SCHOOLMESSENGER®

PRESENCE

Calendars Guide

west ®

Contents

Introduction

Using the Classroom Calendars, teachers can ensure that students and parents are always aware of upcoming assignments and deadlines. This is also a great place to publish notifications about other important events such as field trips, holidays and other school events. Events can also be sent to other calendars so others are always aware of your important dates.

Key Information

In order to access your Calendar, you must first log into your site using your Username and Password.

| LOGIN		SIGNUP
User Name		Signup
Password	Forgot Password?	
Login		

If you have not yet registered with the site you can request access by clicking on the **Signup** button. This will prompt you to create a profile which will be automatically submitted to an administrator for approval.

If you have already registered but have forgotten your password, simply click on **Forgot Password** to retrieve it.

Adding a Calendar Page

Some calendars (like those on a Teacher Page) are added automatically. In some cases however you may want to add to add a new calendar to a page. To do so hover your mouse over **Page** and click **Calendar Page**. Fill in the **Page Name** field for your new page.
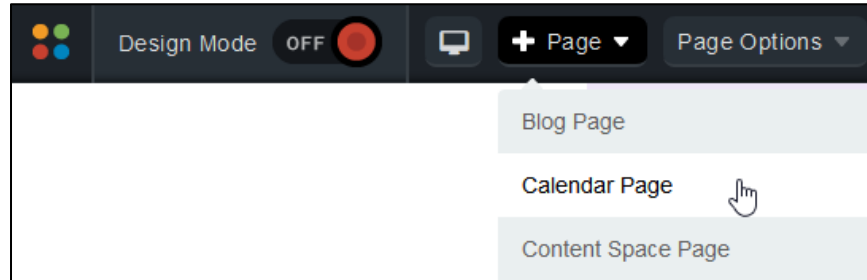

The **Page URL** field will automatically be filled in. The **Page URL** is used to build the Friendly URL used to access the page. If you wish to make modifications to the **Page URL**, click 🔒 and then you can change the text. Keep in mind that only alphanumeric characters, underscores and dashes can be used. Any other characters will be automatically removed.
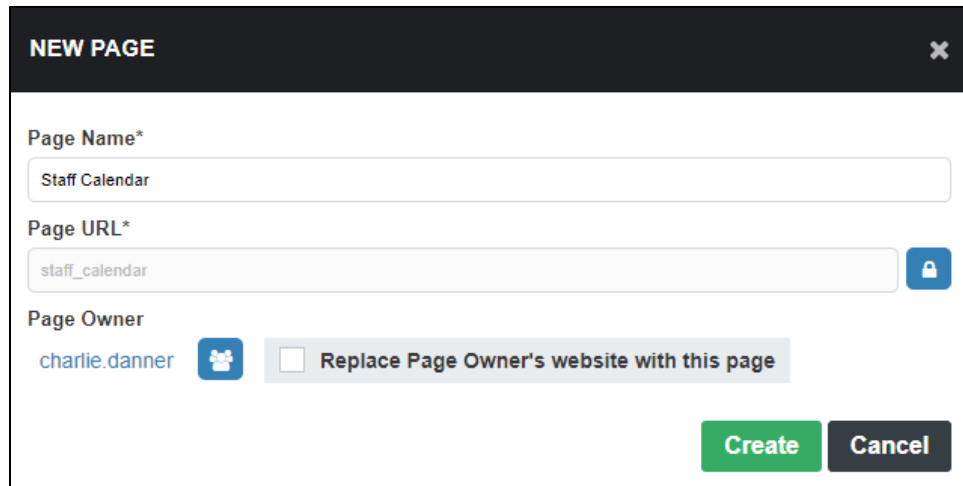
By default, you will be assigned as the **Page Owner**. If you wish to set someone else as the owner, click the 🔲 icon.

When the User Picker opens, choose the user you wish to make the owner, and click **Add** then click **OK**.
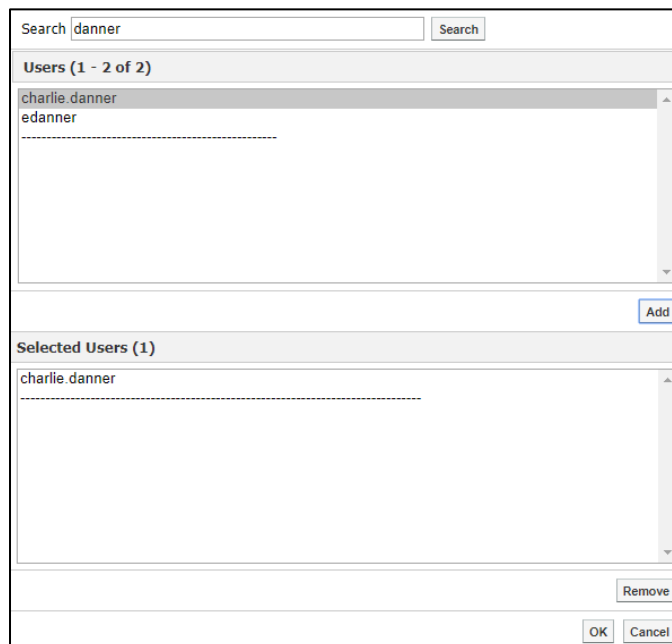
If you want to set the page as the user's homepage in their user profile, click **Replace Page Owner's website with this page**.

💡 *Note: On some sites, you may also have a Category drop-down that you can use to select a category for the page.*

Click **Create** to create the calendar page.

Adding and Removing Events

In order to manage events on a calendar, you will first need to go to your calendar page.

Adding an Event

Click the starting date for the event you wish to add and click on ✚ in the calendar menu.

On the ensuing page, add information about the event in the relevant fields and click **Create Event**.
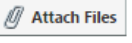
- **Subject:** The name of your event.

- **Location:** Where the event is taking place.

- **Start Date:** The date and time the event starts. Use the **Date Picker** button to select the day from a calendar or enter the date manually. By default this will be set to the highlighted day on your calendar.

- **End Date:** The date and time the event ends. Use the **Date Picker** button to select the day from a calendar or enter the date manually. By default this will be set to the highlighted day on your calendar.

- **Repeating Events:** Check the **Enable Recurrence** box to have an event occur more than once at regular intervals.

- **Repeat Pattern:** This option enables you to decide the frequency with which the event occurs. You can choose between **Weekly**, **Monthly**, and **Yearly** patterns. You will then be presented with further frequency customization options dependent on which of the patterns you selected.

- **Length of Recurrence:** There are three options to choose from when deciding how long you want the recurring event to last. You can choose to have it **Ending** on a specific date. If you make this choice, the event will continue to repeat, as specified, until the date selected. You can choose to have the event **End After** a specific number of occurrences or you can choose **No End** to have the event recur indefinitely.

- **Event Registration:** To allow people to register for your event, click **Yes** for the **Event Registration** field.

