Marketing Calendar

User Guide

Version 3.14

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Welcome to Active Data Calendar v3.14

Active Data Calendar is your solution to sharing event information with customers, students, partners and other key constituent groups throughout your organization.

Active Data Calendar can be used to display events on your organization's website, Intranet, Extranet, and more. You can even share event information across multiple websites.

Active Data Calendar is easy to use with its browser-based interface, allowing users to enter and view calendar information from any Internet connection.

Included with Active Data Calendar is "Online Administration" that allows for different levels of security to be established. This will allow for entry of events from many levels of your organization, while still having the ability to approve events before they are viewed on your website.

TIP: Before starting this book, you may wish to review the terminology in the *Glossary* found at the back of this User Guide.

What's New in Version 3.14?

Active Data Calendar 3.14 includes many enhancements to improve the user experience for event content creators, facility open entry submitters and facility owners. We've also added a new featured events view, "Early Bird Registration" with discount codes that expire and even a few mobile items like showing the "*AddThis*" share functionality from a mobile device.

SUBMITTING FACILITY REQUESTS IS EASIER THAN EVER!

A new and greatly improved option of our Facilities Open Entry Form is now streamlined to make it easy to request rooms and resources for your stakeholders. Intuitive and user friendly, we broke out of the box and reconfigured the process to make it a snap to submit a room or resource request and increase user adoption across your enterprise.

MARKETING YOUR EVENTS

We added a great new way to set your default calendar view to showcase Featured Events and Categories with our new Featured Event View. Designed to allow you to make it easy for your visitors to find your most popular categories and featured events, this format takes full advantage of our flexible syndication templates and quick links all on one page.

New Payment Gateways

* Payment Gateways *
Advanced Registration online payment processing now directly integrates with **Moneris** and **Mercury**.

Product Improvements and Corrections

Base Calendar

Product Area	Type	Description
Front-End Display	Enhancement	New "Featured Events" view that allows clients to configure a new view that showcases featured events and calendars using syndication feeds with minimal to no programming efforts.
Mobile	Enhancement	New option to show the "Add This" functionality in all mobile views to match the configuration made in the administrative interface.
Registration	Enhancement	Registration deadlines can now be created by time such as "2 hours" before each occurrence similar to the current cancellation deadline rules.
Marketing	Improvement	New option on RSS page to "search under subcategories" to gather all events in a master category for a feed.
Install / Upgrade	Improvement	Updates have been made to the Calendar Installer Application to not show a "Not Responding" status during an install or upgrade operation.
Configuration	Improvement	vCal (an older and unused calendar file format) is no longer supported.
Facilities Calendar	Improvement	The full event name is now visible for any event that is 45 minutes or longer as opposed to 1 hour.
Front-End Display	Improvement	Updates to all front end view, details and registration pages to include the "Custom CSS" info added into the admin interface along with any CSS styles listed in the header file.
Front-End Display	Improvement	The quick tip now shows any registration spaces remaining.
Front-End Display	Improvement	Changes to correctly re-direct the default.aspx page to the grid view page if using a Google-Mini to crawl the calendar.
Import/Export	Improvement	The event details URL is now included in all XML exports.

Mobile	Improvement	The mobile views now use the same map service (Google, Bing or MapQuest) as configured in the application.
Notifications - Email, Text, etc.	Improvement	New ability to "Not Notify Event or Category" subscribers when adding events not just on modify or cancel/ reschedule event actions.
Notifications - Email, Text, etc.	Improvement	New option to include multiple email addresses with the "Send a Meeting Request" option in "Add to My Calendar".
Notifications - Email, Text, etc.	Improvement	New option to enter a single email address that all emails will be sent from instead of by event owners such as "events@activedatax.com".
Event Publishing	Improvement	New "Print" option added on the event preview screen when adding an event that pops up a view with all requested information.
Event Publishing	Improvement	First Name, Last Name and Email Address which are required fields on Open Entry forms are now correctly designated with an asterisk to indicate the requirement.
Install / Upgrade	Improvement	The SMTPHost, SMTPUsername and SMTPDomain values will not use case sensitivity.
Import/Export	Improvement	XML based event exports will now be ordered by date and not by event ID.
Purge	Improvement	New ability to purge events by just date and not have to select both date and time ranges.
Registration	Improvement	A message is now displayed indicating that registration is closed if someone clicks on a registration page that was bookmarked or linked up on a webpage.
Registration	Improvement	New option to "Register" for an event from the mobile view by a button that takes the user to the full non-mobile version of the form.
Registration	Improvement	New option to add in registrant specific notes such as payment or conversation details, etc.
Reports	Improvement	New option added in Reports to see a list of cancelled events by date range.
Reports	Improvement	Updates to robots.txt file in application directory to allow Google to more efficiently crawl for event data to render in search results.
Event Publishing	Improvement	New ability to select checkboxes in custom fields from a scrolling list box to control the size of the page in the event of a lot of options.
Import/Export	Improvement	Updates to XML exports to better handle non-printable characters.

Workflow	Improvement	Full details for "submitters" of events entered through the Open Entry form are now stored in the Change Log.
Categorization	Correction	Default images uploaded for categories can now be removed.
Registration	Correction	A re-scheduled event email notice is now correctly sent to registrants.
Front-End Display	Correction	Events listed as a 2 day multi-day event now show on both days instead of the first day on the calendar.
Event Publishing	Correction	The "Change Log" time stamp now reflects the application time zone and not the server time zone.
Notifications - Email, Text, etc.	Correction	Update to various emails to show only 1 location for multiple occurrences instead of multiple locations per the multiple occurrences.
Mobile	Correction	The +7 Days and +14 Days configuration filters for mobile views now correctly hold the configured values.
Notifications - Email, Text, etc.	Correction	If an event is cancelled and rescheduled then the link to the rescheduled event is included in the cancellation email.
Configuration	Correction	Update to allow for the correct saving of an image for the "Submit Link Image" configuration.
Marketing	Correction	Issue with double quotes in location data not working correctly in search syndication is resolved.
Marketing	Correction	Attachments marked as "Do Not Display on Front End" no longer show in syndication templates.

Marketing Open Entry Module*

Product Area	Type	Description
Event Publishing	Improvement	Increased handling for email address fields to trim unnecessary characters down to the valid email address.
Event Publishing	Improvement	Update to not allow multiple clicks on an Open Entry form request to avoid duplicate event submissions.
Event Publishing	Improvement	Change to show a "Preview" button instead of a "Submit" button to get to the final review page before submitting an Open Entry form request.
Front-End Display	Improvement	New addition of 2 CSS classes for Marketing Open Entry forms called "table600" and "width50pct" for width changes to allow for increased flexibility with responsive design headers and footers.

Notifications - Email, Text, etc.	Improvement	All custom field selections that have data entered in on the Open Entry form will now be included in the confirmation email to the event submitter.
Front-End Display	Improvement	Ability to show the private calendar header on a marketing open entry form.
Configuration	Correction	Update to Open Entry configuration page to allow for proper selection of "Generate Code" text.
Notifications via e-mail, text, etc.	Correction	Facility module specific fields such as setup time and setup count have been removed from non-facility open entry from event submission confirmation emails.

Facilities Management Module*

Product Area	Type	Description
Front-End Display	Enhancement	New externalized Gantt view of all facility bookings minus booking details to allow end users to browse available dates for available rooms.
Marketing	Enhancement	New option to generate an RSS feed and "Enable Facility Feed" to include Facility and Resource delivery information.
Facilities Calendar	Improvement	Event names are now included in the Facility and Resource Gantt View operations reports of items.
Facilities Calendar	Improvement	Change to Facility Gantt view to show the room name at the beginning and ending of each row.
Locations	Improvement	All room booking rules now show on any room details pages.
Facilities Calendar	Correction	The CSV/XML download of resource information on the Resource Gantt View now produces the correct data based on current filters.

Facilities Open Entry Module*

Product Area	Type	Description
Front-End Display	Enhancement	Major design enhancements to the Facilities Open Entry form to allow for a better user experience when requesting events, rooms and resources.
Front-End Display	Correction	Updates to the Open Entry form to fix blank preview event submission

		page if not saved correctly.

Advanced Registration Module*

Product Area	Type	Description
Registration	Enhancement	New option to allow "Early Bird Registration" with discount codes that have expiration times.
Reports	Improvement	Event location is now included in Registrant Summary Report.
Registration	Improvement	New email and notice added that notifies the event owner when a registrant has paid for an event.
Registration	Improvement	A custom button for "Invoice Me" can now be uploaded similar to the "Credit Card", "Check" or "Cash" options.

Custom Text Module*

Product Area	Type	Description
Configuration	Improvement	New option to change the currency label in the Custom Text module.
Front-End Display	Correction	If using a custom registration button through the Custom Text Module it will no longer show as a broken image.

** This Active Data Calendar module is separately licensed. Contact your account executive for information.*

Version 3.14 Requirements

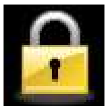
There are some requirements that are needed in order to have 3.14 installed in your environment.

- SQL server must be 2005.
- .Net 3.5 is required on the web server. Higher versions of .NET may co-reside on the machine.
- Facilities Module enhancements affect an installed Facilities Module.
- Open Entry Form Module enhancements affect an installed Open Entry Module.
- Custom Text Settings affect an installed Custom Text Settings Module.
- For further Server requirements please see your Client Portal page and select the *Server Requirements Tip Sheet.*

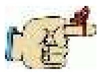
User Guide Features

While reviewing this User Guide you will be presented with information for using Active Data Calendar as well as important Tips, Tricks and Security suggestions to help you configure your calendar.

The notepad icon is used to denote a tip or trick that will help make Active Data Calendar easier to use.



The lock icon denotes a security suggestion or tip. Whenever viewing a security message, remember that your organization's security procedures and policies will always override suggestions in this guide. You should always consult your internal security professionals if there are any questions regarding security.



The finger with a bow points you to a Reminder tip, which are placed in the User Guide to call your attention to something that was previously mentioned in the guide.

Logging into the Calendar Administration Area and System Workflow

Before you can manage events or administer your calendar you'll need to login to the calendar administration menu. A Login ID and Password will have been supplied to you by Active Data Exchange or your calendar administrator. You'll use this information for logging into the calendar.

Calendar Login

1. From the main view of the calendar you can proceed to the login area by clicking on the **Submit Events** link. (Below is an example of the screen.)

2. You'll be presented with the main login screen of Active Data Calendar (note if you've previously logged into the calendar you may bypass the login screen since user data is stored in the browser session).

3. Enter your Login ID and Password and then click Submit or press enter to

continue. If your Login ID and Password cannot be found in the Calendar and you are unable to login, you can either contact your calendar administrator in order to get the correct login information or you can use the **Forgot Your Password** feature. If you forgot your password please click on the link "Forgot Your Password? Click Here." And you will be prompted to enter in your Login ID or Email Address. Entering either of this information will prompt an email to be sent to that account's email address with the current Login ID and a new Password.

NOTE: Calendar installations that are using LDAP Connections in order to authenticate users will not display the "Forgot Your Password" option. You will need to contact your network administrator for your login credentials.

Calendar Workflow

Through the setup of departments, and the creation of user accounts that are assigned permission to a department, the calendar provides your organization with the ability to organize your calendar users into logical workgroups. There is also the ability to create Administrative and Non-Administrative user roles within each department, providing the ability to have a review process for which events are automatically accepted into the calendar and which users must first have their events go through an approval process. This is referred to as “workflow”.

Categories can be "locked" which can change the normal workflow for an event. Locked categories can then be assigned Category Owner(s). A Category Owner is a user who will need to approve any event that is classified within that particular Category and they will decide if the event can be displayed on the front-end view screens for that Category. An event that is added to locked and non-locked categories will need to be processed by both the Department Administrator (if the event is added by a User level account) as well as the Category Owner(s) for the locked category(s). A Category can have more than one Category Owner assigned.

New accounts may be added as individual user accounts with distinct permissions and privileges, and it is also possible to add user groups who share the same permissions and privileges. When a user belongs to one or more user groups, it is still possible to add unique permissions and privileges to that individual user. Users retain the combined privileges that they are assigned individual and within each group, as well as the highest department level permissions and roles ascribed individually or within the groups to which they belong.

Getting Help with Calendar Administration

Within the calendar administration area, you can click the Help icon 

in the upper right corner to see a description of the page currently displayed.

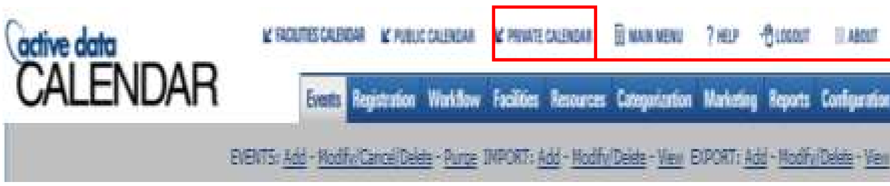
Additional help can be received by contacting your organization’s calendar administrator or by calling Active Data Exchange’s support hotline at 610.997.8100 or e-mailing support@activedataX.com.

Main Administration Calendar Menu

Once you've logged in to Active Data Calendar you will be presented with the main administration screen for your "user account level". All levels of user accounts have the ability to add, update and delete events.

There are three different views of the Main Administrative Menu of the calendar administration area. These are based on whether the user account logged in is established as a "Super User" level account, an "Administrative" level account, or as has a standard "User" level account role. The difference in views and functionality is described below.

Super User/ Administrative/User View(s)



Private Calendar is an optional module that can be licensed. Links may or may not display depending on whether this module has been licensed and enabled.

Main Navigation Panel of Active Data

Super User

The Super User by default has all privileges:

- The Super User has permissions at the Category Owner level to all locked categories including Public and Private
- They also have permission to all Departments at the Administrator level.
- There is only one super user per install and you will setup that account at the time of install.

Public/Private Calendar Category Owner

The privileges of a Public/Private Category Owner account by default include:

- Ability to approve or deny any event marketing request made to the category(s) that they own/manage.

Department Administrator

The privileges of an Administrator account by default include:

- Add/Modify/Cancel/Reschedule/Delete Public Events to those Departments that the user as added as an Administrator (and User)
- Ability to Highlight Events for the Departments that they administer.
- Upload Images & Attachments
- Enable WYSIWYG Editor for Event Management
- Ability to Process Pending Events for the Departments that they administer.
- Ability to Manage Registration for events within their department. (This is automatically enabled for an administrator if at least one user within their department has the privilege enabled.)

User Level

The privileges of a traditional User account by default include:

- Add/Modify/Cancel/Delete Public Marketing Requests
- Enable Highlighted Events
- Enable WYSIWYG Editor for Event Management
- Upload Event Images & Attachments

Additional Privileges that can be assigned to any user includes

System Administration Privileges

- Configure Calendar
- Import Event Data
- Download/Export Event Data
- Download/Export Registrant Data (only appears for installations with the Advanced Registration Module)
- Purge Event Data
- Add/Modify/Delete Categorizations
- Add/Modify/Delete/View Registration Payment Accounts (only appears for installations with the Advanced Registration Module)
- View All Private Events
- View Reports

Department/Workflow Privileges

- Add/Modify/Delete/View User Groups
- Add/Modify/Delete Users for any Department
- Add/Modify/Delete Users for Departments with Administrative Roles
- Add/Modify/Delete Departments
- View User Accounts

Facilities/Locations Privileges

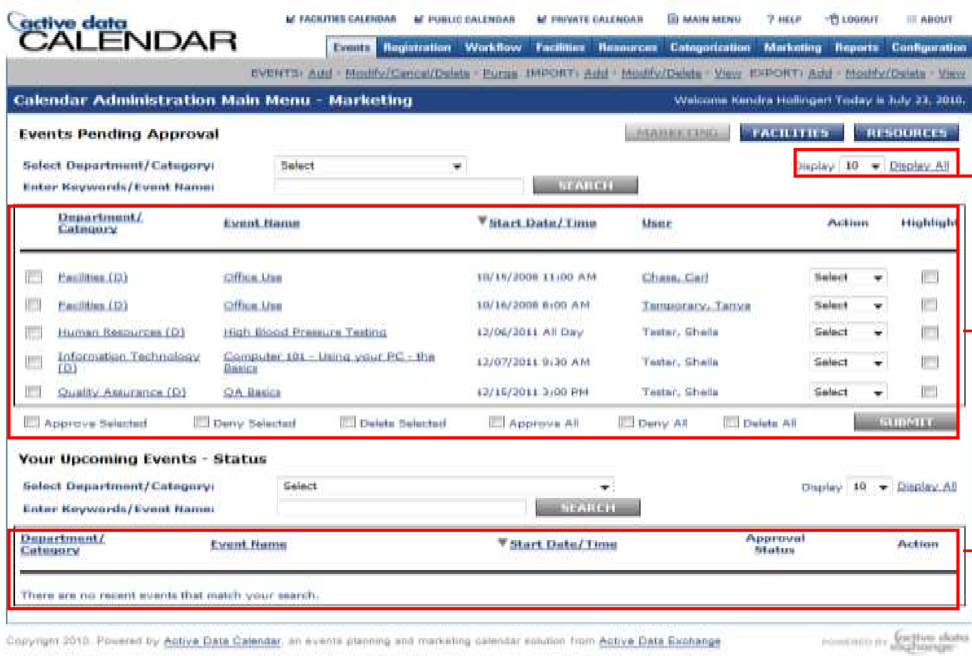
- Add/Modify/Delete Locations/Buildings/Rooms

Event Marketing Privileges

- Add/Modify/Cancel/Delete Private Events (only appears if the Private Module is Enabled)
- Enable Event Registration
- Send Email Notifications
- Generate Syndication, RSS and Quick Links
- Add/Modify/Delete Syndication Templates
- Add/Modify/Delete/View Registration Forms (only appears if the Advanced Registration Module is Enabled)

Main Menu Event Management Areas

The main menu of Active Data Calendar features a fast path dashboard that is customized to your specific user privileges/permissions. Here is what it looks like:



Ten (10) events display as the default. However, you can select to display more or all events requiring processing.

Choose from various options to process events "in bulk" from the main menu process events area.

All users can track the status of their events and take action on them from the main menu.

Administrative Users

Administrative Users can access two fast path areas on their main menu.

Events Pending Approval: By default, each user's main menu is sorted by the event Start Date/Time with the next upcoming event listed first and then the remaining events are listed in descending order. There is a configuration setting where users may select to have the main menu sorted by either the Department/Category column or the Event Name column. You can select to display additional events for processing by using the drop-down option provided, or click the Display All link to display all events that currently require your action.

This fast path area is intended to allow Administrators to make quick approvals or denials of events.

- If "Approve" is selected for an event, then it is automatically approved for the Department and/or Category(s) that you administer and the event is added to the live Calendar(s).
- If "Deny" is selected for an event, then it is automatically denied and an email is sent to the user who entered the event. You will not have the capability to enter in comments regarding why you are denying the event from this fast path menu area. If you would like to add comments or use other options for processing events, go to the "Process Pending Events" area to approve/deny/modify events within your administrative control.
- ***NOTE FOR SUPER USER and DEPARTMENT ADMINISTRATORS:*** Other options from the fast-path drop- down include Modify and Delete which navigate the Super User to the respective area of the application with the event already pre-selected.

