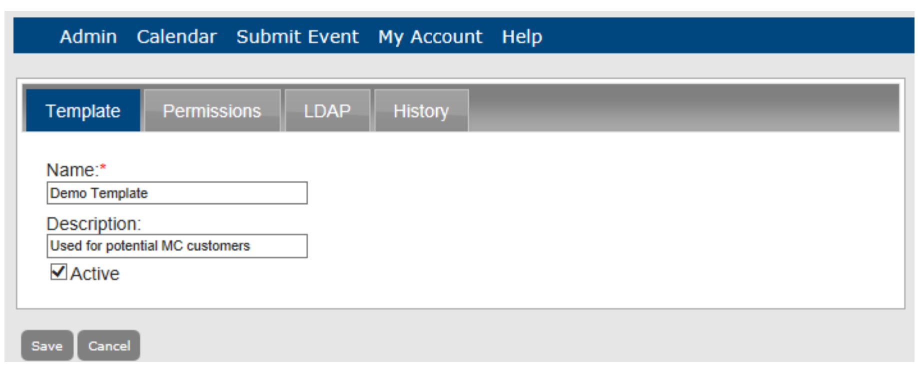


2. Select the user template that you are inactivating.

3. Under Actions, click Edit.

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

Figure 5-40: Add Template page, Template tab, Active template

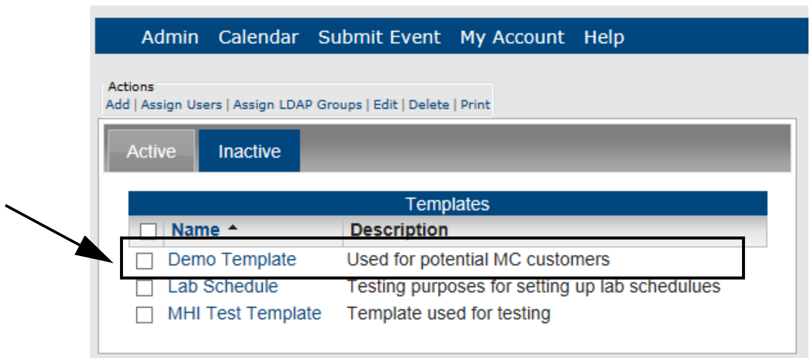


4. Clear the Active option.

5. Click Save.

   The user template is inactivated and is displayed on the Inactive tab on the Manage Templates page.

Figure 5-41: Manage Templates page, Inactive tab



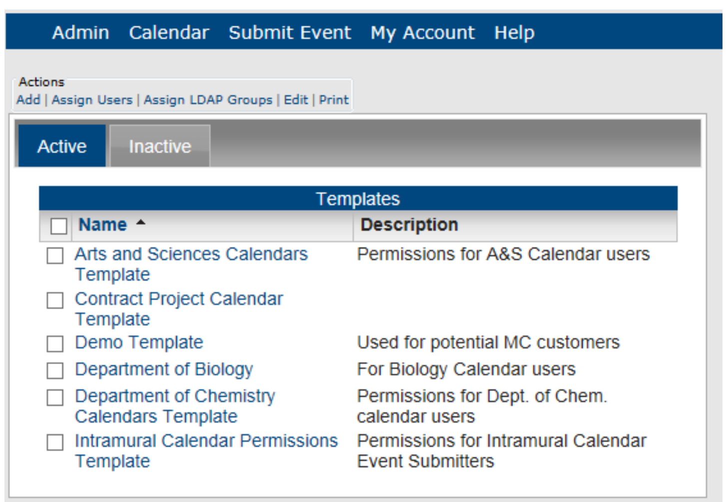
To edit a user template

You can edit both active and inactive user templates.

1. Under the Admin Panel main menu option, point to Security, and then click Templates.

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

Figure 5-42: Manage Templates page, Active tab



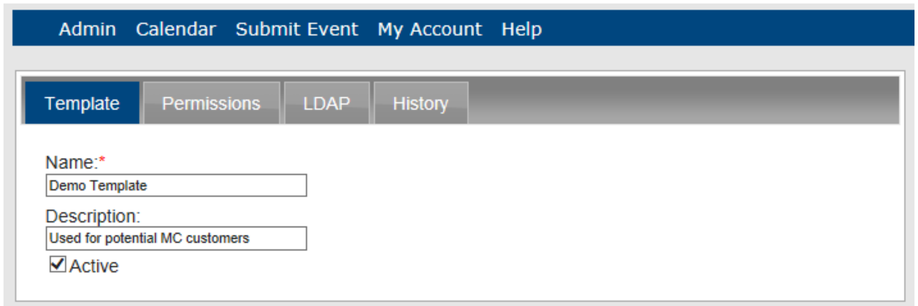
2. If needed, click the Inactive tab to open it.

3. Select the user template that you are editing.

4. Under Actions, click Edit.

   The Add Template page opens. The Template tab is the opened tab.

Figure 5-43: Add Template page, Template tab



5. Edit the information for the user template as needed.

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 "To specify user template permissions".
LDAP	The security group information that is maintained on your organization's network in conjunction with the templates in Master Calendar. See "To add LDAP groups to a user template".

6. Click Save to save the edited template in Master Calendar.

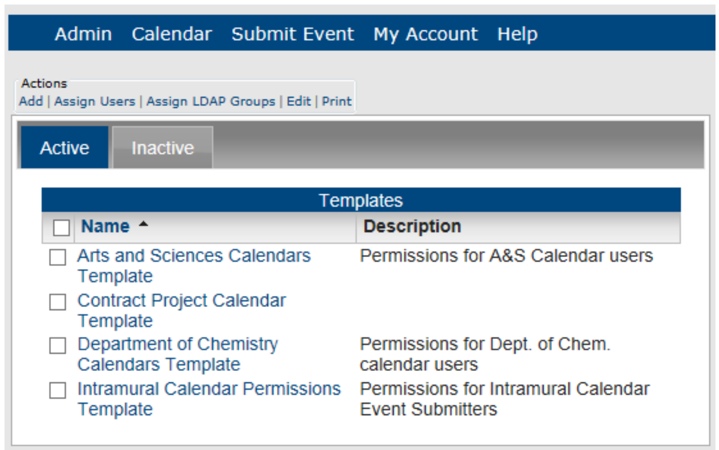
To delete a user template

You can delete only inactive user templates. To delete a currently active user template, you must first inactivate the template. (See “To inactivate a user template”.)

1. Under the Admin Panel main menu option, point to Security, and then click Templates.

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

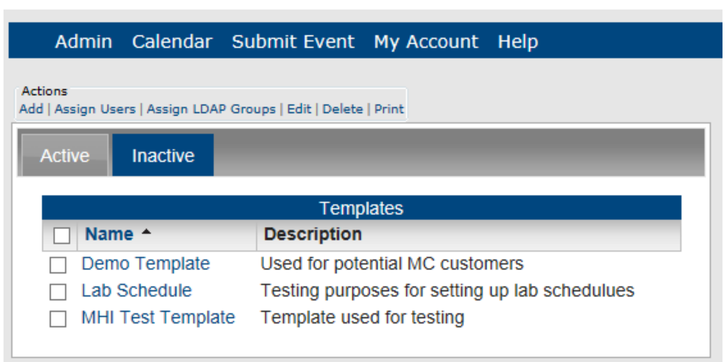
Figure 5-44: Manage Templates page, Active tab



2. Click the Inactive tab to open it.

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

Figure 5-45: Manage Templates page, Inactive tab



3. Select the user template or templates that you are deleting.

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

4. Under Actions, click Delete.

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

5. Click OK in the message.

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

6. Click OK in the message.

   The Inactive tab is refreshed to show the remaining, if any, inactive user templates in Master Calendar.

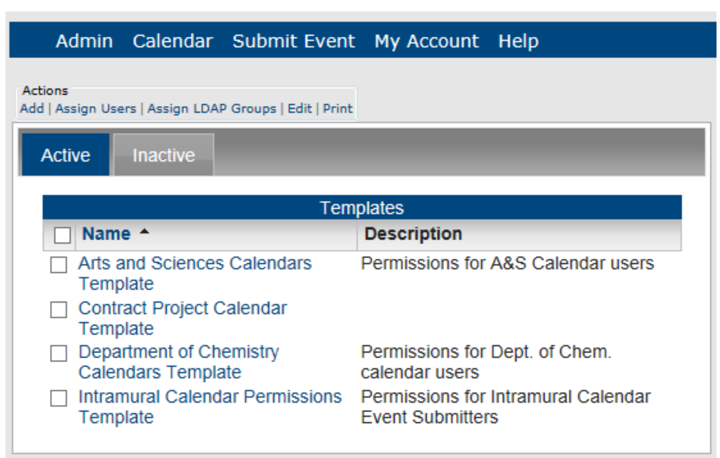
To generate a User Templates List report

You can generate a User Templates List report, which lists all the active or inactive user templates that are configured in Master Calendar. The report includes the template name and description, and it also details the user permissions for each template.

1. Under the Admin Panel main menu option, point to Security, and then click User Templates.

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

Figure 5-46: Manage Templates page, Active tab



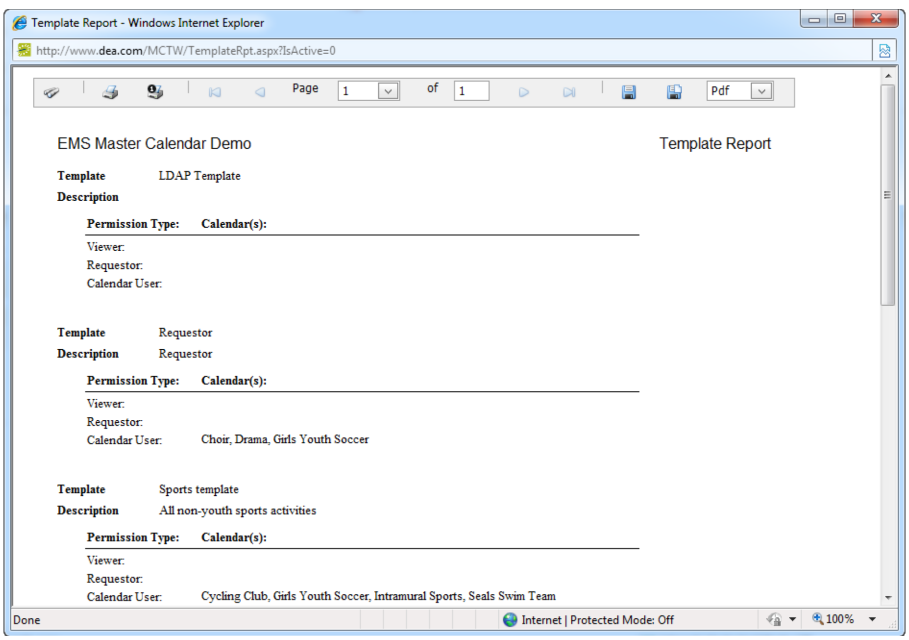
2. Do one of the following:

   - If you are generating a User Templates List report for all *active* user templates in your Master Calendar, under Actions, click Print.
   - If you are generating a User Templates List report for all *inactive* user templates in Master Calendar, click the Inactive tab to open it, and then under Actions, click Print.

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

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

Figure 5-47: Onscreen preview for a User Templates List report



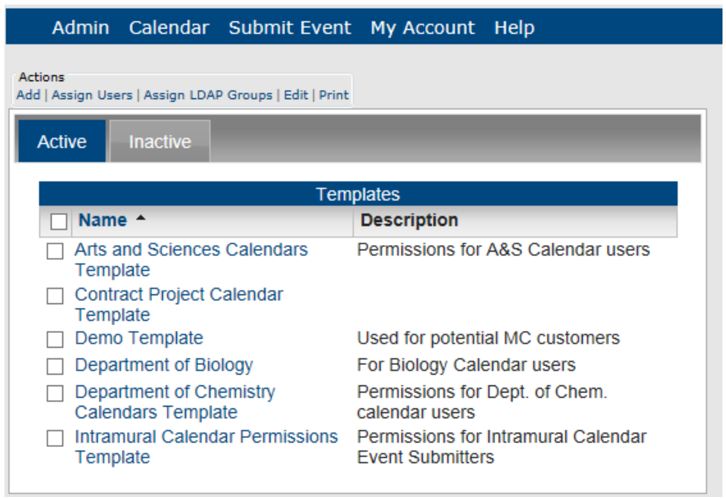
To view the history for a user template

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

1. Under the Admin Panel main menu option, point to Security, and then click Templates.

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

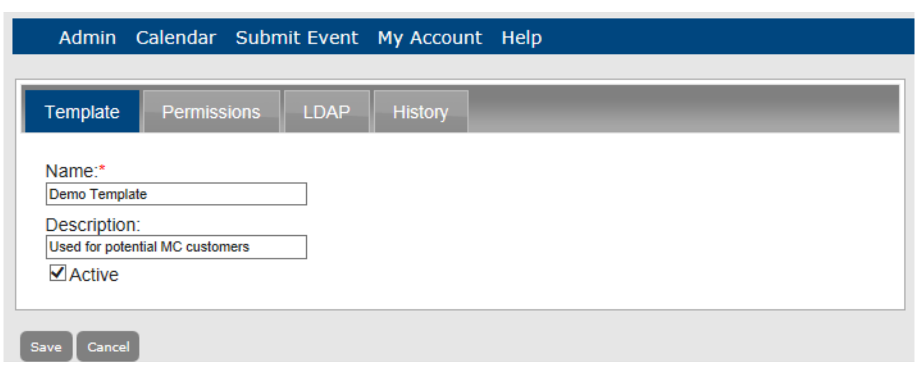
Figure 5-48: Manage Templates page, Active tab



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

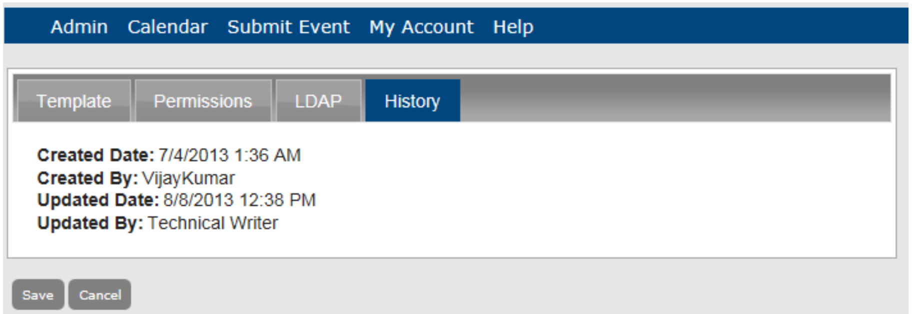
   The Add Template page opens. The Template tab is the opened tab.

Figure 5-49: Add Template page, Template tab



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

Figure 5-50: Add Template page, History tab



Administering Master Calendar

Site administration for Master Calendar consists of a variety of activities, including selecting the appearance of your Master Calendar site, specifying the site theme, managing RSS feeds and menu options, updating Master Calendar registration information, building and generating custom reports, and managing data sources, connectors, help text, and subscriptions. Administrator-specific functions are also available for working with and debugging Master Calendar.

This chapter covers the following topics:

- "Specifying a Master Calendar Theme"
- "Managing Default Settings for Master Calendar"
- "Managing RSS Feeds"
- "Managing Menus in your Master Calendar System"
- "Viewing and Updating Master Calendar Registration Information"
- "Managing Data Sources"
- "Managing Connectors in Master Calendar"
- "Managing Custom Reports"
- "Customizing the Header for Automated Emails"
- "Managing Help Text in Master Calendar"
- "Managing Subscriptions"

Specifying a Master Calendar Theme

A Master Calendar *theme* determines he appearance of your Master Calendar site everywhere other than the Admin panel. You can:

- Add or remove a custom banner. See “To add or remove a custom banner”
- Customize the Sidebar layout. See “To customize the Sidebar layout”
- Customize the main content for the site. See “To customize the main content”
- Pick a default theme. See “To select a default theme”
- Add, edit or delete custom color schemes. See “To add, edit, or delete a custom color scheme”

The theme for the Admin panel is locked upon delivery and installation of Master Calendar and you cannot edit it.

To specify a Master Calendar site theme

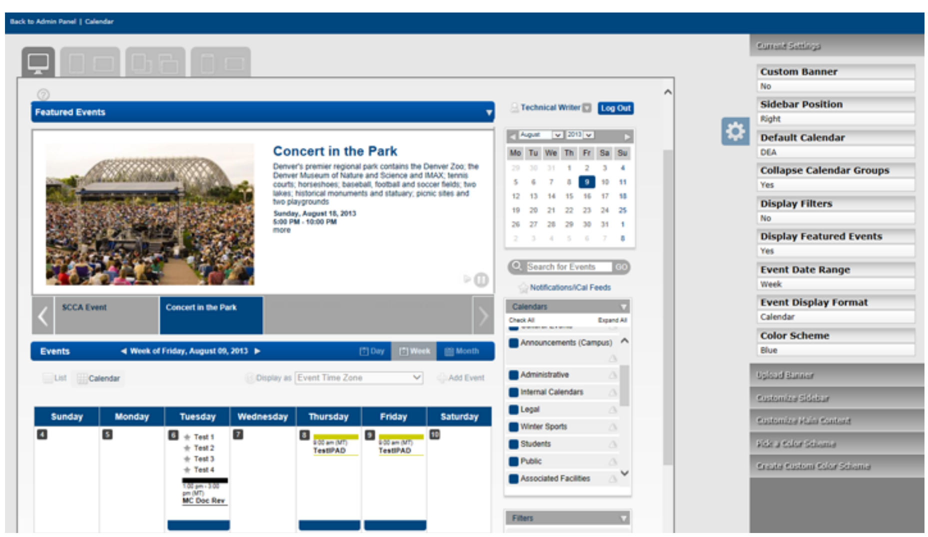
1. Under the Admin Panel main menu option, point to Site Administration, and then click Theme Roller.

   The Theme Roller page opens.

2. Click the Theme Roller Settings icon .

   The Theme Roller Settings list opens. The current settings for the theme are displayed in the list.

Figure 6-1: Theme Roller page



3. Continue to one of the following:
    - "To add or remove a custom banner"
    - "To customize the Sidebar layout"
    - "To customize the main content"
    - "To select a default theme"
    - "To add, edit, or delete a custom color scheme"

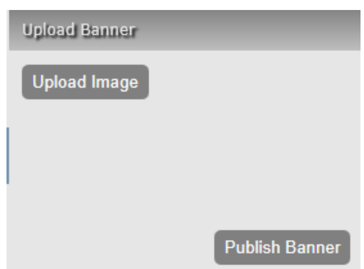
To add or remove a custom banner

A *custom banner* is a graphic image that is displayed at the top of the Master Calendar Home page and the Submit Event page. A custom banner typically announces the name or identity of your Master Calendar site, but you can post any image that fits your organization's business needs.

1. Click Upload Banner.

    The Banner popup opens. If your site currently has a banner displayed, then the name of the image file is displayed along with a Clear Image option and the banner is displayed at the top of the Theme Roller page; otherwise, the popup is blank and only Upload Image and Publish options are displayed.

Figure 6-2: Banner popup



2. Do one or both of the following as needed:
    - To add a banner to your Master Calendar site, click Upload Image, scroll to and select the image file, and then click Publish Banner.
    - To remove a banner from your Master Calendar site, click Clear Image.

    A message opens indicating that your changes were applied successfully and that your theme is now live.

3. Click OK.

    The message closes. If you added a banner, then the banner is displayed at the top of the Theme Roller page for previewing. If you removed a banner, then the banner is no longer displayed at the top of the Theme Roller page. The banner is also removed from the top of the Master Calendar Home page and the Submit Event page.

4. Continue with any other customizations as needed, or click the Theme Roller Settings icon to close the Theme Roller Settings list, and then click Back to Admin Panel to go to the Manage Events page or click Calendar to go to the Master Calendar Home page.

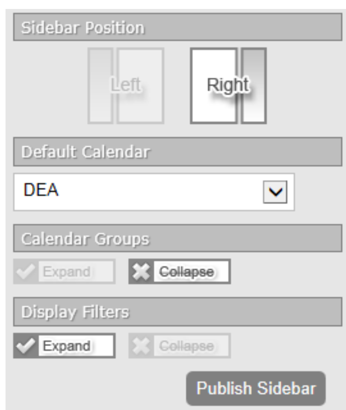
To customize the Sidebar layout

The *Sidebar* consists of a Calendar Tool, a blank keyword Search field, a Calendar Picker, and an Event Filters dialog box. When you customize the Sidebar consists you can specify the following information for it and its components on the Master Calendar Home page—the position of the Sidebar, the default calendar that is to be displayed in the Calendar Display area, whether the calendar display in the Calendar Picker is to be expanded or collapsed by default, and whether the Event Filters dialog box is to be expanded or collapsed by default.

1. Click Customize Side Bar.

   The Sidebar popup opens. The popup displays the current settings for the Sidebar.

Figure 6-3: Sidebar popup



2. Do any of the following as needed:
   - Select the Sidebar position.
   - Select the default calendar that is to be displayed in the Calendar Display area on the Master Calendar Home page.
   - Indicate if the calendar groups in the Calendar Picker are to be expanded or collapsed by default on the Master Calendar Home page.
   - Indicate if the Event Filters dialog box is to be expanded or collapsed on the Master Calendar Home page.

   After every selection, the Theme Roller page display is dynamically updated for previewing.

3. Click Publish Sidebar.

A message opens indicating that the changes were applied successfully and your theme is now live.

4. Click OK.

   The message closes. The Theme Roller page is dynamically updated with the selected changes for previewing.

5. Continue with any other customizations as needed, or click the Theme Roller Settings icon to close the Theme Roller Settings list, and then click Back to Admin Panel to go to the Manage Events page or click Calendar to go to the Master Calendar Home page.

To customize the main content

The main content for your Master Calendar site consists of featured events, the default calendar event range, and the default calendar event type.

1. Click Customize Main Content.

   The Featured Events popup opens.

Figure 6-4: Featured Events popup

2. Do any of the following as needed:

   - Indicate whether featured events are to be displayed on the Master Calendar Home page.
   - Select the date range for events—Day, Week, or Month—in the Calendar Display area.
   - Select the display format for events—List or Calendar—in the Calendar Display area.

   After every selection, the Theme Roller page display is dynamically updated for previewing.

3. Click Publish Main Content.

   A message opens indicating that the changes were applied successfully and your theme is now live.

4. Continue with any other customizations as needed, or click the Theme Roller Settings icon  to close the Theme Roller Settings list, and then click Back to Admin Panel to go to the Manage Events page or click Calendar to go to the Master Calendar Home page.

To select a default theme

Master Calendar is delivered with six default color schemes for the theme. The Dark color scheme is the theme that is in use when Master Calendar is installed.

1. Click Pick a Color Scheme.

   The Default Color Scheme popup opens. The six default color schemes are displayed. The default color scheme currently in use, if applicable, is highlighted.

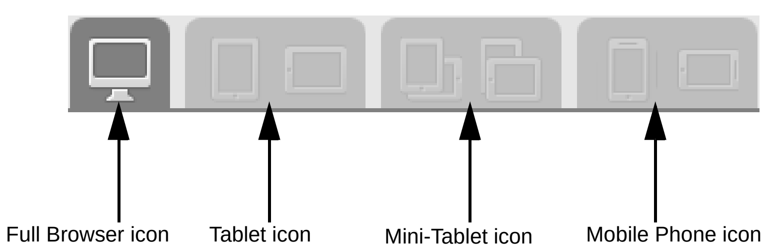
Figure 6-5: Default Color Scheme popup

2. Click a default color scheme, and then click Publish Color Scheme.

   The Theme Roller page is dynamically updated to reflect the chosen color scheme.

3. Optionally, at the top of the Theme Roller page, click the various Responsive Design icons to see what how the chosen color scheme appears in (from left to right) a full browser display, a tablet (portrait/landscape), a mini-tablet (portrait/landscape), or a mobile phone (portrait/landscape).

Figure 6-6: Responsive Design icons



4. Click Publish.

   A message opens indicating that the changes were applied successfully and your theme is now live.

5. Continue with any other customizations as needed, or click the Theme Roller Settings icon to close the Theme Roller Settings list, and then click Back to Admin Panel to go to the Manage Events page or click Calendar to go to the Master Calendar Home page.

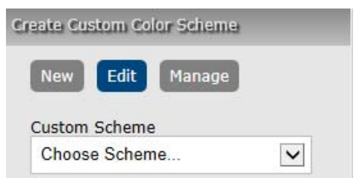
To add, edit, or delete a custom color scheme

If none of the default color schemes meets your needs, then you can create your own custom color scheme. You can also edit a custom color scheme, or delete a custom color scheme.

1. Click Create Custom Color Scheme.

   The Custom Color Scheme popup opens.

Figure 6-7: Custom Color Scheme popup



2. Continue to one of the following:
   - "To add custom color scheme"
   - "To modify a custom color scheme"
   - "To delete a custom color scheme"

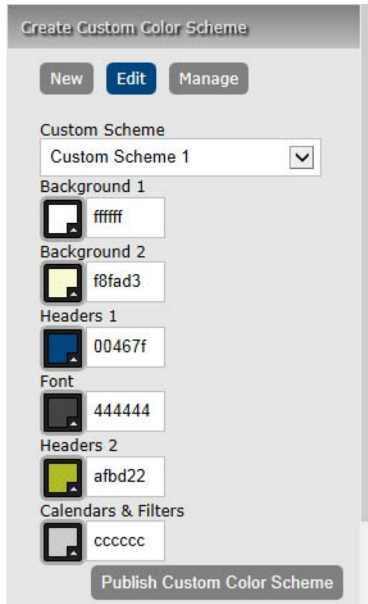
To add custom color scheme

1. Click New.

   A blank Color Scheme Name field opens.

2. Enter the name for the new custom color scheme, and then click Create.
   The Custom Color Scheme popup is refreshed with a template for specifying a custom color scheme. (See Figure 6-8). A default color value and a Color icon that displays the default color are provided for every site option for which you can specify a custom color.

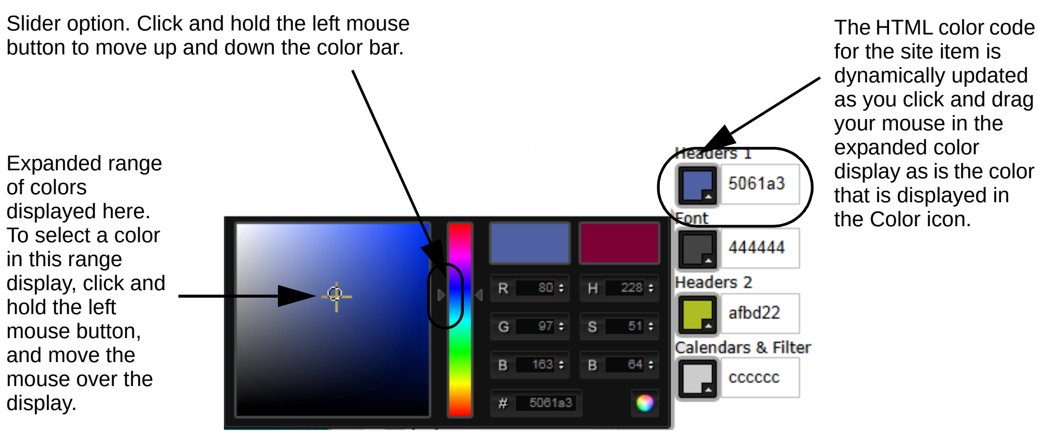
Figure 6-8: Custom Color Scheme popup, Custom Scheme template



3. Change the colors for any or all of the site items as needed. Click the Color icon for an item to open the Color Picker popup and use the options on the popup to select a color or define an RGB or HEX color.

As you use the Slider bar option on the Color Picker popup, an expanded range of colors is displayed to the left of the bar. To select a color in this range display, click and hold the left mouse button, and move the mouse over the display. The RGB and HEX values are dynamically updated in the popup as is the HTML color code and the color that is displayed in the Color icon for the item.

Figure 6-9: Color Picker Popup

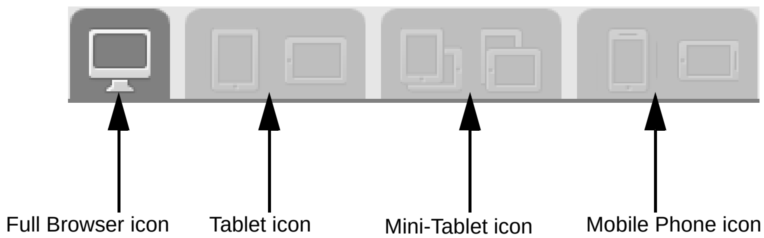


4. Click Publish Custom Color Scheme.

   The Theme Roller page is updated to reflect the custom color scheme. A message opens indicating that the changes were applied successfully and your theme is now live.