- **Registration Deadline:** Choose the date and time when users must register for the event you have created. For obvious reasons, the registration deadline must be earlier than the **End Date** (and time) for the event.

- **Event Capacity:** The event capacity allows you to choose how many users may register for the event.

- **Registration Approval:** If this option is enabled then a calendar administrator must approve users before they will be able to complete registration for the event.

- **Waiting List:** If this option is enabled you can specify a number of users who may be placed on a waiting list. These users will have the option to register even after the event capacity has been reached. They will be told they have been placed on a waiting list and people from this list will be added to the event whenever an event attendee cancels their registration.

- **Online Payment:** If you have configured an online payment provider you can choose that provider here. This allows you to charge a fee for particular events and have users make their payment online.

- **Administrator Notification:** If you enable administrator notification, the event administrator will receive an email any time a user registers for the event.

- **Category:** Choose from a list of preset categories (not a mandatory selection). Choosing a category for your event allows it to be filtered by that category. It also selects a color and icon for your event.

- **Color:** The color of the text displayed on your calendar for your event. You can choose **More Colors** at the bottom of the color selection pop-up to select from a larger range of colors, or even input one by its RGB value.

- **Icon:** The image displayed beside your event name on your calendar. This is not a mandatory element.

- **Participants:** The individuals that are selected to be part of the event. These participants are notified of the event by email, and the event is published on that individual's calendar within their workspace (Workspaces are part of the Advanced Presence package).

- **Members:** With the **User Picker**, choose members from your organization's database.

- **Non-Members:** Enroll external individuals by filling in their email address, using a comma to separate them.

- **Description:** Fill out the details of the event using the WYSIWYG (What You See Is What You Get) editor.

- **Attachments:** Click **Attach Files** in order to select and upload a file that will be available to users viewing the calendar event.

- **Published Calendars:** Publish created events onto other calendars so that others can see your event. Refer to *Publishing Events* for more details on how to publish events.

Editing an Event

To edit an event within your calendar, first click on the event you wish to edit.

Click on the **Edit** tab.

When you have finished making your changes, click on **Update Event**.

Deleting an Event

To delete an event within your calendar, first click on the event you wish to remove.

Click on the **Delete** button.
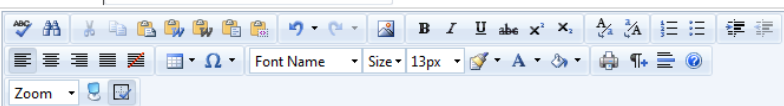
You will be prompted whether or not you'd like to delete this event. Clicking **OK** will permanently remove this event from your calendar as well as any other calendars in which it has been published.

*Note: With recurring events, when you click on the **Delete** button you will be prompted to select whether you'd like to delete the event just for that day or for every instance of that event*

Publishing Events

On the calendar, click ➕ to create an event.

Click the **Select calendars** link in the **Published Calendars** field.

Within the directory, locate the calendars you wish to have your event published to and click on the checkboxes beside them.
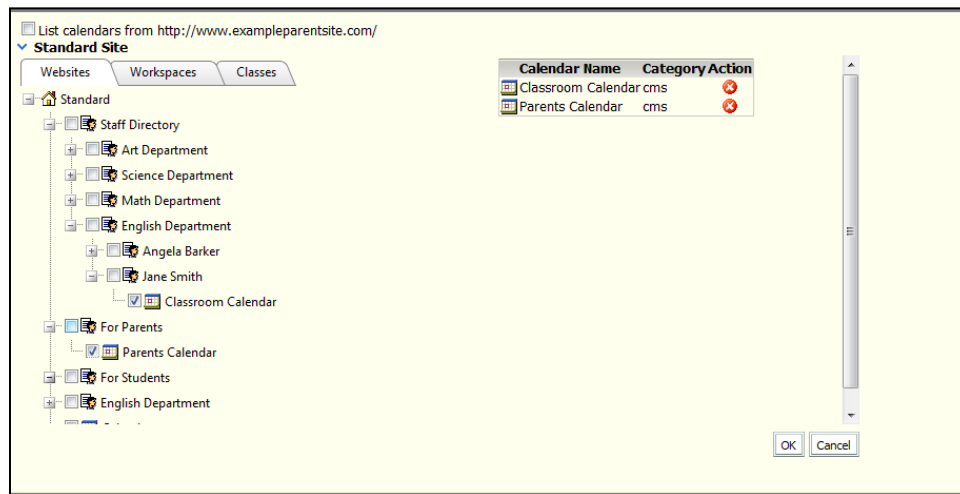
When you have selected all of the calendars you wish to have your event published to, click **OK**.

Click **Create Event** to finish publishing your event.

*Note: Unless you have security permissions to create or write events on the calendars you published to, the event may not be immediately published on those calendars. If the **Require administrator approval to publish events** option has been enabled for the calendar, then the event will require approval by someone who has Full Control permissions. See the Changing Permissions section for more information on security permissions.*

Merging Calendars

In some cases you may wish to take all events from another calendar and make them appear on your calendar. For example, you may wish to take all events from the main school calendar and have those events also appear on your teacher page calendar. To setup your Calendar so that all events created on another calendar are also published on your calendar:

Click on the **Edit** tab of your calendar.