Actions that can be performed from the Pending Marketing Requests area of the Main Menu include:

Fast Approval or Denial of Events

- **Approve**: This selection removes the event from the Pending screen and adds it to the appropriate Calendar(s).
- **Deny**: This selection denies the event and sends the standard denial email to the user who entered the event. The event is maintained in the calendar database, but it is removed from the pending screen and the user who submitted the event is instructed that they can login, go to Modify Event in order to make changes and resubmit for further processing.
- **Highlight Event**: If this checkbox is selected for an event, the Administrator and/or Category Owner can deselect the event so that it will not display as a highlighted event. If the event checkbox is NOT selected for an event, then the Administrator and/or Category Owner can select to make the event highlighted. This column will only display if an Administrator and/or Category Owner was given the privilege to be able to highlight events.
- **Approve Selected**: If the checkbox to the left of each event in the Process Pending list is selected and the checkbox for "Approve Selected" is selected, along with the SUBMIT button, then ALL events that were marked for acceptance will be approved and display on the appropriate Calendar(s).
- **Deny Selected**: If the checkbox to the left of each event in the Process Pending list is selected and the checkbox for "Deny Selected" is selected, along with the SUBMIT button, then ALL events that were marked for denial will be denied and the user who submitted each event will receive an email notification. When using this "mass deny" option, you will not have an opportunity to enter in notes on why are you are denying each event.
- **Delete Selected**: If the checkbox to the left of each event in the Process Pending list is selected and the checkbox for "Delete Selected" is selected, along with the SUBMIT button, then ALL events that were marked for deletion will be deleted completely from the Calendar database. *NOTE: You will not receive a chance to confirm/change this delete action if you select it from this menu. This is considered a "Fast Track" delete option and should be used cautiously.
- **Approve All**: If this checkbox is selected and the SUBMIT button is clicked, ALL events currently displayed on the Process Pending Event list will automatically approve and display on the appropriate Calendar(s).
- **Deny All**: If this checkbox is selected and the SUBMIT button is clicked, ALL events currently displayed on the Process Pending Event list will automatically be denied and the user who submitted each event will receive an email notification. When using this "mass deny" option, you will not have an opportunity to enter in notes on why are you are denying each event. .
- **Delete All**: If this checkbox is selected and the SUBMIT button is clicked; ALL events currently displayed on the Process Pending Event list will automatically be deleted completely from the Calendar database. *NOTE: You will not receive a chance to confirm/change this delete action if you select it from this menu. This is considered a "Fast Track" delete option and should be used cautiously.

Your Upcoming Events - Marketing Status: By default, each user's main menu is sorted by the event Start Date/Time with the next upcoming event listed first and then the remaining events are listed in descending order. Users may select to have the main menu sorted by either the Department/Category column or the Event Name column. This area of the main menu displays those events that you have added, which still require action (Saved, Pending, Denied or Expired) as a default.

- Department/Category
- Event Name

- Start Date/Time
- Status:
  - **Saved**: The event was saved during the "Add process" and the user may select to modify the event and release it through workflow or delete the event.
  - **Pending**: The event was released through workflow and the marketing request is still pending review/approval by the Department Administrator or Category Owner.
  - **Denied**: The event was denied by the Department Administrator or Category Owner and the user may select to modify the event or delete the event completely.
  - **Expired**: The event date/time has passed while the event was still in Save, Denied or Pending Status. The user can either modify the event to push the date/time out to a date/time in the future or delete the event.
- **Action**: A drop-down displays with options for Modify and Delete for all statuses. If the event is pending, then an additional option displays in the drop-down for "Resubmit". If "Resubmit" is selected, then an email notification will be sent out to the Department Administrator(s) and/or Category Owner(s) that still require processing for the selected event.

Standard Users

Standard Users will only see the "Your Upcoming Events - Status" area of the main menu.

Workflow Rules for Processing Marketing Requests

Events submitted to Public and Private Marketing Category by the User level accounts must be approved before they can be posted to your Public/Private Calendar(s). This approval process needs to happen both at the time that the user adds a new event or updates an existing event. This allows for control of the events that will be viewed through your calendar.

Department Administrator

As a Department Administrator, you will just see those event marketing requests that are submitted by User level accounts within your department.

Category Owner

If you are a Category Owner to a locked Category, you will also have access to this Process Pending Events area and will see those events that are submitted by any User or Administrator level account to a Category that you own.

If a User submits an event to both locked and un-locked categories, then the event will need to be processed independently for each locked category and once for any un-locked categories, by going through the standard Department Administration workflow process.

The initial screen for “Process Pending Events” includes a list of all events that are pending approval within your department(s) or for any categories that are locked and to which you are assigned as the Category Owner. You can change the list of events that are being displayed by using the Department/Category drop-down menu in order to select to narrow the list to a single Department and/or Category.

You can choose to Add or Deny events directly from this main list screen or you can click on the event name to view additional details about the event and to see all action options.

Processing Pending Requests

Details displayed regarding events entered include information under two possible tabbed areas:

- Marketing
- Internal

Marketing Tab

If no categories (public or private) have been selected for the event then there will be a message displayed under this tab: “No marketing categorization has been selected for this event.”

Otherwise, the marketing tab includes the following information in table format:

- Event Date/Time: Each occurrence within a series is listed separately.
- Registration: This column displays as “Enabled” or “Disabled”
- Max Registrants: Displays the maximum number of registrants set for an occurrence if registration is enabled.
- Displays “Unlimited” if no limit was set or displays blank if registration is not enabled.
- Registration Deadline: Displays only if the install has the Advanced Registration Module enabled.
- Standard Cost: Displays only if the install has the Advanced Registration Module enabled. Shows the cost associated with the event if the event has registration enabled and payment was setup for the form that was selected for the event. The cost is shown in USD (US Dollars).
- Highlight: Displays a drop-down that includes “Yes” and “No” options for selection by occurrence.
- Status: Displays "View" which is a link that if selected opens a pop-up window with each category that was selected for the event and the associated status based off each particular category approval.

Event Marketing Details ***included at the bottom of the marketing tab area includes the following information:***

- Department
- Event Type
- Highlight
- Categorization: List box with categories/subcategories selected for public and/or private calendars.

Event Registration Details

- Form Template: Shows the name of the form associated with the event for registration as well as a PREVIEW link that can be selected to open a preview of the form. If your installation does not have the Advanced Registration Module enabled then this will always show "Standard Form" as the form template.
- Registration Type: The registration type selected for the event is displayed.
- Max Registrants: Displays the maximum number of registrants set for an occurrence if registration is enabled. Displays “Unlimited” if no limit was set or displays blank if registration is not enabled.
- Registration Deadline: Displays only if the install has the Advanced Registration Module enabled.
- Display Spaces: Yes or No displays here based off what was selected for displaying the number of spaces remaining for the event on the front-end event details screen.
- Payment Enabled: Yes or No displays here based off the form selected for the event. If the form included payment options (payment account) then this will display as "Yes".
- Standard Cost: Displays only if the install has the Advanced Registration Module enabled. Shows the cost associated with the event if the event has registration enabled and payment was setup for the form that was selected for the event. The cost is shown in USD (US Dollars).

Actions that can be performed from the Pending Event Details Screen include:

- **Approve**: This button removes the event marketing request from the Pending screen and adds it to the appropriate Calendar(s).

- **Deny**: This button prompts you to enter in a message that will be sent back to the user who submitted the event marketing request in an email message, notifying them why their request is being denied. The event/request is maintained in the calendar database, but it is removed from the pending screen and the user who submitted the event is instructed that they can login, go to Modify Event in order to make changes and resubmit for further processing.
- **Modify**: This button takes the Administrator directly to the Modify Event area so that they can make changes to the event themselves. NOTE: Any event that is updated directly by an administrator will be automatically posted live once they finalize the Modify Event process. The modify button is only available for the Department Administrators and the Super User. Category Owners cannot modify the event.
- **Highlight Event**: This drop-down can be utilized in order to select to make an event highlighted or remove it from the highlighted list. This drop-down will only display if an Administrator and/or Category Owner was given the privilege to be able to highlight events.

Event Preview: Other Options available from the Pending Event Details Screen

The bottom portion of the Event Details screen shows a preview of the event as it would display on the Marketing Calendar(s).

There are three buttons in the upper right corner for:

- **Comments**

  Select this button to open a pop-up window where you can enter text in the "Internal Comments Log" field provided. When the event is released to the administrator for processing, sent as an event email notice or modified in the future, these internal comments will be included in a comments tracking log within the event details area. Other users and third party individuals can add their comments to the Internal Comments Log as well. Each comment is date and time stamped and appears in the log area along with the name of the user who submitted the comments.
- **Send Notification**

  Click this button to "Go to Event Notification Page". Once selected, you will be navigated directly to the "Send Event Email Notice" screen for this event. You can then complete the "Send Event Email Notice" screen in order to select the type of notice and desired recipients.
- **Change Log**

  Click this button to view a list of changes made to the event you're viewing. Changes logged for viewing include approval or denial of facility, resource or marketing requests related to the event, and changes made to any of these fields: Event Name, Event Marketing, Event Description, Date/Time Changes, Facility/Location Changes, Contact Information Changes, and Registration Changes. Full details of *submitters* using the Open Entry form to create events are now stored in this log also.

Internal Tab

This tab always includes the Internal Notes field. Up to four other fields may be included within this window as well. The field types, labels and data are dependent on what is configured under the Configuration Tab: Setup Calendar: Custom Event Administration Settings.

Event Conflict Notifications

On various event details screens throughout the Calendar Administration area, users may notice a red warning message at the top of their event details notifying and warning them that a possible scheduling conflict may have been identified for their event.

- Add Event
- Modify/Cancel/Reschedule Event
- Process Pending Event Details

When displayed the conflict warning message will include a link to open a pop-up message that includes the details of the possible conflicting events:

Users can click on the name of the user account who added the "conflicting event" and it will open their default email client with the email address for the other user account automatically populated. This allows them to start an email dialogue with the other user on why the events are overlapping or represent a possible conflict with one another.

Conflict warning messages are for informational purposes only and no rules for how to handle these types of events are automatically included in Calendar. When conflicts are identified, user accounts can still continue with the process that they are within, use the wizard back button to go and make event modifications or cancel out of their current action and be returned to the main menu. Conflict notifications will show in case of conflict regardless of the status of the event(s) (Approved, Pending, etc.)

Internal Tab Details

Internal Notes: Text field with any internal notes entered when the vent was added or last updated.
Up to four additional custom internal fields and data may display as well.

Calendar(s) - Public/Private

Public Calendar

All users can access the public calendar from within the administration area. The top portion of the administration area includes a link to the Public Calendar and if selected, navigates the user to the Public Calendar master view. If users select the Public Calendar link while still logged into the administration area, then selecting the Submit events link from the master Public Calendar will navigate the user back into the administration area to the last visited screen prior to selecting the Public Calendar icon.

The Public Calendar can be configured through the Configuration tab within the Active Data Calendar administration area. The details of each Configuration option are outlined later within this User Guide.

The Public Calendar is designed to be accessible from a publicly available website or web page; however it is possible to place the Public Calendar behind a custom, and client defined login area if you choose to do so.

Display Formats that can be enabled for the Public Calendar include:

- Grid View
- Category List View
- Date/Time List View
- Location List View
- Summary List View

The image to the right is a sample of a *Public Calendar - Date/Time View*

Private Calendar

Only applicable for clients licensing the Private Calendar Module

PRIVATE CALENDAR

The Private Calendar allows you to maintain a separate “look and feel” as well as separate categorization structure that includes more “private options” such as internal meetings, board of director events and other events that are more restrictive/private in nature and not for public attendance.

The Private Calendar can be configured through the Configuration tab within the Active Data Calendar administration area. The details of each Configuration option are outlined later within this User Guide.

Only users with the appropriate privilege, “Add/Modify/Delete/View Private Events”, or ”View all Private Events” can access the private calendar from within the administration area. The top portion of the administration area includes a link to the Private Calendar and if selected, navigates the user to the Private Calendar master view. If users select the Calendar link while still logged into the administration area, then selecting the Submit events link from the master Private Calendar will navigate the user back into the administration area to the last visited screen prior to selecting the Private Calendar icon.

There is, however, no built-in login functionality in order to enforce the use of the "Private Calendar" as a truly Private Calendar for viewing only by visitors who must first be authenticated from a login process. However, Active Data has worked with a number of clients to either custom develop a login page that accesses an external authentication application, Single Sign-On product or other options in order to more fully secure access to the Private Calendar.

It is also possible to use the Private Calendar as simply a second Master Calendar instance with unique "look and feel" and categorization options and not as a Private Calendar solution. Use of the Private Calendar terminology throughout the application is simply for administrative distinction that it is a second instance of the Calendar front-end with its own unique attributes and may be maintained as a separate interface for displaying event data from the Public Calendar displays.

Display Formats the can be enabled for the Public Calendar includes:

- Grid View
- Category List View
- Date/Time List View

- Location List View
- Summary List View

Options Available on All View Screens

Active Data Calendar Public and Private Calendars include five ways to view *all* events, called *full views*, which include:

- Grid View
- Category List View
- Date/Time List View
- Location List View
- Summary List View

In addition to these full view, a highly configurable *Featured Events* view displays just those events having their **Highlight this Event** option selected.

Each *Full View* page includes these search options:

- **Display Format**: Options may include Date/Time View, Category View, Location View, Summary View and Grid View. The options included in this drop-down of the Public and/or Private Calendar is based off the configuration selections that are set in the Calendar administration area. Visitors may select a new value from the drop-down list to automatically navigate to that Calendar View format.
- **Display Month**: Use this drop-down in order to quick select the month that you would like to view. All twelve months of the year are displayed and once selected; you will be automatically navigated to the month selected for viewing all events for that particular month.
- **Quick Search Icons**: Options include Day, Week, Month and Year Icons. Click on any of these graphic icons in order to view the events for the current day, week, month or year. You will stay within the View format that you have chosen but the date range of events included in the view will be based off the icon selection for day, week, month or year.

Advanced Search Options in Full Views Include:

- **Date Range**: Use these date selectors to select a start and end date to refine the events that are displayed in your results area. You can either choose the date by clicking on the icon located to the right of the field or by manually typing in the date with the format of MM/DD/YYYY. Example of dates: 04/13/2009 or 4/13/2009.
- **Date Range/Time Range**: Use these drop-downs in order to select a range of days and a range of time in order to refine the events that are displayed in your results area to the right. *NOTE: Date Range/Time Range searching may be disabled for the calendar search options. If you do not see the drop-down selection boxes for Date Range and Time Range, then the feature was disabled for this calendar.
- **Category(s)**: Use this drop-down in order to select a single Category of events to view. You can also select to View All Categories or to “Select Multiple” which will open a pop-up window where you can check those Category(s) and Subcategory(s) of interest to you as part of your search. If multiple Category(s) and Subcategory(s) have been selected to view, you can use the "View" link located next to the Calendar "Category" Title ("Multiple Categories") to view all the Category(s) and Subcategory(s) that have been selected.

- **Location(s) or Address Searching**: One of two location search options may display in this area. You may see a location drop-down menu in order to select from a predefined list of location options, address search fields (City, State, ZIP Code, County) to enter in a location and find events with the location criteria entered, or no location search options at all if location searching was disabled for this Calendar.
    - **Location Drop-Down Option**: If enabled, this drop-down allows visitors to select a single Location of events to view. You can also select to View All Locations or to "Select Multiple" which will open a pop-up window where you can check those Locations of interest to you as part of your search.
    - **Address Searching**: If this option was enabled, include City, State, ZIP Code and County are displayed. Enter in as much criteria as you would like for narrowing your search to display only those events that meet all of the address criteria entered. If Address searching has been enabled, then it is possible that a "Proximity" search option has also been enabled. The field label for "Proximity" searching is configurable per Calendar and therefore the field may say "Miles Willing to Travel", "Proximity" or another field label. The field type will be a drop-down menu with options ranging from 5 miles to 60 miles.
- **Keywords**: Use this text area to enter in a list of keywords as comma separated values. The maximum number of characters that can be entered in this keyword field is 50 characters. The keyword search field searches off the following event details: event name, event description, all additional event detail fields, image and attachment alternate text, location name, building name and room name.

Once you have selected your search criteria and hit the "Submit" link, the selected search will be initiated and the resulting events that match the selected criteria will display in the current active View.

TIP: Within the administrative area entitled "Setup Calendar - Display Options", the Calendar Super User or Administrative User Account (with the privilege to configure the calendar) can choose to have the SUBMIT EVENTS link that is automatically enabled in the upper right area of all Calendar View Screens link to the Calendar Administration Login Screen (default) or to a different URL.

You can also choose to completely disable the SUBMIT EVENTS link and then Calendar User Accounts will need to be provided with the direct URL to access your Organization's Calendar Administration Login screen.

Other Options Available on Full Views

All views also include the following two icons for Visitors to your Calendar:

HELP: If selected, this button will open a new window that includes a Help File for the current View screen.

PRINT: If selected, this button will open a new window that includes a Printer Friendly format of the current View.

Advanced options available for each View screen include:

DOWNLOAD: Use this icon to download all events within your current Calendar view. Choose your file type - CSV, iCal and XML - from the available selections and click SUBMIT to begin the download process.

SUBSCRIBE: Use this icon to set up an event subscription based off your current Category/Subcategory selections. If you choose to SUBSCRIBE at the Category or SubCategory Calendar level, then you will be able to select to receive updates via email or text message or through a persistent iCalendar feed.

***PLEASE NOTE**: The more Categories you subscribe to, the more emails you may receive regarding new and updated events. You will receive an email as soon as an event is added or updated within your Subscription list.

Viewing Events by Grid Format

This view of the Calendar allows visitors to view events within a traditional Calendar Grid Format. At the top of the screen, the current Category and Subcategory Name(s) will be displayed. When first navigating to the Grid View screen "All Categories" will be displayed at the top of the screen until you make a category selection. Notice if "Multiple Categories" is selected this will be displayed on the top of the screen as well as a "View" link to see the current multiple categories being searched.

Expand All Grid: Use this feature located in the upper left hand corner to view all of the events in each grid block.

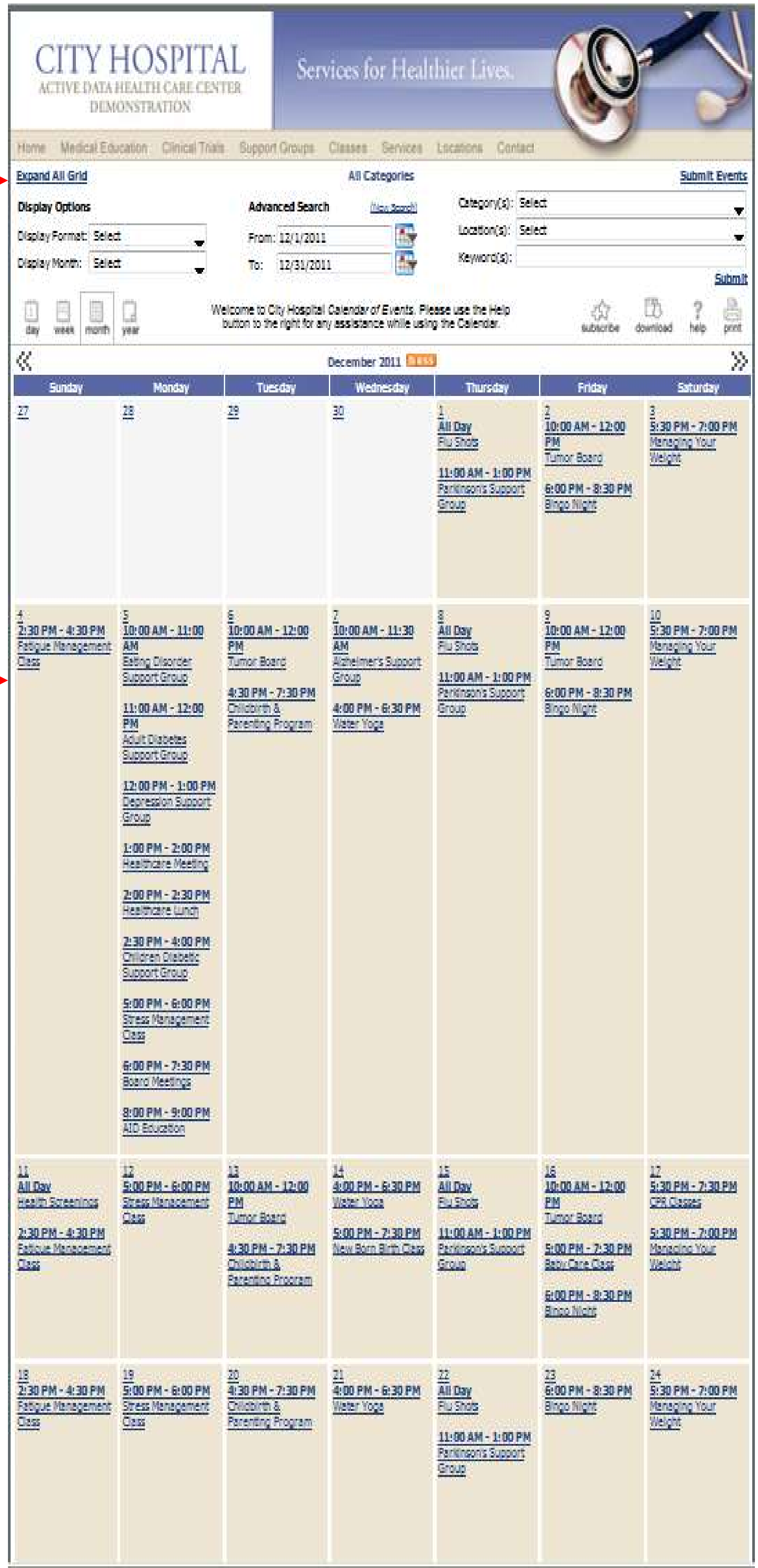
Grid Block Event Formatting: Events are broken down into days of each week in the month. A select number of events will display per block. If there are additional events that can be viewed for a particular day, then a text link will be included at the bottom of the particular Calendar block that says “X More” and can be selected in order to refresh the Calendar grid and display all events n that particular Calendar Grid block.