5. Optionally, at the top of the Theme Roller page, click the various Responsive Design icons to see what how the chosen color scheme appears in (from left to right) a full browser display, a tablet (portrait/landscape), a mini-tablet (portrait/landscape), or a mobile phone (portrait/landscape).

Figure 6-10: Responsive Design icons



6. Continue with any other customizations as needed, or click the Theme Roller Settings icon  to close the Theme Roller Settings list, and then click Back to Admin Panel to go to the Manage Events page or click Calendar to go to the Master Calendar Home page.

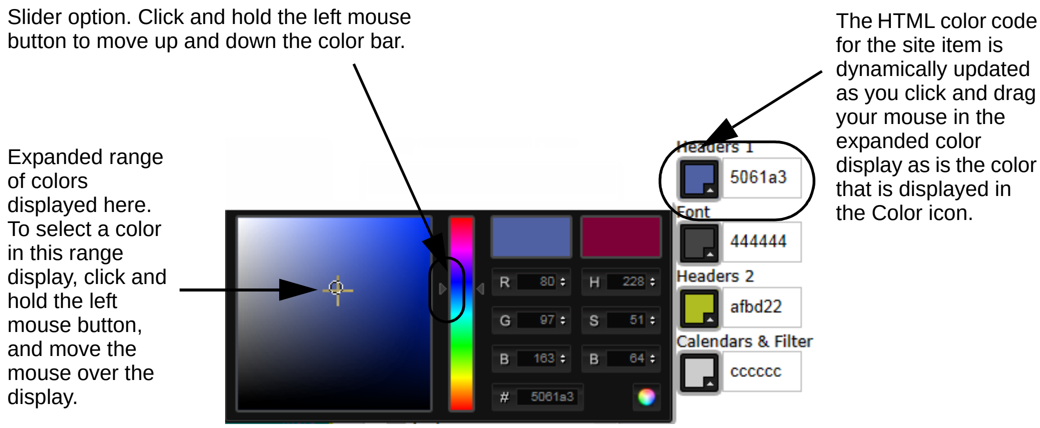
To modify a custom color scheme

1. On the Custom Scheme dropdown list, select the custom color scheme that you are editing.
   The Custom Color Scheme popup is refreshed with the information for the selected scheme. The current color value and a Color icon that displays the current color are provided for every site option. By default, Edit is already selected.

2. Change the colors for any or all of the site items as needed. Click the Color icon for an item to open the Color Picker popup (see Figure 6-11) and use the options on the popup to select a color or define an RGB or HEX color.

As you use the Slider bar option on the Color Picker popup, an expanded range of colors is displayed to the left of the bar. To select a color in this range display, click and hold the left mouse button, and move the mouse over the display. The RGB and HEX values are dynamically updated in the popup as is the HTML color code and the color that is displayed in the Color icon for the item.

Figure 6-11: Color Picker Popup

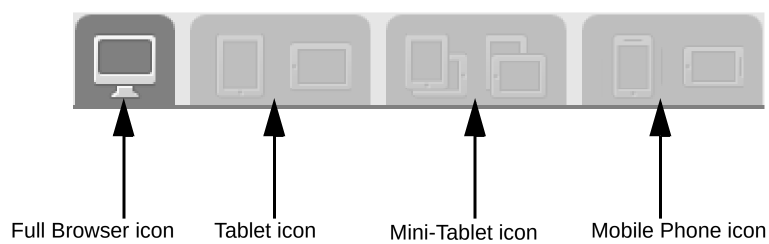


3. Click Publish Custom Color Scheme.

   The Theme Roller page is updated to reflect the custom color scheme. A message opens indicating that the changes were applied successfully and your theme is now live.

4. Optionally, at the top of the Theme Roller page, click the various Responsive Design icons to see what how the chosen color scheme appears in (from left to right) a full browser display, a tablet (portrait/landscape), a mini-tablet (portrait/landscape), or a mobile phone (portrait/landscape).

Figure 6-12: Responsive Design icons



5. Continue with any other customizations as needed, or click the Theme Roller Settings icon ⚙ to close the Theme Roller Settings list, and then click Back to Admin Panel to go to the Manage Events page or click Calendar to go to the Master Calendar Home page.

To delete a custom color scheme

1. On the Custom Color Scheme popup, click Manage.

   A list of all the available custom color schemes for your Master Calendar site opens.

2. Click the Delete icon next to the color scheme that you are deleting.

   - If the selected custom color scheme is not in use, the scheme is deleted immediately. Go to Step 4.
   - If the selected custom color scheme is currently in use, then a message opens indicating this and informing you that your site theme will be set back to the default shipped theme. Go to Step 3.

3. Click Yes.

   The message closes. The site theme is returned to the default shipped theme and the Theme Roller page is dynamically updated to reflect this.

4. Continue with any other customizations as needed, or click the Theme Roller Settings icon to close the Theme Roller Settings list, and then click Back to Admin Panel to go to the Manage Events page or click Calendar to go to the Master Calendar Home page.

Managing Default Settings for Master Calendar

When the Master Calendar application is initially installed, it is installed with *default settings*, which determine how the system is to be used. For example, some default settings include Max number of events/day to display in daily view, Max number of events/day to display in monthly view, Default Calendar Display, and so on. As the site administrator, you can change these settings to better meet your organization’s business needs. You can also generate a Default Settings List report and you can view the history for a default setting.

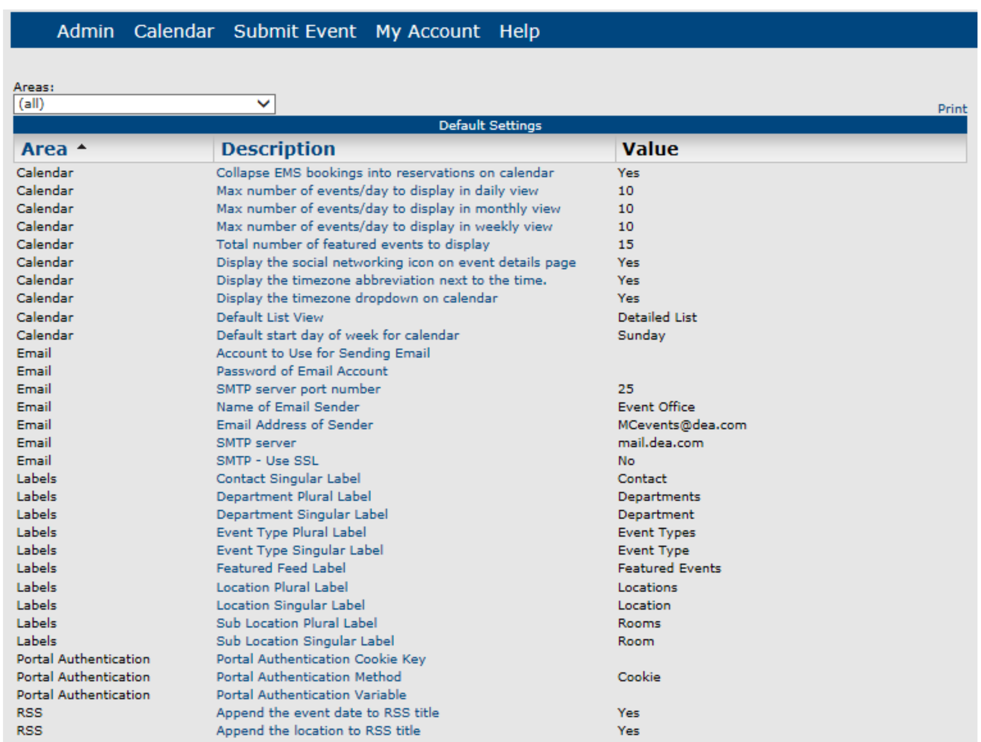
To manage default settings for Master Calendar

1. Under the Admin Panel main menu option, point to Site Administration, and then click Default Settings.

   The Default Settings page opens. All the default settings for Master Calendar with their current values are displayed on this tab.

See Appendix A, “Site Configuration Settings,” for a complete list of default settings, their description, and default values.

Figure 6-13: Default Settings page


Admin Calendar Submit Event My Account Help

Areas:
(all)

Print

Default Settings

Area	Description	Value
Calendar	Collapse EMS bookings into reservations on calendar	Yes
Calendar	Max number of events/day to display in daily view	10
Calendar	Max number of events/day to display in monthly view	10
Calendar	Max number of events/day to display in weekly view	10
Calendar	Total number of featured events to display	15
Calendar	Display the social networking icon on event details page	Yes
Calendar	Display the timezone abbreviation next to the time.	Yes
Calendar	Display the timezone dropdown on calendar	Yes
Calendar	Default List View	Detailed List
Calendar	Default start day of week for calendar	Sunday
Email	Account to Use for Sending Email	
Email	Password of Email Account	
Email	SMTP server port number	25
Email	Name of Email Sender	Event Office
Email	Email Address of Sender	MCevents@dea.com
Email	SMTP server	mail.dea.com
Email	SMTP - Use SSL	No
Labels	Contact Singular Label	Contact
Labels	Department Plural Label	Departments
Labels	Department Singular Label	Department
Labels	Event Type Plural Label	Event Types
Labels	Event Type Singular Label	Event Type
Labels	Featured Feed Label	Featured Events
Labels	Location Plural Label	Locations
Labels	Location Singular Label	Location
Labels	Sub Location Plural Label	Rooms
Labels	Sub Location Singular Label	Room
Portal Authentication	Portal Authentication Cookie Key	
Portal Authentication	Portal Authentication Method	Cookie
Portal Authentication	Portal Authentication Variable	
RSS	Append the event date to RSS title	Yes
RSS	Append the location to RSS title	Yes

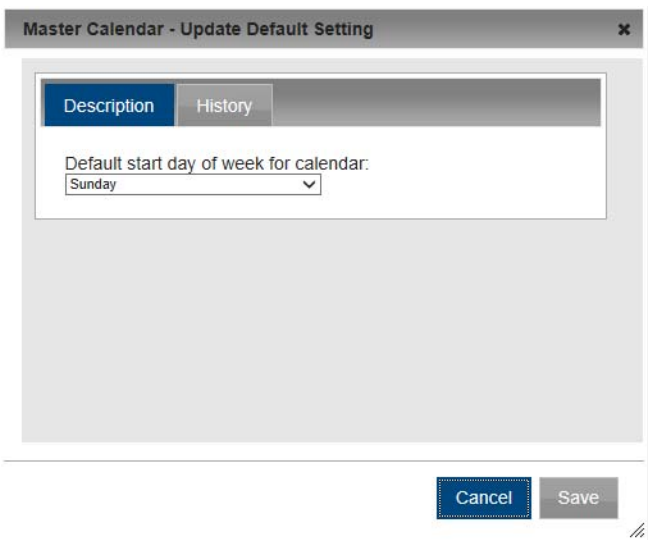
2. Optionally, to refine this list, on the Area dropdown list, select the area in Master Calendar for which you are changing the default settings.

   The Default Settings page is refreshed to show only those default settings for the selected area.

3. Click the default setting for which you are changing the value or viewing the history.

   The Default Setting dialog box opens. This dialog box has a Description tab, which is open by default, and a History tab. The Description tab shows the description for the default setting and its current value.

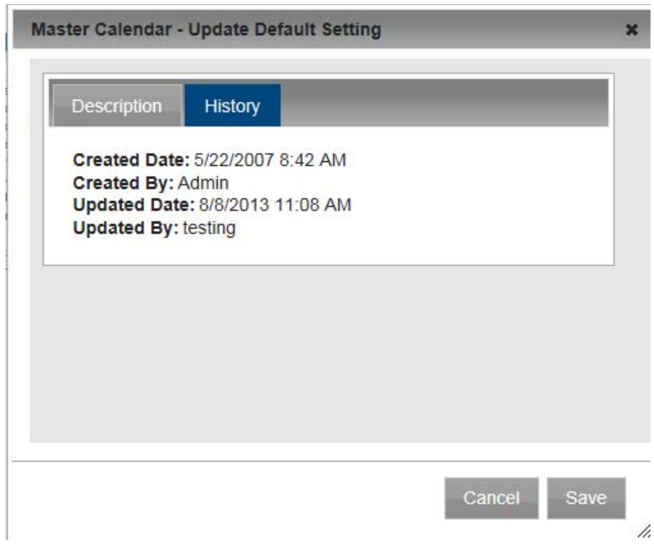
Figure 6-14: Update Default Setting dialog box, Description tab



4. Do one of the following:

   - Edit the value for the setting as needed, and then click Save to save the new value for the default setting.
     The dialog box closes and you return to the Default Settings page, with the new value for the default setting appearing on the page.
   - To view the history for the default setting, click the History tab to open it.
     The history for a default settings consists of the original creation date of the setting, the name of the user who created the setting, the last date that the setting was edited. and the name of the user who last edited the setting. See Figure 6-15.

Figure 6-15: Update Default Setting dialog box, History tab



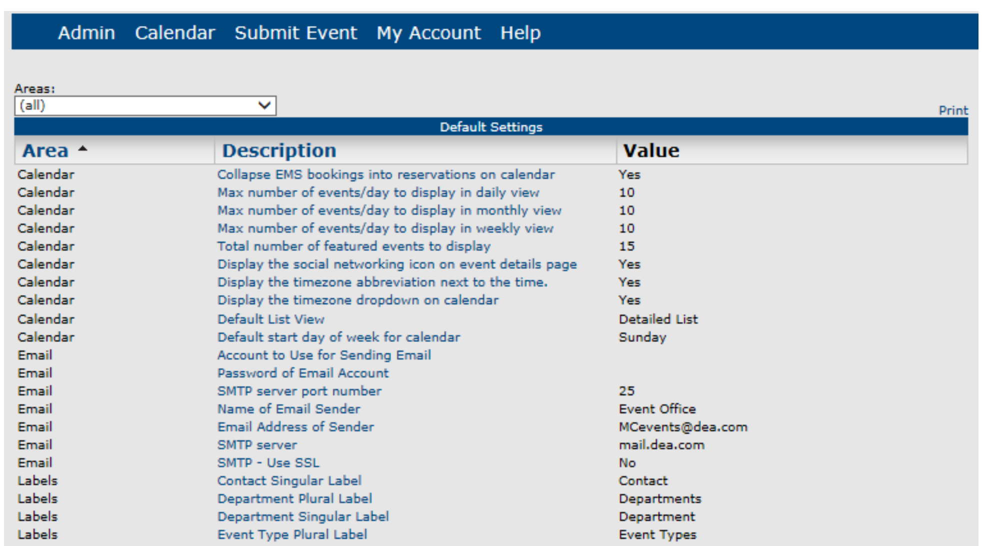
To generate a Default Settings List report

You can generate a Default Settings List report, which lists the current values for the default settings in Master Calendar. You can generate a report that lists the current values for all your default settings, or you can generate a report that lists the current values for a selected area of default settings (Calendar, Email, Labels, and so on).

1. Under the Admin Panel main menu option, point to Site Administration, and then click Default Settings.

   The Default Settings page opens. All the default settings for Master Calendar with their current values are displayed on this tab.

Figure 6-16: Default Settings page

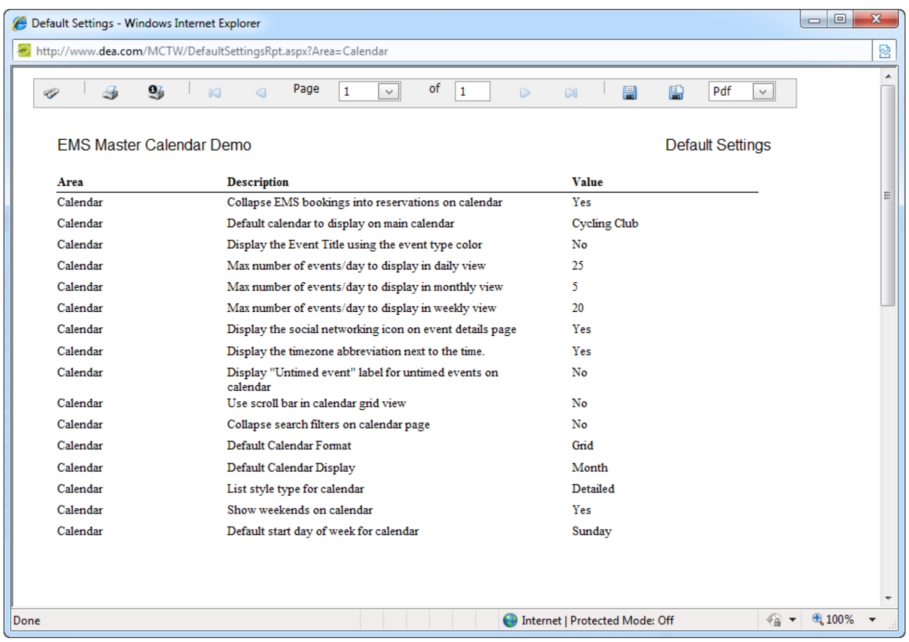


2. Do one of the following:

    - If you are generating a Default Settings List report for all *active* default settings in your Master Calendar, then click Print.
    - If you are generating a Default Settings List report for a specific area in Master Calendar, select the area on the Areas dropdown list, and then click Print.
      An onscreen preview of the Default Settings List report opens in its own window. A variety of options are available from this preview, including (from left to right at the top of the onscreen preview) the options to search the report results, print the report in its entirety, print the currently displayed report page, and export the report to a file and save the file. See Figure 6-17.

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

Figure 6-17: Onscreen preview for a Default Settings List report



Managing RSS Feeds

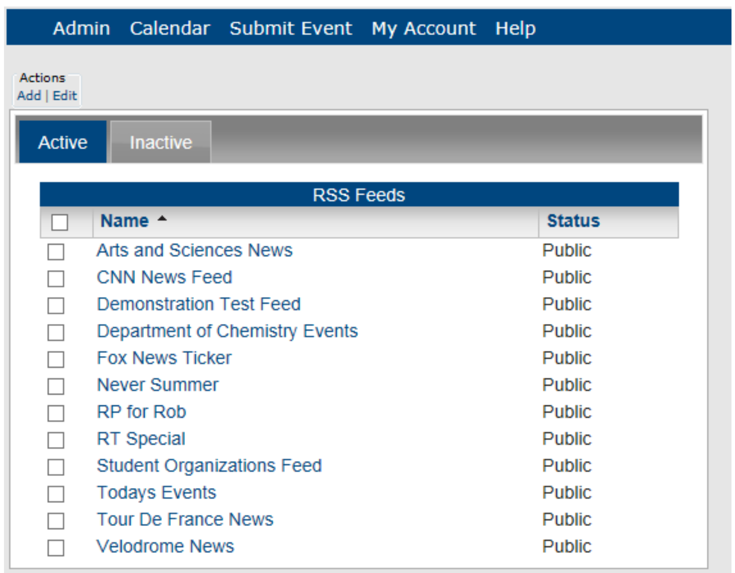
AReally Simple Syndication (RSS) feed is a method of distributing links to content in your Master Calendar that you would like guests or users to use. All RSS feeds to which you have access are available through the RSS link at the bottom of every page in Master Calendar. Private RSS feeds are available to users only after they log in to Master Calendar. Managing RSS feeds consists of adding RSS feeds, activating and inactivating RSS feeds, editing RSS feeds, and deleting RSS feeds. You can also view the history for an RSS feed.

To add an RSS feed

1. Under the Admin Panel main menu option, point to Site Administration, and then click RSS Feeds.

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

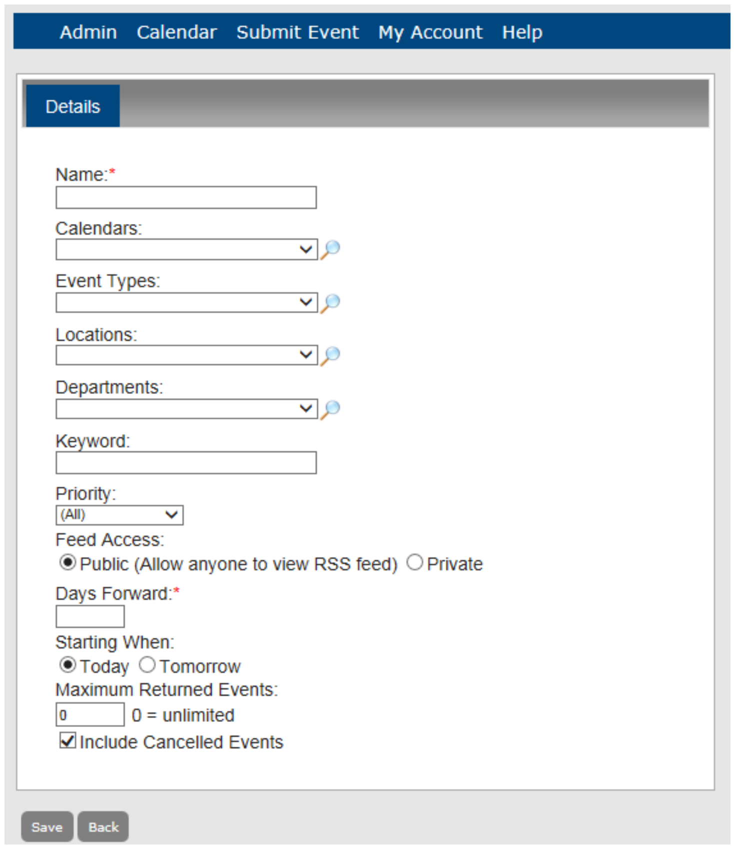
Figure 6-18: Manage RSS Feeds page, Active tab



2. Under Actions, click Add.

   The Add RSS Feed page opens. The Details tab is the only tab on this page. You use the options on this tab to specify the information for the new RSS feed.

Figure 6-19: Add RSS Feed page, Details tab



3. Enter the information for the RSS feed.

Field	Description
Name	The name for the RSS fed.
Calendars	A list of all active calendars to which you have access as a Calendar Manager. Click the Lookup icon to open the Calendars dialog box and select the calendar or calendars from which the RSS feed is to pull information.
Event Types	A list of all active event types that are currently configured in Master Calendar. Click the Lookup icon to open the Event Types dialog box and select the event type or types that RSS feed should pull.
Locations	A list of all active event locations that are currently configured in Master Calendar. Click the Lookup icon to open the Locations dialog box and select one or more locations. The RSS feed will pull the events with these specific locations.

Field	Description
Departments	A list of all active departments that are currently configured in Master Calendar. Click the Lookup icon to open the Departments dialog box and select one or ore departments. The RSS feed will pull the events with these specific departments. **Note:** Department is a default label.You can configure this to better suit your organization's business needs, for example, "Business Units."
Keyword	Enter a search string to further filter the events that are pulled by the RSS feed. **Note:** The search is limited to the exact order of the characters in the string; however, the search string is not case-sensitive and the search string can be found anywhere in the search results. For example, the search string "scout" returns holidays that contain either **Scout**ing Day or Boy **Scout**s' Day.
Priority	Indicate the priority of the events that the RSS feed should pull. The default value is All. You can leave this value as-is, or select from one of three values—High, Medium, or Low.
Feed Access	• 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 Cancelled Events	The default value is Yes. To set to No, clear this selection.
Make Featured Feed	The default value is No. To set to Yes, select this option. **Note:** Remember, only one feed at a time can be the featured feed. If the RSS feed access is set to Private, a user cannot view the featured feed until after they log in to Master Calendar. If the RSS feed access is set to Public, anyone, guest or user, can view the featured feed.

4. Click Save.

   An RSS Feed Saved message opens.

5. Click OK in the RSS Feed Saved message to save your RSS Feed.

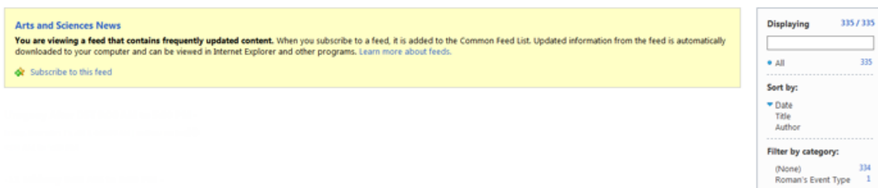
   Four links are displayed at the bottom of the RSS Feed page.

   - Preview Link—Click this link to preview the RSS feed link and determine if it is correct, or if you need to make changes.
   - Encrypted Link—The actual physical URL to the RSS feed.
   - Friendly Link—A shortened URL to the RSS feed to accommodate smaller viewing screens.
   - Custom Link—Includes additional fields (Start Time, End Time, Location and IsAlldayEvent) that are embedded in the RSS document.

Figure 6-20: RSS Links

Preview Link: http://www.dea.com/MCTW/RSSFeeds.aspx?data=sxJvQtP%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

Figure 6-21: Previewing an RSS feed

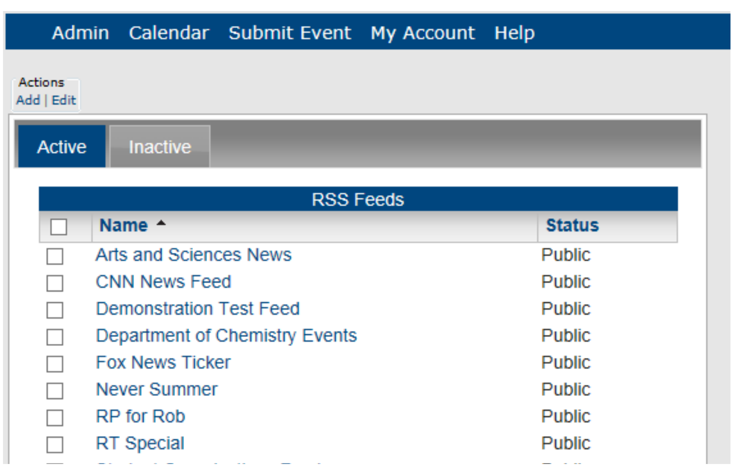


To activate an RSS feed

1. Under the Admin Panel main menu option, point to Site Administration, and then click RSS Feeds.

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

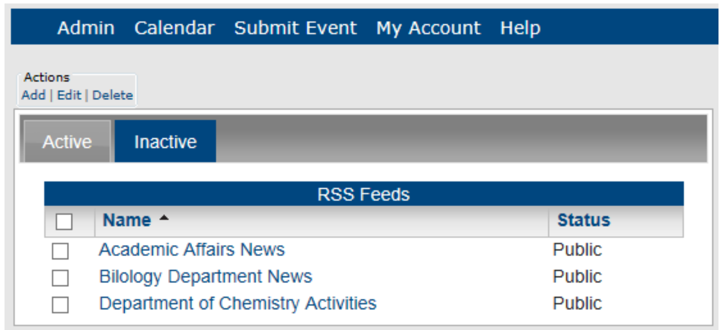
Figure 6-22: Manage RSS Feeds page, Active tab



2. Click the Inactive tab to open it.

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

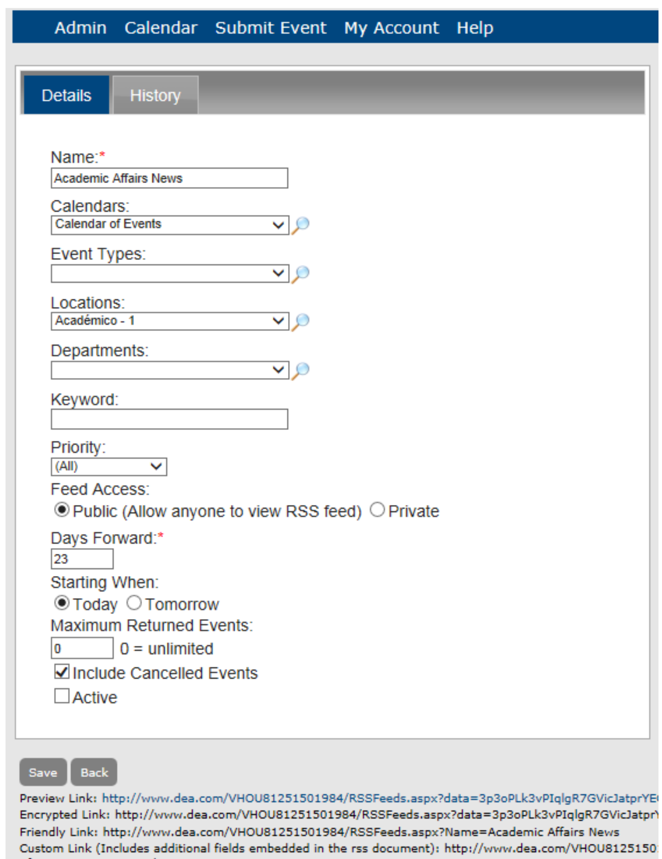
Figure 6-23: Manage RSS Feeds page, Inactive tab



3. Select the RSS Feed that you are activating.
4. Under Actions, click Edit.

   The Add RSS Feeds page opens. The Details tab is the opened tab. The Active option is not selected.