Click on the **Select calendars** link in the **Merged Calendars** field.
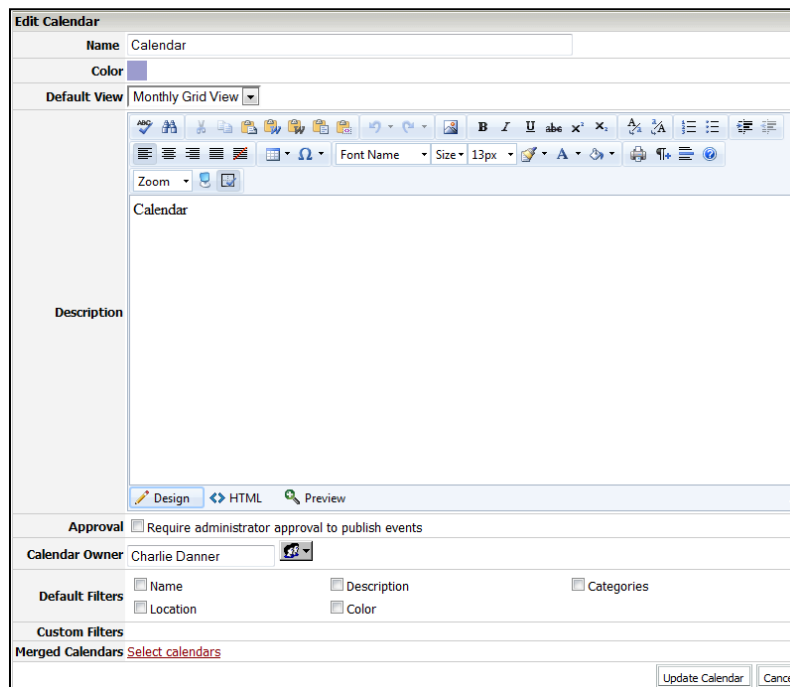
Within the directory, locate the calendars you wish to take events from and click on the checkboxes beside them.
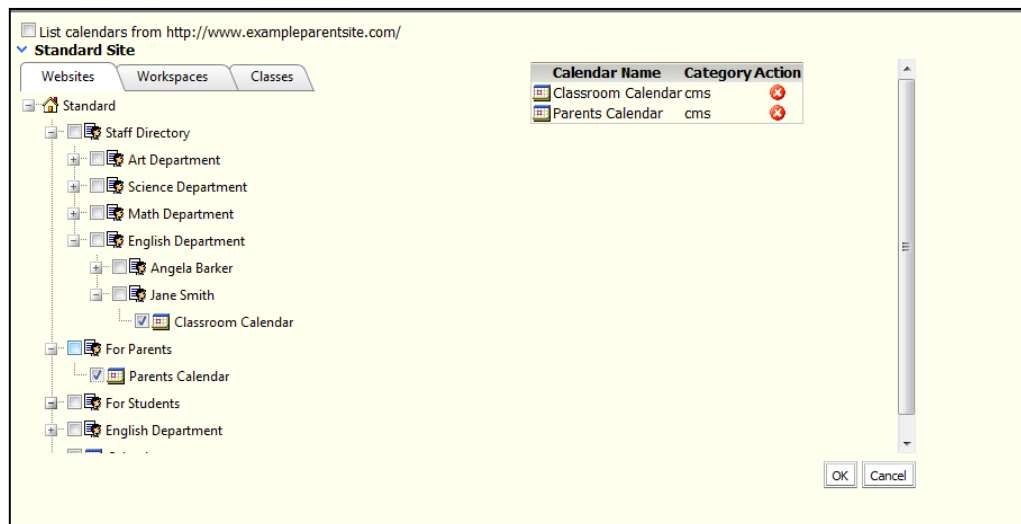
When you have selected all of the calendars you wish to be merged with yours, click **OK**.

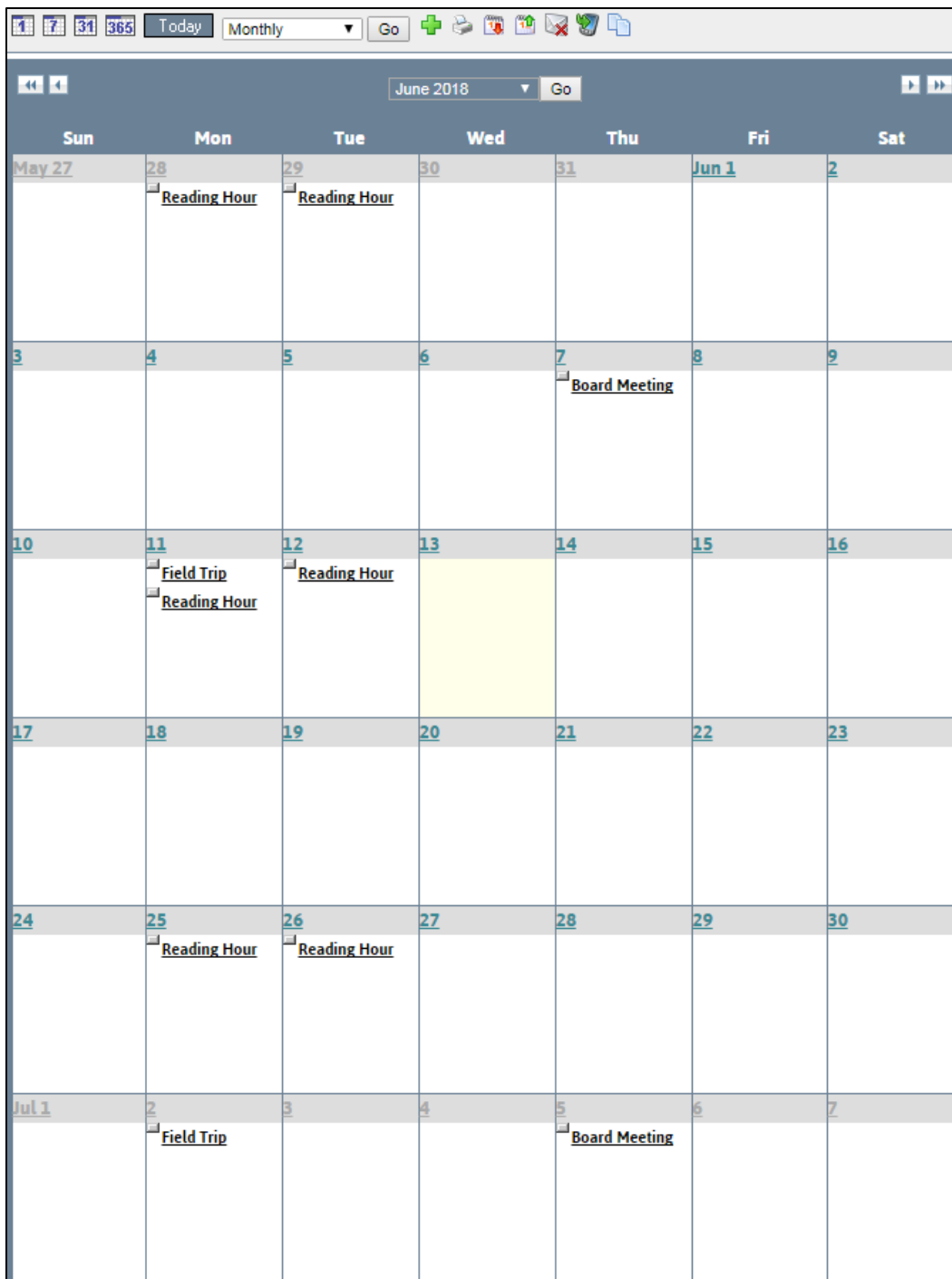Click **Update Calendar** to finish merging calendars.

Filtering Events

If you have enabled filtering from the **Edit** tab, you can choose to view only events belonging to specific categories on your calendar. You can also use the filter to search the events by name, description, location or color. The list of available categories is designated by your administrator; be sure to contact your system administrator if you wish to edit the list of event categories.

To filter your calendar events by categories, click on the **All Categories** drop down at the top of your calendar and choose the category you want to view.

Your calendar will now show all events that belong to the selected event categories.

To filter your event by name, description, location or color, use the **Search** field to type in the text you want to filter by, use the **All Fields** drop down to choose the field(s) you wish to use for your filter and click **Find**.

Importing a Feed from an External Calendar

With calendar integration, you can take a calendar feed from an external calendar service (such as a Google calendar) and import events from that calendar directly on to your Presence calendar. This allows you to easily bring over events from an existing service you are using. When you add a new event to the external calendar, it will be automatically imported into your Presence calendar based on the interval you choose.