Information included per event within each Calendar Grid block includes:

Start Date/Time: The Start Date and Start Time of each event are displayed. If an event has an end time, then the end time will be displayed as well. All Day events will display “All Day” within the Start Time area.

Event Name: Name of the event that was added by the event coordinator. Each event name is displayed as a hyperlink which if selected will navigate you to the Event Details screen.

If **Event Quick Tips** are enabled, then when a visitor places their mouse over an event name, the event quick tip box will open. Event quick tips include an event action that has been enabled for the event including: Remind Me, Notify Me, Add to My Calendar, Email a Friend and Register. Past events do not include the Remind Me or Register features enabled.



Viewing Events by Category List Format

This view of the Calendar allows you to view a date range of events automatically sorted by Category and/or subcategory. At the top of the screen, the current Category and Subcategory Name(s) are displayed. When first navigating to the View by Category screen “All Categories" is displayed at the top of the screen until you select a category. If multiple categories and/or subcategories are selected, "Multiple Categories" is displayed on the top of the screen. You can click on the "View" link to see the current multiple categories being searched.

Search Options from List Views:

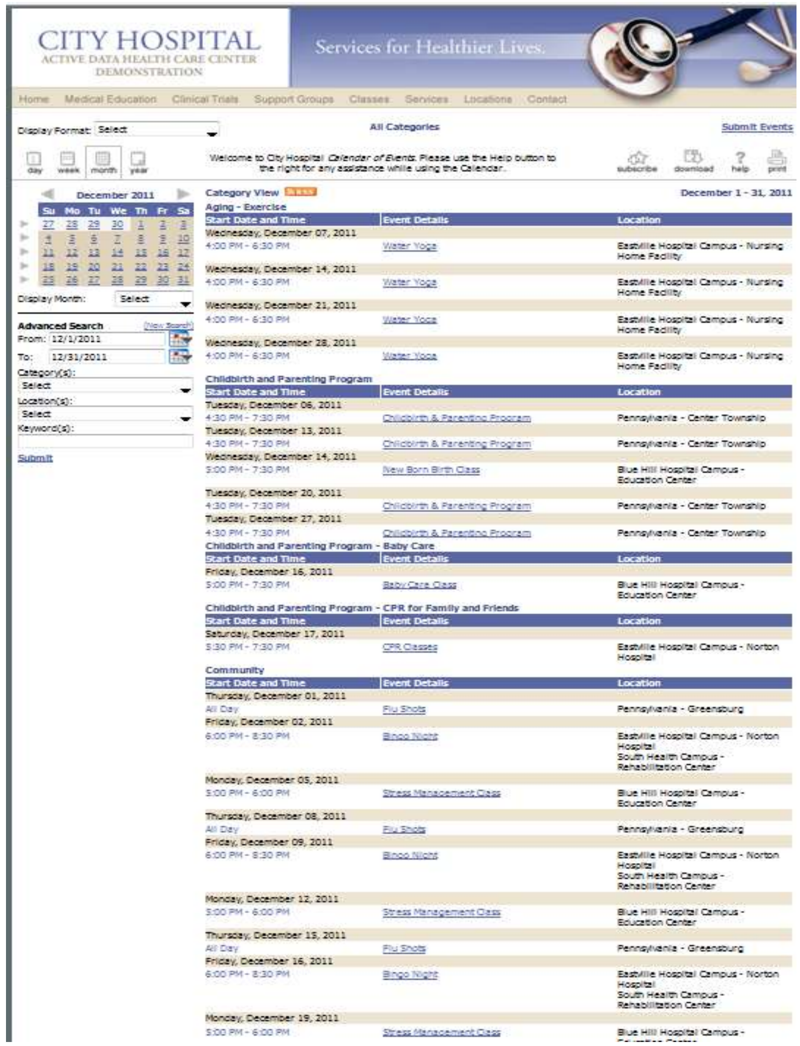
Month Selectors: Navigate to the next and previous month’s events by using the right and left arrow selectors beside the current month.

Week Selectors: View the Date List for all events in a specific week of the month, by clicking on the arrow to the left of a particular week. The selected week will highlight and the corresponding events will display in the list on the right side.

Day Selectors: Click on any day within the month grid displayed in order to view the Date List for that day of the month.

Day Selectors: Click on any day within the month grid to view the Date List for that day of the month.

Display Month: Use this drop-down to select the month that you would like to view. Once selected, you will be automatically navigated to that month.



Events are broken down into Highlighted Events and Events matching the selected search criteria.

Highlighted Events: These are events selected by users as "highlighted" for display at the top of any list screen where highlighted events are enabled.

Main Event List: Events that match your selected search criteria and are sorted in groups by the Category to which they have been classified. There are two columns of information for each event:

Start Date/Time: The Start Date and Start Time of each event is displayed. If an event has an end time, then the end time will be displayed. All Day events will display “All Day”.

Event Name: Name of the event that was added by the event administrator. Each event name is displayed as a hyperlink, which if selected will navigate to the Event Details screen.

Viewing Events by Date/Time List Format

This view of the Calendar shows events as a list. The current date range is displayed at the top, along with current Category and Subcategory names. All Categories is the default until you make a selection. Notice if "Multiple Categories" is selected this will be displayed on the top of the screen, you can then click on the "View" link to see the current multiple categories being searched.

Viewing Events by Location List Format

The Calendar's *Location List* view shows events in a date range, sorted by the Location, Building, and Room in which they are being held. Current category and subcategory names display at the top of the events frame. When first navigating to the *View by Location* page, All Categories is displayed. Choosing *Select Multiple* for **Category**

Search Options from List Views:

Month Selectors: Navigate to the next and previous month's events by using the right and left arrow selectors beside the current month.

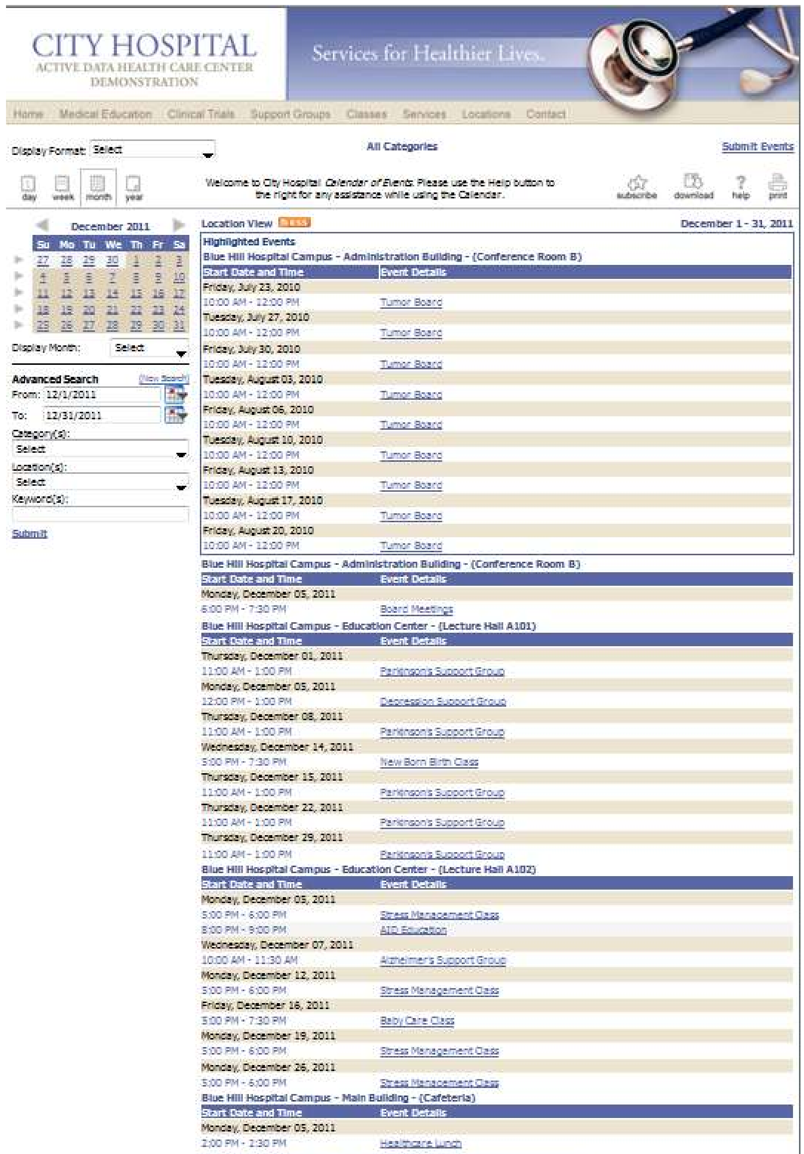
Week Selectors: View the Date List for all events in a specific week of the month, by clicking on the arrow to the left of a particular week. The selected week will highlight and the corresponding events will display in the list on the right side.

Day Selectors: Click on any day within the month grid displayed in order to view the Date List for that day of the month.

Display Month: Use this drop-down in order to quick select the month that you would like to view. All twelve months of the year are displayed and once selected, you will be automatically navigated to that month.

Events are broken down into Highlighted Events and Events Matching the selected search criteria.

Highlighted Events: These are events selected by users as "highlighted" for display at the top of any list screen where highlighted events are enabled.



Main Event List: Events that match your selected search criteria and are sorted in groups by Location - Building - Room.

Start Date/Time: The Start Date and Start Time of each event is displayed. If an event has an end time, then the end time will be displayed as well. All Day events will display "All Day".

Event Name: Each event name is displayed as a hyperlink, which if selected will navigate you to the Details.

displays **Multiple Categories** on top, and clicking the View link below the category drop-down list shows the categories selected.

Viewing Featured Events

Release 3.14 added a new "Featured Events" view to the Calendar. This new view allows configuring a new presentation of Calendar data to showcase events and calendars via syndication feed, but requires little or no programming.

The end user selects this view from the **Display Format** pull-down list on the top-left of the Calendar's front page.

Information Presented

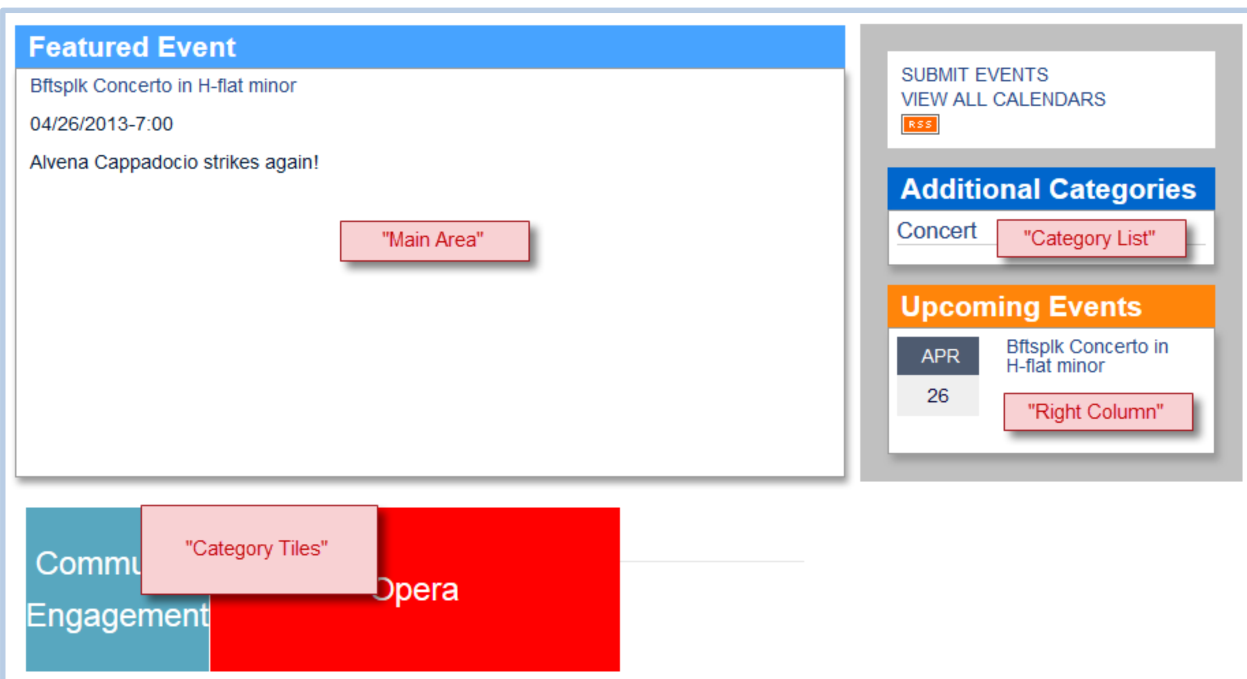
This new view supports two highly configurable areas for displaying *event* information, along with lists of events by category.

How to configure the Featured Events View

All are configured in the Calendar's administration area, from the Configuration tab. The areas labeled in pink in the *Presentation Page Example* are on the Featured Events View page in the Setup Calendar area.

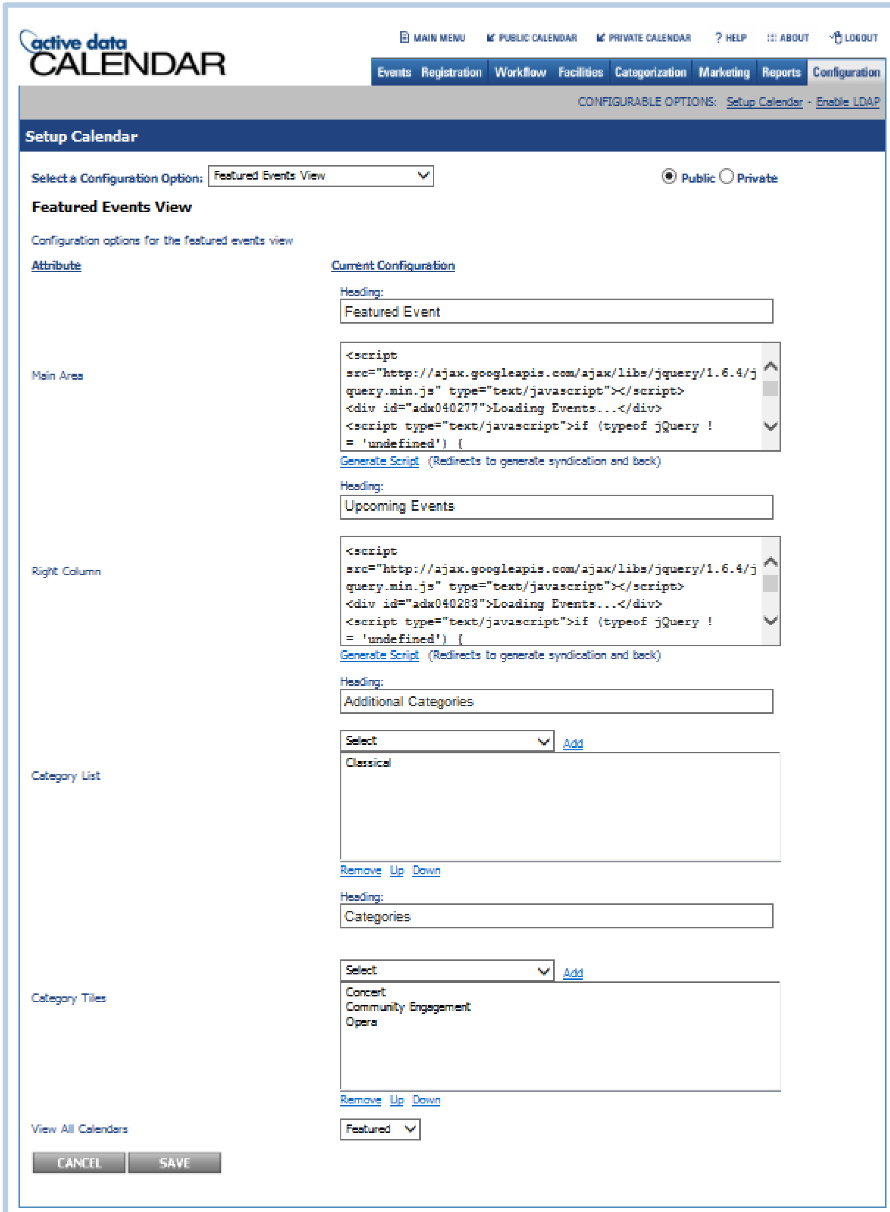
Presentation Page Example

"Main Area" (called *Featured Event* in the capture below) and "Right Column" (called *Upcoming Events*) appear first on the configuration page. The new view also presents lists of categories you select in the "Category List" area (called Additional Categories in the screen shot), and shows the tiles you configure in the "Category Tiles" area.



Configuration Page Example

The entire configuration page for the Featured Events View looks like this:

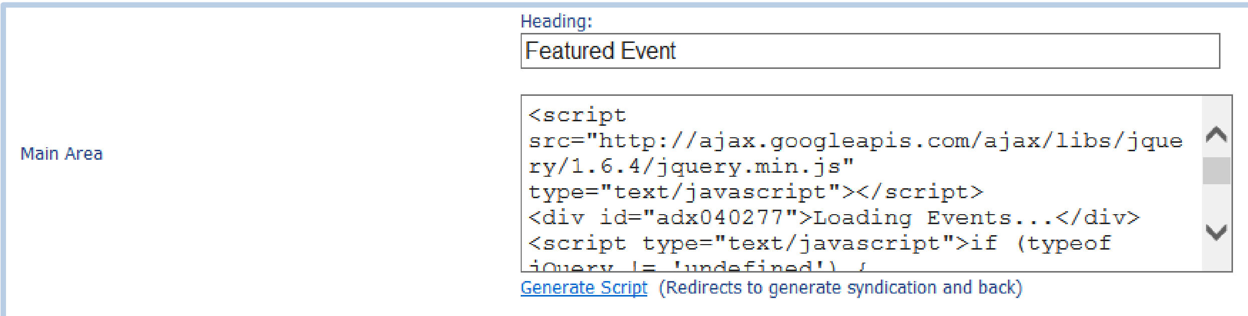


Which Calendar?

First, select the calendar you want to configure this view for. The options are *Public* and *Private*. *Private* is only available to those that have licensed the Private Calendar Module; It pulls event data from your Private category structure.

Configuring the Event Listing Areas

Each area where events are listed on the new view has a corresponding section on the configuration page. For example, the *Main Area*'s section looks like:



Here you can see where the new view's Main Area section has a heading (this area is called "Featured Event", which is the default, but you are free to change it). Below is the syndication code required to grab the events that you want to show there. To modify the code in this section (or the *Right Column* section) click the Generate Script link[1].

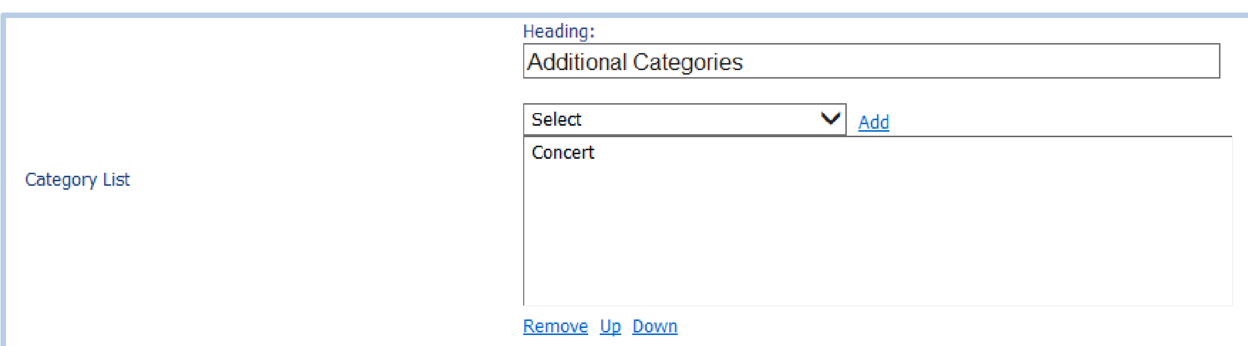
The Generate Script link takes you to the **Generate Active Data Syndication Code** page. The **Syndication Template** for the Main Area is called the *Featured Event Template*. If you clicked the Generate Script link shown above, that is the template that loads automatically on the syndication code page.