Figure 6-24: Add RSS Feeds page, Details tab, Inactive RSS feed

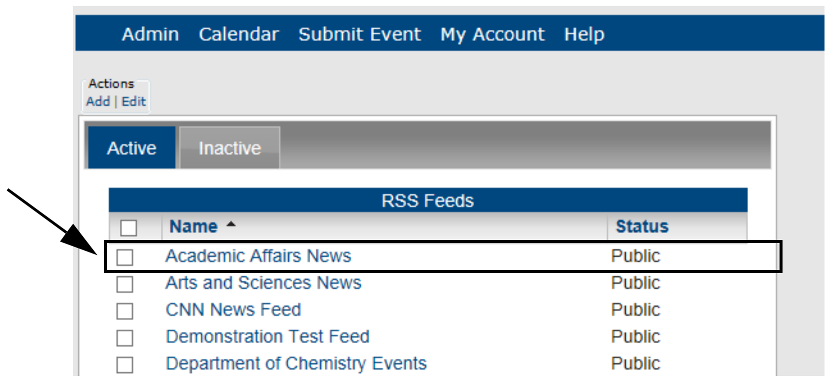


5. Select Active.
6. Click Save.

   An RSS Feed Saved message opens.
7. Click OK in the RSS Feed Saved message to save your RSS Feed.
8. Click Back to return to the Manage RSS Feeds page.

   The Active tab is the opened tab. The RSS Feed is now displayed on this tab.

Figure 6-25: Manage RSS Feeds, Active tab

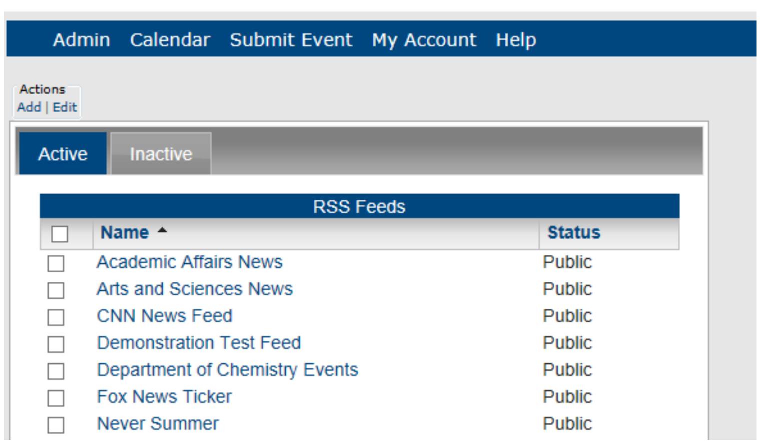


To inactivate an RSS Feed

1. Under the Admin Panel main menu option, point to Site Administration, and then click RSS Feeds.

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

Figure 6-26: Manage RSS Feeds page, Active tab

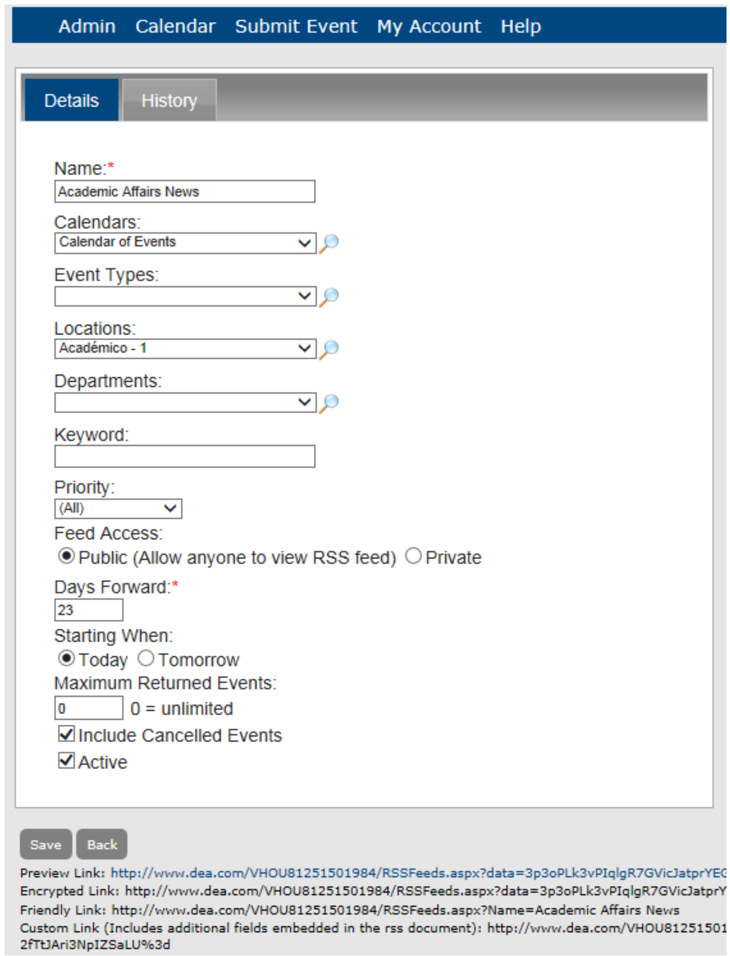


2. Select the RSS Feed that you are inactivating.

3. Under Actions, click Edit.

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

Figure 6-27: Add RSS Feed page, Details tab, Active RSS feed



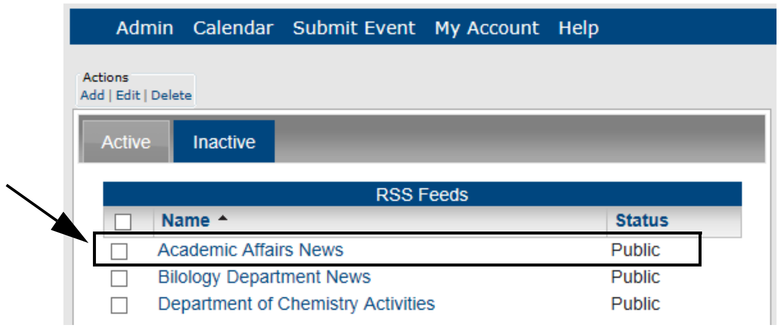
4. Clear the Active option.
5. Click Save.

   An RSS Feed Saved message opens.
6. Click OK in the RSS Feed Saved message to save your RSS Feed.
7. Click Back to return to the RSS Feeds page. The Active tab is the opened tab.

8. Click the Inactive tab to open it.

   The inactivated RSS Feed is displayed on this tab.

Figure 6-28: Manage RSS Feeds page, Inactive tab



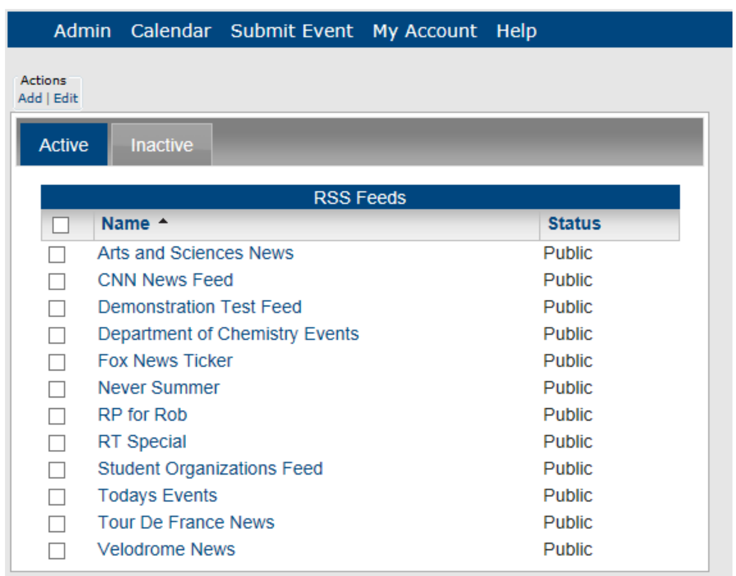
To edit an RSS feed

You can edit both active and inactive RSS feeds.

1. Under the Admin Panel main menu option, point to Site Administration, and then click RSS Feeds.

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

Figure 6-29: Manage RSS Feeds page, Active tab

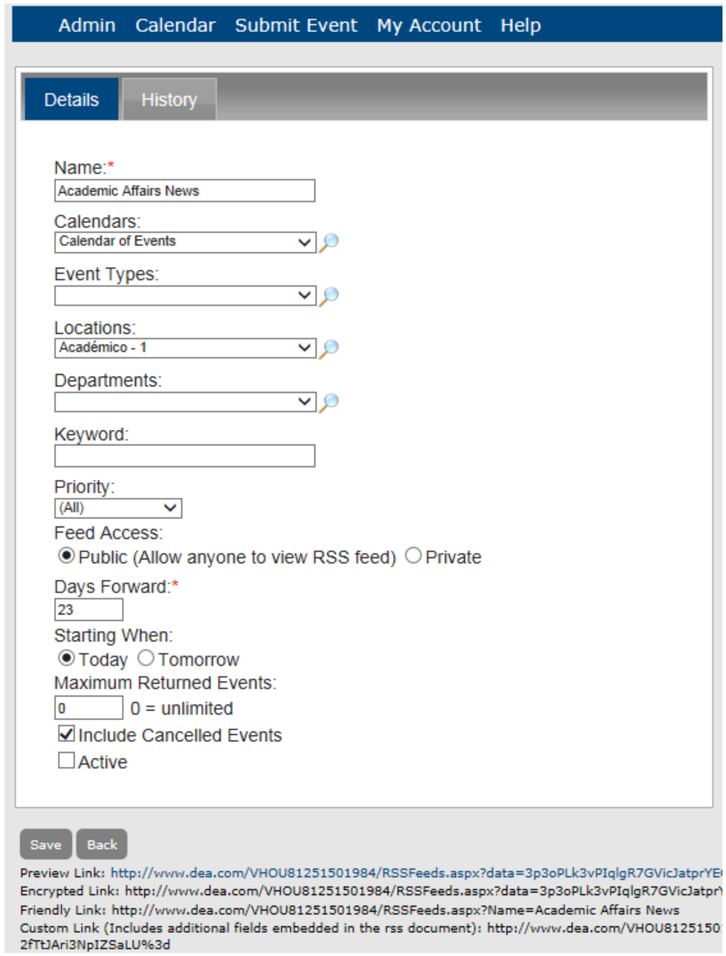


2. If needed, click the Inactive tab to open it.
3. Select the RSS Feed that you are editing.

4. Under Actions, click Edit.

   The Add RSS Feeds page opens. The Details tab is the opened tab.

Figure 6-30: Add RSS Feeds page, Details tab



5. Edit any and all the information as needed for the feed.

Field	Description
Name	The name for the RSS fed.
Calendars	A list of all active calendars to which you have access as a Calendar Manager. Click the Lookup icon to open the Calendars dialog box and select the calendar or calendars from which the RSS feed is to pull information.
Event Types	A list of all active event types that are currently configured in Master Calendar. Click the Lookup icon to open the Event Types dialog box and select the event type or types that RSS feed should pull.

Field	Description
Locations	A list of all active event locations that are currently configured in Master Calendar. Click the Lookup icon to open the Locations dialog box and select the location or locations to select the events with the specific locations that the RSS feed should pull.
Priority	Indicate the priority of the events that the RSS feed should pull. The default value is All. You can change this to one of three values - High, Medium, or Low.
Feed Access	• Public - Anyone, not just users of Master Calendar, can view the feed. (Default value.) • Private - Only users of Master Calendar can view the feed.
Days Forward	The number of days going forward from the current day's date that the RSS feed should pull information.
Maximum Returned Events	The maximum number of events that the RSS feed should return. The default value is 0, which means that there is no limit to the maximum number of events returned.
Include Cancelled Events	The default value is Yes. To set to No, clear this selection.
Make Featured Feed	The default value is No. To set to Yes, select this option. **Note:** Remember, only one feed at a time can be the featured feed. If the RSS feed access is set to Private, a user cannot view the featured feed until after they log in to Master Calendar. If the RSS feed access is set to Public, anyone, guest or user, can view the featured feed.

6. Click Save.

   An RSS Feed Saved message opens.

7. Click OK in the RSS Feed Saved message to save your edited RSS Feed.

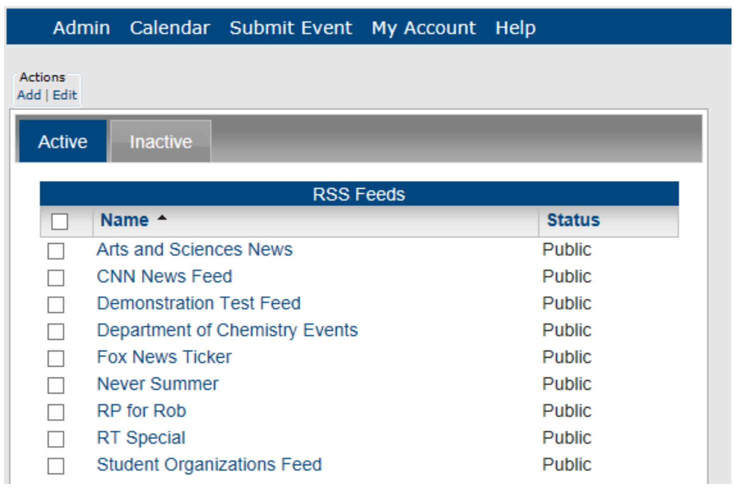
To delete an RSS feed

You can delete only inactive RSS feeds. To delete an active RSS feed, you must first inactivate it. (See “To inactivate an RSS Feed”.)

1. Under the Admin Panel main menu option, point to Site Administration, and then click RSS Feeds.

   The RSS Feeds page opens. The Active tab is the opened tab. All currently active RSS feeds in Master Calendar are displayed on this tab.

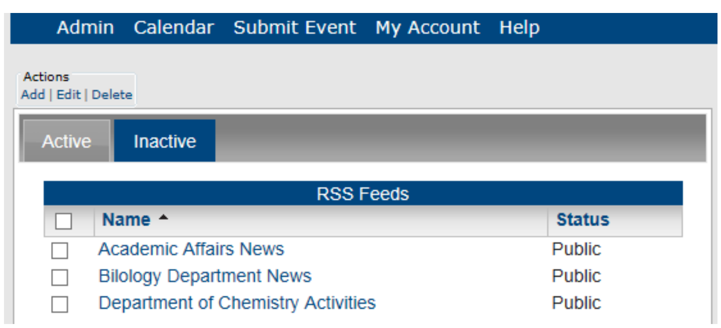
Figure 6-31: Manage RSS Feeds page, Active tab



2. Click the Inactive tab to open it.

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

Figure 6-32: Manage RSS Feeds page, Inactive tab



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.

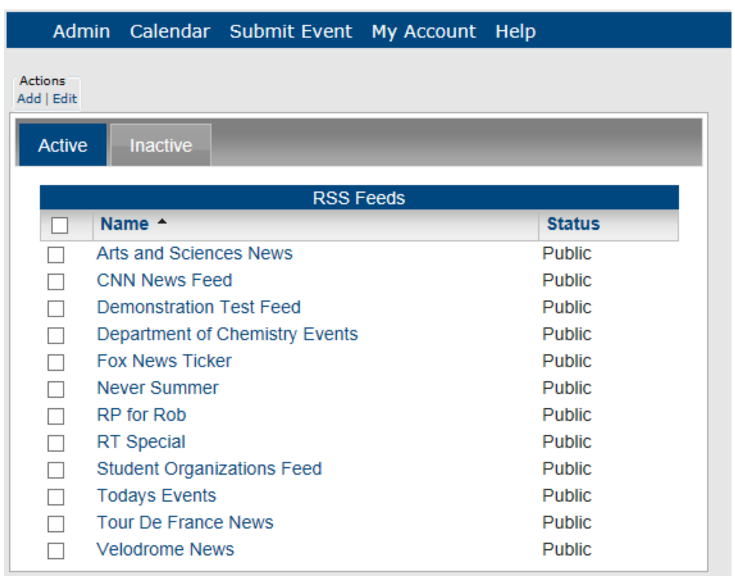
To view the history for an RSS feed

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

1. Under the Admin Panel main menu option, point to Site Administration, and then click RSS Feeds.

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

Figure 6-33: Manage RSS Feeds page, Active tab



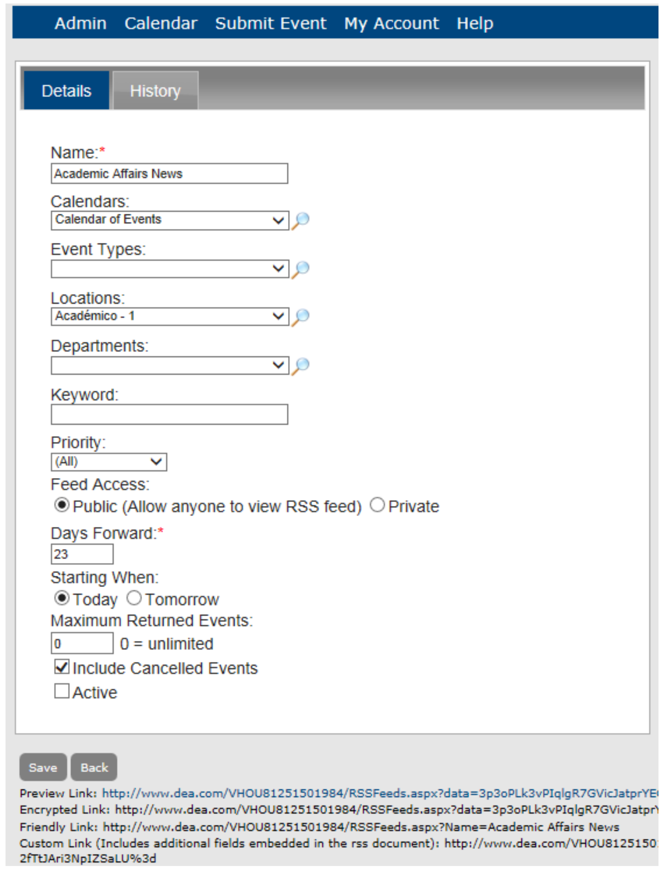
2. If needed, click the Inactive tab to open it.

3. Select the RSS Feed for which you are viewing the history.

4. Under Actions, click Edit.

   The Add RSS Feed page opens. The Details tab is the opened tab.

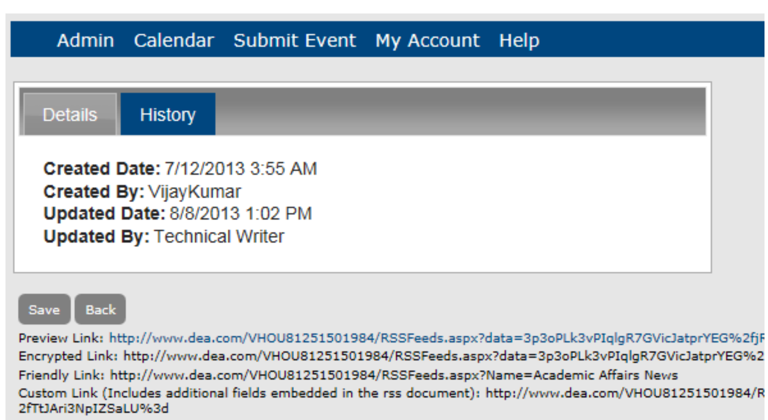
Figure 6-34: Add RSS Feeds page, Details tab



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

   The tab also shows the four links for the RSS feed.

Figure 6-35: Add RSS Feed page, History tab



Managing Menus in your Master Calendar System

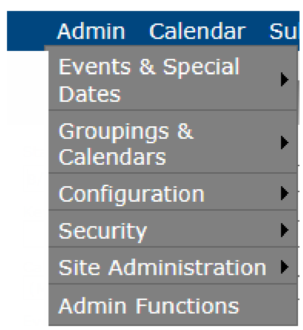
When Master Calendar is first installed, the *main menu*, or *system menu*, has a default layout as shown Figure 6-36. This default layout includes not only the wording that is used for the main menu options, or *parent* options, but also, the order of the child options on each of the parent menus.

Figure 6-36: Main Menu, default layout

Figure 6-37: Main Menu, default layout with Links parent menu activated

When you first log in to Master Calendar, Figure 6-36 shows what the main menu looks like; however, there is another Parent option that is available for the main menu—the Links option as shown in Figure 6-37. The Links option is displayed on the main menu after you add user-defined child options for it.

Figure 6-38: Example of the default Admin menu showing child menu options



You can edit the main menu by doing one or more of the following:

- Editing the text that is used for the main menu options, or *system* options.
- Editing the order of the options on the main menu.
- Editing the text that is used for child menu options, or *system* options.
- Editing the order of child menu options.

You can also add your own options, or *user-defined options*, to the main menu.

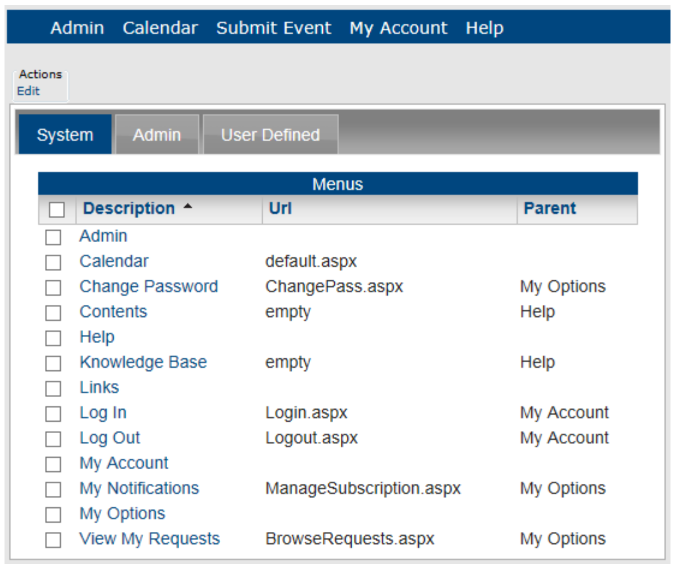
Managing menu options consists of editing main menu options and child menu options, adding user-defined options, editing user-defined menu options, entering translations for menu text and menu options, and deleting user-defined menu options. You can also view the history for a menu option.

To edit a menu option

1. Under the Admin Panel main menu option, point to Site Administration, and then click Menus.

   The Manage Menus page opens. The System tab is the opened tab. All the current main menu options are displayed on this tab. This tab also lists all the child menu options that you can edit.

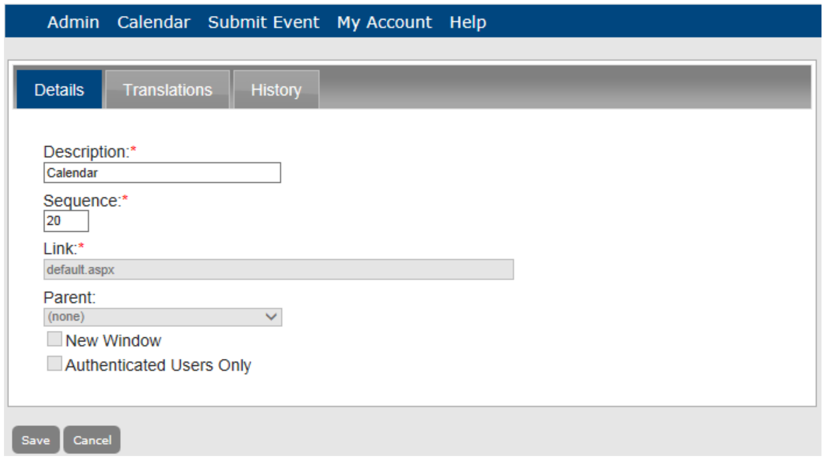
Figure 6-39: Manage Menus page, System tab



2. Select the main menu option or child menu option that you are editing.
3. Under Actions, click Edit.

   The Add Menu page opens. The Details tab is the opened tab. You use the options on this tab to change the description of the menu option, its position (Sequence) on the menu, or both.

Figure 6-40: Add Menu page, Details tab



4. After you make the changes to the menu option, click Save.
5. To see your change, log out of Master Calendar, then log back in to Master Calendar.

Figure 6-41: Example of main menu with edited option

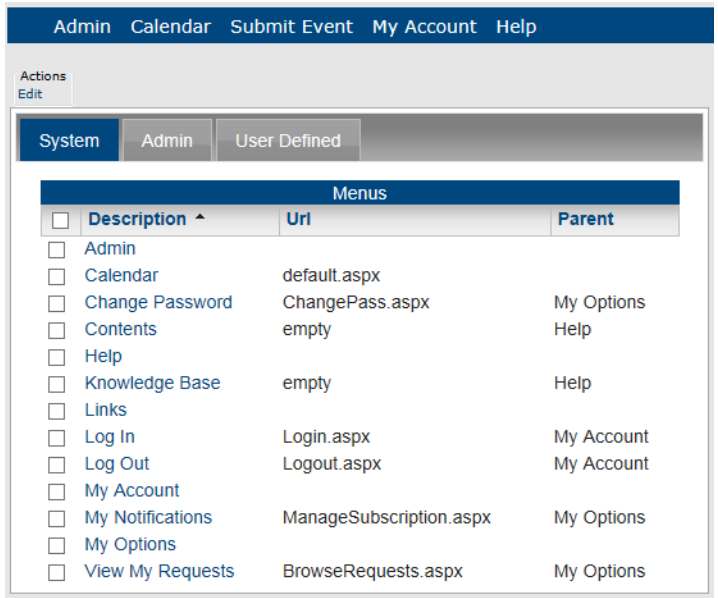
To add a user-defined option to the main menu

A *user-defined* option links to a website that is outside of Master Calendar. When you add this option to the main menu, you can indicate if the website to which you are linking is to open in a new window, and if only users who log in to Master Calendar can see the option on the menu.

1. Under the Admin Panel main menu option, point to Site Administration, and then click Menus.

   The Manage Menus page opens. The System tab is the opened tab. All the current main menu options are displayed on this tab. This tab also lists all the child menu options that you can edit.

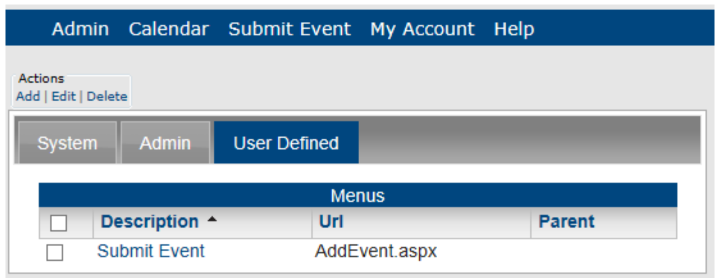
Figure 6-42: Manage Menus page, System tab



2. Click the User Defined tab to open it.

   All currently active user-defined options in Master Calendar are displayed on this tab.

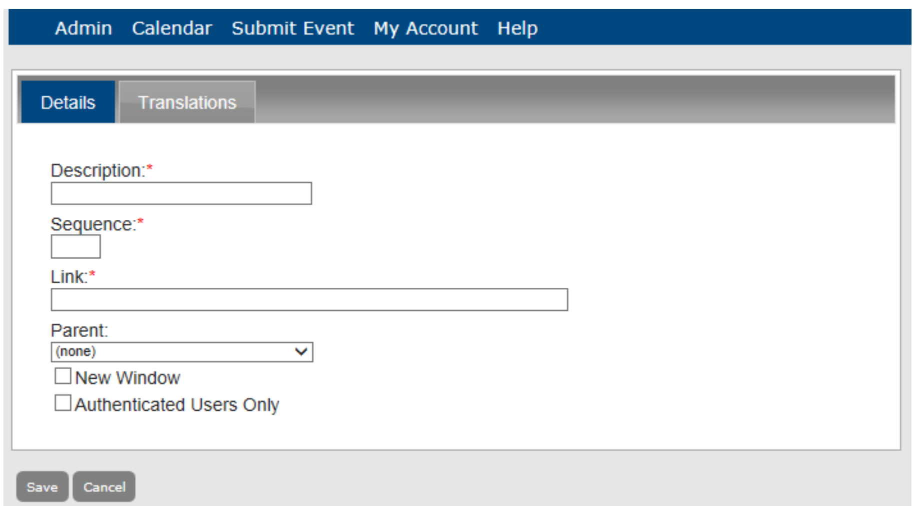
Figure 6-43: Manage Menus page, User Defined tab



3. Under Actions, click Add.

   The Add Menu page opens. The Details tab is the opened tab. You use the options on this tab to specify the information for the user-defined menu option.