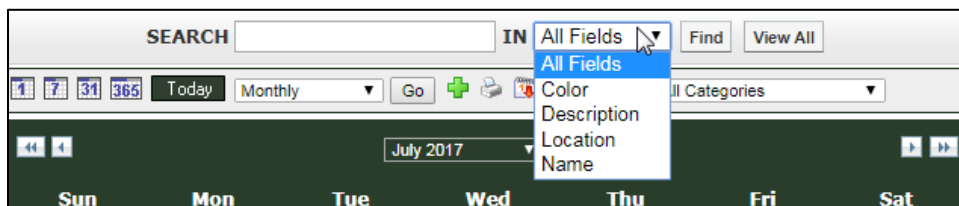When you import a calendar feed, the events do not appear instantly. Instead they will appear based on the refresh interval you have chosen. So depending on when you add your feed you may be waiting anywhere from up to an hour or up to a week for the events to first appear.

To add an external calendar, you will first need to go to your external calendar and get a URL for the iCal feed. For our example, this manual outlines how you can obtain and use an iCal feed from a Google calendar, but you can add any external calendar that allows you to create an iCal feed.

For more information on how to access or create an iCal feed for the particular external calendar product that you are using, please consult the service's help documentation, or consult with your calendar service provider.

Getting the URL for a Google Calendar Feed

To get the URL for a Google calendar feed, first go to your calendar in Google. Click to the right of your calendar under **My Calendar** and choose **Calendar Settings**.
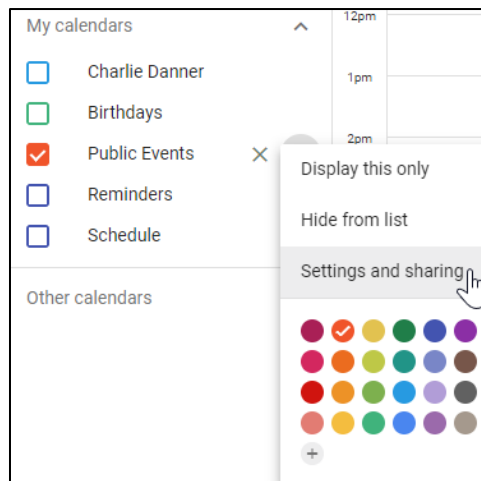
In the **Access Permissions** section, if you want the calendar to be available to the public, check **Make available to public** and set it to **See all event details**. Now scroll down and look for the **Public address in iCal format** and **Secret address in iCal format**. If your Google calendar is set to be publicly available, copy the **Public address in iCal format** URL. If the calendar is private or only partly visible to the public, then you will need to copy the **Secret address in iCal format**.
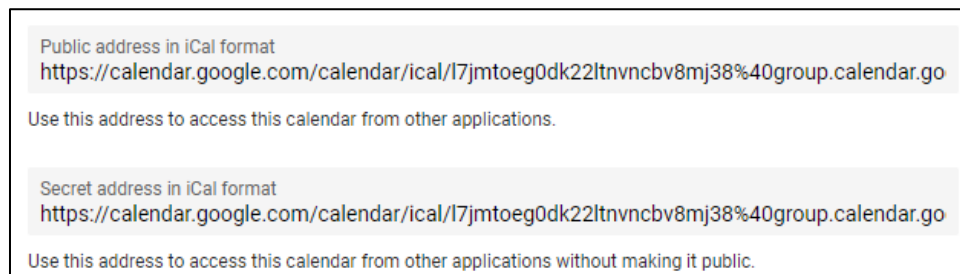
Highlight and copy the URL.

Adding Your Feed URL to a Calendar

Once you have the URL you need, go to the calendar page where you wish to add your events. If you are an administrator, a calendar owner or have otherwise been assigned full control on the page the calendar appears, you will see a tab called **External Calendars**. Click on this tab.
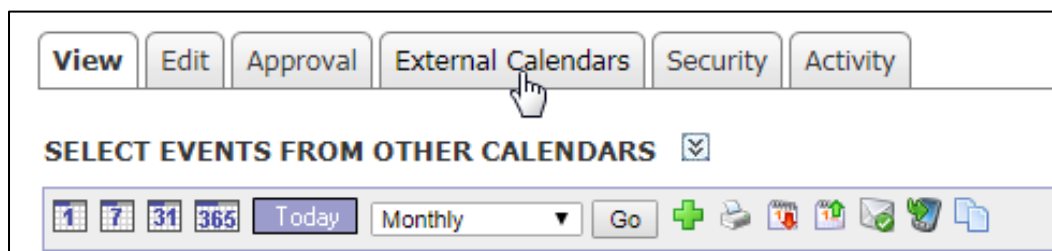
From the **External Calendars** tab, click **Add Calendar**.

Paste your feed's URL in to the **URL** field and click **Add Calendar**.

If this is the first time this particular calendar feed has been added to the site, you will now be prompted to choose your calendar details. These include:

- **Name:** The name the feed will display when managing external calendars. As this feed may be listed alongside other external calendar feeds, it is a good idea to give the feed a unique name. So, for example, call your feed "Charlie Danner's Class Calendar" instead of "Class Calendar."
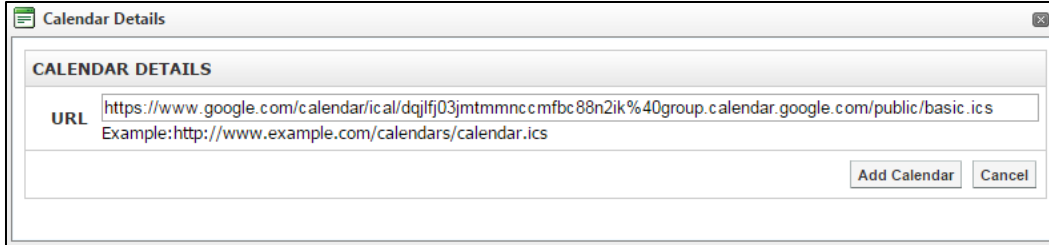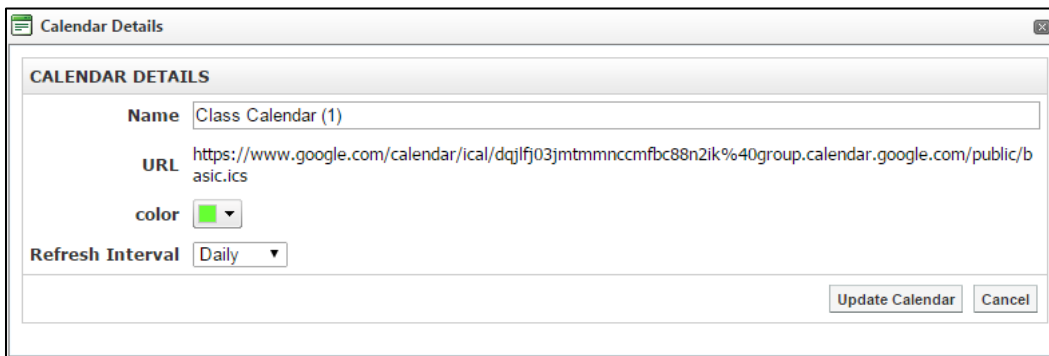
- **URL:** The URL for the feed. This cannot be edited once you have added the calendar.