Make whatever changes you want, such as those specifying a category or date range, then click SUBMIT. Calendar replaces the code on the Featured Event View configuration page with new code containing the selections you made on the syndication code page. Your changes are thus implemented without you having to write or touch any code directly. For more information on syndication code, see Generate Active Data Syndication Code on page 173.

Configuring the Category List and Category Tiles Areas

As the overall page capture shows, the two other areas on this view (*Category List* and *Category Tiles*) are also configured on this page. They're both configured the same way, but that way is a little different from the two event listing areas.

For example, the Category List section looks like:



[1] While you could theoretically edit the code yourself, there is little reason to do so, and Active Data does not publish the specification for it, so you'd be on your own. Best to use the Generate Code function.

To configure this area, change the title (the **Heading**) if you like, then click the Select drop-down list, and choose a category (or subcategory). Next, click Add to place it in the box below it, so it appears in the view, as shown in the screen capture at the top of this section. If you have more than one category, and wish to reorder them, click the category you want to move, then either click Up or Down until the categories are ordered as you want them (or click Remove to delete the highlighted category).

View All Calendars

Finally, you can configure the type of view a Calendar user sees when clicking the VIEW ALL CALENDARS link. Just click the View All Calendars drop-down list on this page and select the view you want.

Publish the Featured Events View

When you have finished arranging all the categories and formatting the areas, click **SAVE** at the bottom of the page.

Enabling the View

The Featured Events View is turned off by default (until you configure it, it looks empty and unfinished to an end-user searching on the front end views of your Calendar). Once you have configured this view and saved it, click the CONFIGURATION tab in the **Calendar's administration area**, then click Setup Calendar. This takes you to the *Display Settings* page by default.

Look for the *"Calendar Views" Selectable* section of the page, and select *Enable* next to *Featured Events View*. Now click **SAVE** to complete the operation. Look for the message, "Your configuration settings have been successfully updated." to confirm that your changes were accepted.

View Event Details

Clicking an event name from a list view or grid view navigates to the **Event Details** screen, where you see the information listed below. To see help for a page anywhere in the Calendar, click the “Help” icon at the upper right of that page. Click the “Print” icon to print the contents of the currently displayed page.

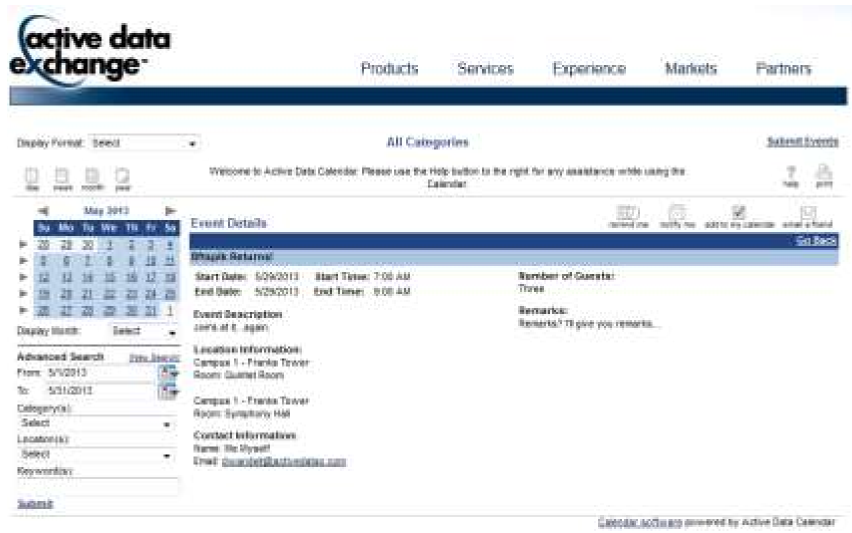
Event Details Includes:

Event Name: Name given by the event administrator.

Start/End Date/Time: If an event has an End Date and End Time, they are displayed. All-day events display “All Day” in Start Time. If an event recurs, the recurring schedule is shown.

AddThis Social Marketing: If AddThis is enabled, the options configured show in this area, for visitors to select from various social marketing sites and services.

Event Description: Text provided by the event’s creator.



Location Information: Location information may include the Building and Room Number as well as the address for the location. If the location name appears as a hypertext link, then it can be selected in order to navigate to a map.

Contact Information: If a contact is available for the event, then the details for the contact will be displayed.

Image: An image may be displayed on this page for graphic representation of the event.

Attachments for this Event: Attached files may be displayed and reviewed by clicking on the title of the attachment.

Three additional customized fields: Up to three additional customized fields and associated information may be displayed on the event details screen. The field labels are based off what was selected by your organization in the Configuration - Setup Calendar - Custom Event Administration.

<u>Other Actions from the Event Details Screen</u>

Some of these features may not be enabled depending the Calendar Administrator's settings.

- **Go Back**: Selecting this link will take you back to your previous Event View List.

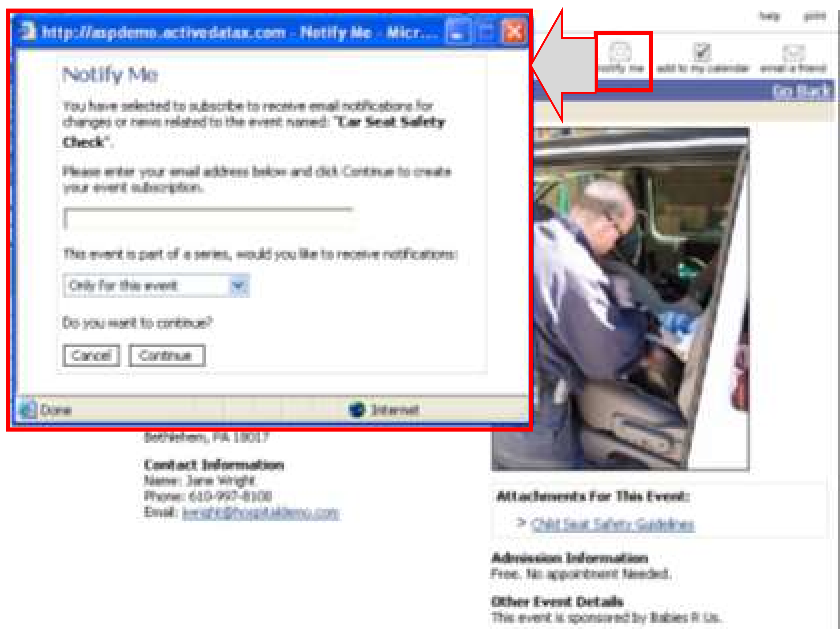
Remind Me

- **Notify Me**: Selecting this link will allow you to enter your email address in order to be added to an event modification subscription list.
- **Add to My Calendar**: Selecting this link will take you to an informational screen that explains how to easily add this event to your personal calendar.
- **Email a Friend**: Selecting this link will allow you to send an email containing Event Details and a hypertext link that will navigate your "friends" directly to the Event Details for the event.
- **Remind Me**: Selecting this link will allow you to enter either your email address or your cell phone number and carrier, in order to be added to an event reminder list. You will have the option to select the timeframe prior to the event when you would like to receive your reminder notice
- **Register**: Selecting this link will allow you to complete an interactive registration request form for the event. Complete the form and clicks SUBMIT to send your registration request to the event administrator. You will receive a follow-up email once your registration request has been processed and the follow-up email

Event Details Screen

Notify Me

Visitors can enter their email address to be added to an email subscription list for the selected event.



If the event is a series, an additional drop-down will allow the visitor to select to receive email notifications/updates on the individual event occurrence that they were viewing or for the entire event series.

The "Notify Me" can be disabled if you do not want to offer this option. Enable or disable this option from the Configuration tab - Setup Calendar - Display Options.

Visitors who register to be notified will receive notifications when an event is modified or when an administrative user selects "Send Notification to Registered Event Subscribers" from within the "Send Event Email Notice" area of the Event Management area in the Calendar administration.

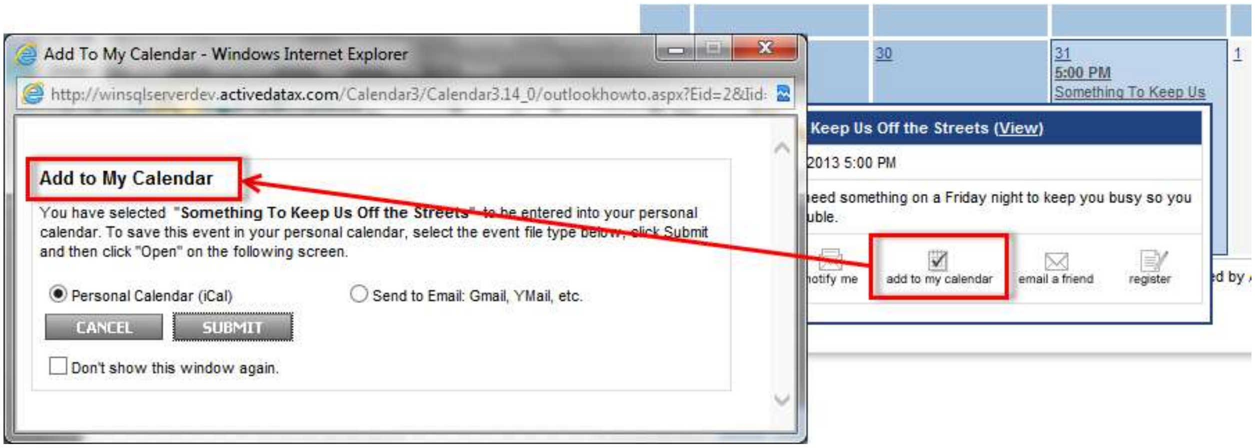
Add to My Calendar

Visitors can request a calendar appointment file, that they can then add to their email/calendar client, such as Outlook. The file can be obtained two ways:

- Download an `.ics` file and load it directly
- Request an Appointment e-mail

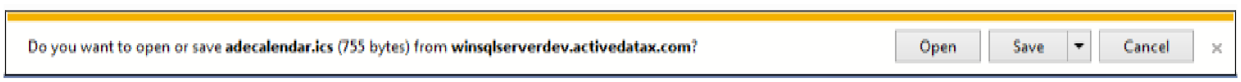
The main purpose of this option is to allow visitors to load the event details directly into their personal calendar, rather than entering them manually. Downloaded files are in iCalendar (`.ics`) format. E-mails are an Appointment file that the recipient can add to their calendar by clicking “Save and Close”. Here is the visitor experience:

A visitor makes the request by clicking the **add to my calendar** icon as shown here, to open the Add to My Calendar window:

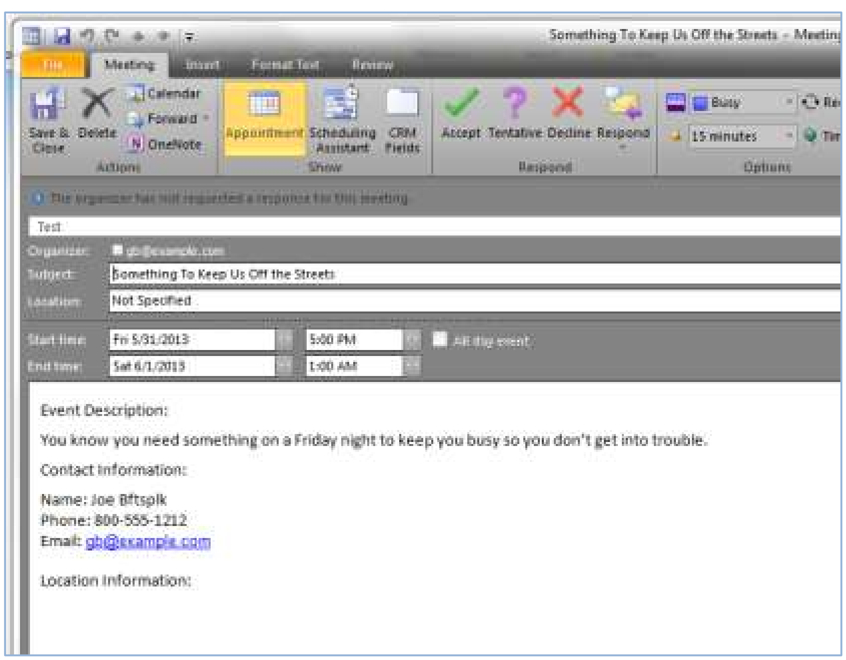


The visitor selects either **Personal Calendar (iCal)** or **Send to Email**. The next step depends on the option selected:

- If the visitor selects the *Personal Calendar* option, the browser prompts to *Open* or *Save* the file. Here's what that looks like with Internet Explorer 9 or 10:

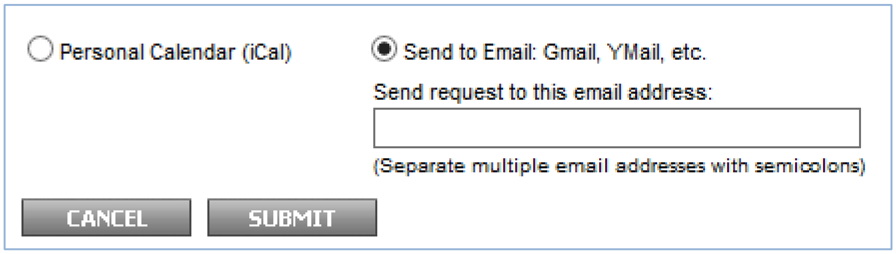


Opening the file presents an Appointment window similar to this one. Clicking **Save & Close** loads the event into the visitor's local calendar:



If the visitor *saves* the file to their machine, they can load it from that place on their machine.

- If the visitor selects *Send an Email*, the window opens a text field for entering the e-mail address to send the Appointment message to, like this:

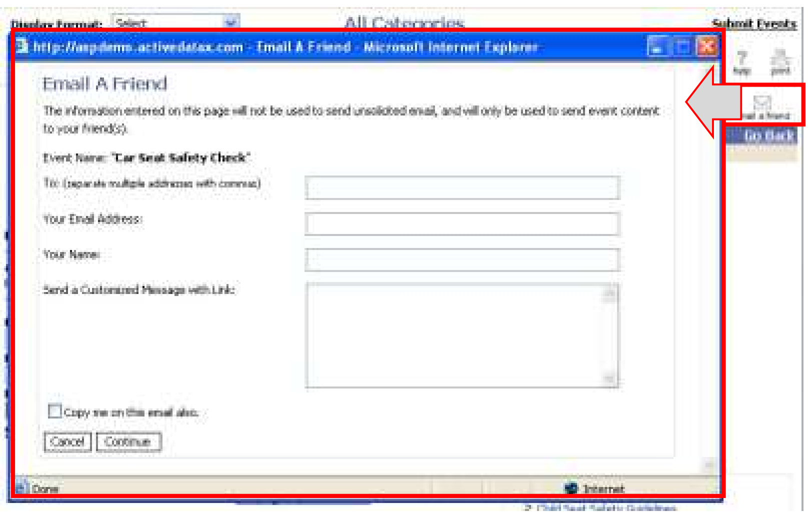


Clicking **SUBMIT** in this case e-mails the Appointment message to the entered addresses. The appointment window and their interaction with it is the same as for the **Personal Calendar** option described above.

Finally the *Don't show this window again* option permanently disables the "Add to My Calendar" pop-up window. To undo this action, the visitor must clear all their browser's cookies.

Email a Friend

Visitors can enter multiple email addresses, separated by commas, in order to share an event notification via email.



You can set a limit to the number of individual email addresses that can be entered in any one "Email a Friend" session by going to Setup Calendar - Configure Calendar - Email Options.

Visitors can also enter their email address, their name and also a customized message to be sent with the event email link. They can also check the box to receive a copy of the email notification being sent to their friends.

This icon "Email a Friend" can be disabled if you do not want to offer this option to your visitors. Enable or disable this option from the Configuration tab - Setup Calendar – Display Options.

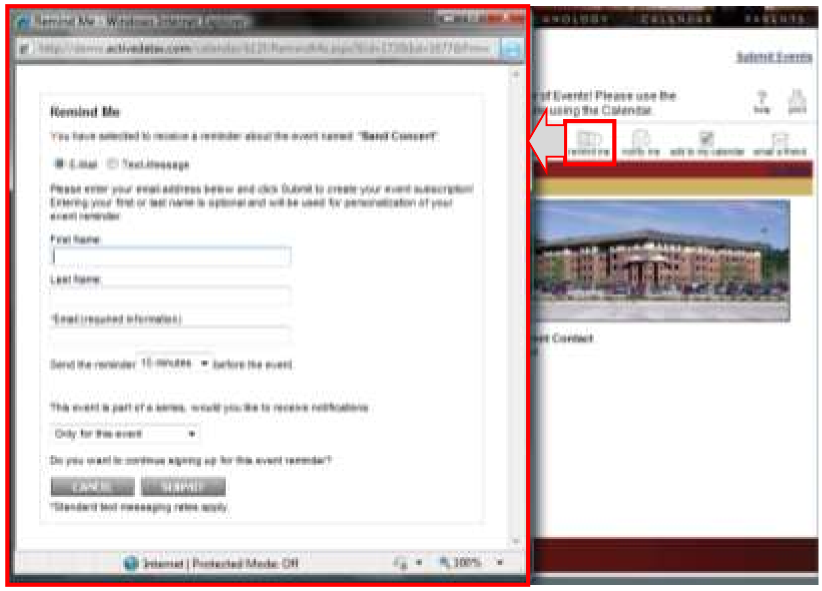
Remind Me

Visitors can select to receive reminders about an event start date/time in either an email or SMS (text message) format.

You can choose to enable or disable the entire Remind Me option or disable individual reminder options for email or SMS.

Visitors must complete the required information for each option that is noted with an asterisk and then click the "SUBMIT" button.

When choosing SMS, an abbreviated reminder is sent to avoid having a Calendar visitor receiving multiple text messages.



Administration Area Overview

All Administration Screens will include the following:

General Links

- **Public Calendar** - Opens the Public Calendar for viewing of event data without logging you out of the Calendar administration menu.
- **Main Menu** - Returns the User back to the Main Menu.
- **Help** - Displays a pop-up window with in-context help for each screen.
- **Logout** - Logs the User out of the software.
- **About** - Displays a pop-up window that includes a description regarding Copyright, Version Number and other valuable install information.
- ***Optional Modules*****Private Calendar** - Opens the Private Calendar for viewing of event data without logging you out of the Calendar administration menu.
- **Facilities Calendar** – Opens the Facilities Calendar in order to view facility and resource scheduling in a graphical view.

Main Navigation

- Events
- Registration
- Workflow
- Facilities
- Categorization
- Marketing
- Reports
- Configuration

When a main link is selected, the sub-navigation within that area is displayed. Users only see the functions that they have permission to see. When a main link is selected, the display area portion of the screen will always default to the “View” selection since not every user has permission to perform the “Add” function. All users can View the information within the system. The exception to this is the “Events” area and the Users area. Within the Events main navigation area, the default screen is the “Add Event” screen.

Adding/Modifying/Cancelling/Rescheduling/Deleting Events

The process for adding events is dependent on the privileges that have been enabled for the user account entering the event. The Super User can enter events for any department and administrators and user roles can only enter events for their specific department(s).