Figure 6-44: Add Menu page, Details tab



4. Enter the information for the user-defined menu option.

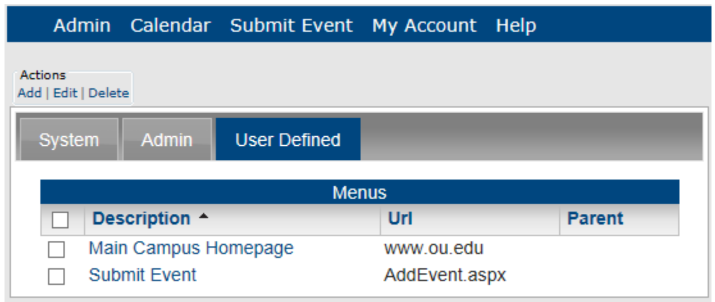
Field	Description
Description	The wording for the menu option.
Sequence	The order of the option on the menu.
Link	A link to an outside website.
Parent	The main menu option under which you are placing the user-defined option.
New Window	Select this option to have the website to which you are linking the option open in a new window (leaving the Master Calendar window open.)
Authenticated Users Only	Select this option to have only those users who have logged into Master Calendar see the link.

5. Click Save.

   The Details tab closes and you return to the System tab of the Manage Menus page.

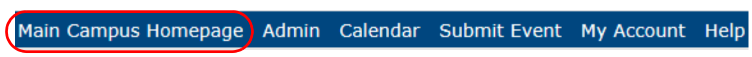
6. Click the User Defined tab to open it and view the newly added user-defined link.

Figure 6-45: Manage Menus page, User Defined tab



7. To see your user-defined menu option, log out of Master Calendar, and then log back in to Master Calendar.

Figure 6-46: Example of User-Defined menu option added to Admin menu

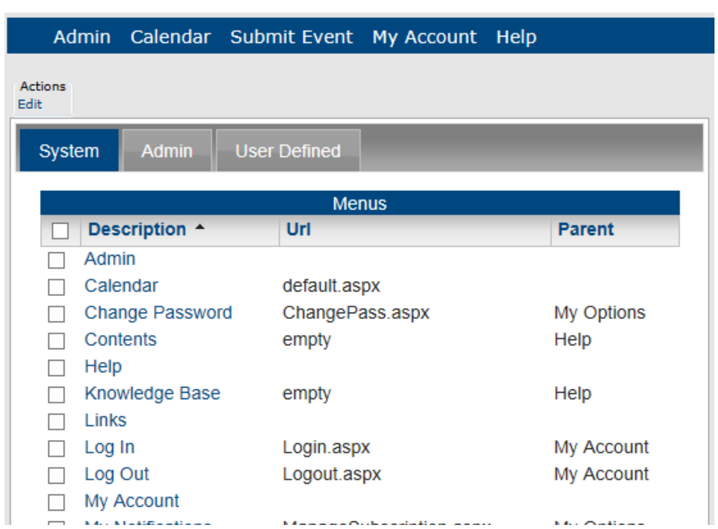


To edit a user-defined menu option

1. Under the Admin Panel main menu option, point to Site Administration, and then click Menus.

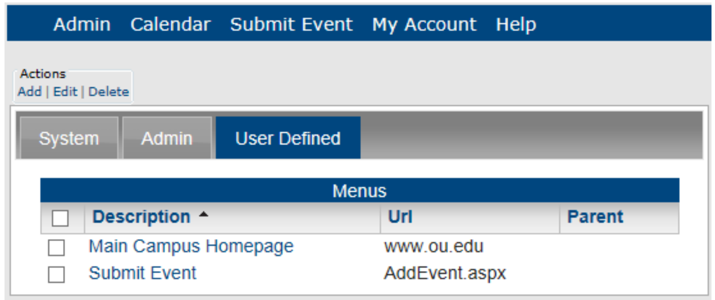
   The Manage Menus page opens. The System tab is the opened tab. All the current main menu options are displayed on this tab. This tab also lists all the child menu options that you can edit.

Figure 6-47: Manage Menus page, System tab



2. Click the User Defined tab to open it.

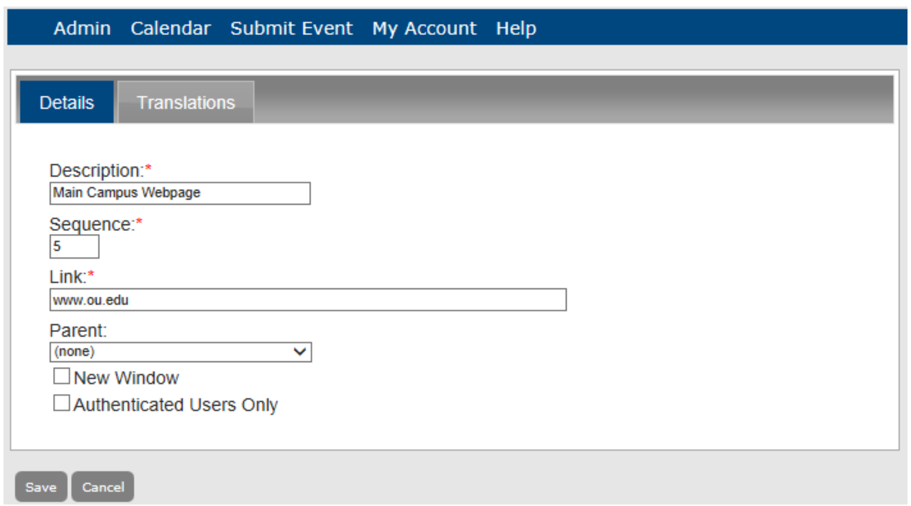
Figure 6-48: Manage Menus page, User Defined tab



3. Select the menu option that you are editing.
4. Under Actions, click Edit.

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

Figure 6-49: Add Menu page, Details tab



5. Edit any and all of the associated information as needed.

Field	Description
Description	The wording for the menu option.
Sequence	The order of the option on the menu.
Link	A link to an outside website.
Parent	The main menu option under which you are placing this user-defined option.
New Window	Select this option to have the website to which you are linking the option be displayed in a new window (leaving the Master Calendar window open.)
Authenticated Users Only	Select this option to have only those users who have logged into Master Calendar see the link.

6. Click Save.

   The Details tab closes and you return to the System tab of the Menus page.

7. To see your edited menu option, log off the system, then log back in to the system and open the User Defined tab.

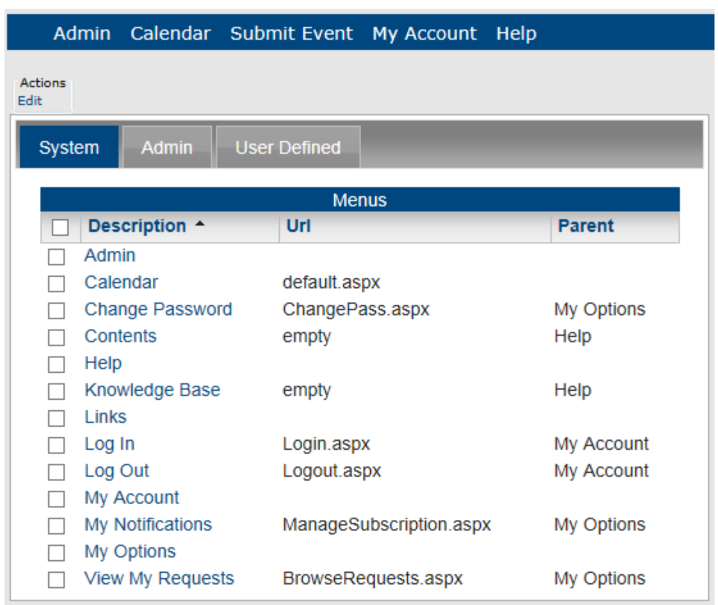
To enter translations for menu text and options

If you have configured one 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. Under the Admin Panel main menu option, point to Site Administration, and then click Menus.

   The Manage Menus page opens. The System tab is the opened tab. All the current main menu options are displayed on this tab. This tab also lists all the child menu options for all menus other than the Admin menu for which you can enter translations.

Figure 6-50: Manage Menus page, System tab



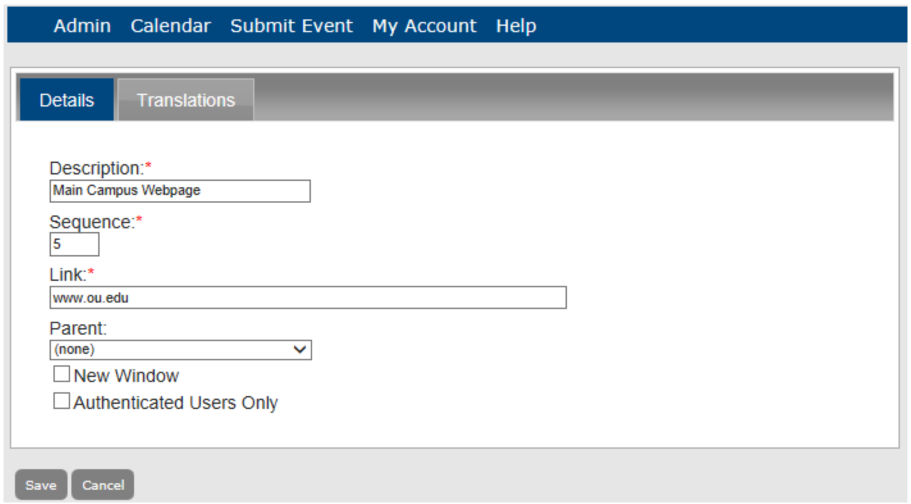
2. If needed, open the Admin tab or User Defined tab.

The Admin tab lists all the Admin menu options for which you can enter translations.

3. Select the main menu text or menu option for which you are entering a translation, and then click Edit.

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

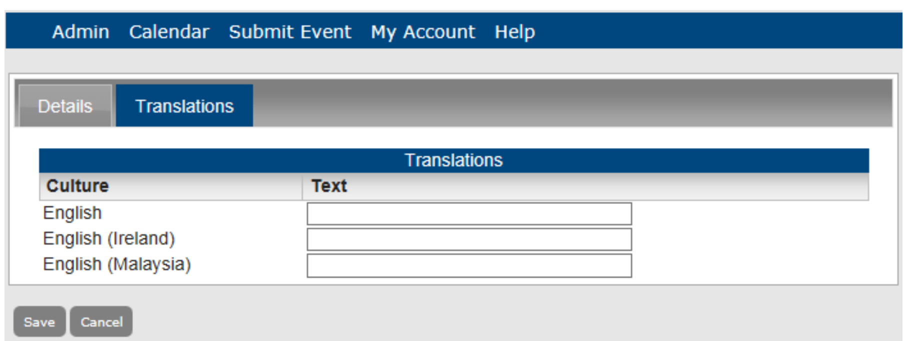
Figure 6-51: Add Menu page, Details tab



4. Click the Translations tab to open it.

   All the cultures that you have configured for Master Calendar are displayed on this page.

Figure 6-52: Add Menu page, Translations tab



5. Enter the appropriate translation for every culture that is displayed on the page.
6. Click Save.

   The Translations tab closes. You return to the opened tab for the selected menu text or menu option.

A user's or guest's Browser language must be set to the appropriate culture (language) to display these translations after opening and/or logging in to Master Calendar.

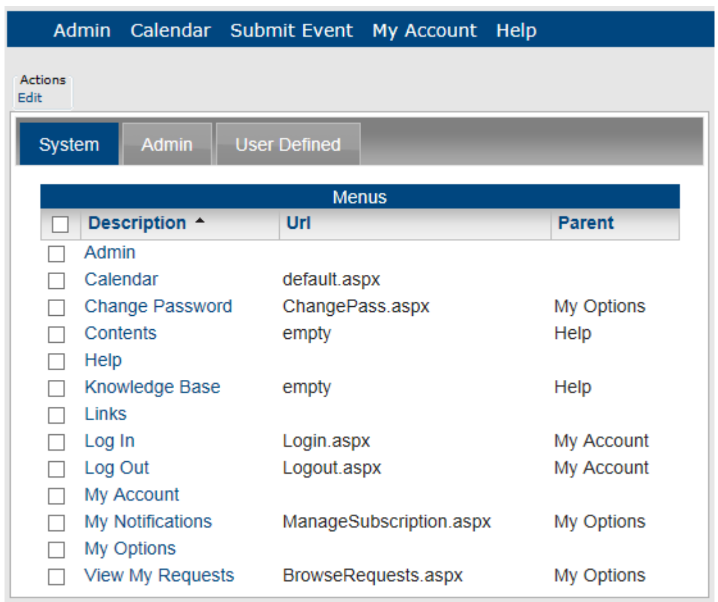
To delete a user-defined menu option

You can delete only user-defined menu options. You cannot delete a system menu option.

1. Under the Admin Panel main menu option, point to Site Administration, and then click Menus.

   The Manage Menus page opens. The System tab is the opened tab. All the current main menu options are displayed on this tab.

Figure 6-53: Manage Menus page, System tab



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.

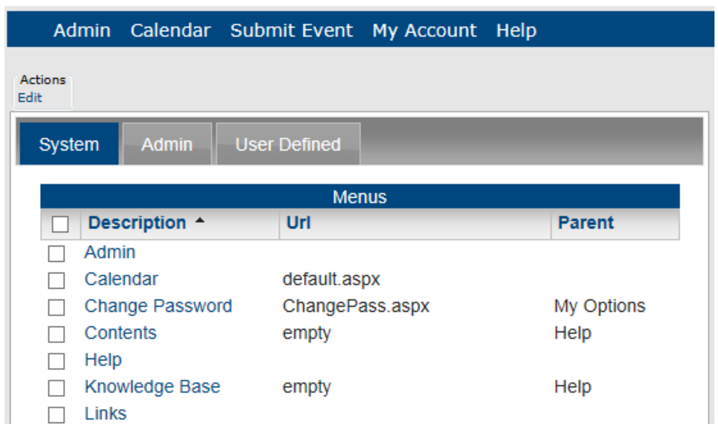
To view the history for a menu option

The history for an menu option consists of the original creation date of the option, the name of the user who created the option, the last date that the option was edited, and the name of the user who last edited the option. You can view the history for both system menu options and user-defined menu options.

1. Under the Admin Panel main menu option, point to Site Administration, and then click Menus.

   The Manage Menus page opens. The System tab is the opened tab.

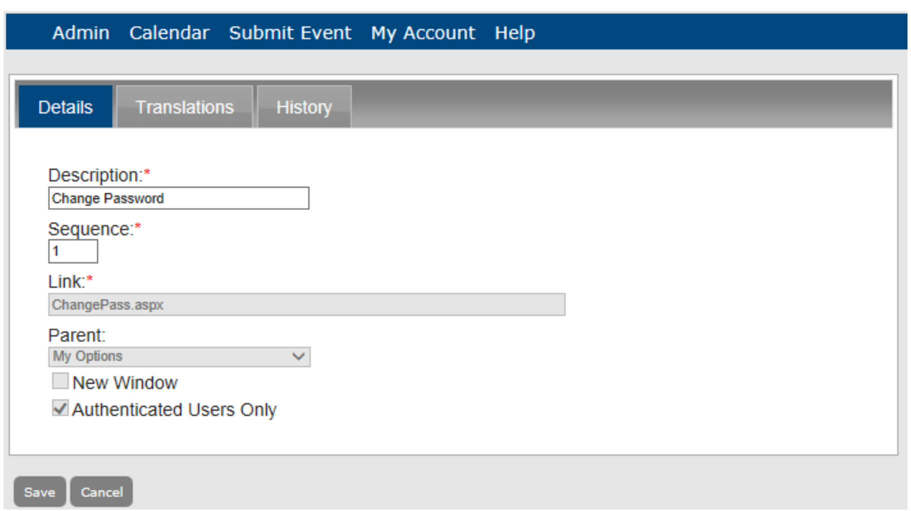
Figure 6-54: Manage Menus page, System tab



2. If needed, click the Admin tab or the User Defined tab to open it.
3. Select the menu option for which you are viewing the history.
4. Under Actions, click Edit.

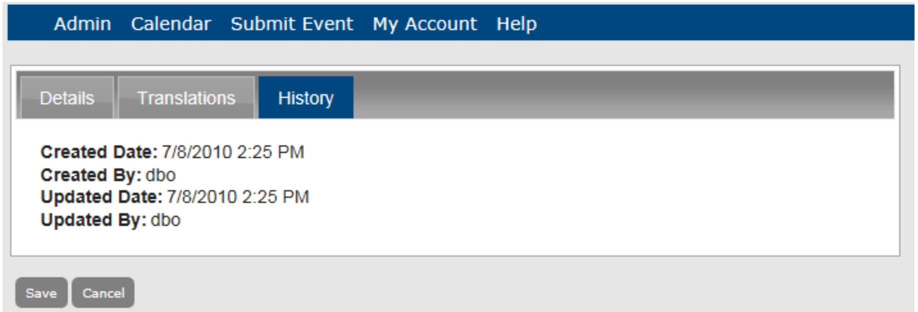
   The Add Menu page opens. The Details tab is the opened tab.

Figure 6-55: Add Menu page, Details tab



5. Click the History tab to open it and view the history for the menu option.

Figure 6-56: Add Menu page, History tab



Viewing and Updating Master Calendar Registration Information

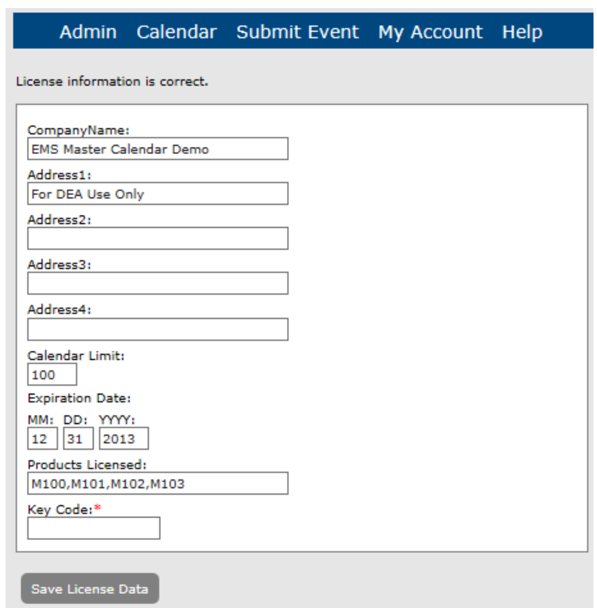
As the Master Calendar site administrator, you can use the Registration function to view, and if needed, update your Master Calendar registration information. This information, which is provided to your organization by EMS Software includes your company name, address, calendar limit, the expiration date for your registration, the products licensed, and a unique key code to activate the registration.

To view and update Master Calendar registration information

1. Under the Admin Panel main menu option, point to Site Administration, and then click Registration.

   The Registration page opens. The page lists all your current Master Calendar registration information.

Figure 6-57: Master Calendar Registration page



2. If needed, you can update this information.

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

Managing Data Sources

In Master Calendar, as the site administrator, you have the option of setting up new event types and holidays (special dates); however, if you are an existing EMS customer who uses any of the EMS products—Campus, Enterprise, Professional, Legal, and so on—this means that you have already configured this information for your EMS application. Rather than creating new items, if your organization has purchased the optional module, Master Calendar Data Connectors, you can use the data sources function in Master Calendar to carry out a one time import of event types and holidays from your EMS application into Master Calendar. You can import event types and holidays from one or more EMS databases to one or more calendars in Master Calendar. Also, at the data source level, you can select a high-level view of your user-defined fields (UDFs) in your EMS database, and you can then run a connector to import one or more selected UDFs and their associated answers into your Master Calendar database. Managing data sources in Master Calendar consists of adding data sources, deleting data sources, importing the event types, importing the holidays, and selecting the UDFs that are to be imported. You can also view the history of event type mapping between your EMS database and your Master Calendar database.

For setting up new event types, see “Managing Event Types”. For setting up new holidays (special dates), see “Managing Special Dates”.

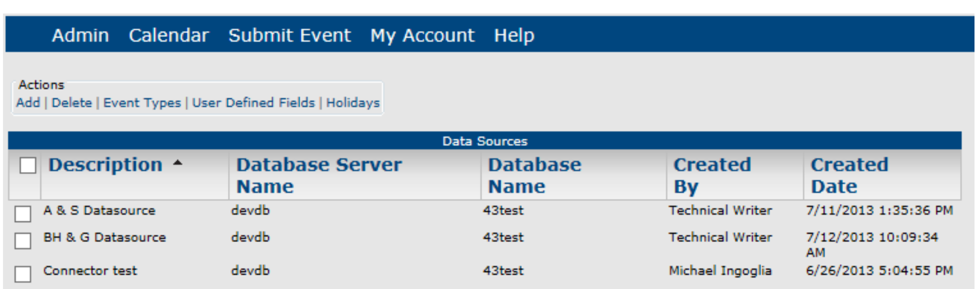
To add a data source

For an EMS database to be used as a data source, you must first execute the Master Calendar Data Connector script against the EMS database. This is REQUIRED to be able to connect the EMS database to the Master Calendar database. Refer to the EMS Master Calendar Installation Instructions document for more information.

1. Under the Admin Panel main menu option, point to Site Administration, and then click Data Sources.

   The Manage Data Sources page opens. This page lists all the currently available data sources in Master Calendar.

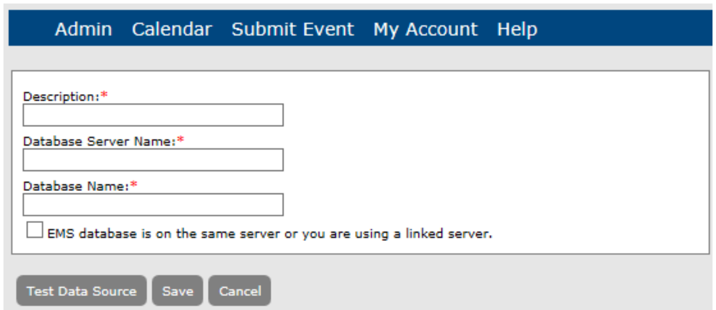
Figure 6-58: Manage Data Sources page



2. Under Actions, click Add.

   The Add Data Source page opens.

Figure 6-59: Add Data Source page



3. Add the information for the data source.

   - Description—The name of the database into which you are importing the event types and/or holidays
   - Database Server Name—The name for the database server on which the EMS database resides. (The EMS database from which you are importing the information.)
   - Database Name—The name of the EMS database from which you are importing the event types and/or holidays.

4. If appropriate, select the option “EMS database resides on the same server or you are using a linked server.”

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

5. Click Test Data Source.

   If Master Calendar can connect to the specified EMS database, a message opens indicating that the “Connection succeeded.” Otherwise, the message indicates that the “Connection failed,” and provides a reason for the failure. You must make the necessary changes to the data connector, and test the connection again.

6. After the message indicates that the “Connection succeeded,” click Save.

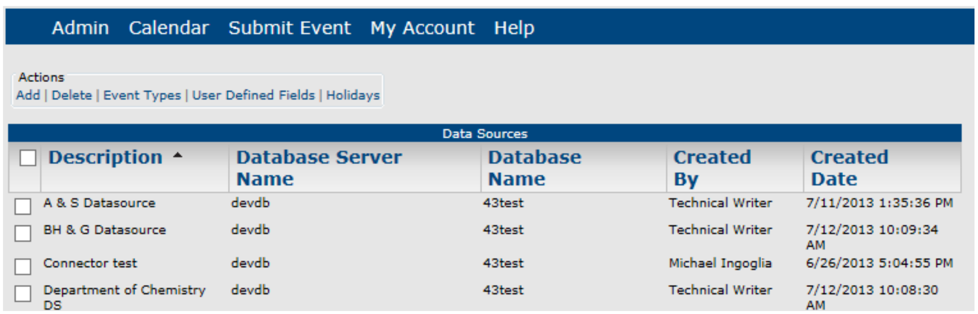
To delete a data source

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

1. Under the Admin Panel main menu option, point to Site Administration, and then click Data Sources.

   The Manage Data Sources page opens. This page lists all the currently available data sources in Master Calendar.

Figure 6-60: Manage Data Sources page



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.

To import the EMS event types

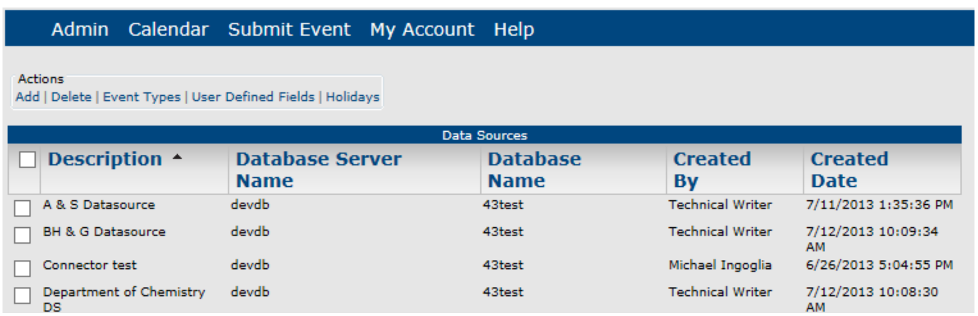
When you are importing event types from EMS into Master Calendar, you have three options. You can:

- Map an EMS event type to an existing Master Calendar event type.
- Create an EMS event type in Master Calendar if it does not already exist.
- Indicate that you do not want to import the EMS event type.

1. Under the Admin Panel main menu option, point to Site Administration, and then click Data Sources.

   The Manage Data Sources page opens. This page lists all the currently available data sources in Master Calendar.

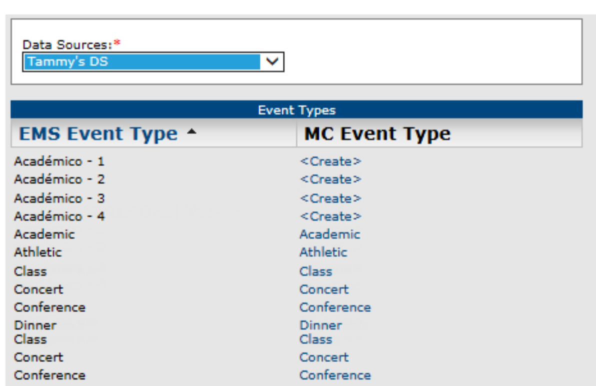
Figure 6-61: Manage Data Sources page



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

   The Data Source Event Types page opens. This page lists all the currently defined event types for the selected data source. It also shows the mapping for each event type, or whether it has been set to “Do Not Use.” If an EMS event type has *not* been mapped to a Master Calendar event type, and it has *not* been set to “Do Not Use,” then the “Create” option is displayed for it in the Master Calendar Event Type list.

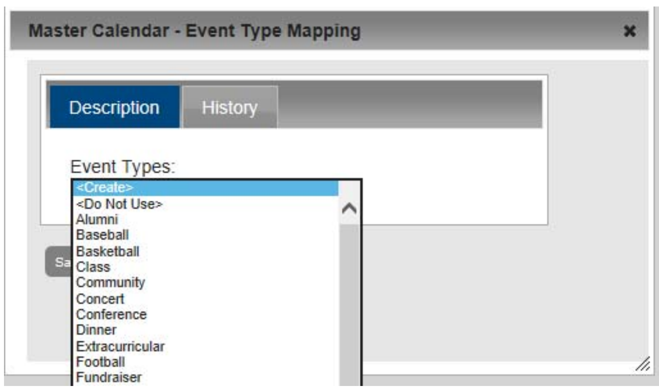
Figure 6-62: Event Types page



3. For any of the unmapped EMS event types, click Create to open the Event Type Mapping dialog box. The Description tab on this dialog box lists all the currently active Master Calendar event types. The “Do Not Use” option is also displayed on this list.

If you do not see the Master Calendar event type to which you want to map the EMS event type, either it has not been created, or it is currently inactive in Master Calendar. To add a new event type, or to activate a currently inactive event type, see “To add an event type” or “To activate an event type”, respectively.