- **Color:** The text color for events from this calendar. If you want to distinguish the events as coming from a particular calendar, choose a unique color. Otherwise, choose the same color as the calendar is using for other events.

- **Refresh Interval:** This setting determines how frequently the feed from your external calendar is refreshed. You can choose to refresh events on an **Hourly**, **Daily** or **Weekly** basis.

Once you have made your configuration choices, click **Update Calendar** to finish adding the external calendar to your Presence calendar**.**

If the calendar feed is already added to one or more calendars on the site, then it will use the settings that were established when the feed was first added to the site.

💡 *Note: When you add a calendar feed to the site, the events will not be immediately visible. They will not appear until the calendar feed refreshes (based on the refresh interval set when adding the calendar feed). If you chose* ***Hourly****, the events will appear within the hour. If you chose* ***Daily****, the events will refresh overnight. If you chose* ***Weekly****, the events will refresh on Saturday night/Sunday morning.*

Editing a Calendar Feed

Once you have added one or more calendar feeds to your calendar, you can edit the feed by clicking on the **Name** of the feed in the **External Calendars** tab or by clicking the 📝 icon.

If this is the only calendar using the feed, you will see the same interface as when you added the calendar feed. You can then reconfigure the following options:

- **Name:** The name the feed will display when managing external calendars. As this feed may be listed alongside other external calendar feeds, it is a good idea to give the feed a unique name. So, for example, call your feed, "Charlie Danner's Class Calendar" instead of "Class Calendar."

- **URL:** The URL for the feed. This cannot be edited once you have added the calendar.

- **Color:** The text color for events from this calendar. If you want to distinguish the events as coming from a particular calendar, choose a unique color. Otherwise, choose the same color as the calendar is using for other events.

- **Refresh Interval:** This setting determines how frequently the feed from your external calendar is refreshed. You can choose to refresh events on an **Hourly**, **Daily** or **Weekly** basis.


Once you have made your configuration choices, click **Update Calendar** to save your changes.

However, if the feed has been added to more than one calendar, you will not be able to make any edits and you will be directed to contact your system administrator for any desired edits. Later in this guide, we will cover how administrators can manage external calendar feeds from the System Administration area of the site.
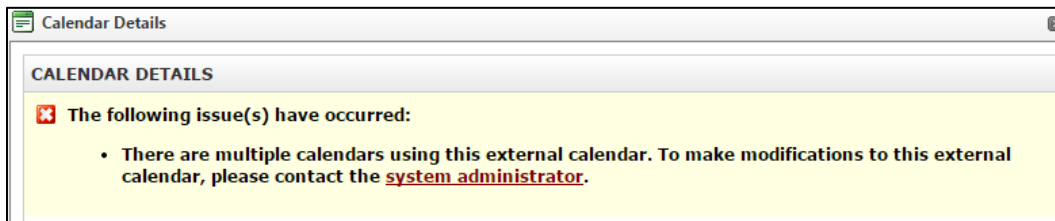
Note: *You can tell how many calendars the feed has been added to by looking in the* **Links** *column under the* **External Calendars** *tab.*

Deleting a Calendar Feed

To remove a calendar feed from your site, click on the 🛑 icon next to the calendar **Name** in the **External Calendars** tab.

Note: *When you delete a calendar feed from your Presence calendar, all the events that are associated with that feed will be immediately removed from the Presence calendar.*

Managing External Calendar Feeds

In addition to accessing calendar feeds from the **External Calendars** tab of a calendar, there is also an administrative interface available. This section of the manual is intended for Administrators only.

To access the feed management interface, go to **System Administration** and click on **Manage External Calendars** under the **Collaboration Server Administration**.

From the management interface, you can see the **Name** and **URL** of each calendar. The **Links** column allows you to see how many calendars each feed has been added to.

If you have a large number of calendars on the site, you can use the **Search Calendar Name** field to search for a calendar with a specific name.

Editing an External Calendar Feed

To edit an external calendar feed, click on the **Name** of the feed or click on the 🖉 icon. This will bring up the calendar details interface. This is the same interface that appears when first adding a feed. From here you can view or change the following items:

- **Name:** The name the feed will display when managing external calendars.

- **URL:** The URL for the feed. This cannot be edited once you have added the calendar.

- **Color:** The text color for events from this calendar. If you want to distinguish the events as coming from a particular calendar, choose a unique color. Otherwise, choose the same color as the calendar is using for other events.

- **Refresh Interval:** This setting determines how frequently the feed from your external calendar is refreshed. You can choose to refresh events on an **Hourly**, **Daily** or **Weekly** basis.

Once you have made your configuration choices, click **Update Calendar** to save your changes.

The calendar settings for a given feed are the same for each calendar the feed appears on. This is why once a feed appears on more than one calendar it can only be edited from the **Manage External Calendars** interface.

Deleting a Calendar Feed

From the Manage External Calendars interface you can delete a feed by clicking on the ❌ icon next to the feed under the **Actions** column.

💡 *Note: If you delete an external calendar feed then all events that are coming from that feed, on every calendar that is displaying the feed, will be immediately removed.*
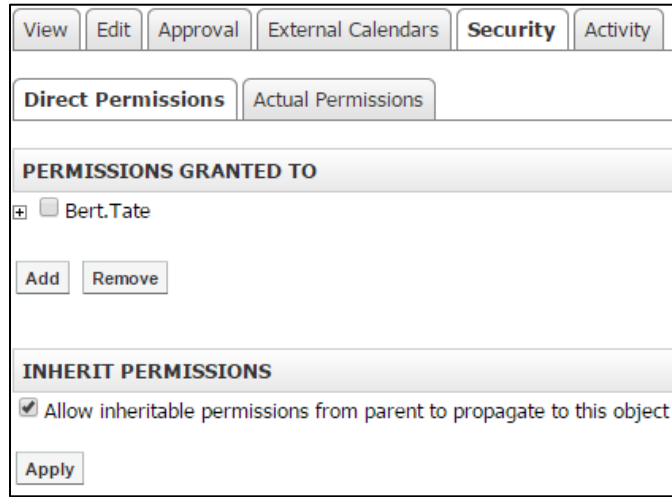
Changing Permissions