Add Wizards

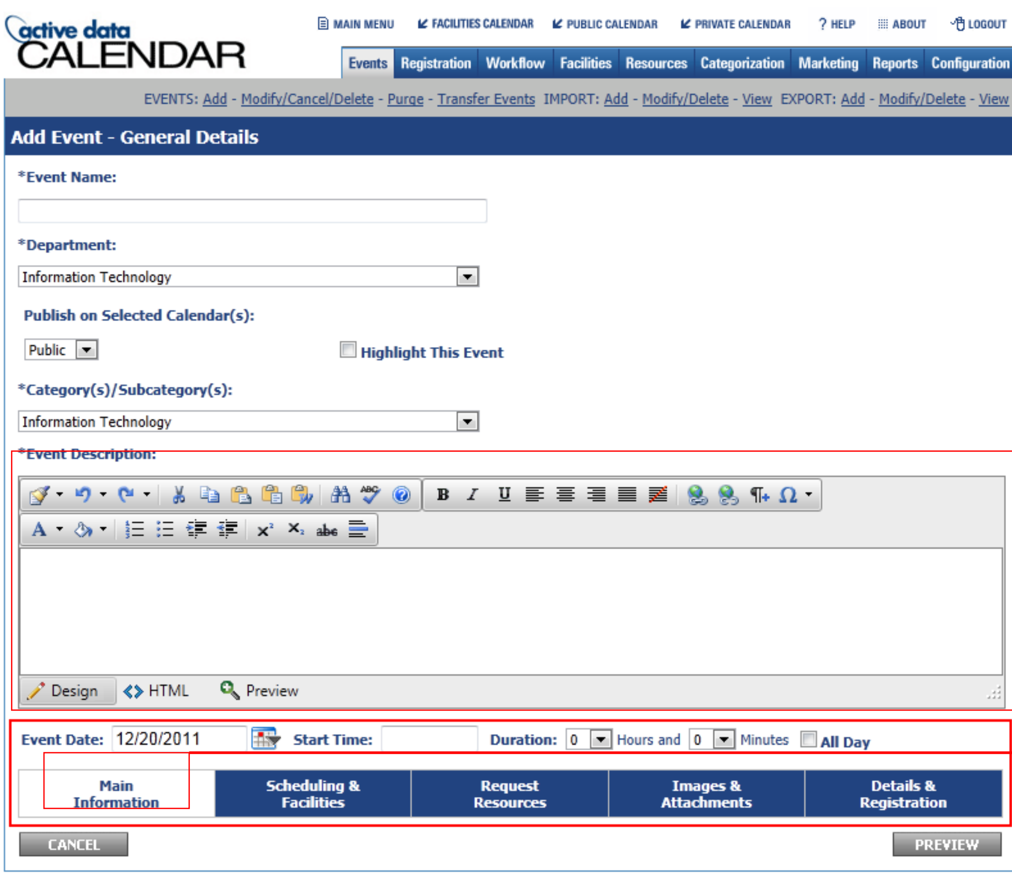
Add Wizards display the total number of steps in the "Add" process in the upper right corner, along with highlighting graphically the step that you are on within any step in the wizard process. Buttons in the Add Wizard include:

- **CANCEL**: All screens include a CANCEL button to discard changes made and back out of the step or process. When canceling, the user is brought back to the main Calendar menu.
- **BACK**: Some areas contain a BACK button. When the BACK button is used it will bring the user to the previous screen in the Add process and save any data entered on the previous screens.
- **NEXT**: The NEXT button is enabled on every screen within an Add Wizard. When an administrative user selects the NEXT button, all fields are validated before proceeding to the next step. If there are any required fields or incorrect field entries, then the user will see an error message noted at the top in red, allowing them to correct the errors before proceeding.
- **FINISH**: Enabled on each screen within the Add Wizard. Click FINISH to navigate to the "Preview and Finalize" screen and can SAVE or RELEASE the event. There is validation of the entire entry, and once the validation has occurred, then the user will be navigated back to the first step in the Add Wizard process and an appropriate confirmation message is displayed based off the User account who is performing the "Add" functionality.

Adding an Event

To navigate to the ADD EVENT wizard, click on the EVENTS tab and then select EVENTS: ADD. The Add Wizard has up to five steps, plus a final *Preview and Finalize Event* view.

Step 1: Main Information



The WYSIWYG Editor can be enabled or disabled for individual user accounts. If enabled, the WYSIWYG lets you create your event description text in the normal WYSIWYG mode or HTML mode. You can also easily "Preview" the text by selecting the preview tab option. If the WYSIWYG is not enabled for a user, then they will see a standard text field.

The steps in the add event process are controlled through a bar at the bottom of the wizard allowing users to finalize an event faster. Clicking "Preview" takes you immediately to the last screen to finish the event and release it.

- **Department**: Displays a drop-down including all of the Departments that the User Account has Permission to access. If a user only has permission to one department, then the department name will display as the default and will not require the user to make a selection. (This is a required field/selection)
- **Event Name**: Alpha-numeric, open-text field that allows for up to 100 characters maximum. This field allows HTML, though it is not recommended since it may cause formatting issues on the front-end visitor display screens and in emails sent to your visitors with links to this event. (This is a required field)
- **Place Event on Selected Marketing Calendar(s)**: Displays a drop-down including the following Event marketing types (Private/Public/Both). This drop-down only displays if the Calendar license includes the Private Module and if the User has been granted the privilege to Add/Modify/Delete and View Private Events.
- **Highlight an Event**: This checkbox only displays if a User Account has been given the privilege to highlight events.
- **Category(s)/Subcategory(s)**: Displays a drop-down box including: Select, Select All, Select Multiple, Category Name(s) and then indented under each Category, each Subcategory added within that Category. This is a required field and at least one Category or one Category/Subcategory combination must be selected for each event. If the User Account selects "Select All", then the event will be added within each Category/Subcategory classification area. If "Select Multiple" is chosen, then the User Account will be presented with a new window on the right side of the screen where they will see a breakdown of all available Category(s) and Subcategory(s) and then can use checkboxes in order to select multiple. Categories that are displayed with an asterisk in front of them denote a Private Only Category. If you select Public as your Event Type then Private categories will not display as options. Any Category that has a locked status will display with (Locked) on the end of the Category name.

Category/Subcategory Selection Function Box

This function box will show all Categories listed with checkboxes available beside of each. To the left of each Category name there is a possibility of the following:

- **Nothing displays except the Checkbox for Selection** – this means that there are no Subcategory(s) available within that Category for selection.
- **A (-) displays beside the Checkbox for Selection** – if a Category includes Subcategory(s), and the Category list has been expanded, then the (+) becomes a (-) so that the User can click the (-) in order to collapse the Category list of Subcategories. Using this (-) does not remove any of the checkbox selections made within that area.
- **A (+) displays beside the Checkbox for Selection** – the User can click on the (+) in order to expand that selection and see the list of available Subcategories.

Once all of the selections have been made from the "Select Multiple" Category/Subcategory window, the user can select from the following buttons within that window:

- **Cancel**: Cancels out of the window, does not save any of the selections, closes the window and brings the user back to the Add Event main wizard screen.
- **Deselect All**: Resets all of the checkboxes back to not being selected.
- **Select All**: Expands all Categories that have Subcategory selections and selects all Category/Subcategory.

- **Submit**: Submits the form contents, saves the selections and displays the selections back on the main Add Event – General Details screen, under *Category(s)/Subcategory(s).

Once the user submits their selections the area within the Add Event – General Details form where the Category/Subcategory drop-down selection appeared, there will now be a list displaying the selected Category(s)/Subcategory(s), along with a “Change” button to the right to allow the user to adjust their selections.

Rules of Categorization Selection and Display of Events for visitors in the visitor list views:
Rules on Selecting Category Level: If you would like to add the event to only specific Subcategories, then click the (+) to expand the Category and view all available Subcategories. You may expand more than one Category to select Subcategories from across multiple Category level classifications.

If you select a Subcategory, then the event is also automatically added to the main Category as well.

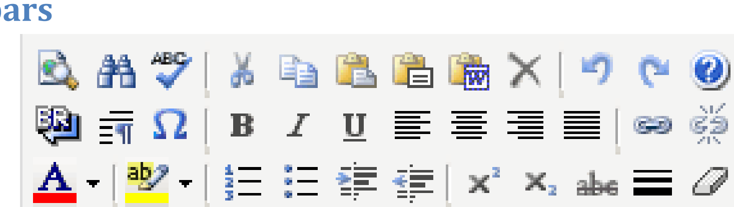
> **Example:**
> Category = Meetings
> Subcategories = Sales, Marketing, Products, Management

If the event is added to the Products Subcategory then it is also part of the Meetings category.

Categories that are displayed with an asterisk in front of them denote a Private Only category. If you select Public as your Event Type, Private categories will not display as options. Any Category that has a locked status will display with (Locked) on the end of the Category name.

- **Event Description**: This field may display as either a WYSIWYG editor or as an open text field. The type of field/options that display are dependent on the privileges that have been granted to a user account. If the field displays as an open text area (without WYSIWYG functionality) then the field allows for up to 1,000 alpha-numeric characters to be entered. The field also allows for HTML tags to be entered. You can also enter a hypertext link in this field using "http://", "https://" or "www." and the hypertext link will be automatically created for you on the front-end view of the Calendar details. **(This is a required field)**
    - WYSIWYG Editor: The user can create and edit their event description in WYSIWYG mode or HTML mode. There are tabs along the bottom of the editor that allow the user to easily switch between the views. There is also a third tab option for "Preview" which if selected allows the user to preview what the event description display would look like if submitted as it is currently entered. If text is entered (or HTML) using the WYSIWYG editor, then the field allows for up to 6,000 characters to be entered to accommodate both text and HTML characters. For help understanding the WYSIWYG editor, click the help icon in the upper right corner of the menu and toolbars area of the WYSIWYG editor.

Menus and Toolbars



Button/Menu Option	Function Description
Preview	preview the current page
Find and replace	find and replace the text in the editor's content area
Spell	launch the spell checker
Cut	Performs normal function of cutting
Copy	Copy the current selection and store it in the clipboard
Paste	Insert content from the clipboard
Paste Plain Text	Paste plain text (no formatting)
Paste from word	Paste content copied from Microsoft Word, removes the web-unfriendly tags
Delete	Delete the current selection
Undo	Undo the last operation
Redo	Redo the last operation
Break	Insert Line Break
Paragraph	Insert a paragraph
Special Character	Insert a special Character from a list
Bold	Bold selected text
Italicize	Italicize the selected text
Underline	Underline selected text
Help	Provides information to assist

Button/Menu Option	Function Description
Left Justify	Align the selected content to the left
Center	Center the selected text
Right Justify	Align selected content to the right
Justify None	Justify Full
Insert Link	Add a link to the text on your page
Remove Link	Remove a hyperlink from selected content
Font Color	Change color of the selected text
Highlight	Highlight the selected text
Numbered List	Insert a Numbered list
Unordered List	Insert an unordered list
Indent	Indent the selected content
Outdent	Outdent the selected content
Subscript	Change the selected text to subscript
Superscript	Change the selected text to superscript
Strike Through	Strike through the selected text
Insert Rule	Insert a horizontal rule at the selected position
Remove Format	Remove formatting of selected text

NAVIGATION OPTIONS WITHIN THIS WIZARD

To **CANCEL** out of the Add Event Wizard, click the **CANCEL** button and you will be returned to the main menu of Calendar and no event data will be saved.

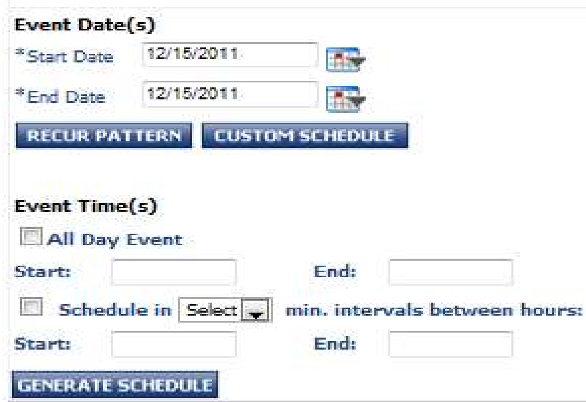
Continue to the next step of the Add Event process by clicking the **NEXT** button. If there have been fields that have not been completed correctly you will receive an error message indicating the fields that must be changed before finishing the process. Please correct these and click **NEXT**.

The **BACK** button is not enabled on this screen. Click **FINISH** to complete your event entry and navigate to the Preview and Finalize Event screen. On the Preview and Finalize Event screen you can either **SAVE** your event as it is currently entered or **RELEASE** the event live to the Calendar or for processing by the appropriate administrator(s) or category owner(s).

Step 2: Scheduling & Facilities

Selecting Event Date(s)

- **Start Date**: You may either enter in a valid date within the text field provided (mm/dd/yyyy) or you may use the Calendar Date selector to display an interactive Calendar interface to select your start date.
- **End Date**: The end date field is automatically updated to reflect the same date entered/selected for the event start date.



***NOTE**: most events will have the same start and end date. Rarely will you want to change the end date of the event to be a different date than the start date since within Calendar this essentially creates a multi-day, continuous duration event. A true multi- day event is something that begins at a select time on one date and continues through to the end date selected and end time selected without any break. An example of a multi-day event would include a "Dance-a-Thon" or "Fall Registration" if registration can be conducted at any time throughout the dates selected. Otherwise, you will want to use the RECUR PATTERN or CUSTOM SCHEDULE options to select additional dates for your event in order to build a series, where each date selected has a distinct start and end time on each of the dates chosen.

Recur Pattern

The options provided once this button is selected are based off the start date and end date selected for your event. Options based off a single day event series include:

- Daily Every (#) Days
- Every (#) Weeks: Checkboxes for Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday. (Here you can select the days for your intended schedule/pattern of days the event should be displayed each week)
- On the(x) day that corresponds to the Start Date selected for every (#) Month(s). - (i.e. On the fourth Wednesday)
- of every (#) Month(s)
- On day (x) of every month
- Yearly on this date

End Repeat Schedule

- End after (#) of Occurrences:
  NOTE: Each individual day that the event should occur must be accounted for in the total number entered here.
- End On: You may either enter in a valid date within the text field provided (mm/dd/yyyy) or you may use the Calendar Date selector to display an interactive Calendar interface.

NOTE: Please refer to the User Guide for this product for examples and additional details of creating a series schedule.

Recurring Multi-Day Event (Continuous Duration)

It is possible to have a multi-day event that you need to recur, but this will most likely be very rare. If you do select a different end date for your event than the start date, and also choose RECUR PATTERN, then the options will include:

- Every (#) Weeks
- On the (x) set number day that corresponds to the Start Date selected (i.e. Wednesday, Thursday, Friday) of every (#) Month(s)
- On dates (x+) of every (#) Month
- Yearly on these dates

End Repeat Schedule

- End after (#) of Occurrences
- End On: You may either enter in a valid date within the text field provided (mm/dd/yyyy) or you may use the Calendar Date selector to display an interactive Calendar interface to select your date.
  NOTE: Please refer to the User Guide for this product for examples and additional details of this event schedule type.

Custom Event Series

If you choose this option, then you will be required to select the dates of each occurrence within your Custom Event Series from Calendar Grid interfaces that are presented on the screen. You can change the Start Month; Start Year; and Number of Months which will change the number of calendar grids available for selection of your series dates. Simply click on each of the individual dates of your event series to create your custom schedule.
NOTE: The Start Date and End Date fields are disabled when this option is chosen and you will be required to physically select the first date in your series from the Grids provided.

When to Use "Custom Event Series"

Custom Event Series are for events that start and end on the same day for each occurrence in the series. The difference between a custom event series and a recurring single day event series, are that custom event series do not follow a specific pattern and dates for the series are selected individually. An example of when you would use this type of event includes:

Event Name: Faculty Speaker Series

Event Description: Sign up for this popular event series and you will receive a notice announcing the speaker features for each date in this exciting series!

Series Dates: April 21, May 13, June 3, June 27, July 7 and August 18

Start Time/End Time for Each Occurrences in the Series: 5:00 PM - 8:00 PM

Event Time Options

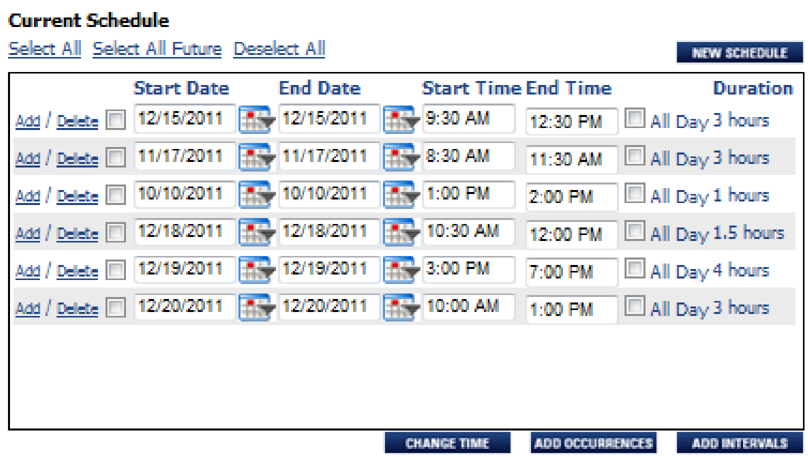
If "All Day:" is selected, this checkbox disables the fields for Start Time and End Time. If the checkbox for All Day Event is left unselected, then you can choose to select from the Start Time and End Time selectors. It is optional if you want to enter a Start Time or End Time for the Event. If you would like to add an event notice to display without a Start Time/End Time or without the designation of All Day Event, then do not check the box for All Day Event and do not select a Start Time or End Time. Time selections made from this main screen will be applied to all occurrences of your series as the default starting and ending times. You may enter the time in the text field provided (00:00 AM) or you may click inside the text field to use the selector. The End Time field will automatically show the duration between the start time already selected and the end time options in the selector.

Interval Scheduling

Select the checkbox that states "Schedule in X intervals between hours selected below" in order to select from the drop- down provided, the interval in minutes, that you would like to utilize in order to create a group of event occurrence times between a specific starting and ending time on each of the dates selected from your Schedule/Pattern. You will need to select the interval (in minutes) from the drop-down menu first and then select from the start and end time drop-down options when to begin creating the event occurrences and when to end the event occurrences on each date.

If you select to schedule in intervals, then the checkbox for All Day and the Start and End Time options above the checkbox will be disabled.

***NOTE**: When using Interval Scheduling, each occurrence set between the start and end time selected will occur back to back with the preceding and following occurrence.



Generate Schedule - Customizing your Schedule

Generate Schedule: Click this button in order to SAVE your schedule. Once you have generated your schedule, the screen will refresh with your saved schedule and you will be able to further customize your schedule if you have the need to add more occurrences, change dates or times for individual occurrences and other options identified below. The Current Schedule window allows for the following schedule customizations:

- **New Schedule**: Use this button to start over with a brand new schedule. This will completely remove all previously selected scheduling options and return you to the start of Step 3 of the Event wizard.
- **Add/Delete**: Select Add beside of any occurrence in order to add another occurrence on the same date. You will be required to select a start and end time for the occurrence and All Day will not be an option as two occurrences on the same date cannot overlap. Select "Delete" beside of any occurrence in order to delete that occurrence from your schedule. You cannot delete the last occurrence in an event. If you want to start over, please select the New Schedule button.
- **Start Date/End Date/Start Time/End Time**: The options for modifying/selecting start date, end date, start time or end time are the same as on the master schedule screen. The duration of each occurrence is also shown with this information and is updated based off any changes made to each occurrence.

- **Change Time**: The Change Time button allows you to change the time for all occurrences selected in the list at one time. You may click the checkbox for individual occurrences or use the Select All, Select All Future links at the top of the Current Schedule window.
- **Add Occurrences**: Select this option to view a pop-up window with the option to enter in a number of occurrences to be automatically appended to the end of your current series schedule. The dates of each occurrence added through this option will follow your original schedule selections/pattern as much as possible and you will be able to modify any occurrence dates or times as required. No default times are displayed for occurrences added through this option.
- **Add Intervals**: You may select the dates from your Current Schedule window and then select the interval between the start and end time you enter that you want Calendar to automatically generate additional occurrence intervals and add them to your Current Schedule. If your event is a multi-day event this option will not be enabled. Continue to the next step of the Add Event process by clicking the NEXT button. If there have been fields that have not been completed correctly you will receive an error message indicating the fields that must be changed before finishing the process. Please correct these and click NEXT.

  Do Not Display End Date/Time: New option to not show an end date or end time for the event series or event occurrence being modified. This is optimal for events where an end time is not known like a party, dance or theater event. Select the checkbox to use this option: **This event should not display an end date or end time**.

Publish or Unpublish Events

Choose from a publish date/time and an unpublish date/time option to force an event to show or not show on a front facing Marketing public or private calendar. If left blank the event will show by default. This option allows users to plan events far into the future and get all internal category approvals but just not promote the event until they are ready. It is also useful in staging content so an event could be added on Friday evening but not show on the Calendar until Monday morning when it is ready to be announced with the advantage that this is all set up ahead of time. NOTE: If an event is not current "published" it will not show in any feeds such as RSS or the Syndicated List option.