Figure 6-63: Event Type Mapping dialog box



4. On the list, select the Master Calendar event type to which you are mapping the EMS event type, or select Do Not Use.

5. Optionally, for any of the currently mapped EMS event types, change the mapping, or set the mapping to “Do Not Use.”

All EMS event types that you leave in a '<Create>' status will be created in Master Calendar when you save your event type mappings. On the Master Calendar main menu, select Admin > Configuration > Event Types to view a global list of all the event types that are being stored in your Master Calendar database, regardless of their data source.

6. Click Save on the Master Calendar dialog box.

   The Master Calendar dialog box opens. You return to the Event Types page.

7. Click Save on the Event Types page.

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

8. Click OK in the message.

   The message closes. The page is refreshed to show the newly selected mapping for the EMS event type.

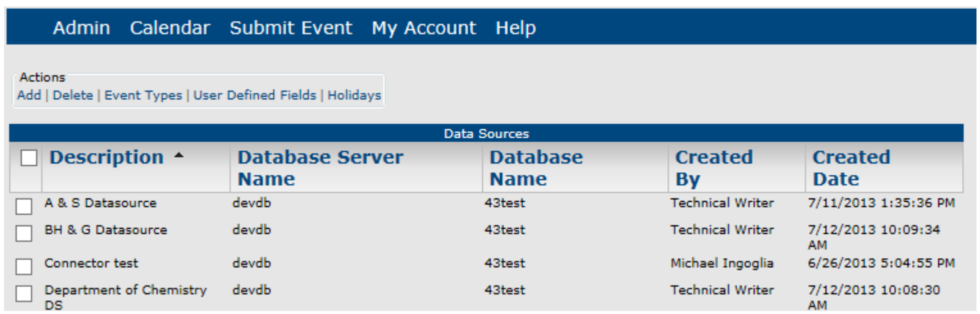
To view the history for an event type mapping

The history for an event type mapping consists of the original creation date of the mapping, the name of the user who created the mapping, the last date that the mapping was edited, and the name of the user who last edited the mapping.

1. Under the Admin Panel main menu option, point to Site Administration, and then click Data Sources.

   The Manage Data Sources page opens. This page lists all the currently available data sources in Master Calendar.

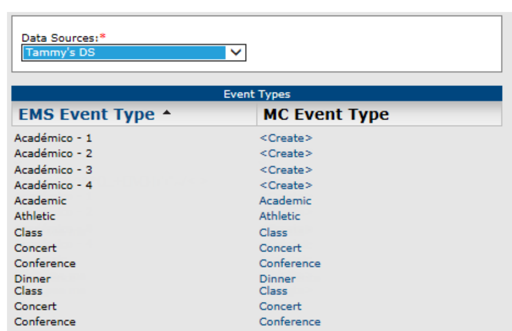
Figure 6-64: Manage Data Sources page



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.

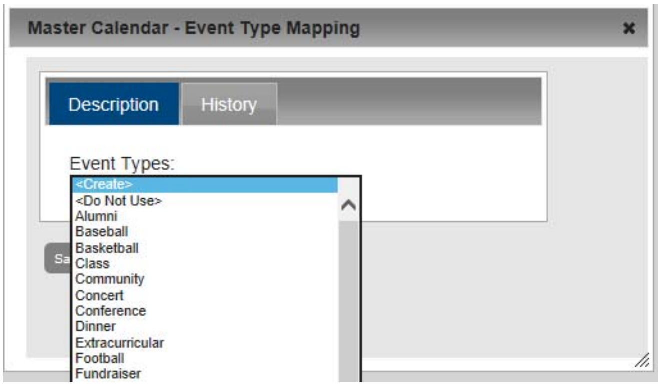
Figure 6-65: Event Types page



4. Click the MC Event Type link for the mapping for which you are viewing the history.

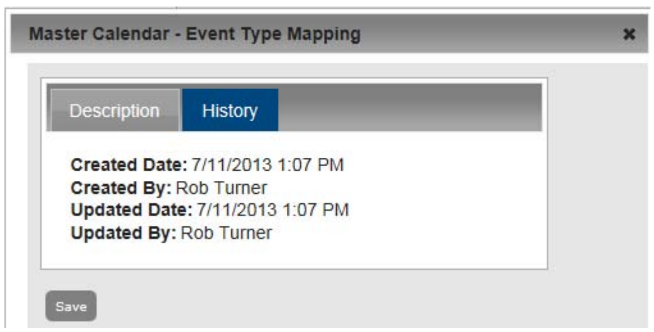
   The Event Type Mapping dialog box opens. The Description tab is the opened tab.

Figure 6-66: Event Type Mapping dialog box, Description tab



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

Figure 6-67: Event Type Mapping dialog box, History tab



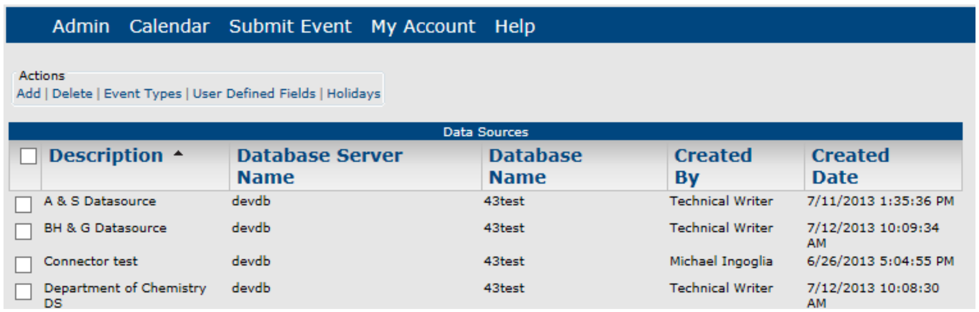
To import the EMS holidays

The EMS term "holiday" is equivalent to the Master Calendar term "special date."

1. Under the Admin Panel main menu option, point to Site Administration, and then click Data Sources.

   The Manage Data Sources page opens. This page lists all the currently available data sources in Master Calendar.

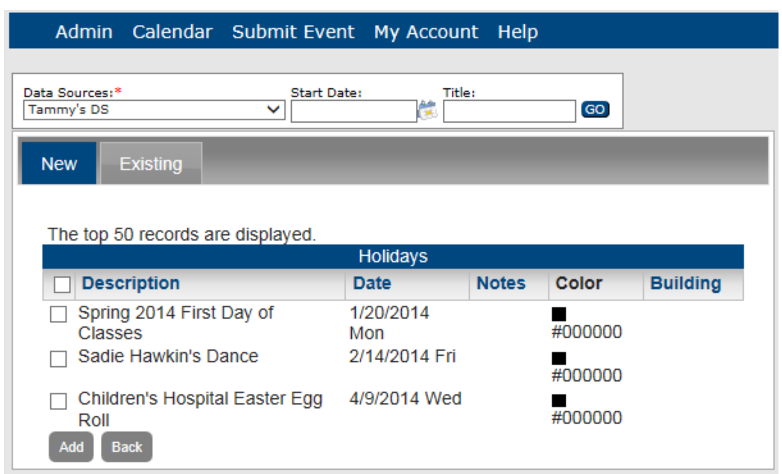
Figure 6-68:   Manage Data Sources page



2. Select the data source from which you are importing the holidays.
3. Under Actions, click Holidays.

   The Holidays page open. The New tab is the opened tab. This tab lists the records for up to the first 50 holidays that are defined in the selected data source and that have a date greater than or equal to the current day's date.

Figure 6-69:   Holidays page, New tab



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 ***Scout****ing Day or Boy* ***Scout****s' Day.*

5. Click Go.

   The page is refreshed to show the Holidays that meet your search criteria.

6. Select the holidays that are to be imported from the selected data source, and then Add.

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

   A message opens asking you if you are sure that you want to add all the selected holidays.

7. Click OK in the message.

   The message closes. You remain on the Holidays page.

When you import EMS holidays into your Master Calendar database, all the imported holidays are added to all the calendars in Master Calendar. You must manually delete the dates from the calendars on which you do not want the holidays to be displayed. See *"To delete a special date".*

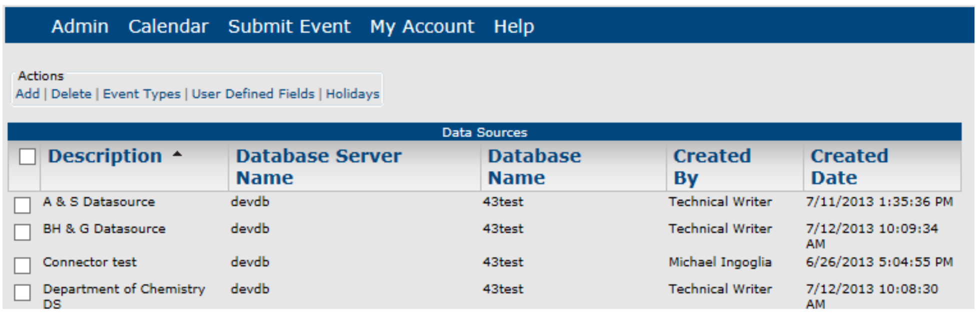
8. Optionally, click the Existing tab to open it and view the list of all the holidays that you have imported into Master Calendar.

To select the EMS user-defined fields (UDFs) for importing

1. Under the Admin Panel main menu option, point to Site Administration, and then click Data Sources.

   The Manage Data Sources page opens. This page lists all the currently available data sources in Master Calendar.

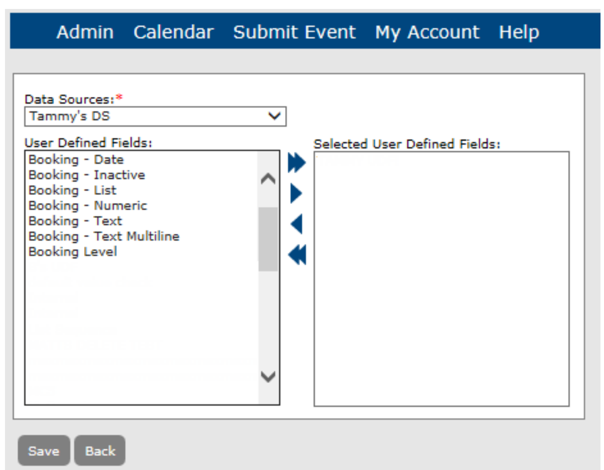
Figure 6-70: Manage Data Sources page



2. Select the data source from which you are importing the UDFs.
3. Under Actions, click User Defined Fields.

   The EMS UDFs page opens. Only those UDFs that have the Field Applies To: Reservation configured within the EMS database are displayed on the page.

Figure 6-71: EMS UDFs page



You can find those UDFs that have the Field Applies To: Reservation configured within the EMS database in the EMS client under Configuration > Other > User Defined Fields.

4. On the User Defined Fields list, select the UDF that is to be imported from the selected data source (CTRL-click to select multiple UDFs), and then click the Add button ▶ to move the UDFs to the Assigned list.

To move all the UDFs in a single step, click the Add All button ⏩.

5. Click Save.

6. You must now run a connector to import the selected UDFs and their associated answers into your Master Calendar database. See "To run a connector" in "Managing Connectors in Master Calendar."

Managing Connectors in Master Calendar

A *connector* is a direct feed from your EMS database to your Master Calendar database. If you are an EMS customer and a Master Calendar customer, a connector prevents you from having to carry out double entry of your events. You can enter all your events once into your EMS system, then use a connector to import one or more, or all your EMS events into Master Calendar. To import EMS events into Master Calendar, you must indicate the data source that you want to use to connect to the EMS database and the calendars to which to import the events. You can define the connector as broad or as narrow as you need it to best meet your organization's business needs. For example, if you have an academic calendar in Master Calendar, you might want to import all EMS events with an event type of "Class" to the Academic calendar. You must also use a connector to import selected UDFs into your Master Calendar database. Managing connectors in Master Calendar consists of adding a connector, filtering the events to import, setting the frequency of the import, activating and inactivating connectors, editing a connector, running a connector, purging a connector, and deleting a connector. You can also generate a Connectors List report and you can view the history for a connector.

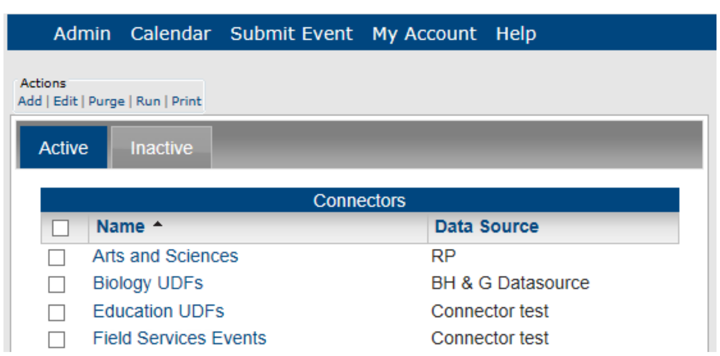
As with data sources, the Connector function requires that your organization purchase the optional module, Master Calendar Data Connectors.

To add a connector

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

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

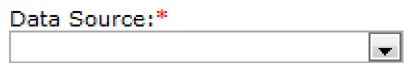
Figure 6-72: Manage Connectors page, Active tab



2. Under Actions, click Add.

   A Data Source list is displayed.

Figure 6-73: Data Source List

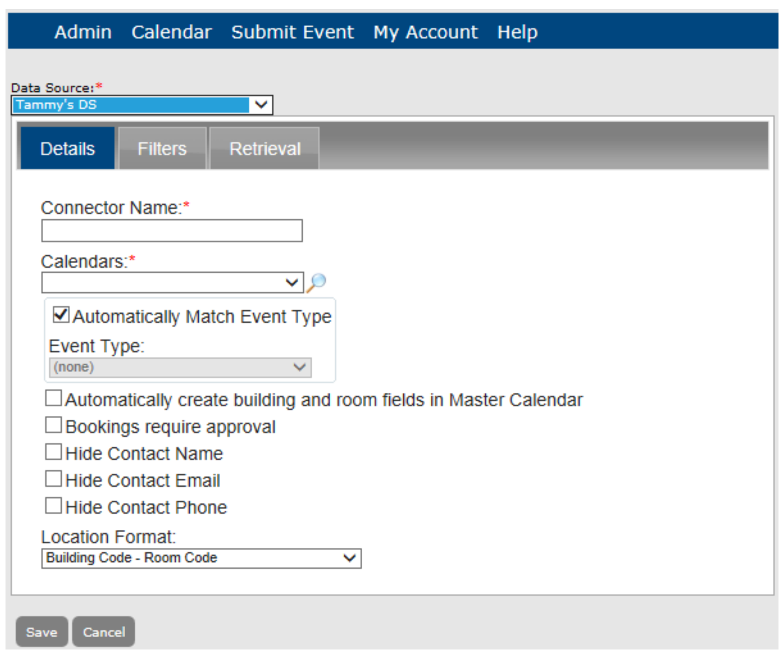


3. Select the data source that you want to use for the connector.

Remember, the data source is for the connection to the EMS database. If you do not see the data source that you want to use for the connector, then it has not been created. To add a data source, see "To add a data source".

The Add Connector page opens. The Details tab is the opened tab. You use the options on this tab to add the basic information for the connector.

Figure 6-74: Add Connector page, Details tab



4. Enter the information for the connector.

Field	Description
Connector Name	The title or the name for the connector.
Calendars	A list of all active calendars to which you have access as a Calendar Manager. Click the Lookup icon to open the Calendars dialog box and select the calendar or calendars to which you are importing the EMS events.
Automatically Match Event Type	Selected by default. If you leave this option selected, then every event type in the selected data source is mapped according to the event type mapping that you carried out for the data source. (See "To add a data source".) If you clear this option, then the Event Type dropdown list becomes available.
Event Type	Available only if you clear the Automatically Match Event Type option. Every event type in the selected data source will be mapped to the Master Calendar event type that you select on this dropdown list.
Automatically create building and room fields in Master Calendar	If you select this option, then all the buildings and rooms for all the imported events are also imported into Master Calendar. The imported buildings are displayed as locations. (See "Managing Event Locations".) The imported rooms are displayed as sub-locations. See "Managing Event Sub-Locations".)
Bookings Require Approval	If you select this option, the imported events will follow the approval workflow for the Manage Events option. See *Managing Events* in the *Master Calendar User's Manual*.
Hide Contact Name	If you select this option, the name of the event's contact person does not show on the calendars to which the event is imported.
Hide Contact Email	If you select this option, the contact email for the event does not show on the calendars to which the event is imported.
Hide Contact Phone Number	If you select this option, the contact phone number for the event does not show on the calendars to which the event is imported.
Location Format	Determines the location format that is imported from EMS. For example, if one of the buildings for an event type is the Strong building, you can indicate whether you want to import the EMS Building Description (STRONG) or the EMS Building Code (STR). Eight options are available: • Building Code - Room Code • Building Code - Room Description • Building Description - Room Code • Building Description - Room Description • Building Code • Building Description • Room Code • Room Description

5. Continue to "To filter the EMS events".

To filter the EMS events

When you filter the EMS events, you must select at least one event type, one status, and one group type, or no events are pulled from your EMS database into your Master Calendar database.

1. Click the Filters tab to open it.

The Buildings label, Rooms label, Group Types label, and Group label that you see on the Filters tab are brought over from the EMS data source. You configure these labels in the EMS Database under System Administration > Settings > Parameters. Asterisks next to Event Types, Statuses, and Group Types indicate that the EMS Display on Web setting is enabled for the item.

2. Select at least one event type, one status, and one group type. CTRL-click to select multiple event types, statuses, and group types.
3. If you do not select any specific groups for a group type, then EMS events tied to all groups are pulled. Optionally, to filter the connector based on the EMS events for a specific group:
   - Click Add to open an EMS Group Lookup dialog box.
   - In the Filter field, specify the search criteria for the group, and then click Go.

*The search is limited to the exact order of characters in the search string, and the string must begin with the information for which you are searching. The string is not case-sensitive. For example, if you enter "admin" as your search string for All groups, "**Admin**istrators" is returned in the search results, but DnsAdmins is not.*

   - From the search results, select the group that you are using as a filter (CTRL-click to select multiple groups), and then click Add to move the groups to the Groups list.

To remove groups, select the department (CTRL-click to select multiple groups), and then click Remove.

4. Optionally, do one or both of the following:
   - Select (All) to pull all EMS events booked in all EMS buildings, or pick a specific building. If you pick a specific building, you must also select the building rooms.

To select all rooms for a building a single step, click the Move All (>>) button.

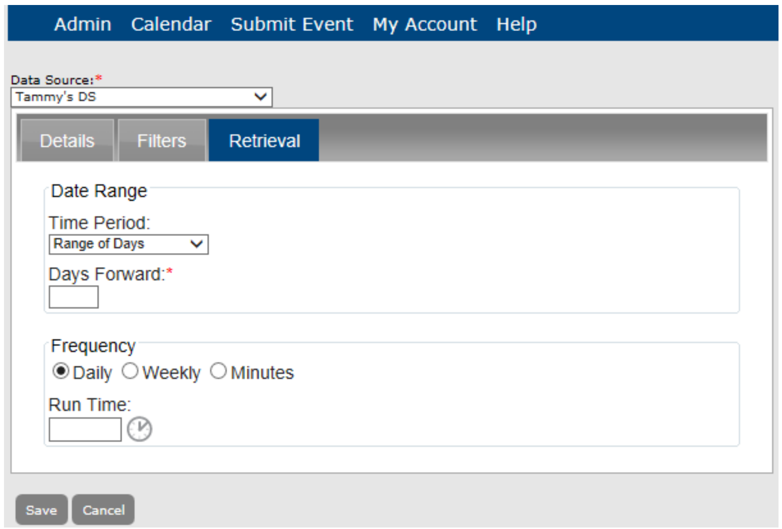
   - To filter the EMS events based on a specific response to a specific UDF, select the UDF on the User Defined Fields dropdown list, and select the answer on the Answer dropdown list.
5. Continue to "To specify the frequency of the data import" .

To specify the frequency of the data import

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

1. Click the Retrieval tab to open it.

Figure 6-75: Add Connector page, Retrieval tab



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

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 (Start Date/End Date/ No End Date) are displayed instead.
Days Forward	Available only if you select Range of Days for the Time Period. Indicates the number of days into the future from the current day's date that the event types are to be imported from the EMS database.
Start Date/End Date/No End Date	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.

Field	Description
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.

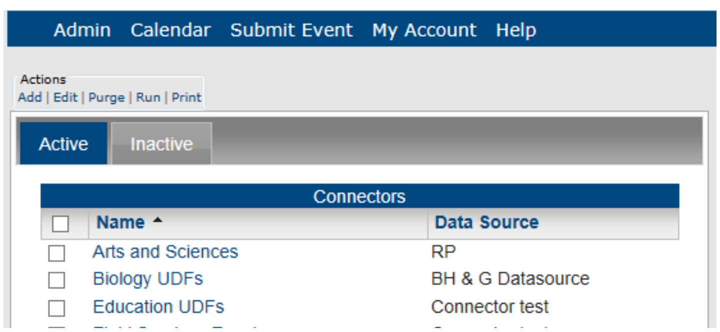
   The connector is saved as an *active* connector in Master Calendar.

To activate a connector

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

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

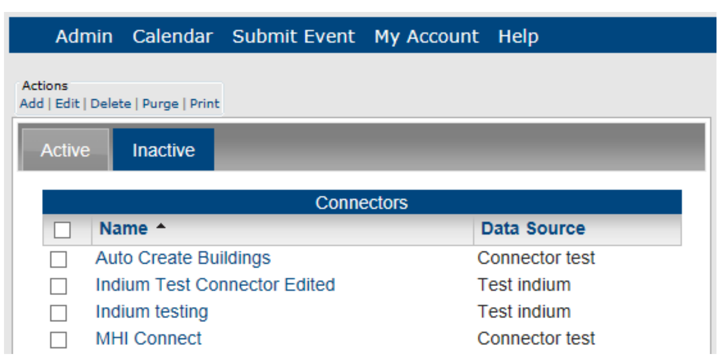
Figure 6-76: Manage Connectors page, Active tab



2. Click the Inactive tab to open.

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

Figure 6-77: Connectors page, Inactive tab

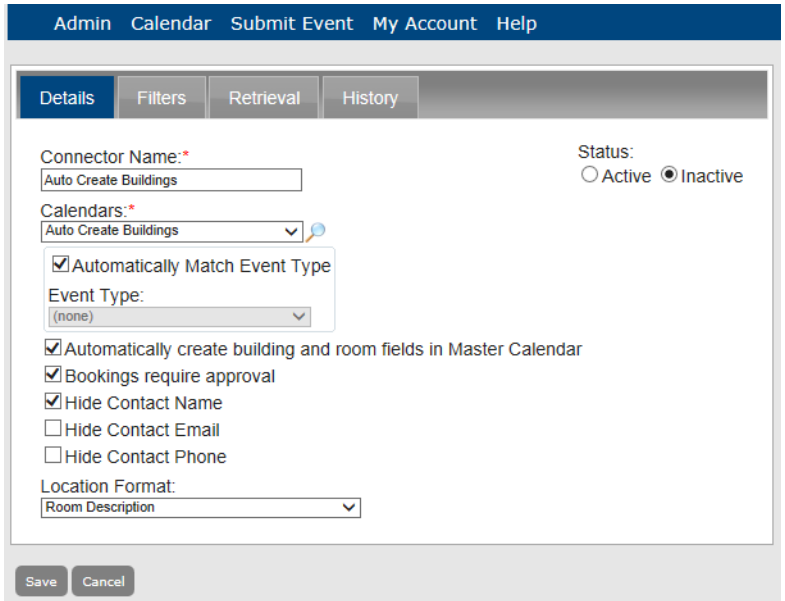


3. Select the connector that you are activating.

4. Under Actions, click Edit.

   The Add Connector page opens. The Details tab is the opened tab. The Inactive option is selected.

Figure 6-78: Add Connector page, Details tab, Inactive connector

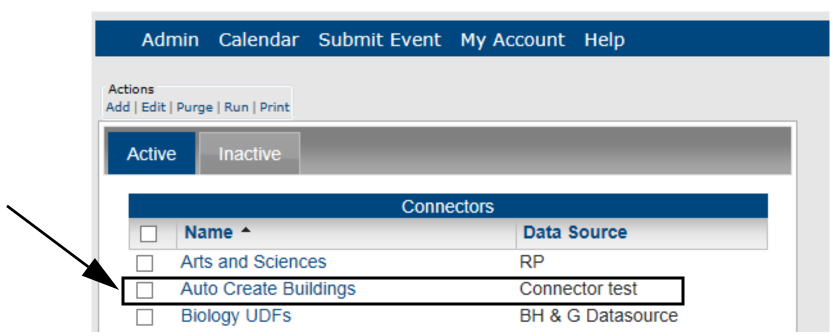


5. Select Active.

6. Click Save.

   The connector is saved and is displayed on the Active tab on the Connectors page.

Figure 6-79: Manage Connectors page, Active tab

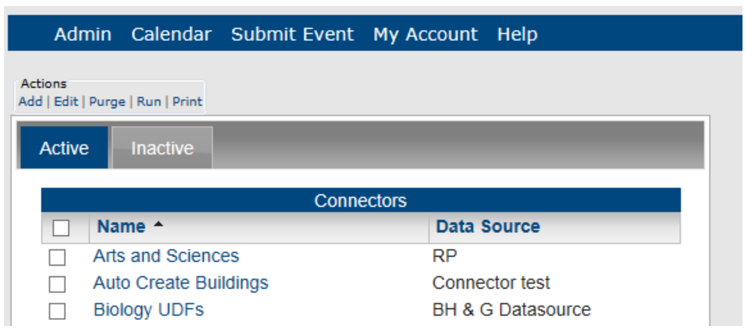


To inactivate a connector

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

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

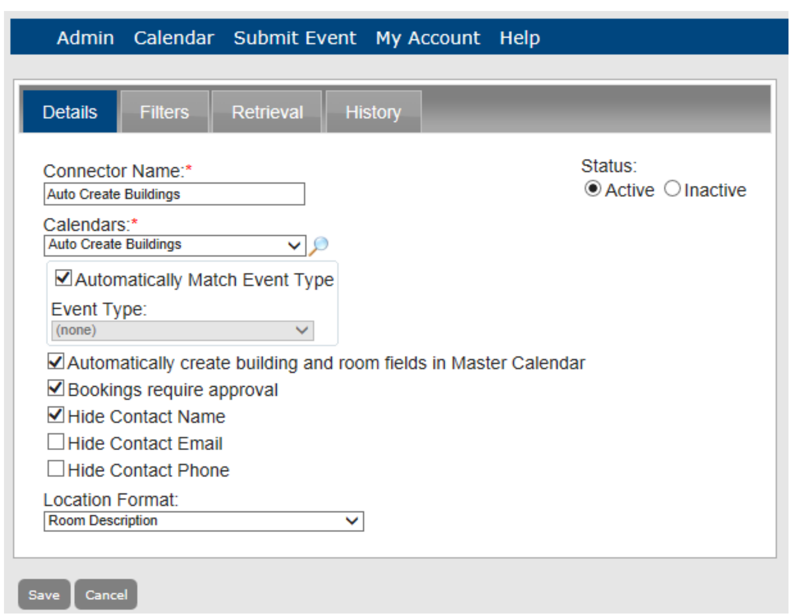
Figure 6-80: Manage Connectors page, Active tab



2. Select the connector that you inactivating.
3. Under Actions, click Edit.

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

Figure 6-81: Add Connector page, Details tab, Active connector

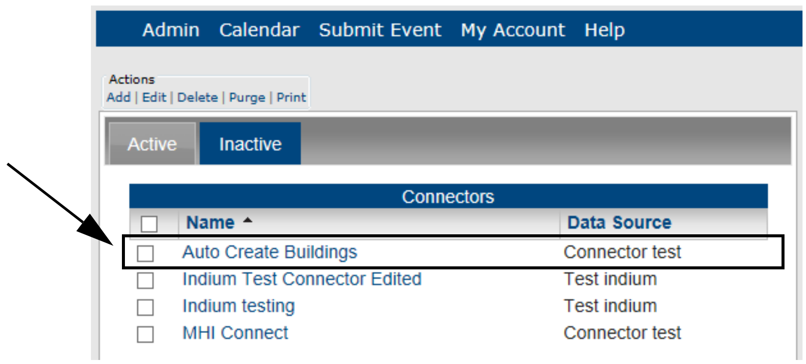


4. Select Inactive.

5. Click Save.

   The connector is saved and is displayed on the Inactive tab on the Manage Connectors page.