You can designate which users can see, create, edit or delete events within your calendar. To do so, click on the **Security** tab.
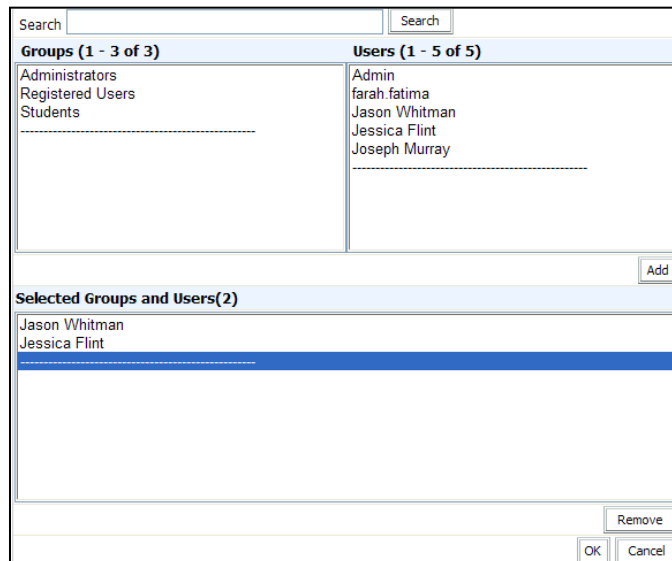
Direct Permissions

Within **Direct Permissions** you can assign security permissions on your calendar to other users.

First, click **Add** to select the users to grant permissions to. A window will pop up.

From this window select the users or groups you'd like to grant permissions to by clicking their name and clicking **Add**. When you have selected your users, click **OK**.

To individually assign permissions to each user, click on the ⊞ beside their name. From here you can assign specific permissions.

PERMISSION	WHAT IT ALLOWS YOU TO DO
Create	Can create events
Delete	Can delete events
Read	Can view the calendar
Write	Can make changes to events
Full Control	All of the above, as well as the ability to approve submitted events, and the ability to assign permissions to others

Actual Permissions

Actual Permissions allows you to view what permissions specific users have on your calendar. Users higher up the security hierarchy may already have permissions for your calendar. Users with entire site permissions (or higher tiers of security hierarchy) may have permissions to your calendar if you have the **Allow Inheritable Permissions From Parent to Propagate to This Object** checkbox selected on the **Direct Permissions** screen. System Administrators will always have full control permissions for your calendar.

Approval

Other users may wish to publish events to your calendar. If you have enabled **Require administrator approval for users to publish events** on the **Edit** tab of your calendar, any events they publish to your calendar will require your approval before they are visible. To view the status of events published to your calendar:

Click on the **Approval** tab.

Here you will see all the events that have been published on your calendar, as well as any pending requests. Click **Approve** to publish an event to your calendar, or click **Reject** if you do not wish to publish the event. You may change this status at any time.

Event Name	Start Date	From Calendar	Calendar Category	Status	Actions
New event	6/27/2014 12:25:00 PM	Workspace Calendar	CMS	Approved	Reject
Picnic	8/19/2016 1:00:00 PM	Workspace Calendar	CMS	Submitted	Approve Reject
HR Meeting	9/10/2016 3:00:00 PM	Workspace Calendar	CMS	Submitted	Approve Reject

Activity

You can track all changes made to your calendar or the events within. To do so, simply click on the **Activity** tab.

Here it will tell you what changes were made, when they were made and by whom. If you wish to receive e-mail alerts about changes made to your calendar, click on the **Subscribe** link.

AVAILABLE ALERTS

Content Item	
This alert will provide you with an update on changes to this file and its children.	Subscribe
Content Item	
This alert will provide you with comments changes to this page.	Subscribe

Registering for Events

You can register yourself in published events to let others know that you will be attending. You will receive e-mail notifications for events that you have enrolled in. To enroll in an event:

Click on the event you wish to enroll yourself in.

WINTER PICNIC   🧩 **EXPORT EVENT**

Date and Time   Dec 17 2016 12:00 PM -- 3:00 PM

Registration Deadline   Dec 11 2016 9:00 AM Register Now

Click **Register Now**.

If you are already enrolled in an event, you can un-enroll yourself by clicking **here** where it says "Click **here** to unregister."

Calendar Subscriptions

Calendar Email Alerts

To receive alerts when new events are added to a calendar, first you must navigate to the calendar you wish to subscribe to.

Click the ![icon] button.

Fill out relevant information:

- **Title**: The name of your alert.

- **Alert Type**: Choose to either get alerts online, or email alerts. If choosing email, please fill in valid email address in the email address field. If the you are viewing the forum as a guest, this option will not be available as guests can only choose the email alert option.

- **Select Email Type**: **Html** or **Text**.

- **Notification Time**: Chose to get your alert as soon as an event is added or updated on the calendar, at the end of a day when an event is added or updated, or at the end of the week when an event is added or updated.

- **Security Measure**: If you are a guest user, you will also be prompted to fill out a CAPTCHA to verify that you are a real person subscribing to the alert.

Once the fields have been filled in, click **Add Alert**.
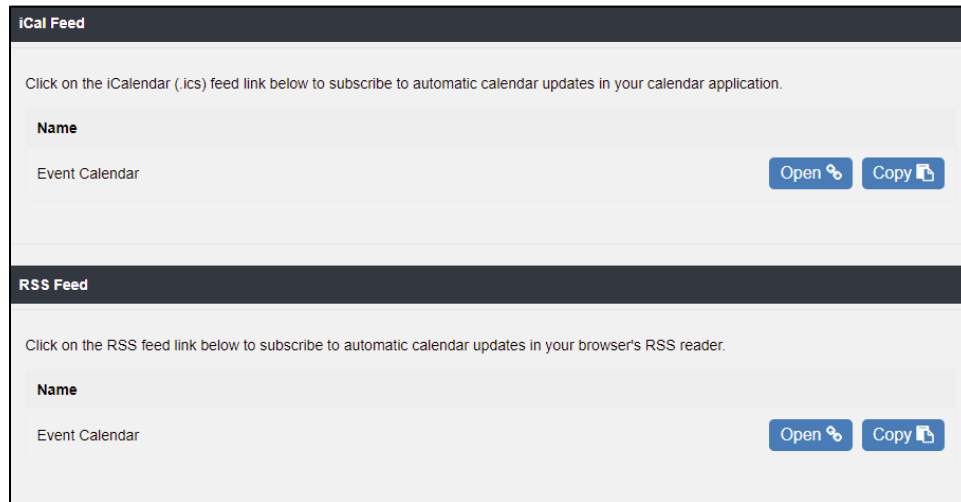
Unsubscribing from a Calendar

If you to wish to no longer receive alerts from a particular calendar, navigate to the calendar you are subscribed to and click the ![icon] button.

💡 *Note: You can also unsubscribe by clicking the unsubscribe link in the footer of each email alert you receive.*

Subscribing to Calendar Feeds

You can also keep up to date with changes to the calendar via its RSS and iCal feeds. To view the RSS and iCal feeds, click the 🖐 icon.