TIP: Individual occurrences can be modified under Modify/Cancel/Delete Events. You can use this feature to further customize specific occurrences within your series (including event time) Example: A theater production occurring on Friday, Saturday and Sunday may have a different start time for the Sunday matinee production.)

Facility Search Options

Search options include: Facility(s): List box where you can use the CTRL key to select multiple locations, buildings or rooms depending on how you want to search and/or classify the locations associated with your event. Above this list box there is a Search option as well to search for only those rooms in a specific building or by a specific location.

Users with the appropriate privileges may add new locations, buildings or rooms from this screen. There are three buttons available and if selected each opens a pop-up window on the right side of the screen with the appropriate fields required to complete the add process for the location, building or room. Required fields are noted with an asterisk.

ADDING NEW LOCATIONS This function box allows you to enter in a new Location which will then become available systemwide. The only required field that must be entered within this window is Location Name. The exact location fields displayed in this window depend on if Domestic or International Location Fields are enabled. Once the Location information has been entered, click the SUBMIT button to save the new location and return to the main Add Event: Contact & Location Information screen.

The location that you add from this window will become the default value displayed in your location drop-down on the main Add Event - Contact/Location Information screen.

There is also a similar window for entering in a new Building and a New Room. Each window allows you to create a new Building or Room that becomes available systemwide. The required fields on each of those screen is noted by the asterisk (*) before the field name.

Once the locations, buildings and/or rooms have been selected click the SAVE button to add them to your list. You may choose to add locations, buildings and/or rooms multiple times using the SAVE option until you are ready to go to the next screen.

NAVIGATION OPTIONS WITHIN THIS WIZARD

To **CANCEL** out of the Add Event Wizard, click the **CANCEL** button and you will be returned to the main menu of Calendar and no event data will be saved.

Select the BACK button to navigate back to the previous screen in the wizard and make changes. All current information entered about the event will be maintained.

Continue to the next step of the Add Event process by clicking the **NEXT** button. If there have been fields that have not been completed correctly you will receive an error message indicating the fields that must be changed before finishing the process.

Click **FINISH** to complete your event entry and navigate to the Preview and Finalize Event screen. On the Preview and Finalize Event screen you can either SAVE your event as it is currently entered or **RELEASE** the event live to the Calendar or for processing by the appropriate administrator(s) or category owner(s).

Step 3: Request Resources

This option is available for users of the Facilities Management system. It is the ability to request resources (portable items not available in a room) to be brought to an event such as chairs, tables, trainers, security services, car fleet, etc.

Step 4: Images & Attachments

Upload Image: This function provides the ability to upload an image that will display on the front-end of the Calendar. The image must be either a .GIF or a .JPG and the maximum file size should not exceed 80K. The maximum pixel size of an uploaded image when displayed to the visitor on any screen is 350 pixels wide. The aspect ratio of any image that you upload will remain constant.

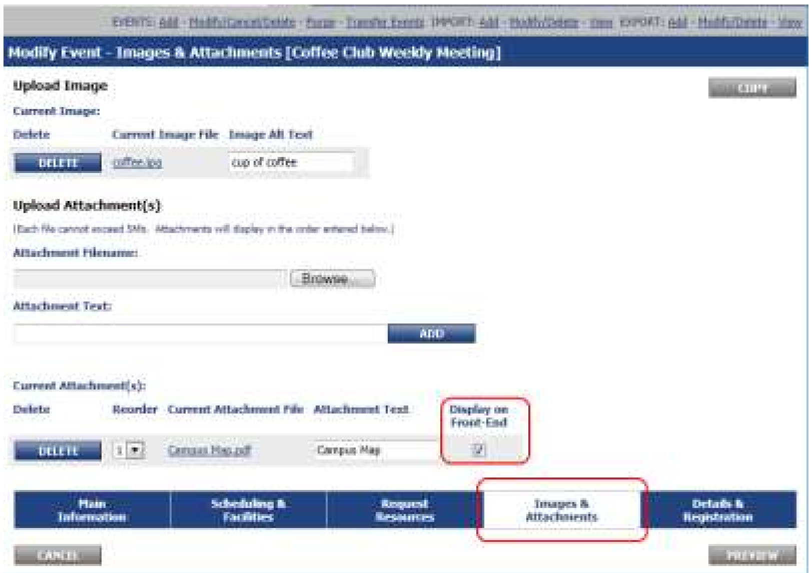


Image Alt Text: This text field allows you to enter Image Alt Text if an Image has been uploaded. The image alt text is required if any image has been uploaded. (The maximum character limit is 75 characters).

You must click the ADD button in order to finalize adding your image to the event and then the image and alt text will display with the following capabilities:

- Click on the Image Name to open a preview of the image.
- Click the DELETE button beside the image in order to delete it from the event and add a new image.
- Change the Image Alt Text within the editable text field.

The upload field is disabled once you have already uploaded an image file. It is not re-enabled unless you select the DELETE button.

Upload Attachments: This function provides the ability to browse and upload attachment files that will display as links within the event details screen on the Calendar front-end interface. The attachments can be any of the following document types: .doc, .docx, .xls, .xlsx, .ppt, .pptx, .vsdx, .wav, .wmf, .wma, .jpg, .gif, .pdf, .avi, .mp3, .ram, .qt, .swf. Each attachment cannot exceed the maximum set per attachment within the Configuration area of your Calendar administration area. The default set to file size upload for attachments is 5mb.

The total number of attachments that can be uploaded and linked from any event is set to three (3) by default but this number can be modified within the Configuration area of your Calendar administration area. If the maximum set is zero (0) then this feature is completely disabled. Each user account can also be set individually to have access to upload images and/or attachments.

Attachment Link Text: This is a text field where you can enter text that will serve as the link that a Visitor sees on the Calendar front-end interface and that they can select in order to download/open the attachment file. The Attachment link text is not required. (The character limit is 75 characters).

Display on Front-End: Selection of this checkbox allows for the attachment to display on a public or private calendar front-end view. This is useful for internal forms or details about an event that should not show for the end user.

You must click the **ADD** button in order to finalize the addition of your attachment to the event and then the attachment filename and link text will display below the upload box and you will have the capability to:

- Click the DELETE button beside the attachment in order to delete it from the event and add a new attachment.
- By default, the first attachment assumes the first position and then each attachment thereafter takes the next available position. However, you can use the drop-down boxes to re-order the attachments.
- Change the Attachment Link Text.
- Click on the Attachment Name to open a copy of the attachment.

The upload field is disabled once you have reached the attachment limit and is renabled when you delete an attachment.

TIP: For additional tips on how to maximize event images, see your Client Portal page for Tips and Tricks on "Optimizing Images for Upload into Events".

NAVIGATION OPTIONS WITHIN THIS WIZARD

To **CANCEL** out of the Add Event Wizard, click the **CANCEL** button and you will be returned to the main menu of Calendar and no event data will be saved. Select the **BACK** button to navigate back to the previous screen in the wizard and make changes. All current information entered about the event will be maintained.

Continue to the next step of the Add Event process by clicking the **NEXT** button. If there have been fields that have not been completed correctly you will receive an error message indicating the fields that must be changed before finishing the process. Please correct these and click **NEXT**. Click **FINISH** to complete your event entry and navigate to the Preview and Finalize Event screen. On the Preview and Finalize Event screen you can either **SAVE** your event as it is currently entered or **RELEASE** the event live to the Calendar or for processing by the appropriate administrator(s) or category owner(s).

Step 5: Details & Registration

This function includes options for setting up location and contact information for the new Event that you are entering.

Use the following instructions to complete Step 4:
There are no required fields on this screen. You can complete your desired fields, or select the NEXT button to bypass this screen and go directly to the preview and finalization of your event.

Contact Information
The Name, Phone, and Email fields are auto-populated with the Department's default information located in the Add/Modify Department screen. However, all fields can be modified for individual events.

- **Name**: This field is limited to 100 alpha-numeric characters.
- **Phone**: This field is limited to 20 numeric characters.
- **Email**: This field is limited to 255 alpha-numeric characters.

  NOTE: If visitors to your Calendar choose to "Add to My Calendar", they will be downloading an iCal file to their personal email program in order to have a personal copy of the event information. iCal files require an email address for each event regarding event contact information. If you elect to leave this field blank and a visitor adds this event to their personal calendar using iCal, then your user email address will display as the default for the event contact information email address.

Other Event Information

- **"Custom Multi-Line Text Box"**: The name and type of field displayed here is dependent on what was entered in the Super User Configuration area. If no custom field name was provided, then the name of this field will be displayed as "**Admission Info**:". The default "Admission Info" field is an open text field that can contain up to 500 alpha-numeric characters. This default field allows you to enter HTML tags for additional formatting options. You can also enter a hypertext link in this field using "http://", "https://" or "www." and the hypertext link will be automatically created for you on the front-end view of the Calendar details. You may customize this field name as well as select a different field type including a drop-down selection box where you may select only one option from the drop-down list, or checkboxes where you may select as many options as you need from the provided list.
- **"Custom Multi-Line Text Box"**: The name and type of field displayed here is dependent on what was entered in the Super User Configuration area. If no custom field name was provided, then the name of this field will be displayed as "**Other Details**:". The default is an open text field that can contain up to 500 alpha-numeric characters. This default field allows you to enter HTML tags for additional formatting options. You can also enter a hypertext link in this field using "http://", "https://" or "www." and the hypertext link will be automatically created for you on the front-end view of the Calendar details.

  You may customize this field name as well as select a different field type including a drop-down selection box where you may select only one option from the drop-down list, or checkboxes where you may select as many options as you need from the provided list.
- **"Custom Multi-Line Text Box"**: The name and type of field displayed here is dependent on what was entered in the Super User Configuration area. If no custom field name was provided, then the name of this field will be displayed as "**Ticket Order Internet Address**". The default "Ticket Order Internet Address" field is an open text field that can contain up to 500 alpha-numeric characters. This default field allows you to enter HTML tags for additional formatting options. You can also enter a hypertext link in this field using "http://", "https://" or "www." and the hypertext link will be automatically created for you on the front-end view of the Calendar details.

  You may customize this field name as well as select a different field type including a drop-down selection box where you may select only one option from the drop-down list, or checkboxes where you may select as many options as you need from the provided list.
- **"Custom Multi-Line Text Box"**: The name and type of field displayed here is dependent on what was entered in the Super User Configuration area. If no custom field name was provided, then the name of this field will be displayed as "**Remarks**". The default "**Remarks**" field is an open text field that can contain up to 500 alpha- numeric characters. This default field allows you to enter HTML tags for additional formatting options. You can also enter a hypertext link in this field using "http://", "https://" or "www." and the hypertext link will be automatically created for you on the front-end view of the Calendar details.

  You may this field name as well as select a different field type including a drop-down selection box where you may select only one option from the drop-down list, or checkboxes where you may select as many options as you need from the provided list.

Event Registration without Advanced Registration Module

- **Enable Registration**: Users who have been granted the privilege to enable event registration will see a checkbox at the bottom of this screen for "Enable Registration". If selected, then the registration icon will be enabled on the event details screen and visitors to the event details can click the registration icon to complete a form to register for the event.

Registration Type

- **Mandatory Complete Series Registration Only**
  If selected, whenever a Calendar visitor clicks on a registration icon from a series event, they will see only the option to register for the entire series and not for individual occurrences within the series. By completing the registration, the event administration area will include only one "event" listing for approving/denying, etc. the registrant for the entire series. When clicking on the registrant link, the user managing the registrants can see the series details and all dates included but only process at the series level.

  With this option selected, the Calendar interface will only display the registration option for the series up to the start date/time of the first occurrence in the series. Once the first occurrence start date/time has passed, registration will be removed from the event, including the first date/time occurrence and all occurrences thereafter. This is due to the fact that selecting this option enforces that the registrant is signing up to attend all event occurrences and since one is "past" they cannot complete that requirement, so registration is removed.
- **Series Registration Enforced with Partial Series Allowed**
  Whenever a Calendar visitor clicks on a registration icon from a series event, they will see only the option to register for the entire series and not for individual occurrences within the series. By completing the registration, the event administration area will include only one "event" listing for approving/denying, etc. the registrant for the entire series. When clicking on the registrant link, the user managing the registrants can see the series details and all dates included but only process at the series level.

  With this option selected, the Calendar interface continues to display the registration option throughout the entire series date/time span, up to the start date/time of the last occurrence in the series. By selecting this option the user is saying that even though series registration is enforced, visitors may register to attend the series, even when they have missed occurrences because the start date/time of one or more occurrences has passed. This allows for registration at the series level up to the last occurrence date/time. By completing the registration, the event administration area will include only one "event" listing for approving/denying, etc. the registrant for the entire series. When clicking on the registrant link, the user managing the registrants can see the series details and all dates included but only process at the series level. The only way that the user managing registrants knows which registrants attended all occurrences vs. registered after the series commenced, is by reviewing the registration date/time stamp in the administration area.
- **Single Occurrence Level Registration Only Enforced**
  When a Calendar visitor clicks on a registration icon from any date/time occurrence in a series, they will

see the registration option for that occurrence ONLY and they will not see the link to see all other occurrences in the series. They are only allowed to register for one occurrence and if the registration process is completed and approved, and they attempt to register for another occurrence, they will be presented with a message that they cannot register for more than one occurrence in the series as well as the details on the occurrence for which they are already approved.

The registration icon will display and if the visitor is already registered for an occurrence in the series and selects the icon, then the registration form screen will not display the registration form fields, but rather a message stating that "You are already registered for the event date/time listed below. You may not register for more than one data/time within this event series." The occurrence name and date/time that the visitor is already registered for will display for informational purposes only. There will also be text included regarding how the member can withdraw/cancel their existing registration. That text is current set to "If you would like to cancel your existing registration and register for a new date/time, then please use the cancellation option available in the email confirmation that was sent when your registration was approved."

- **Multiple Occurrence Registration Allowed**
  When a Calendar visitor clicks on a registration icon from any date/time occurrence in a series, they will see the registration option for that occurrence as the default on the top of their registration form, however they will ALSO see the option to "Click here to register for other occurrences within this series." and if selected all future occurrence dates and times will display as individual options for registration and the visitor may check any checkboxes for those occurrences that they would like to register.

  Within the administration area of Calendar, each occurrence in a series that has "Multiple Occurrence Registration Allowed" will display individually as a separate "event" with separate registrants that can be processed on an event occurrence basis.
- **Maximum Number of Registrants:** For events having registration enabled, you may set a maximum number of registrations. See *Display Registration Spaces Still Available* to control displaying the number of available registration spaces on the event details screen. Registration is closed by the Calendar when the number of approved registrations reaches this maximum number. Visitors clicking on a link to an event that has met its registration limit receive a message that the event’s registration is closed.
- **Registration Deadline:** New registrations are not accepted from the front end after the date or number of hours you specify here. You can change this deadline after the event has been published, but the new date or time must be after the current date or time.
- **Cancellation Deadline:** You may use this field to signify the last point at which registration cancellations will be accepted, and any monies may be refunded, if applicable. A valid date (mm/dd/yyyy) can be manually entered into the text field or the Calendar Date Selector can be used to select a valid date. Alternatively, you may select a number of hours to specify precisely when registration may be cancelled, such as 24 hours before the event begins.
- **Display Registration Spaces Still Available:** Options include "Yes" and "No" radio buttons. The default is set to "No" which means that the number of registration spaces still available for the event will not show with the event details on the front-end Calendar views. If "Yes" is selected, the Public and Private Front-End Calendar Event Details Views will display the number of registration spaces remaining for the event.
- **Display text when no spaces are remaining:** The default text displayed where no registration spaces are remaining/available is, "There are no registration spaces remaining for this event." If you would like a custom message displayed with the event details on the front-end Calendar view screens, please edit the

text within the field provided. This field allows for up to 100 maximum alpha-numeric characters to be entered.

Continue to the next step of the Add Event process by clicking the **NEXT** button. If there have been fields that have not been completed correctly you will receive an error message indicating the fields that must be changed before finishing the process.

Event Registration - Including Advanced Registration Module

- **Enable Registration**: Users who have been granted the privilege to enable event registration will see a checkbox at the bottom of this screen for "Enable Registration". If selected, then the registration icon will be enabled on the event details screen and visitors to the event details can click the registration icon to register for the event.
- **Registration Form Template**: Select the registration form that you would like to apply to your event from the dropdown menu. Only those forms which you have been granted permission to utilize will appear in your drop-down menu. You may select a form and click the PREVIEW button if you would like to preview the form prior to finalizing your event submission. If a form is selected that includes payment options, then the screen will be refreshed and payment setup fields will be displayed within this step.

  ***IMPORTANT NOTE**: Once you enable a registration form for an event and there is at least one (1) approved registrant, you will no longer be able to modify the form fields. Please be sure to completely finalize your form before adding it to an event.
- **Registration Rules**
  - **Mandatory Complete Series Registration Only**
    If selected, whenever a Calendar visitor clicks on a registration icon from a series event, they will see only the option to register for the entire series and not for individual occurrences within the series. By completing the registration, the event administration area will include only one "event" listing for approving/denying, etc. the registrant for the entire series. When clicking on the registrant link, the user managing the registrants can see the series details and all dates included but only process at the series level.

    With this option selected, the Calendar interface will only display the registration option for the series up to the start date/time of the first occurrence in the series. Once the first occurrence start date/time has passed, registration will be removed from the event, including the first date/time occurrence and all occurrences thereafter. This is due to the fact that selecting this option enforces that the registrant is signing up to attend all event occurrences and since one is "past" they cannot complete that requirement, so registration is removed.
  - **Series Registration Enforced with Partial Series Allowed**
    This means that whenever a Calendar visitor clicks on a registration icon from a series event, they will see only the option to register for the entire series and not for individual occurrences within the series. By completing the registration, the event administration area will include only one "event" listing for approving/denying, etc. the registrant for the entire series. When clicking on the registrant link, the user managing the registrants can see the series details and all dates included but only process at the series level.

    With this option selected, the Calendar interface continues to display the registration option throughout the entire series date/time span, up to the start date/time of the last occurrence in the series. By selecting this option the user is saying that even though series registration is enforced, visitors may register to attend the series, even when they have missed occurrences because the start date/time of one or more occurrences has passed. This allows for registration at the series level up to the last occurrence date/time. By completing the registration, the event administration area will include only one "event" listing for approving/denying, etc. the registrant for the entire series. When clicking on the registrant link, the user managing the registrants can see the series details and all dates included but only process at the series level. The only way that the user managing registrants knows which registrants attended all occurrences vs. registered after the series commenced, is by reviewing the registration date/time stamp in the administration area.

- **Single Occurrence Level Registration Only Enforced**
  This means that when a Calendar visitor clicks on a registration icon from any date/time occurrence in a series, they will see the registration option for that occurrence ONLY and they will not see the link to see all other occurrences in the series. They are only allowed to register for one occurrence and if the registration process is completed and approved, and they attempt to register for another occurrence, they will be presented with a message that they cannot register for more than one occurrence in the series as well as the details on the occurrence for which they are already approved.

  The registration icon will display and if the visitor is already registered for an occurrence in the series and selects the icon, then the registration form screen will not display the registration form fields, but rather a message stating that "You are already registered for the event date/time listed below. You may not register for more than one data/time within this event series." The occurrence name and date/time that the visitor is already registered for will display for informational purposes only. There will also be text included regarding how the member can withdraw/cancel their existing registration. That text is current set to "If you would like to cancel your existing registration and register for a new date/time, then please use the cancellation option available in the email confirmation that was sent when your registration was approved."

- **Multiple Occurrence Registration Allowed**
  This means that when a Calendar visitor clicks on a registration icon from any date/time occurrence in a series, they will see the registration option for that occurrence as the default on the top of their registration form, however they will ALSO see the option to "Click here to register for other occurrences within this series." and if selected this option will function as it does in 3.6 of Active Data Calendar where all future occurrence dates and times will display as individual options for registration and the visitor may check any checkboxes for those occurrences that they would like to register.

  Within the administration area of Calendar, each occurrence in a series that has "Multiple Occurrence Registration Allowed" will display individually as a separate "event" with separate registrants that can be processed on an event occurrence basis.

- **Maximum Registrants**: In addition to enabling registration for the event, you may also select to set a maximum number of event registrants and if the number of available registration spaces should display on the event details screen. The maximum number of registrants is based off the number of approved registrations in the administration area.