Figure 6-82: Manage Connectors page, Inactive tab



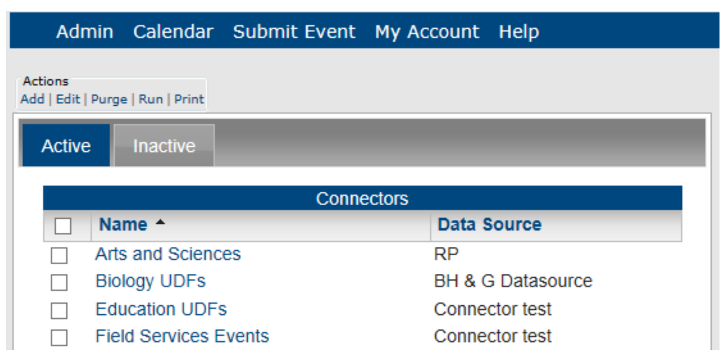
To edit a connector

You can edit both active and inactive connectors.

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

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

Figure 6-83: Manage Connectors page, Active tab

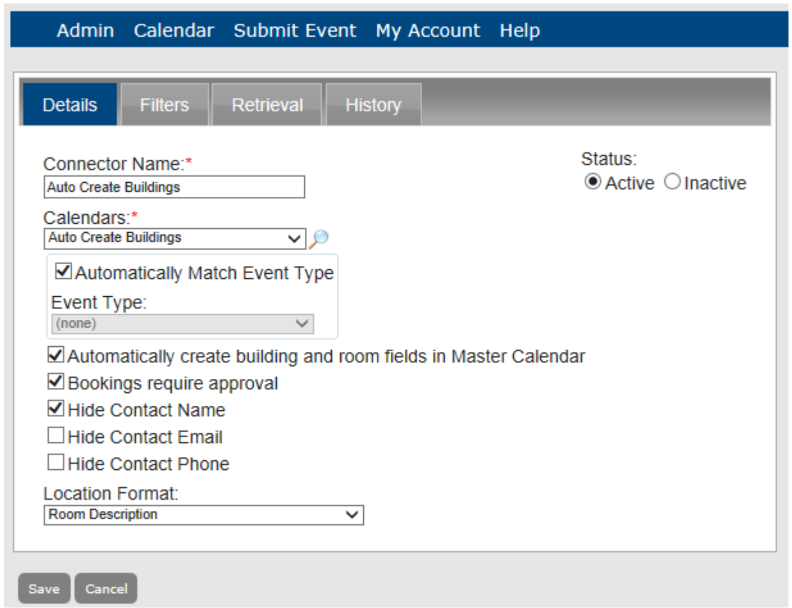


2. If needed, click the Inactive tab to open it.
3. Select the connector that you are editing.

4. Under Actions, click Edit.

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

Figure 6-84: Add Connector page, Details tab



5. Edit the information as needed for the connector.
   - For the Details tab, see Step 4 of "To edit a connector"
   - For the Filters tab, see "To filter the EMS events"
   - For the Data Retrieval tab, see Step 2 of "To specify the frequency of the data import"
6. Click Save.

   The edited connector is saved in Master Calendar.

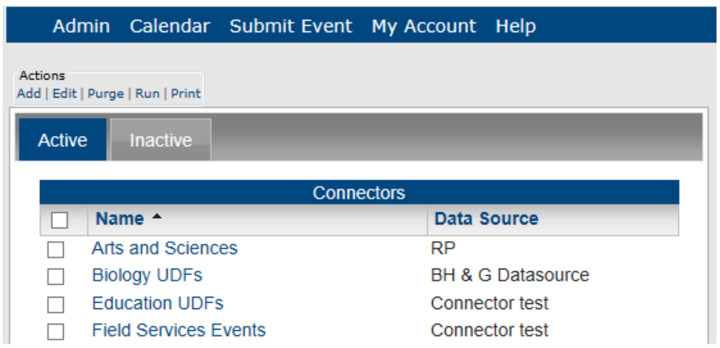
To purge a connector

You can purge both active and inactive connectors. When you purge a connector, all the *events* that you imported into Master Calendar using the selected connector are deleted. The connector itself is not deleted. It remains available either on the Active or Inactive tab of the Connectors page.

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

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

Figure 6-85: Manage Connectors page, Active 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.

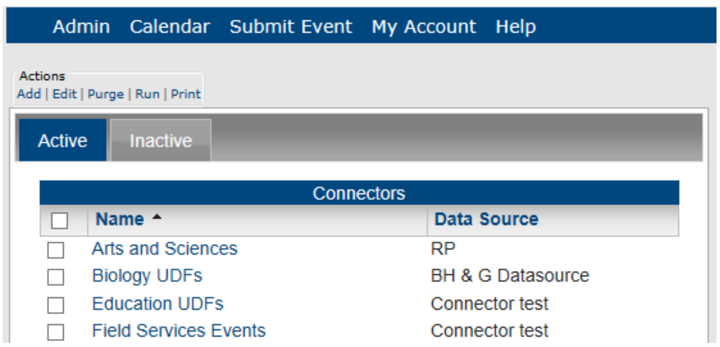
To run a connector

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

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

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

Figure 6-86: Manage Connectors page, Active tab



2. Select the connector that you are running.
3. Under Actions, click Run.

   After the connector runs, a message opens indicating that the run was successful. It also indicates the number of records that were inserted, the number of records that were updated, and the number of records that were deleted.

To delete a connector

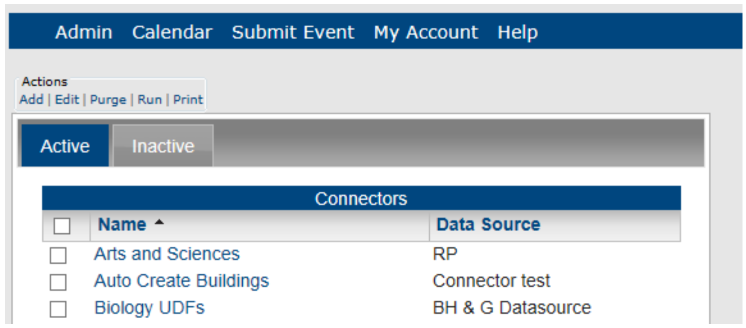
You can delete only inactive connectors. To delete a currently active connector, you must first inactivate the connector. (See "To inactivate a connector".)

When you delete a connector, none of the events that were imported through the connector is deleted. To delete the events, you purge the data first (see "To purge a connector"), and then delete the connector.

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

   The Manage Connectors page opens. The Active tab is the opened tab. All the currently active connectors in Master Calendar are displayed on this tab. See Figure 6-87.

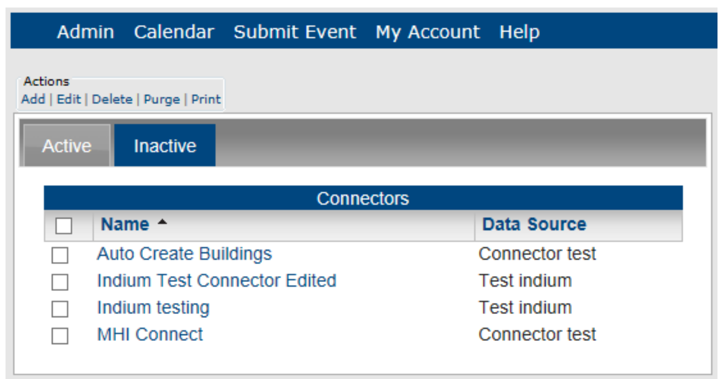
Figure 6-87: Manage Connectors page, Active tab



2. Click the Inactive tab to open.

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

Figure 6-88: Manage Connectors page, Inactive tab



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.

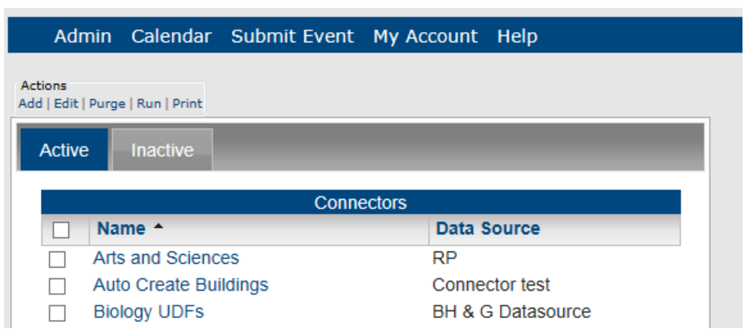
To generate a Connectors List report

You can generate a Connectors List report, which lists all the active or inactive connectors that are configured in Master Calendar. The report includes the connector name and data source, the connector filters, the event types that imported by the connector, and the calendars to which the event types are imported. It also indicates whether auto-matching for the imported event types has been selected.

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

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

Figure 6-89: Manage Connectors page, Active tab

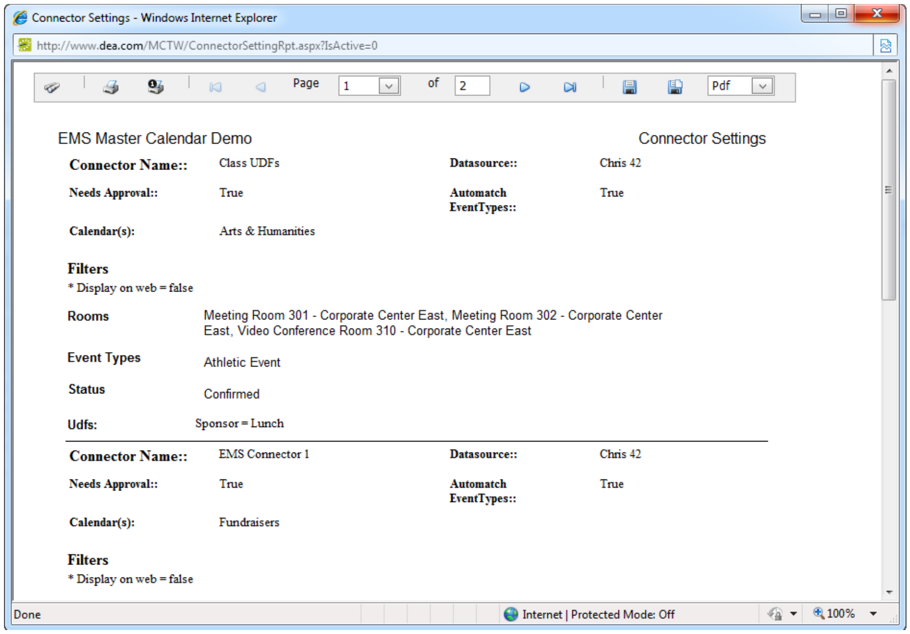


2. Do one of the following:

   - If you are generating a Connectors List report for all *active* connectors in your Master Calendar, under Actions, click Print.
   - If you are generating a Connectors List report for all *inactive* connectors in Master Calendar, click the Inactive tab to open it, and then under Actions, click Print.
     An onscreen preview of the Connectors List report opens in its own window. A variety of options are available from this preview, including (from left to right at the top of the onscreen preview) the options to search the report results, print the report in its entirety, print the currently displayed report page, and export the report to a file and save the file. See Figure 6-90.

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

Figure 6-90: Onscreen preview for a Connectors List report



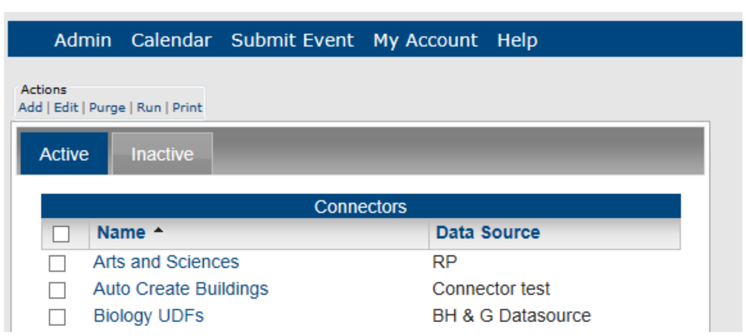
To view the history for a connector

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

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

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

Figure 6-91: Manage Connectors page, Active tab

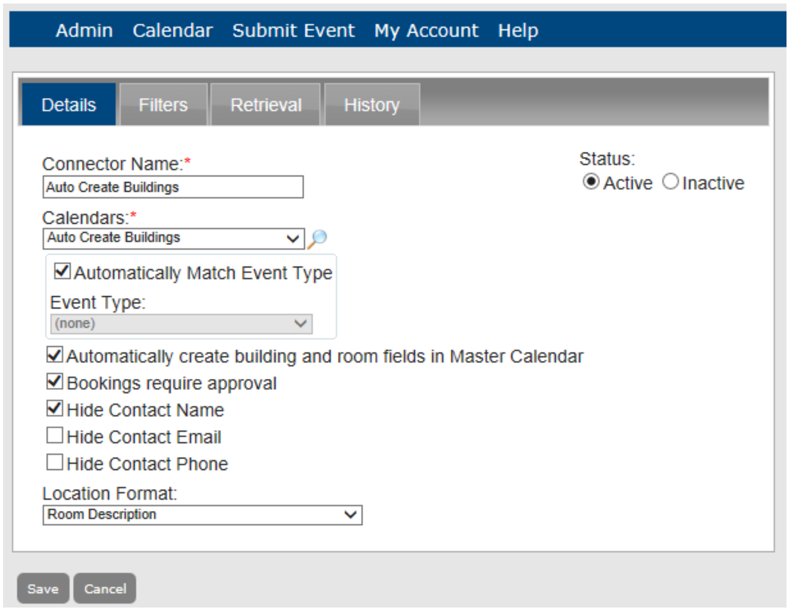


2. If needed, click the Inactive tab to open it.
3. Select the connector for which you are viewing the history.

4. Under Actions, click Edit.

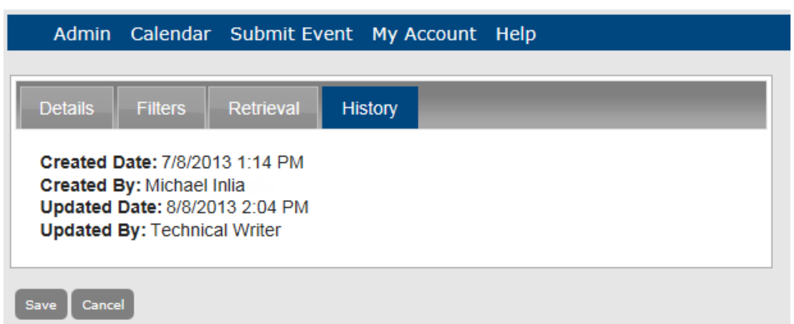
   The Add Connector page opens. The Details tab is the opened tab.

Figure 6-92: Add Connector page, Details tab



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

Figure 6-93: Add Connector page, History tab



Managing Custom Reports

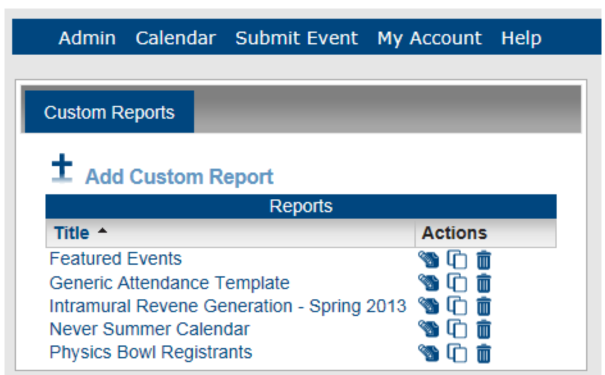
A Custom Reports function is available from the Admin menu. You use this function to create *custom reports* for retrieving information from your Master Calendar database. When you create a custom report, you can name and save the custom report so that you can run the custom report at any time that you choose. You can create a new custom report, or you can create a custom report by copying an existing custom report and editing the copied custom report as needed. You can also edit a custom report, delete a custom report, print a custom report, and export custom report results to a PDF, XLS, or CSV file.

To create a new custom report

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

   The Manage Custom Reports page opens. This page always contains the Add Custom Reports option. It also displays a list of custom reports that have been previously defined in your Master Calendar database.

Figure 6-94: Manage Custom Reports page



2. Click Add Custom Reports.

   The Report Builder dialog box opens. The Details tab is the opened tab. You use the options on the different tabs of this dialog box to name and define the custom report.

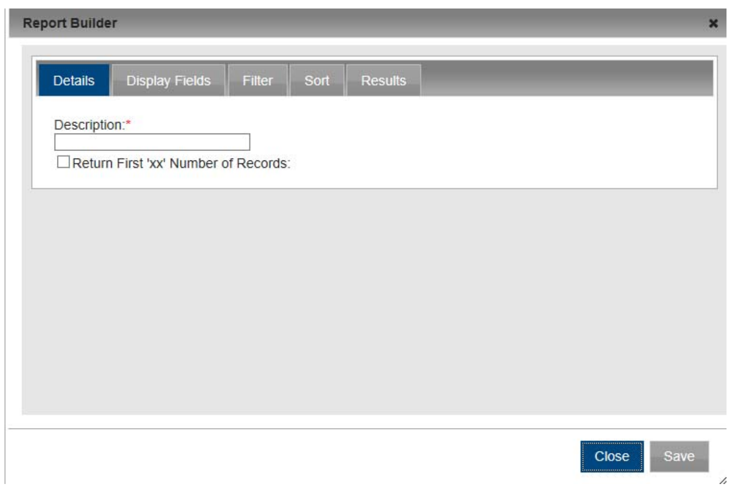
3. Enter the information for the custom report. See:

   - “Details tab”
   - “Display Fields tab”
   - “Filter tab”
   - “Sort tab”

4. Do one of the following:
   - Click Save to close the Report Builder dialog box and save the named custom report. The named custom report is displayed on the Custom Reports page. You can run this custom report at any later date when needed.
   - Open the Results tab, and then click Preview to run the custom report immediately and view the results on the tab. You can then click Save to save the named custom report and close the Report Builder dialog box. The named custom report is displayed on the Custom Reports page. You can run this custom report at any later date when needed.

Details tab

Figure 6-95: Report Builder dialog box, Details tab



1. On the Details tab, name and define the custom report.

Option	Description
Description	Required. Name or title for the custom report. **Note:** The name can be a maximum of 50 characters, including spaces.
Return First “xx” Number of Records	To limit the number of records that the custom report returns, select this option, and then enter the number of records in the field.

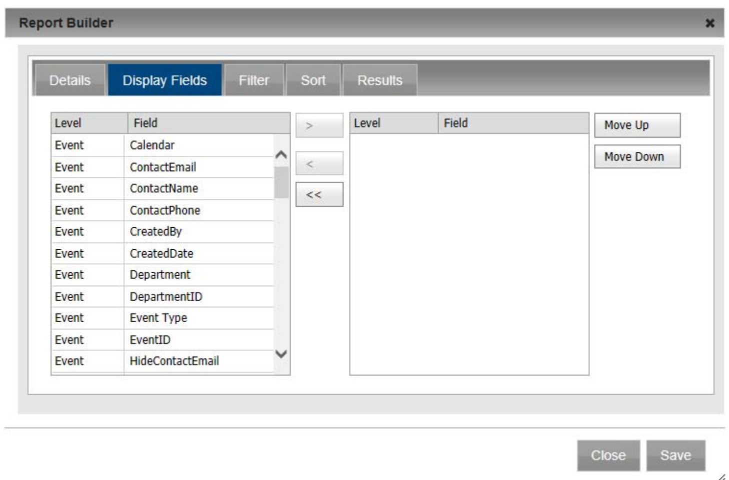
2. Continue with any other configuration for the custom report as needed, or if the configuration is complete, do one of the following:

   - Click Save to close the Report Builder dialog box and save the named custom report. The named custom report is displayed on the Custom Reports page. You can run this custom report at any later date when needed.

   - Open the Results tab, and then click Preview to run the custom report immediately and view the results on the tab. You can then click Save to save the named custom report and close the Report Builder dialog box. The named custom report is displayed on the Custom Reports page. You can run this custom report at any later date when needed.

Display Fields tab

Figure 6-96: Report Builder dialog box, Display Fields tab



1. Open the Display Fields tab and select the fields (CTRL-click to select multiple fields) that are to be displayed in the custom report results, and then click the Add button (>) to move the selected fields to the Selected list.

   The fields are displayed in the custom report results in the order in which they are listed in the Selected list.

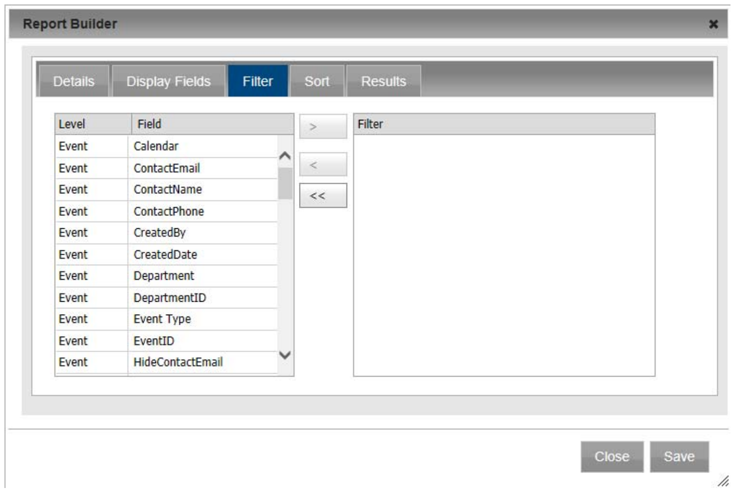
If you are copying an existing custom report, then when the Display Fields tab opens, the Selected list is already populated with a list of fields. You can select one or more of these fields in the Selected list and then click the Remove button (<) to move these fields back to the Available list. To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

2. Optionally, to change the order of the fields, select a field and then click Move Up/Move Down as needed.

3. Continue with any other configuration for the custom report as needed, or if the configuration is complete, do one of the following:
   - Click Save to close the Report Builder dialog box and save the named custom report. The named custom report is displayed on the Custom Reports page. You can run this custom report at any later date when needed.
   - Open the Results tab, and then click Preview to run the custom report immediately and view the results on the tab. You can then click Save to save the named custom report and close the Report Builder dialog box. The named custom report is displayed on the Custom Reports page. You can run this custom report at any later date when needed.

Filter tab

Figure 6-97: Report Builder dialog box, Filter tab



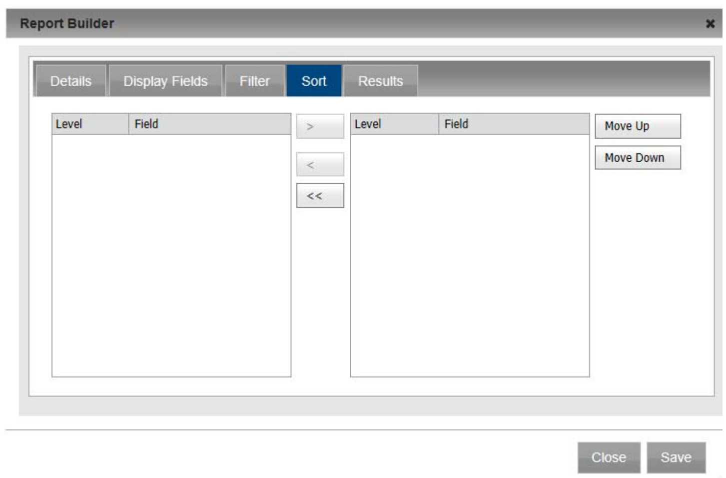
1. Open the Filter Fields tab, and for each field that is to define the custom report, select the field, and then click the Add button (>).
2. For each field that you select, a dialog box opens in which you must specify the allowed values for the field. After you specify the allowed values and click OK, the dialog box closes, and the selected field is moved to the Filter list.

If you are copying an existing custom report, then when the Filter tab opens, the Filter list is already populated. You can select one or more of the fields in the Filter Summary list and then click the Remove button (<) to move these fields back to the Available list. If you want to use the same Filter fields in the "new" custom report, but with different values, you cannot change the values directly. You must move the appropriate fields back to the Available list, then select the fields again to change their values.

3. Continue with any other configuration for the custom report as needed, or if the configuration is complete, do one of the following:
   - Click Save to close the Report Builder dialog box and save the named custom report. The named custom report is displayed on the Custom Reports page. You can run this custom report at any later date when needed.
   - Open the Results tab, and then click Preview to run the custom report immediately and view the results on the tab. You can then click Save to save the named custom report and close the Report Builder dialog box. The named custom report is displayed on the Custom Reports page. You can run this custom report at any later date when needed.

Sort tab

Figure 6-98: Report Builder dialog box, Sort tab



1. Open the Sort tab, select the field or CTRL-click to select the multiple fields by which the custom report results are to be sorted and then click the Add button (>) to move the fields to the Selected list.

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

2. Continue with any other configuration for the custom report as needed, or if the configuration is complete, do one of the following:

   - Click Save to close the Report Builder dialog box and save the named custom report. The named custom report is displayed on the Custom Reports page. You can run this custom report at any later date when needed.

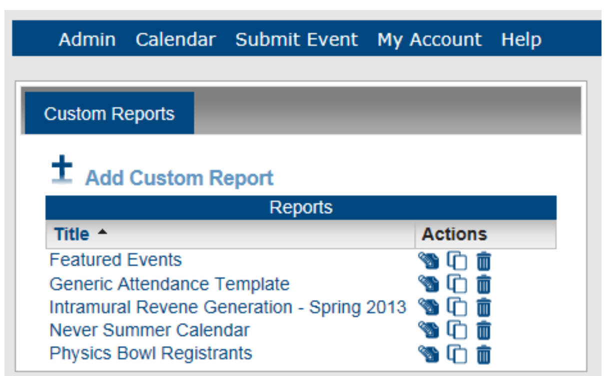
   - Open the Results tab, and then click Preview to run the custom report immediately and view the results on the tab. You can then click Save to save the named custom report and close the Report Builder dialog box. The named custom report is displayed on the Custom Reports page. You can run this custom report at any later date when needed.

To create a custom report by copying an existing custom report

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

   The Manage Custom Reports page opens. This page always contains the Add Custom Reports option. It also displays a list of custom reports that have been previously defined in your Master Calendar database.

Figure 6-99: Manage Custom Reports page



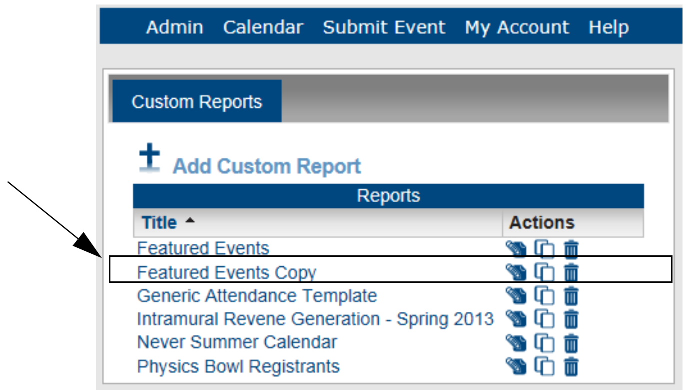
2. Click the Copy icon for the custom report that you are copying.

   A message opens indicating that the selected report was copied.

3. Click OK to close the message and return to the Custom Reports page.

   An entry for the copied custom report is displayed on the Custom Reports page as <custom report Name> Copy.

Figure 6-100: Custom Reports page with a copied custom report



4. Click the Edit icon  next to the copied custom report that you are editing.

   The Report Builder dialog box opens. All the tabs are populated with the information for the selected custom report.

5. Edit the custom report as necessary, including one or more of the following:

   - Renaming the custom report. See “Details tab”
   - Changing the fields that are to be displayed in the custom report results. See “Display Fields tab”
   - Changing the fields that define the custom report. See “Filter tab”
   - Changing the sort order of the custom report results. See “Sort tab”

6. Do one of the following:

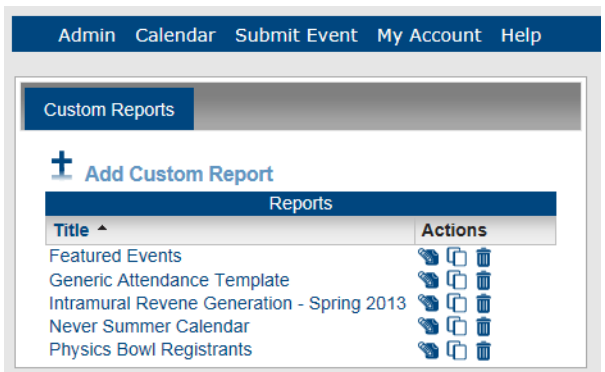
   - Click Save to close the Report Builder dialog box and save the named custom report. The named custom report is displayed on the Custom Reports page. You can run this custom report at any later date when needed.
   - Open the Results tab, and then click Preview to run the custom report immediately and view the results on the tab. You can then click Save to save the named custom report and close the Report Builder dialog box. The named custom report is displayed on the Custom Reports page. You can run this custom report at any later date when needed.