You can subscribe to a feed by clicking on the name of the calendar page under either **iCal Feeds** or **RSS Feeds**.

iCal Feed

Click on the iCalendar (.ics) feed link below to subscribe to automatic calendar updates in your calendar application.

Name

Event Calendar   Open 🔗   Copy 📋

RSS Feed

Click on the RSS feed link below to subscribe to automatic calendar updates in your browser's RSS reader.

Name

Event Calendar   Open 🔗   Copy 📋

If you click **Open** for the iCal feed, you can then import it into the calendar program of your choice. Alternatively, you can click **Copy** to copy the URL for the feed.

Here are links to instructions on how to import an iCal feed to:

- Outlook (see *Subscribe to Calendar* section).

- Google Calendar (While the instructions mention Google Calendars specifically, you can use the same steps to add any calendar feed URL).

- iCalendar

If you click **Open** for the RSS feed, the feed will then be opened in your browser and you can then choose to subscribe to the feed with your RSS reader of choice. Alternatively, you can click **Copy** to copy the URL for the feed.

💡 *Note: Google Chrome no longer supports RSS feeds by default. To view the feed as rendered content in Google Chrome, you will need to install a browser extension.*

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Calendar Portlets

There are two other portlets that can be paired with the calendar, the Mini Calendar and the Upcoming Events portlets. These portlets can be added to the homepage or other pages on your site and allow users to see specific elements of a calendar.

Adding Portlets

To add a Mini Calendar or Upcoming Events portlet to a page, you will first need switch **Design Mode** to **On**.
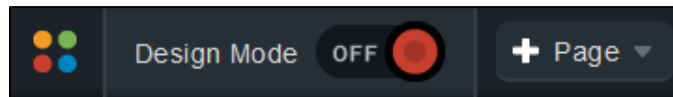
In the **Portlet Library**, click on the **Collaboration Category**. Drag and drop the portlet you wish to add (in this case, the Mini Calendar or Upcoming Events) in to a region on the page.
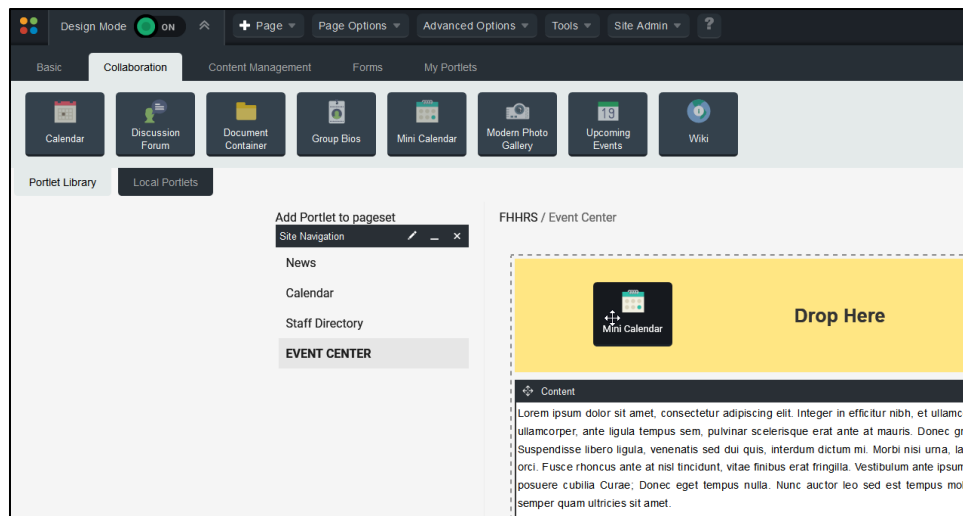
Configuring Mini Calendars

To configure the Mini Calendar portlet, switch to **Design Mode**, hover over the **Mini Calendar** portlet and click on the ![edit icon] icon.
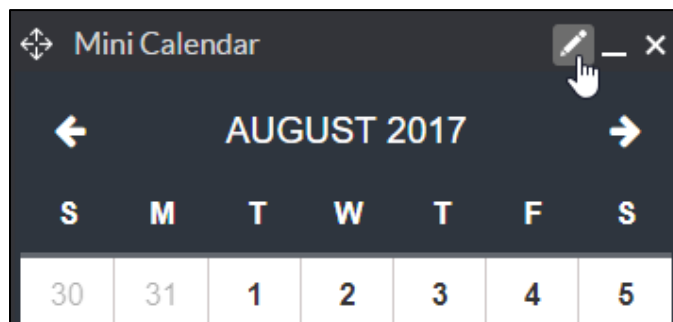
To select a calendar to display via the Mini Calendar, click **Browse** on the **Calendar** field.

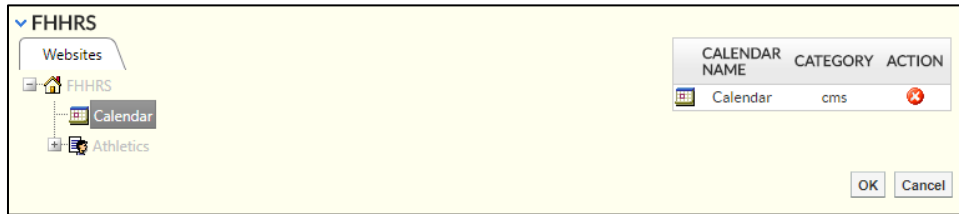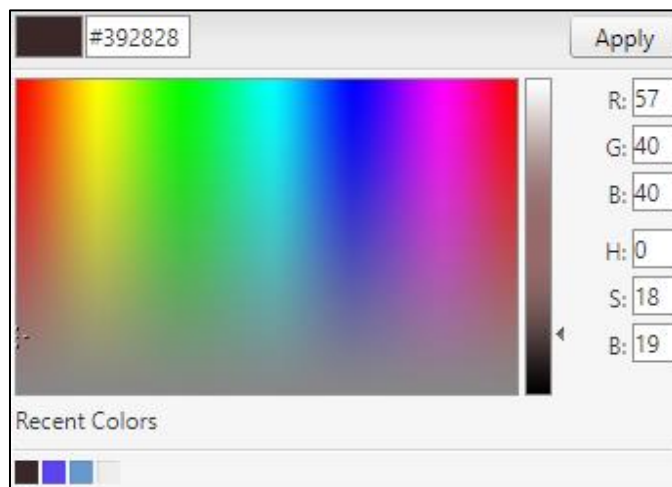In the window that pops up, drill down to find the calendar you wish to display. Once you find the calendar, click on it and click **OK**.

For the **Header Background Color** click the ▾ icon to open a color picker window.

You can click anywhere in the color grid to select the color you wish to use. Alternatively, you can type in the hex code for a color, or enter in the color values.


Once you are satisfied with your color, click **Apply**. If you wish to revert to the default **Header Background Color**, click the 🔄 icon.

You can also choose if you would like the **Header Text Color** to be **Light** or **Dark**.