The maximum number of registrations cannot be set to a number that exceeds the maximum capacity of the room scheduled for the event (and based off the setup chosen). If you attempt to make the number great than the maximum capacity, they will receive the following warning message when they click the "NEXT" or "FINISH" buttons:

> The maximum number of registrants entered exceeds the maximum capacity for the room and setup that you selected. Please adjust your maximum number of registrants or use the BACK button in the navigation options on this screen to return to your event location/schedule area for modifying your selections.

- **Registration Deadline**: A valid date (mm/dd/yyyy) can be manually entered into the text field or the Calendar Date Selector can be used to select a valid date. If a registration deadline is selected/entered, then registration will be automatically turned off from the front-end Calendar screens on that date, regardless of whether the maximum registrants has been reached or not. You may always go into Modify Event to extend the date or make the deadline sooner, however the date selected must always be after the current date. When maximum registrants are set and a registration deadline is set, then the first "rule" met will supersede the other rule.

- **Cancellation Deadline:** You may use this field to signify the last point at which registration cancellations will be accepted, and any monies may be refunded, if applicable. A valid date (mm/dd/yyyy) can be manually entered into the text field or the Calendar Date Selector can be used to select a valid date from the interactive Calendar grids. Alternatively, you may select a number of hours to specify precisely when registration may be cancelled, such as 24 hours before the event begins.

- **Display Registration Spaces Still Available**: Options include "Yes" and "No" radio buttons. The default is set to "No" which means that the number of registration spaces still available for the event will not show with the event details on the front-end Calendar views. If "Yes" is selected, then a message will display at the top of the event details screen on all Public and Private Front-End Calendar Event Details Views that states the number of registration spaces remaining for the event.

- **Display text when no spaces are remaining**: The default text displayed where no registration spaces are remaining/available is, "There are no registration spaces remaining for this event." If you would like a custom message displayed with the event details on the front-end Calendar view screens, please edit the text within the field provided. This field allows for up to 100 maximum alpha-numeric characters to be entered.

Registration Payment Information

- **Event Cost**: The event cost text field allows you to enter up to 12 numeric characters, however the total cost will be rounded to the closest 2 decimal dollar value. If the event has mandatory series registration selected for registration type, then the cost is for the entire series. If any other registration type is selected, then the cost entered is for each occurrence and if the registrant is allowed to select more than one occurrence, their total will be the number of occurrences selected multiplied by the event cost.
- **Discount Code Setup**
  This area appears when using a registration form that includes payment, after a
  - **View Codes**: This link displays a table of discount codes that have been entered by all users through the Calendar system and have been designated as "Allow General Use." Calendar does

not allow for duplicate discount codes and therefore you may select from previously entered codes to easily add them to your event.

  - **Discount Code:** This text field allows for up to 12 alpha-numeric characters to be entered as a unique discount code. Discount codes are not case sensitive when added by registrants.
  - **Discount Type:** Drop-down with two options: Percentage Discount and Fixed Dollar Discount. Based off the selection chosen, the field for discount details will have different business rules. If a discount code is added, then this is a required field.
  - **Discount Details:** If percentage is selected, then you must enter in a value between 1 and 100%. This field supports discounts that include decimal points up to 2 placeholders following the decimal point (99.99%). Rounding will be applied to the total cost if the cost plus discount creates a final cost that is more than two placeholders. If Fixed Dollar Discount is selected, then a dollar amount must be entered in the field for Discount Details and that fixed dollar amount can have a decimal with two placeholders as well. The maximum number of characters for this field is 12. Please do not enter in the % or $ signs.
  - **Applies To:** If percentage is selected, then the discount must always be applied to the total and this option will be disabled. If fixed dollar amount is chosen, then you may select to apply the discount to each individual occurrence in the series (thus providing a possibly higher discount total amount) or to the total registration cost (including all occurrence costs combined).
  - **Discount Deadline:** Enter a date (or click the date selector) to set a date until which the discount is automatically applied to the registration cost. This is useful for so-called “Early Bird Discounts”. After the specified date, the registration form no longer displays the code, giving instead an open text box where the registrant can enter a discount code for the event. After this date, this discount code (i.e., the one assigned a deadline) is disabled.
  - **Allow:** Select this checkbox if you would like your discount code to be added to the general list that can be access and applied by other users to their events. Be aware that any results related to discount codes will then be across all events where the discount is applied and not directly tied to any one event.
- **ADD Button**: Select this button to add the Discount Code to your event. You may add as many discount codes as you would like to your event, including unique discount codes and also those pulled from the General Use list. Registrants will only be able to apply one discount code to their event registration. Discount Codes added to the event will appear in a list on the screen. You may delete any discount codes that you need from your list until you are ready to proceed with your event entry.
- **Four Internal Configuration Fields**: Up to four custom fields will display within this area of the Add Event wizard and are dependent on the fields configured in the Setup area under the option entitled: "Custom Event Administration Information". The name and type of field displayed here is dependent on what was entered in the Super User Configuration area.
- **Internal Notes**: This field will not display on any front-end interface. Use this field within the Add Event or during the Modify Event process to enter in notes regarding the event, such as number of tickets or spaces available, number of attendees from previous years, materials required for the event, or other important items regarding the overall event planning/history. This allows other users administering the calendar or viewing event information in the download to be able to have historical or current information that they do not want externally viewable. This field allows for a maximum of up to 1,000 alpha-numeric characters.

NAVIGATION OPTIONS WITHIN THIS WIZARD

To **CANCEL** out of the Add Event Wizard, click the **CANCEL** button and you will be returned to the main menu of Calendar and no event data will be saved.

Select the **BACK** button to navigate back to the previous screen in the wizard and make changes. All current information entered about the event will be maintained.

Continue to the next step of the Add Event process by clicking the **NEXT** button. If there have been fields that have not been completed correctly you will receive an error message indicating the fields that must be changed before finishing the process. Please correct these and click **NEXT**.

Click **FINISH** to complete your event entry and navigate to the Preview and Finalize Event screen. On the Preview and Finalize Event screen you can either **SAVE** your event as it is currently entered or **RELEASE** the event live to the Calendar or for processing by the appropriate administrator(s) or category owner(s).

Preview and Finalize Event

This screen allows you to preview your new Event before "Finishing" the Add Event Wizard. There are various other options available from this screen and some of the functionality depends on your department permissions.

This is what the top half of the page looks like:

The Internal Comments Log allows you to enter in notes/text about an event that can be viewed and appended by another administrator, super user, category owner or third party recipient that you send this event to during the planning process. Enter your comments by clicking the COMMENTS button and launching the Comments window.

Advanced Registration Module

Clients with the Advanced Registration Module will see a column here denoting if any payment options were enabled for he event registration and the costs associated with registering for the events.

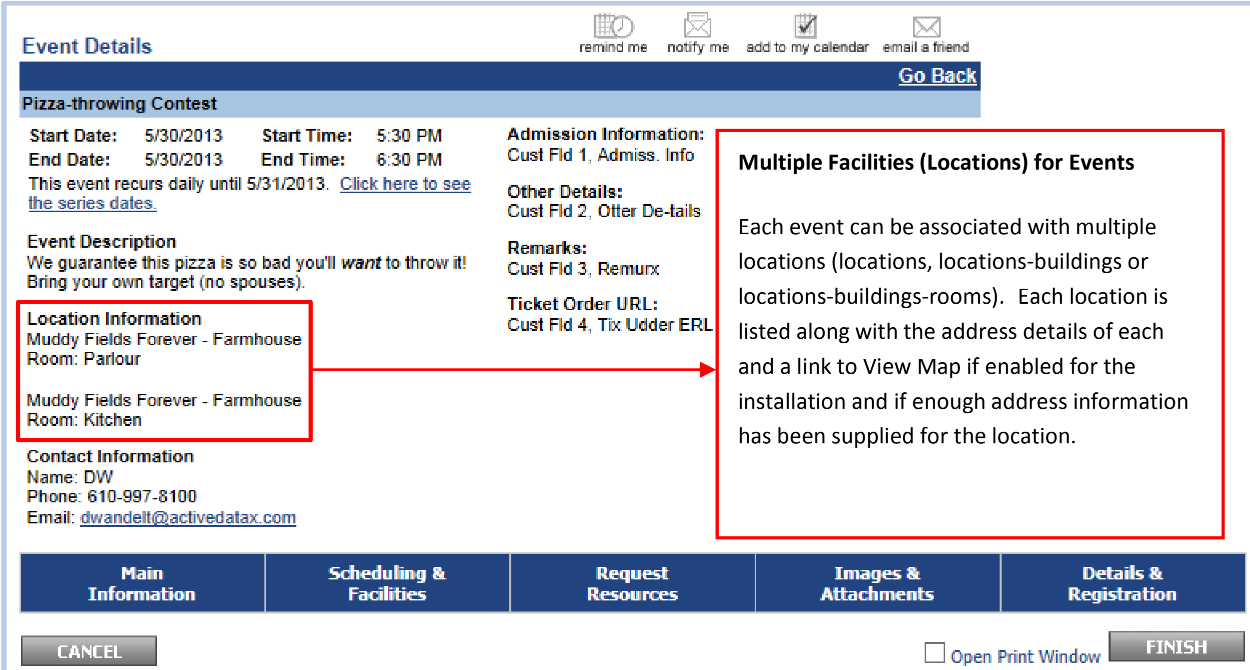
Within the area entitled “Event Registration Details” you will also see the details regarding the form associated for registration, the registration type, maximum registrants allowed, deadline for registration, spaces available and cost.

***NOTE**: Clients with Standard Registration will also see these details except for payment/cost details.

***NOTE**: Once entered, event comments cannot be edited or deleted. All comments include the submitter’s name and the date/time stamp.

TIP: When sending email notices to other calendar users or third party recipients, don't forget to select "Include Internal Notes and Comments" if you want the recipient to be able to view the comments log and add their own comments.

This is the lower half of the Preview and Finalize page, showing the event's details, and providing function buttons to **CANCEL** the operation or **FINISH** creating the event:



Open Print Window option: Select this option (beside the **FINISH** button) to automatically open your machine's Print dialog window after clicking **FINISH**.

Options from the Preview/Finalize Event Screen

Save Event: If selected and you click the FINISH button, the event will be stored in the database in a "Saved" status. This means the event is not published or available to your users.

Release Event: If selected and you click the FINISH button, for Calendar Administrators the event is released live to the Calendar and for User Level Accounts it is submitted to the Department Administrator(s) or Category Owner(s) for approval. If the user releasing the event has an administrator role for the Department to which the event was added, but they also selected to classify the event in at least one locked category, then the event will only be released live for the unlocked categories. The Category Owner(s) for the locked category(s) will still need to process the event before it goes live within the locked category(s).

Go to Event Notification Page: If this checkbox is selected and you click the FINISH button, then regardless of the action you selected for either saving or releasing your event, on completion of that action you will be navigated directly to the "Send Event Email Notice" screen for that particular event.

Do not notify category or event subscribers of this event change: Select this check box to not send the usual notification e-mail to subscribers to this category of event (or this specific event, in the case of a Modify/Cancel/Delete) of the addition or change you are making.

Comments

Click this button to open a pop-up window that shows all this event's previously submitted comments, and provides the ability to "Add Comments".

All other event details entered display on this final preview also.

Once the event has been finalized you can use the FINISH button to either post your event live to the Calendar(s) or send it for approval and processing by an Administrator(s) and/or Category Owner(s).

This is the final screen in the Add Event process. You can preview an actual copy of how the event will appear on the Visitor's front-end “Event Details” screen. You can use the BACK button to navigate back through the Add Event Wizard in order to make any necessary changes before finalizing your event.

Conflict Notification

This screen may also include additional information at the top of the screen, depending if Conflict Notifications have been enabled for your Calendar installation. A conflict notification is a warning message and link that allows you to click and preview a list of possible events that may conflict with your event, based off the event's location (location/building/room number) and the event dates and times.

A conflict notification does not require any action and you can still continue with finalizing the addition of your event. However, each conflict notification listing will provide the email address for the user who submitted the event that may conflict with the event that you are adding. This allows you to easily contact the user to coordinate and resolve the possible conflict if you choose to do so.

Marketing Tab

General Information

- Category(s)/Subcategory(s) where the event has been classified
- Department
- Event Type (Public, Private or Both) - Private and Both are only available if the Private Module is enabled.
- Highlighted (Yes/No)

Event Registration Information

If event registration has been enabled for your event, then the registration information setup for the event will be displayed for preview on this screen as well. The registration information includes:

- Registration Enabled/Disabled
- Maximum Registrants
- Registration Deadline
- Cancellation Deadline
- Standard Cost

If Registration is enabled for your event and your Calendar has standard registration (Advanced Registration Module is not enabled), then additional registration details that will display in this tab include:

- Form Template: Standard Form
- Registration Type
- Registration Deadline
- Cancellation Deadline
- Display Spaces: Yes or No

Also, if Advanced Registration is enabled for your installation, the additional registration details may display including:

- Form Template: Standard Form, or other form name as added and selected
- Payment Enabled: Yes or No
- Standard Cost: This will show “None” (if payment was not enabled), or a dollar value will display with the note of
- (Occurrence) or (Series) based off the rule applied.
- Discounts: A link will display to view (DISCOUNTS), if discount codes have been setup for the event. Click this link to open a pop-up window and view details on the discount codes setup for the event.

Internal Tab

The Internal Tab displays any fields that were configured under: Configuration/Setup Calendar/Custom Event Administration Settings and were enabled as Internal Only Fields. In addition to the four configurable fields, the Internal Notes field displays as well.

Modify/Cancel/Delete Event - Select Event

To navigate to the MODIFY/CANCEL/DELETE EVENT wizard, click on the EVENTS tab and then select EVENTS: MODIFY/CANCEL/DELETE.

This function is used to select an Event that you would like to modify, cancel or delete. When an event is cancelled, you will also have the option to select to reschedule the event.

TIP: Department administrators who administer over multiple departments can easily create "Saved Searches" for each department (or Category if you are a Category Owner) by selecting the department or category and any other pertinent criteria.

Then any time you want to quickly find events related to one of the departments or categories for which you administer, select that department/category saved search from the appropriate drop-down and have your event list automatically and quickly filtered

Use the following instructions to begin the modification/cancellation/deletion process:

Select an Event Name: The drop-down will default to the last 25 events that were added/modified by the user who is accessing this function. If you do not see the event that you would like to modify/cancel/delete from this default list, you may search for the event.

All saved searches appear in a drop-down in the top portion of the Search Events window. To reuse a saved search, select it from the drop-down menu entitled "Select Saved Search". Your saved search criteria will be automatically pre-populated in the appropriate fields. You may also delete a saved search by selecting it from the drop-down and then using the DELETE link provided.

Search for Events Window: This window allows you to search for events that you have either added or are an administrator for, based off your permission level.

- **# of Events Displayed**: Options include 25, 50, 75 and 100. The number selected dictates how many matching results till display in the list box of available events for selection.
- **Event Type**: Drop-down including the following Event Types (Private/Public/Both). This drop-down only displays if your installation includes the Private Calendar Module and if the User Account has the privilege to Add/Modify/Delete/View Private Events.
- **Department Name**: Drop-down of Departments to which you have been given Permission.
- **Search by Category(s)/Subcategory(s):** Select from the list of all available Category(s) and Subcategory(s).
- **Location:** Select a Location/Building/Room combination from the drop-down select box.
- **Keyword Search:** Use this text area to enter in a list of keywords as comma separated values. The maximum number of characters that can be entered in this keyword field is 50 characters. The keyword search field searches the following event details: event name, event description, all additional event detail fields, image and attachment alternate text, location name, building name and room name.
- **Select Events for a Specific Date Range:** Click this checkbox in order to narrow your results by a date range. You can then select to pick specific starting and ending dates or select from the date range drop-down to narrow results by range of days. The range of days options include: Today, Tomorrow, Current Week, Current Month, Next Week, Next Month, Next Year, Next 7 Days, Next 14 Days, Next 30 Days.
- **Select Events for a Specific Time Range:** Click this checkbox in order to narrow your results by time of day. You can then select to pick specific starting and ending times or select from the time range drop-down to narrow results by range of time. The range of time options include: Midnight - 5am, 5am - Noon, Noon - 5pm and 5pm - Midnight.

From within this window, you can click the **SUBMIT** button to finalize your search selections and refresh the event results list on the left of the main screen, or you can choose to save your search.

- **Save for the Current User Login Session**: If this checkbox is selected, then the search results will be the new default search results anytime the user navigates to the main modify/cancel/delete events screen during their current login session. Once the user logs out of the Calendar administration area, the search settings will no longer be saved.
- **Save for all Future Sessions**: If this checkbox is selected, then the user will be prompted to enter in a search name. Once the SUBMIT button is selected, the events list refreshes to the current search results and the saved search appears as a new option in the "Search Events" window in the drop-down beside "Select Saved Search". Each time the user returns to the modify/cancel/delete events area during this login session or a future login session, they can re-select the saved search to once again initiate the same search and view the associated results for selecting the event they would like to modify/cancel or delete.

NOTE: Event information is formatted in the event list box in this format:
Event Name, Start Date (Recurs Until Date) - (# of Event Subscribers)
Example: Theatre Production of Fiddler on the Roof, 4/21/2006 (4/30/2006) - (10)

NOTE: When modifying an existing event (via Modify, Cancel or Delete), the *Preview and Finalize* page gives you the option of not emailing subscribers about the change. The option for that is **Do not notify category or event subscribers of this event change**.

Modify Event

Allows you to change event information and the event will be re-sent to all applicable Administrators or Category Owners for re-processing.

When modifying an event, you can change event details and also change the status of a "Saved" event. If the event was added and saved and has not yet been released for processing or posting live to the Calendar(s), then on the final "Preview and Finalize Event Modification" screen, choose the radio button option appropriate to the action that you would like to take with your event. You can either maintain the saved status or you can choose to release the event for processing or to go live on the Calendar (if you have appropriate department permissions).

***NOTE:** You can modify a saved event and maintain the saved status but you cannot modify an already released event and choose to only "Save" those changes and not release them live or for processing by an Administrator or Category Owner. Once an event is released it cannot be "re-saved".

If you are an Administrator and the event has not been added to any locked categories, the event changes will post live automatically on completion of your modification process.

There are various rules for what information can be modified for a particular type of event. The table below gives an overview of the rules that will be followed based off the event that you select for modification and if that event is a single, multi-day or recurring event series.

Once you have selected the event that you would like to Modify, you may then need to select from the drop-down on the level of modification, based off the type of event that you have selected to modify.

Event Series - If the event is a series (repeat schedule), then you can modify the entire series or only specific occurrences within the series. If you select to modify the series, then specific rules will apply. These rules are outlined in the next section.

Modify the Series

When you select to modify a series you will be asked to select from three radio buttons in order to decide how the series modifications should affect any occurrences within the series.

- Modify Series Details For Non-Modified Occurrences (DEFAULT)
  Field(s) modified at the series level will be updated for all future occurrences as long as the field has not been modified previously at the occurrence level.
- Modify Details For The Entire Event Series.
  Field(s) modified at the series level will be updated for all future occurrences and fields previously updated at the series/occurrence level will be overwritten.

Modify an Occurrence(s) in the Series

If you select to modify select occurrence(s) in the series, then a new window will open on the right side of the screen and will include a list of all the individual occurrences within the series. Events that have been cancelled and their reschedule occurrence are denoted with the words "Cancelled" or "Rescheduled" before the event name for that particular occurrence.

Rules for Selecting Occurrences to Modify

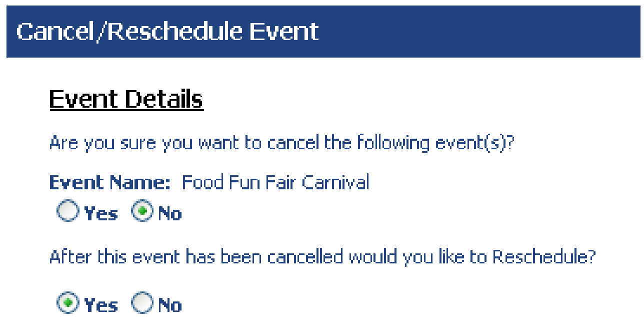
- You cannot select to modify multiple occurrences that do not contain the exact same field information. So, if an event occurrence has already been modified, then you will not be able to modify that occurrence at the same time as you are modifying a previously unmodified occurrence.
- You can modify a previously rescheduled occurrence, but you must modify the reschedule occurrence by itself and not at the same time as modifying other series occurrences.