To edit a custom report

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

   The Manage Custom Reports page opens. This page always contains the Add Custom Reports option. It also displays a list of custom reports that have been previously defined in your Master Calendar database.

Figure 6-101: Manage Custom Reports page



2. Click the Edit icon next to the custom report that you are editing.

   The Report Builder dialog box opens. All the tabs are populated with the information for the selected custom report.

3. Edit the custom report as necessary including one or more of the following:

   - Renaming the custom report. See “Details tab”
   - Changing the fields that are to be displayed in the custom report results. See “Display Fields tab”
   - Changing the fields that define the custom report. See “Filter tab”
   - Changing the sort order of the custom report results. See “Sort tab”

4. Do one of the following:

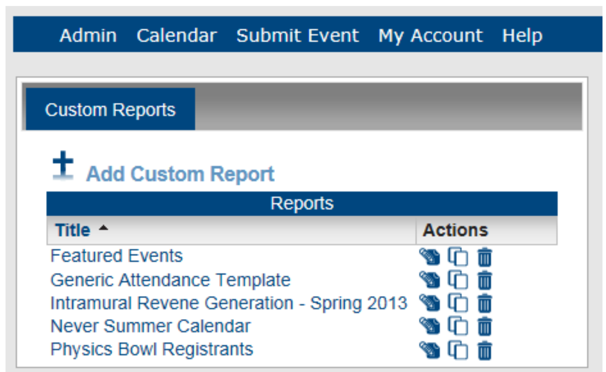
   - Click Save to close the Report Builder dialog box and save the named custom report. The named custom report is displayed on the Custom Reports page. You can run this custom report at any later date when needed.
   - Open the Results tab, and then click Preview to run the custom report immediately and view the results on the tab. You can then click Save to save the named custom report and close the Report Builder dialog box. The named custom report is displayed on the Custom Reports page. You can run this custom report at any later date when needed.

To delete a custom report

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

   The Manage Custom Reports page opens. This page always contains the Add Custom Reports option. It also displays a list of custom reports that have been previously defined in your Master Calendar database.

Figure 6-102: Manage Custom Reports page



2. Click the Delete icon next to the custom report that you are deleting.
3. Select the custom report that is to be deleted, and then click Delete.

   A message opens, asking you if it is OK to delete the selected report.
4. Click Yes.

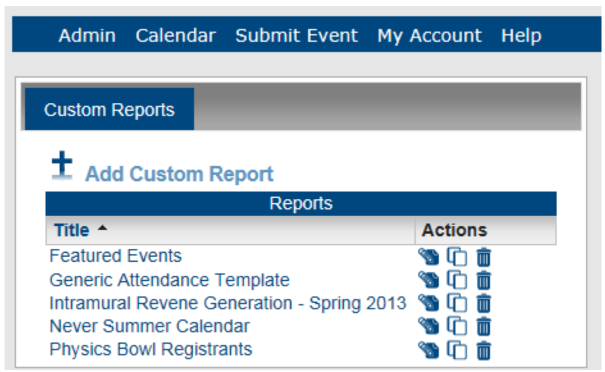
   The message closes. The custom report is deleted, and another message opens indicating that the report was successfully deleted.

To run, print, and export a custom report

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

   The Manage Custom Reports page opens. This page always contains the Add Custom Reports option. It also displays a list of custom reports that have been previously defined in your Master Calendar database.

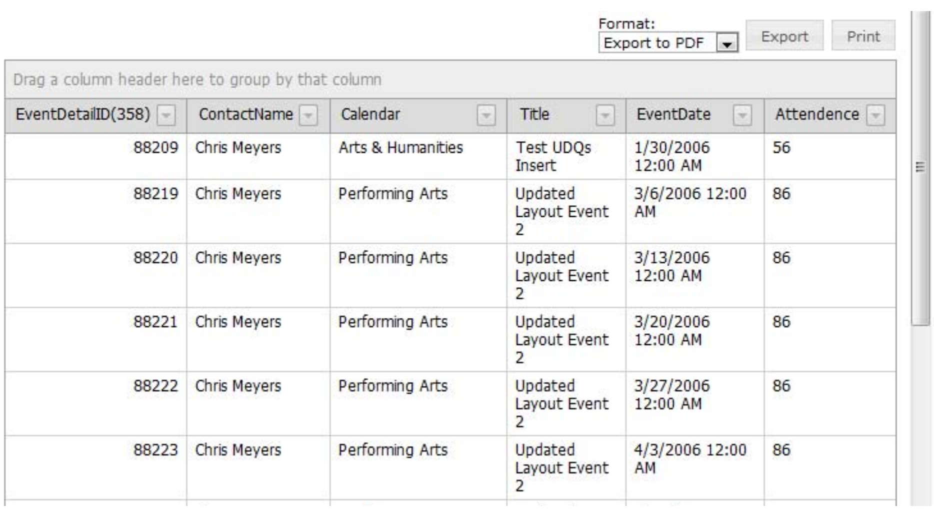
Figure 6-103: Manage Custom Reports page



2. Click on the name/title of the custom report that you are running.

   An onscreen preview of the selected custom report opens in the Master Calendar application.

Figure 6-104: Example of an onscreen preview of a custom report


Format: Export to PDF | Export | Print

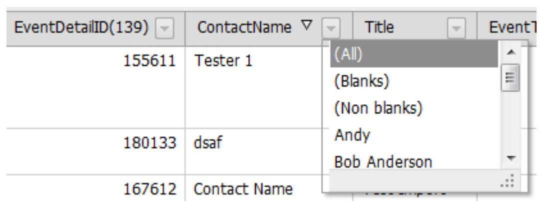
Drag a column header here to group by that column

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

3. Optionally, do one or more or all the following:

    - To group the report by a column header, drag the column to the indicated location at the top of the onscreen preview of the report.
    - To change the sort order of the custom report results, click on a column header. Click on the column header again to reverse the sort order.
    - To filter the custom report results, click on the Dropdown arrow next to a column header to open a list of all available values for the column, and select a specific value.

Figure 6-105: Filtering a custom report by column values



- To export the custom report to a PDF file or a Microsoft Excel file (CSV or XLS), under Format, select the appropriate Export option, and then click Export.

  A message opens, asking you if you want to open or save the file.

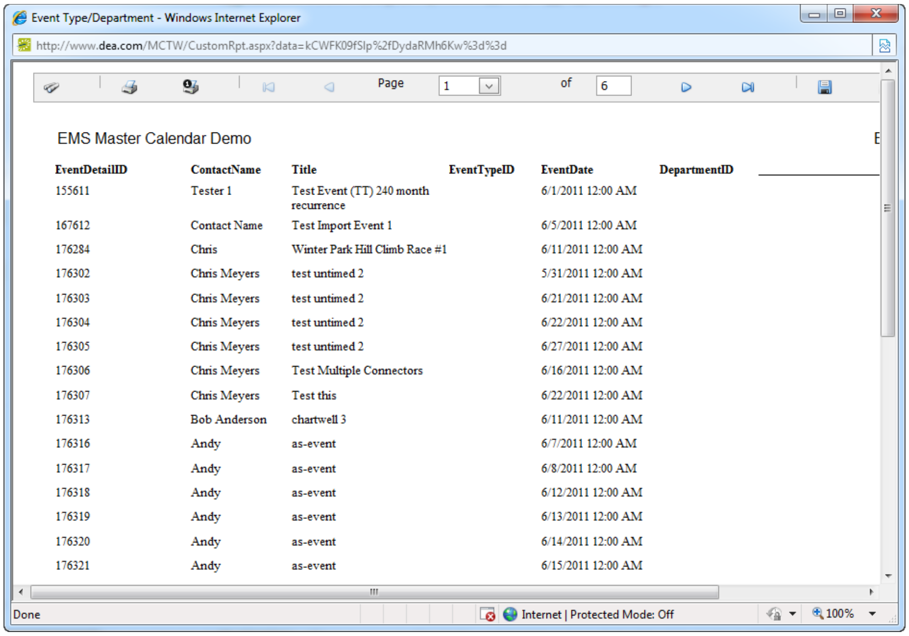
    - If you click Open, then the file is opened in the appropriate application (Adobe Acrobat or Reader for a PDF or Microsoft Excel for a CSV or XLS file) and you can use the options that area available in these applications to name and/or save the file.
    - If you click Save, then you are prompted to name the file (the default name is ReportGrid.pdf, ReportGrid.csv, or ReportGrid.xls) and you must select a location for saving the file. (The default location is your client’s Desktop.)

- To print the custom report, click Print.

  An onscreen preview of the selected custom report opens in its own window. A variety of options are available from this preview, including (from left to right at the top of the onscreen preview) the options to search the custom report results, print the custom report in its entirety, print the currently displayed custom report page and export the custom report to a file and save the file. See Figure 6-106.

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

Figure 6-106: Print preview for a custom report



Customizing the Header for Automated Emails

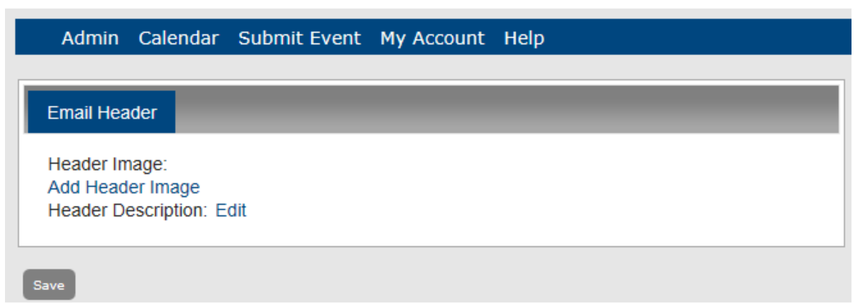
Automated emails can be sent from many areas within Master Calendar, including subscriptions, reminders, and change notifications. You can customize the header for these automated emails, and you can also select a logo for these automated emails that is displayed in the upper right hand corner of the automated emails.

To customize the header for automated emails

1. Under the Admin Panel main menu option, point to Site Administration, and then click Email Header.

   The Email Header page opens.

Figure 6-107: Email Header page



2. Do one or both of the following:

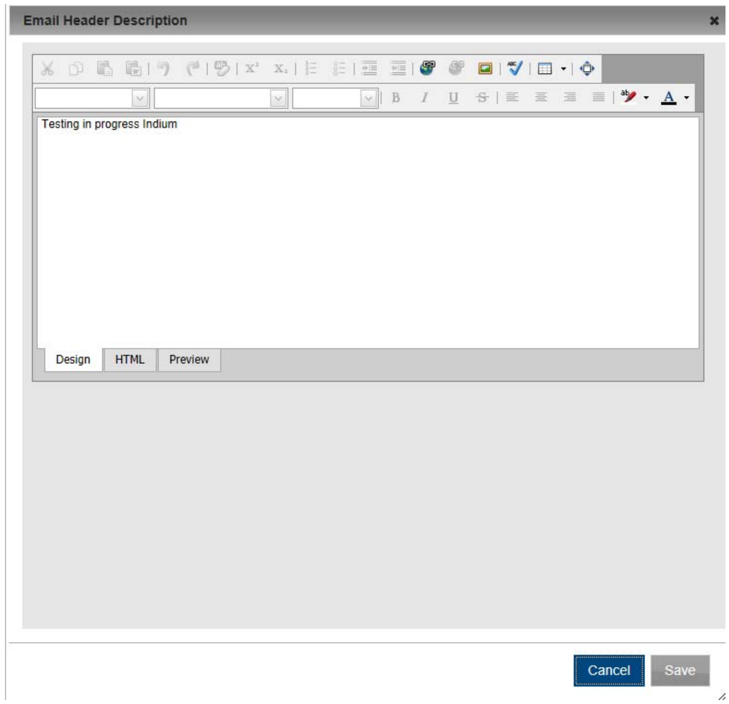
   - To select an image—Click Add Header Image to browse to and select the image that is be used for the logo in all automated emails.

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

After you select a logo, the name of the logo is displayed and a "Remove" option is displayed next to the logo. To remove the logo from all automated emails, simply click Remove.

   - To edit the email header—Next to Header Description, click Edit to open the Email Header Description dialog box. (See Figure 6-108.) On the Design tab, in the blank header description field, enter the needed text for the email header. Use the formatting options that are available to select the paragraph style (Normal, Heading 1, and so on), font, font color, and font size for the header, insert links, and so on.

Figure 6-108: Email Header Description dialog box



3. Optionally, do one or both of the following:
   - Click HTML to open the HTML tab and view the HTML code for the email header.
   - Click Preview to open the Preview tab and view the email header as it will be displayed in your Master Calender system.
4. Click Save.

   An Saved message opens.
5. Click OK.

   The message closes. The settings are saved for the customized heading.

Managing Help Text in Master Calendar

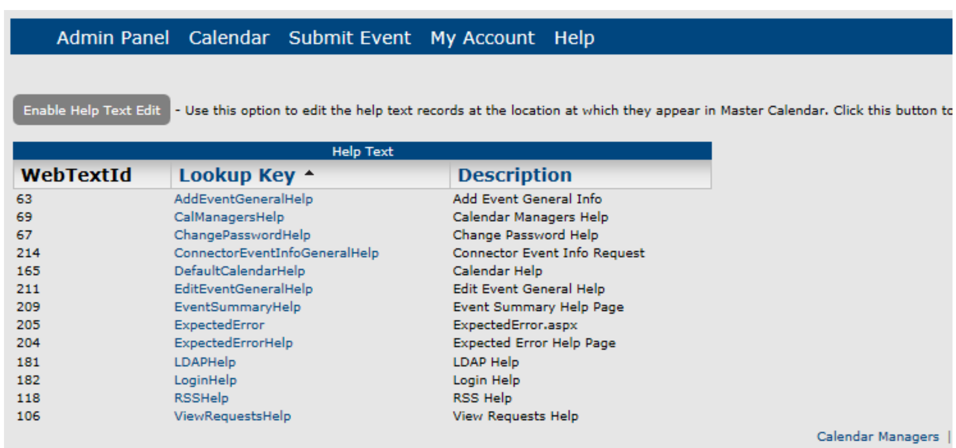
As the Master Calendar site administrator, you can customize messages in key areas of your system that provides organization-specific information or hints to your users about how to use Master Calendar. For example, you might want to place help text above a calendar that explains what type of events that a user should and should not post to the calendar. You have two options for managing help text in Master Calendar—from the Help Text function on the Admin Panel menu, or by clicking an Edit link, which is displayed above the help text on any page other than the Login page in the Admin Panel area.

To manage help text in Master Calendar

1. Under the Admin Panel main menu option, point to Site Administration, and then click Help Text.

   The Manage Help Text page opens. By default, when the page first opens, Help Text Edit mode is disabled.

Figure 6-109: Manage Help Text page



2. Click the appropriate Lookup Key link to open the page for editing the help text.

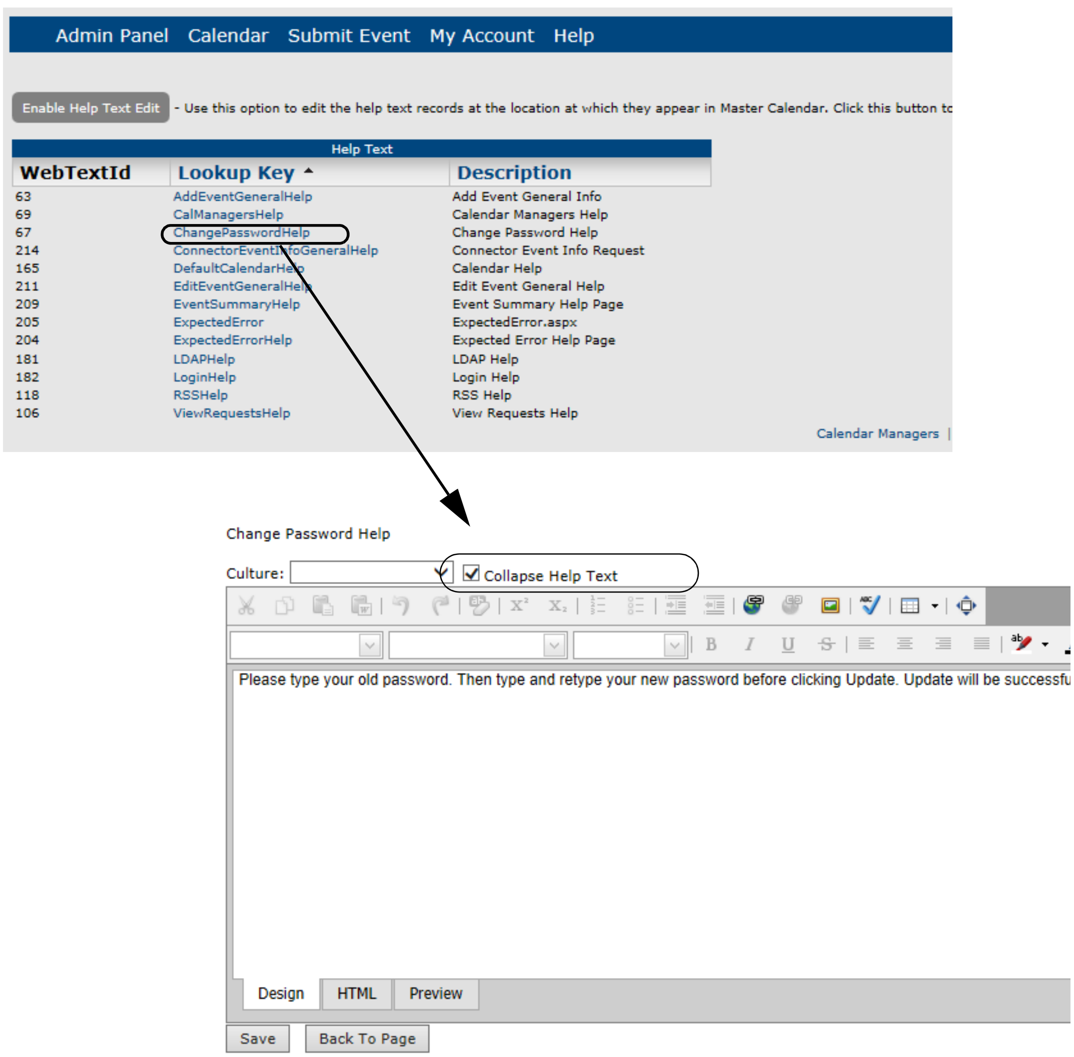
   A page opens for editing the help text in the selected area of Master Calendar that has the following characteristics:

   - The option Collapse Help Text is not selected.

If this option is not selected, then the help text for a page is displayed explicitly at the top of the page.

   - If you have configured cultures for Master Calendar, then these cultures are displayed in a Culture dropdown list.

Figure 6-110: Page that opens for editing help text in a selected area of Master Calendar



3. Optionally, do one or both of the following:
   - Select Collapse Help Text.

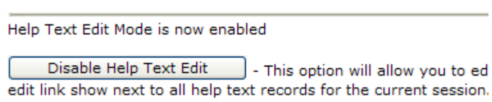
If this option is selected, then the help text for a page is collapsed behind a Help icon on the page. A user must click this icon to display the help text.

   - Select a different culture (language) in which the help text is to be displayed.

The guest's or user's Browser language must be set to the appropriate culture (language) to display these translations.

4. Enter the help text in the blank Design tab. Use the available formatting options to select the font size, style, color, and so on.
5. Optionally, do one or both of the following:
   - Click Preview to open the Preview tab and view the Help text as it will be displayed in your Master Calender system.
   - Click HTML to open the HTML tab and view the HTML code for the help text.
6. Click Save.
7. Toggle Enable Help Text. The message "Help Text Mode is now enabled" is displayed above the toggle, and the toggle now reads "Disable Help Text Edit."

Figure 6-111: Enable Help Text toggle - Help Text Mode enabled



An Edit link is displayed next to all the Help Text records on all Admin Panel pages for the current Master Calendar session. You can click this Edit link to open the page for editing the help text at the location at which it is displayed in Master Calendar. See Figure 6-113 and Figure 6-114.

As the site administrator, if you enable Help Text mode, and then log out of Master Calendar, Help Text mode is disabled when you log back into Master Calendar. You must enable Help Text mode again.

8. Optionally, to disable Help Text mode, toggle Disable Help Text Edit.

   The message "Help Text Mode is now disabled" is displayed above the toggle, and the toggle now reads "Enable Help Text Edit."

Figure 6-112: Help Text Mode enabled

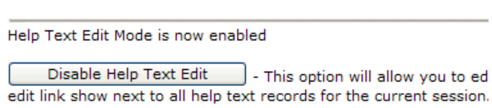


Figure 6-113: Edit link for collapsed help text

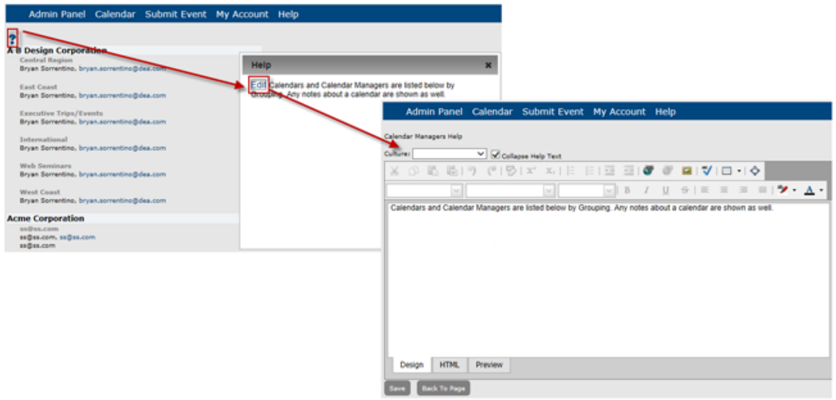
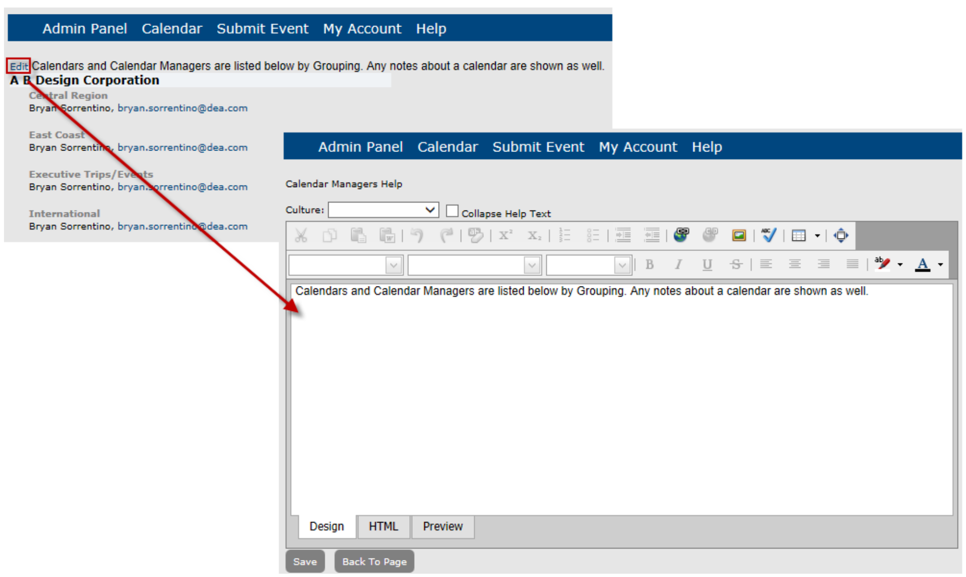


Figure 6-114: Edit link for help text explicitly displayed on a Master Calendar page



Managing Subscriptions

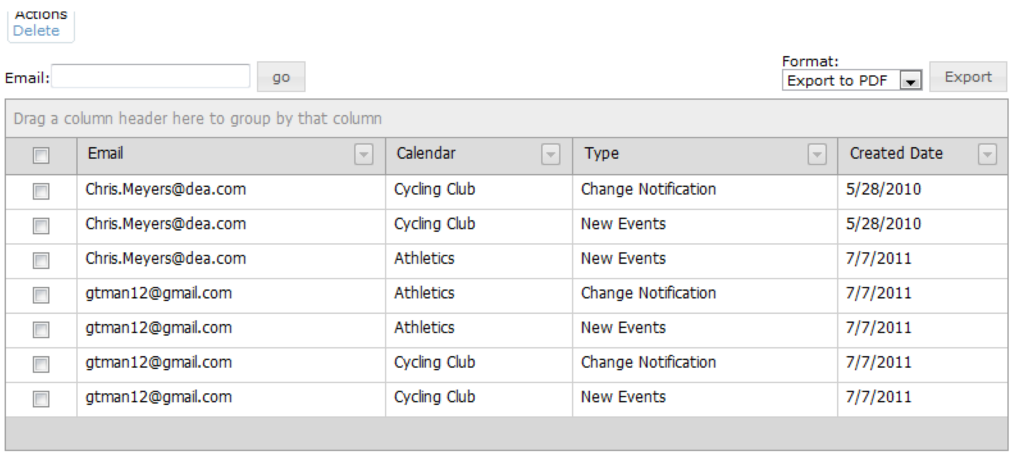
You use the functions in the Subscriptions area to manage all active subscriptions to the calendars in Master Calendar. Managing subscriptions consists of searching for and viewing all active subscriptions, exporting all active subscriptions to a file, and deleting active subscriptions.

To view, search for, and export active subscriptions

1. Under the Admin Panel main menu option, point to Site Administration, and then click Subscriptions.

   The Subscriptions page opens. All the currently active subscriptions to all calendars in Master Calendar are displayed on this page.

Figure 6-115: Subscriptions page



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.

---

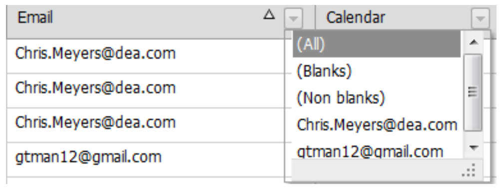
*The search is limited to the exact order of characters in the search string, however, the string is not-case sensitive and it can appear anywhere in the search results. For example, if you enter "Rob" as your search string, search results can include **Rob**ert.Smith@ems.com, M**Rob**ertson@gmail.com, 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.

Figure 6-116: Filtering the subscription display by column values



- To export the subscriptions to a PDF file or a Microsoft Excel file (CSV or XLS), under Format, select the appropriate Export option, and then click Export.

  A message opens,asking you if you want to open or save the file.

- If you click Open, then the file is opened in the appropriate application (Adobe Acrobat or Reader for a PDF or Microsoft Excel for a CSV or XLS file) and you can use the options that 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.)

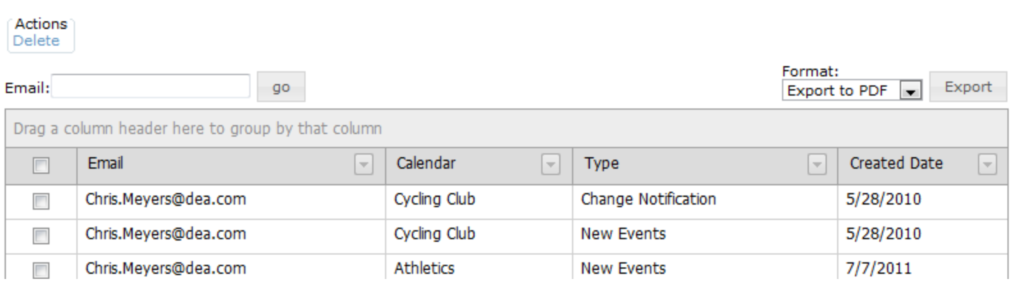
To delete active subscriptions

When you delete an active subscription, the deletion is for a subscription to a specific calendar. A user's subscriptions to other calendars is not affected in any way.

1. Under the Admin Panel main menu option, point to Site Administration, and then click Subscriptions.

   The Subscriptions page opens. All the currently active subscriptions to all calendars in Master Calendar are displayed on this page.

Figure 6-117: Subscriptions page



2. Optionally, search for the specific subscriptions that you are deleting. (See “To view, search for, and export active subscriptions”.)
3. Select the subscriptions that you are deleting.
4. Under Actions, click Delete.

   A message opens, asking you if you are sure that you want to delete all the selected RSS feeds.
5. Click OK in the message.