You will be presented with a **Contrast Example** which will preview your chosen header background and text colors to let you know the contrast ratio.

💡 *Note: If the ratio for your selection is less than 4.5:1, the text will be hard for some users to read and you will receive a warning letting you know that the contrast does not meet* WCAG 2.0 AA *accessibility requirements.*
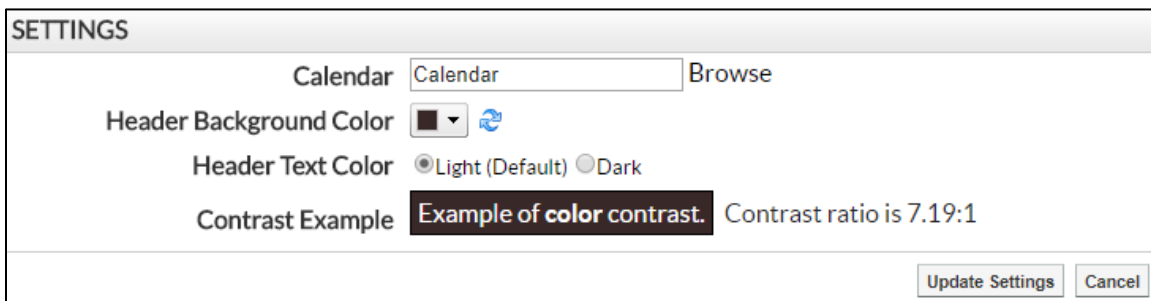
After configuring the portlet, click **Update Settings** to save your selected options.

Once your portlet has been configured, you should be able to tell what days have events on them at a glance.
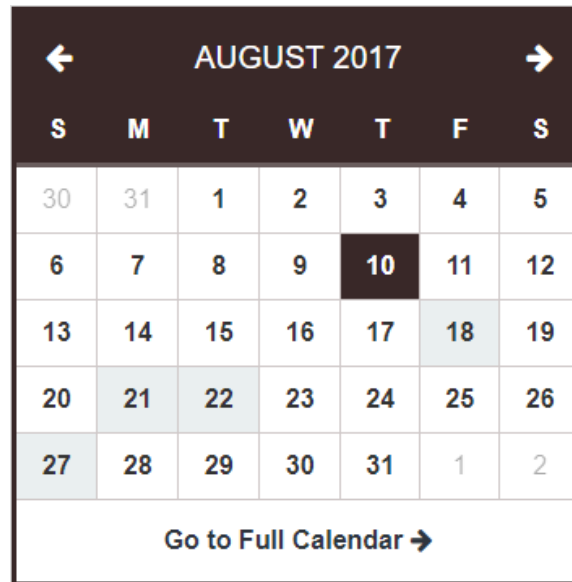
To view the events for a specific date, double-click the date on the calendar.

You can also use the **Go to Full Calendar** link to jump to the calendar page with its default view.

Configuring Upcoming Events

The Upcoming Events portlet is often paired with the Mini Calendar portlet. This allows users to see events that are coming up in the immediate future. To configure the Upcoming Events portlet, switch to **Design Mode**, hover over the **Upcoming Events** portlet and click on the ✎ icon.
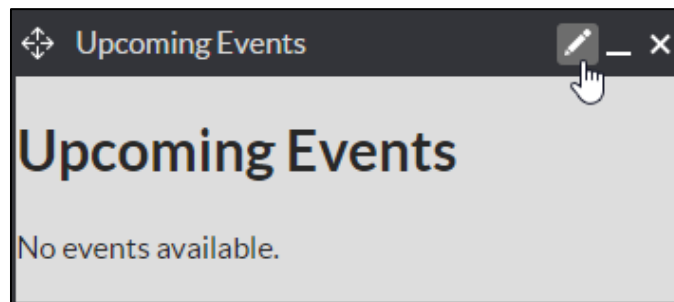
To select a calendar to display via the Upcoming Events, click **Browse** on the **Calendar** field.

In the window that pops up, drill down to find the calendar you wish to display. Once you find the calendar, click on it and click **OK**.

For the **Style** of your Upcoming Events portlet, you can choose between **Default**, **Custom Render Template**, **Legacy – Default** or **Legacy – Blue**.

The **Default** option will give you the default look and feel for the portlet.

If you choose **Custom Render Template**, you will be able to use the **Select a Template…** drop-down to select a custom render template for the portlet.

If you choose **Legacy – Default** or **Legacy – Blue**, you will get the old look and feel for the portlet.

After choosing a style, you can then configure the **Display Options**.

*Note: If you choose **Custom Render Template**, **Legacy – Default** or **Legacy – Blue**, some of the display options will not be available. When using a custom render template, these options are controlled by the template. When using a legacy display option, your ability to customize the look and feel is limited.*

You can set a **Header** name for your portlet. Alternatively, you can choose to **Hide Header** if you do not wish to have a header appear.

If you wish, you can set a static **Width** for the portlet in **px** (pixels). If you leave this blank, then the portlet will take up the width of the region.

For the **Color** click the ▼ icon to open a color picker window.

You can click anywhere in the color grid to select the color you wish to use. For a fuller range of colors, click the **HSB** tab. From the **HSB** tab you can also type in the hex code for a color, or enter in the color values.
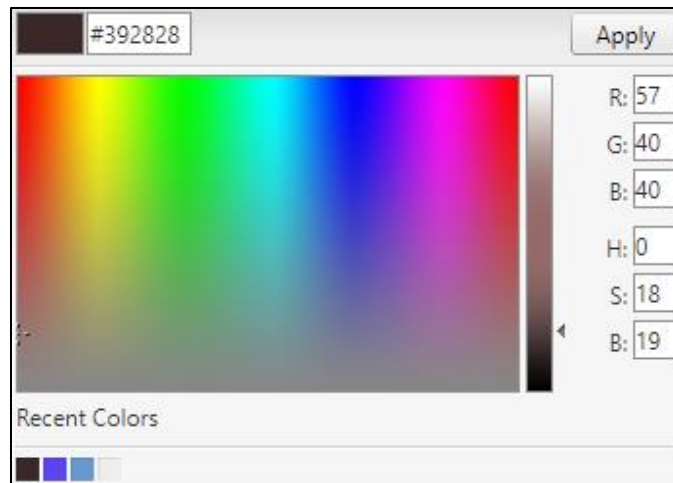
Once you are satisfied with your color, click **Apply**. If you wish rollback to the default **Color** click the ↻ icon.

You can specify the **Number of Events per Page** as well as the **Number of Pages**. If you have more than one page of events, arrows will appear on the portlet that allow the user to navigate between each page of upcoming events.

Once you have finished configuring the portlet, click **Update Settings** to save your changes.

When viewing the portlet, users can use the ◀ ▶ icons to navigate between pages of upcoming events. Keep in mind that they will only be able to view as many pages of events as was set in the **Number of Pages** field.

Users can view the full calendar by clicking on the **More Events** button.

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