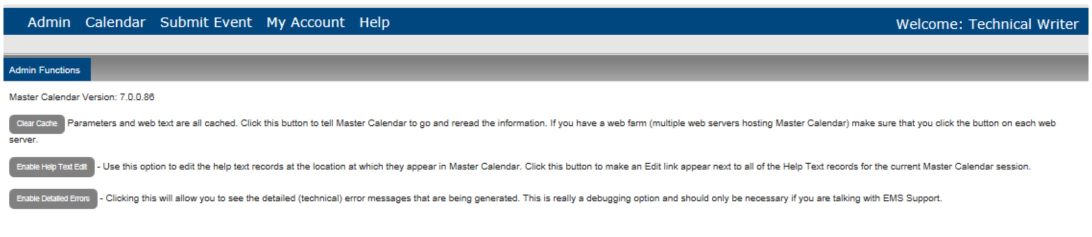
   A message opens indicating that all the selected subscriptions were successfully deleted.
6. Click OK in the message.

   The Subscriptions page is refreshed to show the remaining, if any, active subscriptions in Master Calendar.

Master Calendar Administrator-Specific Functions

Several administrator-specific functions are available to assist you in making sure that Master Calendar is operating efficiently and effectively as well as debugging the application. All the options are available under the Admin Functions option on the Admin menu.

Figure 6-118: Admin-specific functions



Function	Description
Clear Cache	Clears the cache for the web server that is hosting Master Calendar.
Enable Help Text Edit	Allows for the editing of the help text directly on the pages in Master Calendar. **Note:** This option is also available from the Help Text function on the Admin menu. See “Managing Help Text in Master Calendar”.
Enable Detailed Errors	Makes the detailed (technical) error messages that are being generated visible. **Note:** This is really a debugging option and should be necessary only if you are talking with EMS support.

Appendix A
Site Configuration Settings

This appendix details the Master Calendar site configuration settings.

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

If you need assistance in understanding the definitions for any of these settings, or need assistance in setting any of these values, contact EMS Software, LLC, at:

EMS Software, LLC, an Accruent Company
6465 Greenwood Plaza Blvd
#600
Centennial, CO 80111
800-440-3994 (Phone)
303-796-7429 (Fax)
support@emssoftware.com
www.emssoftware.com

Area: Calendar

Parameter Description	Default Value	Function
Collapse EMS Bookings into reservations on calendar	Yes	For events that are pulled from EMS into Master Calendar, collapse the bookings and display only the reservation-level information.
Max number of events/day to display in daily view	20	In the Daily view, select the number of events that are to be displayed.
Max number of events/day to display in monthly view	5	In the Monthly view, select the number of events that are to be displayed.
Max number of events/day to display in weekly view	10	In the Weekly view, select the number of events that are to be displayed.
Total number of featured events to display	15	Total number of featured events to display in the Featured Events section at the top of the Master Calendar Home page.
Display the social networking icon on Event Details page	Yes	Display the Social Networking icon on the Event Details page, which allows users to add the event to various social network sites (Facebook, Twitter, and so on).
Display the time zone abbreviation next to the time	Yes	Display the time zone abbreviation (for example EST) next to the event time on the calendar.
Display the timezone dropdown on the Master Calendar Home page to allow adjusting of the event display times	Yes	Allows adjustment of the event display times based on the selected timezone in the Calendar Display area on the Master Calendar Home page.
Default List View	Detailed List	Indicate the style type for the calendar List view.
Default start day of week for calendar	Sunday	Select the day of the week on which a calendar week should begin.

Area: Email

Parameter Description	Default Value	Function
Account to Use for Sending Email		Enter a value if your SMTP server requires authentication.
Password of Email Account		Enter a value if your SMTP server requires authentication.
SMTP server port number	25	The default port to use for the SMTP server.
Name of Email Sender	Events Office	Enter the name that is to be displayed on system-generated emails.
Email Address of Sender	events@yourdomain.com	Enter the email address that is to be displayed on system-generated emails.
SMTP Server		Enter the name of the organization’s SMTP Server.
SMTP - Use SSL	No	Create a secure encrypted connection between the email client application and the email server.

Area: Labels

Parameter Description	Default Value	Function
Contact Singular Label	Contact	Indicate the wording that should how for the Contact Label singular.
Department Plural Label	Departments	Indicate the wording that should show for the Department Label plural.
Department Singular Label	Department	Indicate the wording that should show for the Department Label singular.
Event Type Plural Label	Event Types	Indicate the wording that should show for the Event Type Label plural.
Event Type Singular Label	Event Type	Indicate the wording that should show for the Event Type Label singular.
Featured Feed Label	Featured Events	Indicate the wording that should show for the Featured Feed Label.
Location Plural Label	Locations	Indicate the wording that should show for the Location Label plural.
Location Singular Label	Location	Indicate the wording that should show for the Location Label singular.
Sub Location Plural Label	SubLocations	Indicate the wording that should show for the Sub Location Label plural.
Sub Location Singular Label	SubLocation	Indicate the wording that should show for the Sub Location Label singular.

Area: Portal Authentication

Parameter Description	Default Value	Function
Portal Authentication Cookie Key		For portal authentication, enter in your organization’s portal authentication cookie key.
Portal Authentication Method	QueryString	For portal authentication, select a portal authentication method.
Portal Authentication Variable	MCQuery	For portal authentication, enter your organizations portal authentication variable.

Area: RSS

Parameter Description	Default Value	Function
Append the event data to RSS title	Yes	Show the date of an event in the RSS title.
Append the location to RSS title	No	Show the location of an event in the RSS title.
Append the start and end time to RSS title	Yes	Show the start and end event time in the RSS title.
Insert the location to RSS description	Yes	Show the Location in the RSS description.
Insert the start and end time to RSS description	Yes	Show the start and end time in the RSS description.

Area: Submit

Parameter Description	Default Value	Function
Allow users to add attachments	Yes	Indicate if users are allowed to add attachments on the Submit an Event page.
Allow custom fields	Yes	Indicate if users are allowed to use the custom fields on the Add Event page.
Allow invitee emails	Yes	Indicate if users are allowed to invitee attendees on the Add Event page.
Acceptable attachment extensions	.csv,.doc,.gif,.jpg,.pdf,.ppt,.txt,.xls, .xlsx, .tif	Indicate the acceptable types of attachments that can be added to the Add Event page.
Check Hide Contact Boxes by default	No	Hide the checkbox for Contact Name and Contact Email when submitting an event.
Force users to choose from pre-existing departments created in the system	No	Do not require a user to select from a list of pre-existing departments when submitting an event. (User can manually enter any value for a department in the Department field.)
Require department field	No	Indicate if the Department field should be required on the Add Event page.
Default end time of submit page	5:00 pm	Indicate a default end time for submitting an event.
Require event type field	No	Indicate if the Event Type field should be required on the Add Event page.
User groups allowed to use HTML editor	Users	Indicate which level of users should be allowed to use the HTML editor from within the Event Description box on the Add Event page.
Force users to choose from pre-existing locations created in the system	No	Do not require a user to select from a list of pre-existing locations when submitting an event. (User can manually enter any value for a location in the Location field.)
Require location field	Yes	Indicate if the Location field should be required on the Add Event page.

Parameter Description	Default Value	Function
Max number of attachments allowed per event	3	Indicate the maximum number of attachments that can be added to a single event.
Max size of a single attachment (in megabytes)	20	Indicate the maximum size (in megabytes) of an attachment for the Add Event page.
Minute increment drop down	15	Select 5, 15, 30, or 60 as the way time fields are incremented.
Allow requestors to edit their events after they have been approved?	Yes - No approval required	Allow requestors to edit their events after the Calendar Manager has approved the events. Two options for Yes: • Yes - No approval required. (After a user edits the event, the event remains in an approved status.) • Yes - Approval required. (After a user edits the event, the event is returned to a pending status, and the Calendar Manager must either approve or deny the request.)
Display department field	Yes	Indicate if the department field should be displayed on the Add Event page.
Display priority field	No	Indicate if the priority field should be displayed on the Add Event page and for RSS Feeds.
Show timezone dropdown on submit page	No	Show the Timezone dropdown list on the Add Event page.
Default start time of submit page	9:00 am	Indicate a default start time for submitting an event.
Enable CAPTCHA. This feature requires users to enter a distorted phrase before submitting an event.	No	Enables additional protection from malicious programs that automatically submit events by having a user enter a specific distorted phrase on the Add Event page that must be verified before the event can be submitted.
Number of months forward that a user can submit an event	36	Select a number of months in the future that a user can submit an event to a calendar.

Area: System Configuration

Parameter Description	Default Value	Function
Show email me my password link	Yes	Show the Email Me My Password Link on the Master Calendar Login page.
Updates to Connector Events by the EMS Contact require approval?	No	Updates by the EMS Contact to events that have been imported from your EMS database into Master Calendar require approval by the Calendar Manager.
Max length of event title (0-255)	50	Indicate the maximum character length for an event title.
Max results displayed before pagination is used	30	Enter the number of items that are shown in any list (other than those on the Calendar page) before pagination.
Show Calendar Managers link	Yes	Indicate if the link to show the list of Calendar Managers should show on the site.
This determines whether to show the login menu link.	Yes	Display the Login menu link under My Account on the Master Calendar main menu.
Show timezone preference on the login page.	Yes	Display a Timezone dropdown list on the Login page from which a user can select a preferred timezone.
Show weekends on calendar	No	Show Saturday and Sunday on calendars in the Calendar Display area.
Suspend sending of subscription emails	No	Indicate if the subscription emails should be suspended.
Height of thumbnail image (in pixels)	200	Enter the number (in pixels) for the height of a thumbnail image.
Width of thumbnail image (in pixels)	200	Enter the number (in pixels) for the width of a thumbnail image.
Application Time zone	(GMT -07:00) Mountain Time	Select the time zone for the application.
Use secondary location field	Yes	Display the Sub-Location field on the Submit Event page.
Max length of special dates title (0-255)	50	Indicate the maximum character length for a special date.

Parameter Description	Default Value	Function
Time to send out email subscriptions	2:00 am	Indicate the time in which email subscriptions are to be sent out.
Delay between text change on dynamic feeds (in seconds)	5	Indicate (in seconds) the delay between text change for the dynamic feeds.

Area: Tooltip

Parameter Description	Default Value	Function
Show tooltip on calendar	Yes	Indicate if the calendars should show on the tooltip.

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Master Calendar Integrated Authentication Configuration Instructions

EMS Software LLC, an Accruent Company

Integrated Authentication is *Optional* Functionality

The Integrated Authentication module (which includes Integrated Windows Authentication, Portal Authentication and LDAP Integration) is a separately licensed component for the EMS Master Calendar system. ***You must be licensed for Master Calendar and Integrated Authentication in order to configure and use this module.***

If you are unsure whether your organization is properly licensed, or if you would like to learn more about the Integrated Authentication module, please contact your EMS Software Account Executive (800-440-3994).

Compatible EMS Systems

Integrated Windows Authentication and Portal Authentication are supported on the following Master Calendar versions:

- EMS Master Calendar 1.5 (Build 2.0.40) or later

LDAP integration is supported on the following Master Calendar versions:

- EMS Master Calendar 2.0 or later

You can determine your Master Calendar version by accessing your system and, at the main (i.e., Calendar Selection) window, adding systemcheck.aspx to the end of the website address. For example:

http://[ServerName]/ MasterCalendar/systemcheck.aspx
(*replace [ServerName] with the name of your web server*)

The version number is displayed at the top of the page and can also be found by clicking the Assembly heading.

If you would like to utilize integrated authentication or LDAP integration but are not running a Master Calendar version that supports it, you can (if you have a current Annual Service Agreement) download the latest version of the software from our website (www.emssoftware.com). Click Customer Login, provide your email address and password (or request a password), click on the appropriate download(s) and follow the instructions.

Portal Authentication

The Master Calendar system can, with proper licensing, be configured so that users are automatically signed on when they access your network. This process is sometimes referred to as “single sign-on” since users have already signed on to the network through some other means – usually a portal such as SiteMinder, Plumtree or uPortal.

Using one of several methods, Master Calendar can compare a unique variable captured by your portal/sign-on page (email address, employee ID, network credential, etc.) to a value that has been stored for the user in your database. If the credentials match, the system automatically logs the user into the Master Calendar application.

Configuration Steps

In order to configure portal authentication you must perform the following steps:

1. Confirm or install new license
2. Select portal authentication method
3. Verify portal redirect

These steps are described in detail below.

Confirm or Install New License

In order to use Portal Authentication, your organization must be properly licensed. If you are unsure about whether you have purchased the Integrated Authentication module that enables Portal Authentication, log in to Master Calendar, go to the systemcheck.aspx page (as described under Compatible Systems), click the License Information heading and review the Licensed For list.

If you were not previously licensed for Integrated Authentication but are now, update your registration information by logging in to the Master Calendar, going to Admin – Registration, entering the new information and clicking Save License Data.

After you have entered the registration information, you must have Master Calendar re-read it by going to the systemcheck.aspx page, clicking the License Information heading and then clicking Read License.

Select Portal Authentication Method

To select the portal authentication method to be used, log in to Master Calendar and go to Admin – Default Settings. Select the appropriate entry from the Portal Authentication Method drop-down list. Since almost every “single sign-on” environment and strategy is different, we have provided you with five commonly-supported methods of authentication: server variable, session, form, cookie and query string. The first two methods are the most widely used.

Server Variable Method (Header Variable)

Server Variable/Header Variable is a collection of variables that are set by the Internet Information Server (IIS). Applications like SiteMinder create custom server variables for portal site use.

Code example:
Set the Portal Authentication Method field to Server Variable and type the appropriate entry in the Portal Authentication Variable field. Then redirect users to the Default.aspx page (or to *any* page in the system for Master Calendar) and the server variable will be read.

Session Method

A session is a way to provide/maintain user state information in an inherently stateless environment. It provides access to a session-wide cache you can use to store information.

In order to use the session method, set the Portal Authentication Method field to Session and type the appropriate variable in the Portal Authentication Variable field. Then you must create an asp.net web page and name it with the .aspx extension similar to the example below. The asp.net web page created must be copied into the Master Calendar root web directory. It must be put there in order for Master Calendar to read the session variable.

You will need to pass the user's email address or external reference through to your asp.net web page.

Code example in vb.net:

```
<%@ Import Namespace="System" %>
<script runat="server" language="vb">
	Sub Page_Load(ByVal sender As System.Object, ByVal e As System.EventArgs)
		Session.Item("MCSession") = "test@ems.com"
		Response.Redirect("Default.aspx")
	End Sub
</script>
```

Form Method

Forms enable client-side users to submit data to a server in a standardized format via HTML. The creator of a form designs the form to collect the required data using a variety of controls, such as INPUT or SELECT. Users viewing the form fill in the data and then click Submit to send the data to the server.

To use the form method, set the Portal Authentication Method field to Form and type the appropriate variable in the Portal Authentication Variable field. To create portals through a form, create a web page with a form similar to below. Once the user logs on through the portal, the form below can be submitted to log the user on to the application.

Code example in HTML:

```
<Form name="form1" method="Post" action="http://localhost/virtualdirectory/Default.aspx">
	<input type="hidden" id="MCFORM" name="MCFORM" value="test@ems.com">
	<input type="submit" value="submit">
</form>
```

Cookie Method

A cookie is a small piece of information stored by the browser. Each cookie is stored in a name/value pair called a crumb—that is, if the cookie name is "id" and you want to save the ID's value as "this", the cookie would be saved as id=this.

You can store up to 20 name/value pairs in a cookie, and the cookie is always returned as a string of all the cookies that apply to the page. This means that you must parse the string returned to find the values of individual cookies. Cookies accumulate each time the property is set. If you try to set more than one cookie with a single call to the property, only the first cookie in the list will be retained.

To use the cookie method, set the Portal Authentication Method field to Cookie and type the appropriate variable in the Portal Authentication Cookie Key field. Then create a web page with code similar to below. Once the user logs on through the portal, take their user logon information and create a cookie. After the cookie is created, send the user to the Default.aspx page of the application.

Code example in Active Server Pages 2.0:

```
<%@LANGUAGE="VBSCRIPT" %>
<%
	Response.Expires = -1
	Response.Cookies("MCCookie")("CookVal") = "test@ems.com"
	Response.Cookies("MCCookie").Path = "/"
	Response.Cookies("MCCookie").Expires = DateAdd("m", 3, Now)
	Response.Redirect("http://localhost/virtualdirectory/Default.aspx")
%>
```

Query String Method

A query string is information appended to the end of a page's URL. An example using portal authentication is below

Code example:
http://localhost/virtualdirectory/Default.aspx?MCQS=test@ems.com

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

Verify Portal Redirect

The portal authentication entry page is the page within Master Calendar that processes the portal request. The name of the page is Default.aspx and it is the page where all portal authentication requests should be sent. This page is already installed and included with your Master Calendar software. The location will be the same folder as the EMS product's root web folder. For example, http://localhost/virtualdirectory/Default.aspx

Integrated Windows Authentication

Integrated Windows Authentication is another form of "single sign-on" available as an option with Master Calendar systems.

Configuration Steps

In order to configure Integrated Windows Authentication for Master Calendar, you must perform the following steps *after* installing and configuring Master Calendar:

1. Confirm or install new license
2. Add domain/user account information to user records
3. Configure IIS for authenticated access

These steps are described in detail below.

Confirm or Install New License

In order to use Integrated Windows Authentication, your organization must be properly licensed. If you are unsure about whether you have purchased the Integrated Authentication module that enables Integrated Windows Authentication, log in to Master Calendar, go to the systemcheck.aspx page (as described under Compatible Systems), click the License Information heading and review the Licensed For list and look for a description to state "Integrated Authentication".

If you were not previously licensed for Integrated Authentication but are now, update your registration information by logging in to the Master Calendar, going to Admin – Site Administration - Registration, entering the new licenses information then click Save License Data. Please note, the licenses information is case sensitive and needs to be entered in exactly how it was provide from EMS Software, LLC, an Accruent Company. If the information that was provided is incorrect, please contact EMS Software.

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

Add Domain/User Account Information to User Records

Integrated Windows Authentication functions by comparing the domain/user account used when logging in to your network workstations with the corresponding domain/user account information recorded on your Master Calendar user records.

There are three ways to add the domain/user information to user records. The first method, manually entering information through the Master Calendar interface, is less technical and can be managed with little knowledge of SQL. The second method while more efficient assumes some degree of experience with SQL and database administration. The third method has your Master Calendar users enter the appropriate information when they first use the application.

Manually entering information through the Master Calendar

1. Log on to EMS Master Calendar and navigate to Admin – Security - Users.
2. Click the icon in the Update column for the user record that you want to edit.
3. In the External Reference field, type the domain\user account used by this person to log in to your network.

   In a single domain environment, only the user account is necessary.

4. Click Update to save your entry.

5. After editing all users, continue to the Configuring IIS step below.

Configure IIS for Authenticated Access

To configure IIS for authenticated access, do the following:

1. Open the Microsoft Internet Information Services (IIS) Manager.
2. Navigate to the appropriate virtual directory and right-click to reach Properties.
3. Go to the Directory Security tab and edit the Anonymous Access and Authenticated Access sections as follows: Clear the Anonymous Access check box and check the Integrated Windows Authentication box.

Figure 1-1: The Authentication Methods Window (IIS 6.0)

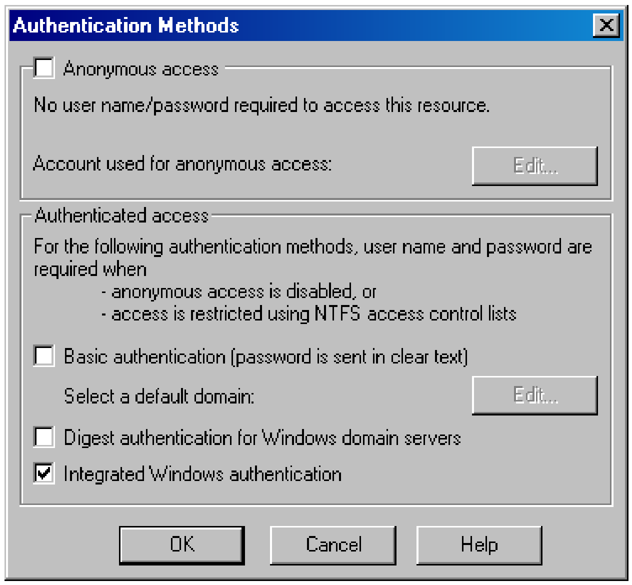
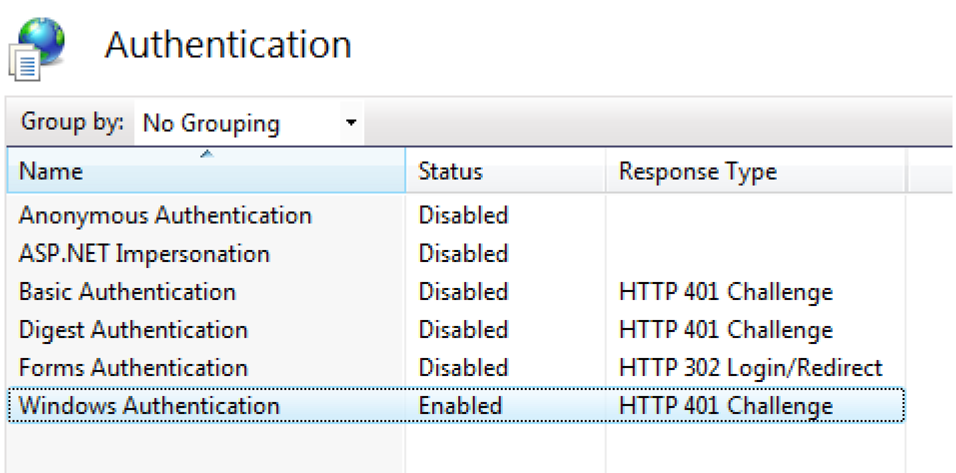


Figure 1-2: The Authentication Methods Window (IIS 7.0)



4. Click OK. Integrated Windows Authentication is now enabled.

Frequently Asked Questions

- *Why is it necessary to put account information into tblUser to authenticate a user?*

We need to know the Master Calendar security template assignment (among other preferences) for the user to authenticate. For licensing purposes we also need to know how many users are active in the system.

- *Why do we need to put account information in the External Reference field for a user?*

Integrated Windows Authentication works by comparing credentials on the user record to those being supplied by Windows authentication. Without the account information, there is no way to cross reference a Master Calendar user with their Windows credentials.

- *We also need our non Windows-authenticated users to access Master Calendar. What can we do?*

You can install another Master Calendar anonymous access directory to your web server and point that installation to the same database. Public users may access the database via this second directory.

LDAP Integration

LDAP integration allows the system to use security group information maintained on your network to determine the appropriate permissions for Master Calendar users.

Configuration Steps

In order to configure LDAP integration for the Master Calendar system, you must perform the following steps *after* installing and configuring Master Calendar:

1. Confirm or install new license
2. Configure Master Calendar to call your LDAP Server
3. Add LDAP security groups to Master Calendar

These steps are described in detail below.

Confirm or Install New License

In order to use LDAP Integration, your organization must be properly licensed. If you are unsure about whether you have purchased the Integrated Authentication module that enables LDAP Integration, log in to Master Calendar, go to the systemcheck.aspx page (as described under Compatible Systems), click the

License Information heading and review the Licensed For list and look for a description to state "Integrated Authentication".

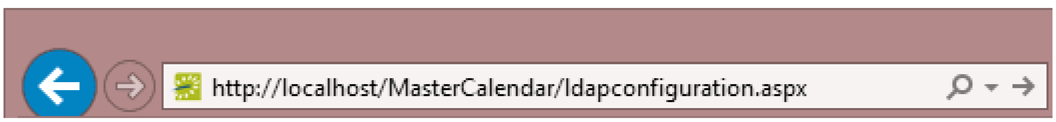
If you were not previously licensed for Integrated Authentication but are now, update your registration information by logging in to the Master Calendar, going to Admin – Site Administration - Registration, entering the new licenses information then click Save License Data. Please note, the licenses information is case sensitive and needs to be entered in exactly how it was provide from EMS Software, LLC, an Accruent Company. If the information that was provided is incorrect, please contact EMS Software.

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

Configure Master Calendar to call your LDAP server.

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

   Figure 1-3: Accessing the LDAP configuration page



2. Configure your LDAP Settings. Please note:

   - Master Calendar only utilizes read-only queries to the organizations directory services.
   - The Domain\User account does not need to have any special privileges. All that is required is that it be an active account in your directory services.
   - Be aware, in some environments, passwords expire at scheduled intervals. If the password in LDAP settings is not updated when this occurs, Master Calendar/LDAP connectivity will be lost until the new password has been re-entered. It is recommended to consider using a generic account and a password that does not expire.

Figure 1-4: LDAP Security Settings

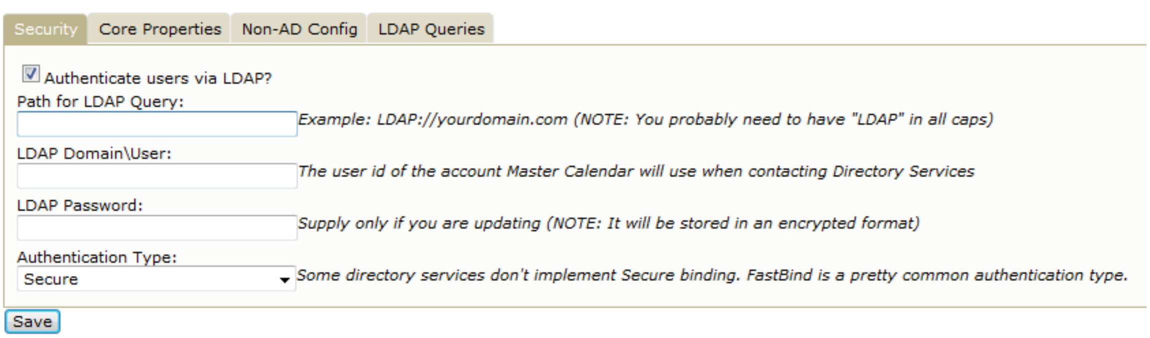


Figure 1-5: Core Properties

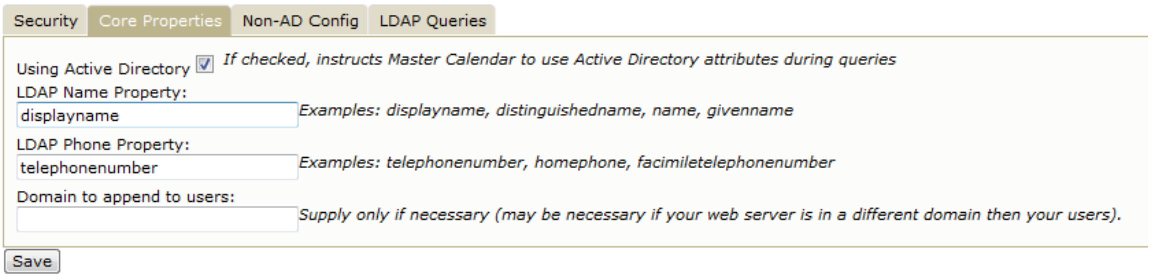


Figure 1-6: Non-AD Configuration

Figure 1-7: 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 there with security groups from your network. In order to make groups available for this pairing, you must "add" them to the Master Calendar. To do so, perform the following steps (which are also covered in the *Master Calendar Setup Guide*):

1. Log in to the Master Calendar site as the sites system administrator and select under Admin – Security - User Templates.
2. Click Assign LDAP Groups, and then click Add.
3. Use the Search By to search all LDAP groups or filter by Global Group or Universal Groups. Use the Grouping text box to search a particular string of characters from the list.
4. From the list of LDAP Groups, feel free to use Microsoft Windows multi-select function to highlight group(s). All of the LDAP Groups that are highlighted from the list will be added to Master Calendar once "Add" is selected on the bottom of the Security Group Lookup screen.
5. If a user is in multiple groups, their Master Calendar permissions are based on the template associated with the highest priority group that is assigned. Highlight one or more of the security groups that are listed and use the Move Up ++ / Move Down -- buttons to order the groups in a top – down order.
6. Click Save to save the Security Groups order.

Customer Support

Customer support is available to customers who have a current Annual Service Agreement (ASA). If after reading this document you have questions about configuring your system, contact us at:

Email: **support@emssoftware.com**

Web: **www.emssoftware.com**

Phone: **(800) 288-4565**

Fax: **(303) 771-0110**

Please have the following information available:

- Name of the organization to which the software is licensed (typically your company).
- Information on any recent problems with, or changes to, your computer or network.

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