Modifying/Cancelling/Deleting an Event – Marketing Workflow Rules - (Registration Rules Not Included)

	Expired/Past	Active	Cancelled	Rescheduled
Single Day One Time	All fields available for modification.	All fields are available for modification.	All fields are available for modification.	All fields are available for modification.
Multi-Day One Time	All fields available for modification.	All fields are available for modification.	All fields are available for modification.	All fields are available for modification.
Single Day Recurring (Entire Series)	All fields available for modification.	All fields are available for modification.	All fields are available for modification.	All fields are available for modification.
Single Day Recurring (Individual Occurrence)	All fields can be modified except for Department, Categorization & Event Type.	All fields can be modified except for Department, Categorization & Event Type.	All fields can be modified except for Department, Categorization & Event Type.	All fields are available for modification.
Single Day Recurring (Multiple Occurrences)	All fields can be modified except for Department, Categorization & Event Type.	All fields can be modified except for Department, Categorization & Event Type.	All marketing fields can be modified except for Department, Categorization & Event Type.* If you select to cancel multiple occurrences of a series at the same time, you will not be given the opportunity to reschedule.	You cannot reschedule multiple occurrences at the same time.
Multi-Day Recurring (Entire Series)	All fields are available for modification.	All fields are available for modification.	All fields are available for modification.	All fields are available for modification.
Multi-Day Recurring (Individual Occurrence)	All fields can be modified except for Department, Categorization & Event Type.	All fields can be modified except for Department, Categorization & Event Type.	All fields can be modified except for Department, Categorization & Event Type.	All fields can be modified except for Department, Categorization & Event Type.

Multi-Day Recurring (Multiple Occurrences)	All marketing fields can be modified except for Department, Categorization & Event Type.	All marketing fields can be modified except for Department, Categorization & Event Type.	All marketing fields can be modified except for Department, Categorization & Event Type.* If you select to cancel multiple occurrences of a series at the same time, you will not be given the opportunity to reschedule.	You cannot reschedule multiple occurrences at the same time.

Cancel/Reschedule Event



Allows you to cancel a single event, cancel a multi-day non- recurring event, cancel a single day recurring event series or cancel a single event occurrence in a series. Cancelling multiple single event occurrences in a series and multi-day recurring event series will not allow for the events to be rescheduled.

First, select the event or event series that you would like to cancel from the main Modify/Cancel/Delete screen.

If Cancel is selected and you also select “Cancel an Occurrence in the Series”, then a new window will open on the right side of the screen that will allow you to select the occurrence(s) that you would like to cancel/reschedule. If you select more than one, the Cancel Verification screen will not give you the option to reschedule. You can only reschedule if one event occurrence in a series is being cancelled.

The rules for those occurrences that can be selected for cancellation are the same as the rules for selecting events to modify. See the breakdown of details above.

NOTE: When cancelling an event, you will be given the option to enter Internal Comments regarding the event. This is a good way to enter information on a cancellation so that you have it for future reference (on Download of Events). The Internal Comments are never displayed to any Calendar visitor.

Reschedule Event

If you have elected to reschedule a cancelled event, then you will be navigated to a Reschedule Event Wizard that will include the same functionality as the Modify Event Wizard, however certain rules will be applied to which field can be edited. See the table above for the fields that are not editable for rescheduled events.

Once the event has been rescheduled, the original cancelled event will display on the front-end with the word "Cancelled" in front of the event name on the originally scheduled date/time and the new rescheduled event will display on the front- end with the word "Rescheduled" for the new date/time. There will be a link added to the "Cancelled" event occurrence details screen that allows any web visitor to click and navigate directly to the "Rescheduled" occurrence date.

If you select to reschedule an event and then decide that you would like to cancel out of the action, click the CANCEL button from within the Reschedule Event Wizard.

PLEASE NOTE: Once you cancel out of the Reschedule Event Wizard you will not be able to reschedule that cancelled event. You will instead have to enter a new event for the rescheduled occurrence/event.

Delete Event

Event Name - The event name is listed here. The event details are also displayed on the bottom portion of this screen.

Yes/No Radio Selection: Click the radio button associated with the action that you would like to take. Select "Yes" if you do want to finalize the delete process. Select "No" if you want to end this action. You will still need to click the FINISH button at the bottom of the screen to finish/finalize your selection. You can also use the CANCEL button at the bottom of the screen to cancel out of this delete action but you will be navigated back to the Main Menu. The BACK and NEXT buttons are disabled on this screen. Click the FINISH button to finalize your action.

***NOTE**: There are specific rules associated with modifying, cancelling and deleting an event with registration associated (specifically if the Advanced Registration Module is enabled for an install and payment has been associated with an event). Any event that has registration enabled and there is at least one registrant associated with payment information (regardless of the status of the registrant), you will not see the option to delete the event.

Purge Events

To navigate to the PURGE EVENTS wizard, click on the **Events** tab and click EVENTS: **Purge**. You can select from a variety of parameters to set up a one-time purge of specific events.

Purge All Events: Purges <u>all</u> events from your Calendar regardless of type or status. *Only perform this operation if you really want to completely empty your Calendar of all events.*

Purge by Import Feed: One-time imports show as the file name and persistent feeds show with the name given to the import. You may select any of the imports listed to delete all events associated with the **import ID** assigned to that import. This is a final action and cannot be undone. **PLEASE NOTE**: If you delete by import feed and you notice that the import feed is not removed from the dropdown, then the feed you selected is probably set up as a persistent feed. You must first delete/disable the persistent import feed so it stops running or is removed from the application as a feed and then

Options for setting up the purge parameters include:

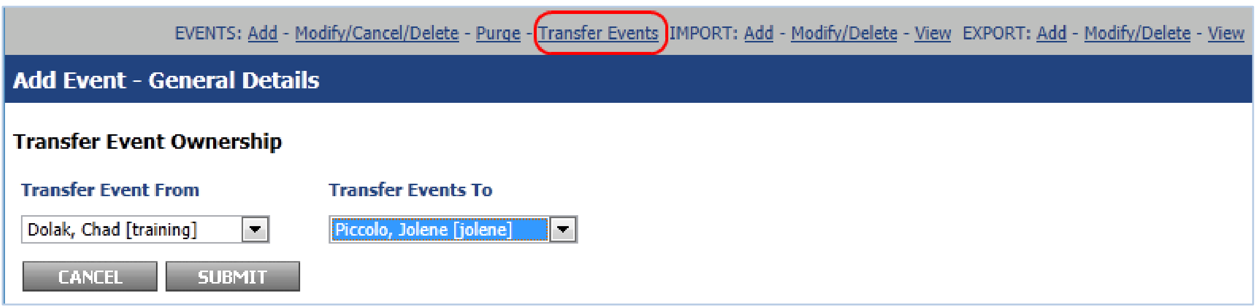
- **Date and Time**: Events that are included in this download will be those events that are on or between the dates selected. Times are optional, but if supplied, those events falling entirely within the time range are deleted (if they fall within the specified date range).
- **Event Type**: Public/Private/Both (This only displays if you have licensed the Private Module. Otherwise this selection will not display)
- **Categorization**: Select one or Select All from the drop-down. Or choose "Select Multiple" to open a pop-up window to choose multiple from the complete list.
- **Department(s)**: Choose one or multiple from the list box provided. Use the CTRL key to select multiple.
- **User(s)**: Choose one or multiple from the list box provided. Use the CTRL key to select multiple.

- **Location(s)**: Choose one or multiple from the list box provided. Use the CTRL key to select multiple.

Once you have made your Purge selection criteria, click the **SUBMIT** button to begin the Purge process. You will be presented with a pop-up window that gives you the ability to choose to continue with the Purge action or Cancel out of the action. Once the Purge Process has been completed you will be presented with either a confirmation message that the purge was completed successfully or a message that the purge criteria you selected found no matching results.

Transfer Events

The ability to transfer events is used when an user account in the system is made inactive. There are a number of emails that come from each user account when events are modified as well as what email address is sent updates for things like new registrants to events that use registration. This is a global move of all events from one user to another user. When deleting an account, there is an ability to transfer event ownership by which departments the various events originated.



Exporting Events

This area allows you to create one-time event downloads and persistent event exports. To navigate to the EXPORT EVENTS area, click on the EVENTS tab and then select EXPORT: ADD.

One-Time Event Downloads/Exports

This area allows you to search the event database in order to create a downloadable list of events that can be downloaded as a comma separated value (CSV), iCal or XML file. After clicking on the SUBMIT button, you are prompted to save the file.

Select from these options in order to generate the appropriate event download list:

- Select the File Format for downloaded events:
  - Export CSV
  - Export iCal
  - Export XML
- Searching for Events to Export
  The following fields are included for searching and downloading:
  - Export All Events - This option includes all events in the download/export file except for events with a "Saved" status. Columns for marketing status are only included if the checkbox for "Export Events with Marketing Status Included" is also selected.
  - Export Events with Marketing Status Included - This option includes all events in the download/export file that meet all other search criteria selected and the export file columns will include the marketing status for each category and/or department status.

- Export Only Approved Marketing Events - This will download/export only events that have the marketing status of approved for at least one category (or department).

Or, you can select to narrow the events you would like to download by searching the database for specific events.

- Date Range: You may either enter in a valid date within the text field provided (mm/dd/yyyy) or you may use the Calendar Date selector to display an interactive Calendar interface to select your start date.
- Time Span: Drop down menus for start time and end time, with the ability to select hours, minutes and time of day (AM/PM). This time range searches against the event start and end time. This field remains disabled unless the date range is selected.
- Event Type: This drop-down selection only displays if your installation includes the license of the Private Calendar Module. If enabled this drop-down allows you to select to include events marked as Private Only, Public Only or Both (set to post to both the Public and Private Calendars).
- Keyword(s): An open text field that allows the user to enter in keywords separated by commas. The field allows for up to 255 characters. The following fields are searched: Event Name, Event Description, Contact Info (Name & Email fields), Details, Admission Info and Remarks (Or your custom field names if setup within the Configuration Area).
- Categorization: Drop-down menu with the ability to select all or select one from the drop-down directly. Or, users can click "select multiple" to launch the full list of category(s)/subcategory(s) to select more than one.
- Department(s): A list box that includes all (active) the departments, sorted in alphabetical, descending order (with “All” as the first selection).
- User Account(s): A list box that includes all (active) user names sorted in alphabetical, descending order (with “All” as the first selection).
- Location(s): A list box that includes all (active) locations added within the event database. All users can see all locations and the list is sorted in alphabetical, descending order (with “All” as the first selection.) The first selection in the list box will always be "No location" which means that if selected the downloaded list will include any event where no location was selected.

***NOTE:** For any list box you can choose as many selections as needed for inclusion in your search/download list.
Continue with the Export/Download process by clicking the **SUBMIT** button. If the search criteria selected does not produce any event results, then a message will be displayed instructing you to change your criteria. Other buttons available on this screen include **RESET** which if selected will reset all screen values back to their default settings and **CANCEL** which if selected will cancel all actions and return you back to the Main Menu of Active Data Calendar.

Data Included in Event Exports

As of version 3.8, the new ability to schedule multiple facilities per event occurrence has necessitated the creation of new comprehensive “enterprise” XML and CSV export format. XML and CSV exports of events consist of data in the new enterprise formats regardless of what calendar modules are installed. This change will require any processes which had been designed to leverage the old (3.7 and earlier) XML and CSV export formats to be revised to accept the new format.

Persistent Event Exports

This area allows you to create scheduled export feeds. You will first need to name your export feed, setup an automated schedule and frequency for Calendar to export the event updates and also select your search criteria for what events should be included in the export. This area will allow you to create persistent CSV, iCal or XML file export files. Options will be different based off the export type selected. All export feeds from Active Data Calendar will be formatted according to the Calendar data definitions.

Set Up Export as Push
To add a new event export feed as a "Push", complete the following fields:

- **Export Name:** Please enter an export name that will identify the events that are being exported. This is a required field and has a maximum character limit of 50 alpha-numeric characters.
- **Export Type:** Please select "Setup Export as a Push" and specify the Export Location/URL in the next field.
- **Export Location/URL:** If you select to Setup Export as a Push, please enter the URL where Active Data Calendar should push event updates. The export URL is a required field and the maximum characters cannot exceed 255 alpha-numeric characters.
- **Username/Password Fields:** These fields must only be completed if the URL that you are using for the event export feed is secure and requires login information. Each field can accept a maximum of 55 alpha-numeric characters.
- **Start Date:** Date to start the event export feed.
- **End Date:** Date to end the event export feed. Events will no longer update from this feed once this date is past.
- **Time to Begin Exporting:** The time each day when the Calendar export feed should begin exporting new event updates from this event feed.
- **Time to End Exporting:** The time each day when the Calendar export feed should stop exporting new event updates from this feed.
- **Export Interval:** The interval, in minutes, that Calendar should place an updated export file at the desired location/URL (between the start and end times identified).
- **Active:** The default selection is "Active". If maintained, then the export feed will be active once finalized. If the selection for "No" is chosen, then the export will be added when you click "Finish" but the export will not run (regardless of dates/times entered for export), until the status is changed to "Active".

You can then setup the criteria for what event data should be included in your export feed by selecting from the following criteria:

- Select the File Format for exported events:
    - Export CSV
    - Export iCal
    - Export XML
- Searching for Events to Export
  The following fields are included for searching/selection:
    - **Export All Events** - This option includes all events in the download/export file except for events with a "Saved" status. Columns for marketing status are only included if the checkbox for "Export Events with Marketing Status Included" is also selected.

- **Export Events with Marketing Status Included** - This option includes all events in the download/export file that meet all other search criteria selected and the export file columns will include the marketing status for each category and/or department status.
- **Export Only Approved Marketing Events** - This will download/export only events that have the marketing status of approved for at least one category (or department).

You can also select to narrow the events you would like to export by searching the database for specific events.

- **Date Range**: Drop down menus for start date and end date, with the ability to select month, day and year. The date range searches against the event start and end date. The default start date is the date of the earliest data within the event database.
- **Time Span**: Drop down menus for start time and end time, with the ability to select hours, minutes and time of day (AM/PM). This time range searches against the event start and end time. This field remains disabled unless the date range is selected.
- **Event Type**: This drop-down selection only displays if your installation includes the license of the Private Calendar Module. If enabled this drop-down allows you to select to include events marked as Private Only, Public Only or Both (set to post to both the Public and Private Calendars).
- **Keyword(s)**: An open text field that allows the user to enter in keywords separated by commas. The field allows for up to 255 characters. The keywords entered are searched against the following fields: Event Name, Event Description, Contact Info (Name & Email fields), Details, Admission Info and Remarks (Or your custom field names if setup within the Configuration Area).
- **Categorization**: Drop-down menu with the ability to select all or select one from the drop-down directly. Or, users can click "select multiple" to launch the full list of category(s)/subcategory(s) to select more than one.
- **Department(s)**: A list box that includes all (active) the departments, sorted in alphabetical, descending order (with “All” as the first selection).
- **User Account(s)**: A list box that includes all (active) user names sorted in alphabetical, descending order (with “All” as the first selection).
- **Location(s)**: A list box that includes all (active) locations added within the event database. All users can see all locations and the list is sorted in alphabetical, descending order (with “All” as the first selection.) The first selection in the list box will always be "No location" which means that if selected the downloaded list will include any event where no location was selected.

***NOTE**: For any list box you can choose as many selections as needed for inclusion in your export list.

Set Up Export as Pull (HTTP Download)

To add a new event export feed as a "Pull", complete the following fields:

- **Export Name:** Please enter an export name that will identify the events that are being exported. This is a required field and has a maximum character limit of 50 alpha-numeric characters.
- **Export Type:** Select "Setup Export as a Pull". Active Data Calendar will generate a URL for you once you click the SUBMIT button. This will become the URL that you "Pull" your event updates from.
- You can then setup the criteria for what event data should be included in your export feed by selecting from the following criteria:
- Select the File Format for exported events:
    - Export CSV
    - Export iCal
    - Export XML

- Searching for Events to Export

  The following fields are included for searching:

  - **Export All Events**: A check box for selecting to export “All Events”

  As another option, you can also select to narrow the events you would like to export by searching the database for specific events.

  - **Date Range**: Drop down menus for start date and end date, with the ability to select month, day and year. The date range searches against the event start and end date. The default start date is the date of the earliest data within the event database.
  - **Time Span**: Drop down menus for start time and end time, with the ability to select hours, minutes and time of day (AM/PM). This time range searches against the event start and end time. This field remains disabled unless the date range is selected.
  - **Sort By:** [XML only] Select either *Event ID* or *Start Date*.
  - **Event Type:** If you the Private Calendar module installed, this drop-down allows you to select to include events marked as Private Only, Public Only or Both (set to post to both the Public and Private Calendars).
  - **Keyword(s):** An open text field that allows the user to enter in keywords separated by commas. The field allows for up to 255 characters. The keywords entered are searched against the following fields: Event Name, Event Description, Contact Info (Name & Email fields), Details, Admission Info and Remarks (Or your custom field names if setup within the Configuration Area).
  - **Categorization:** Drop-down menu with the ability to select all or select one from the drop-down directly. Or, users can click "select multiple" to launch the full list of category(s)/subcategory(s) to select more than one.
  - **Department(s):** A list box that includes all (active) the departments, sorted in alphabetical, descending order (with “All” as the first selection).
  - **User Account(s):** A list box that includes all (active) user names sorted in alphabetical, descending order (with “All” as the first selection).
  - **Location(s):** A list box that includes all (active) locations added within the event database. All users can see all locations and the list is sorted in alphabetical, descending order (with “All” as the first selection.) The first selection in the list box will always be "No location" which means that if selected the downloaded list will include any event where no location was selected.

  ***NOTE:** For any list box you can choose as many selections as needed for inclusion in your export list.

<u>**NAVIGATION OPTIONS WITHIN THIS AREA**</u>

To **CANCEL** out of the Export Events area, click the **CANCEL** button and you will be returned to the main menu of Calendar and no event data will be saved.

Click the **SUBMIT** button to finalize your Persistent Event Export.

PUSH Exports: Once you SUBMIT your feed parameters, Calendar will start exporting to the specified URL starting on the date/time that you entered.

PULL Exports: Once you SUBMIT your feed parameters the Export Pull becomes available. Calendar will generate a URL and it will be displayed in a window in the right area of the screen. Copy this URL and use it for pulling your export updates immediately!

View Persistent Export Feeds

To navigate to the VIEW EXPORT EVENTS LIST area, click on the EVENTS tab and then select EXPORT: VIEW. Only Persistent Export Feeds that have been setup as a PUSH will be listed on the View screen.

TIP: If the schedule export service is not running, then none of your exports, regardless of their scheduled dates, times or polling intervals will run and export any event updates. If you click the "START" button, all feeds will be started and will perform their function.

If for any reason you need to temporarily **STOP** or **START** all scheduled exports at one time, you can use the **STOP** and **START** buttons for managing the export service.

Other information that is listed for each persistent export includes:

- **Name**: This is the name that you entered for the export when it was added or last modified.
- **Polling Dates**: This includes the start date and end date during which Calendar should continue to update events in the export.
- **Polling Time**: This includes the time, each day during the Polling Dates that Calendar should begin and end running the scheduled export updates.
- **Frequency of Polling**: The interval, in minutes, that Calendar should place an updated export file at the desired location/URL (between the polling times identified).
- **Feed Status**: Statuses that may display include: Active, Future, Expired and Inactive.
  - **Active**: The feed is updating and is between the dates/times of polling and will run at the next scheduled interval.
  - **Future**: The feed is within the scheduled dates for polling but the next polling time is in the future.
  - **Expired**: The feed end date is in the past. Use the MODIFY action to change the end date and extend it to continue using this feed.
  - **Inactive**: The feed has been inactivated and is not updating.
- Last Run Result: Results that may display include: Failed or Success
  - **Error**: The last scheduled "run" had an error and could not be completed. Click the ERROR link to see the date/time that the export last produced an error or was last successfully run.
  - **Success**: The last scheduled "run" of the export service for this export feed was successful. Click the SUCCESS link to see the details.
- **Action**: Options here include Modify and Delete. Select either to navigate to that respective screen to complete your desired action.

Modify Persistent Export

To navigate to the MODIFY EXPORT area, click on the EVENTS tab and then select EXPORT: MODIFY. You will see a list of current persistent exports, select the export you want to modify and use the drop-down under the column entitled "Actions" in order to select the Modify option.

Persistent exports, that have been setup to "Pull" export updates, can be modified. The information that can be modified includes:

- Export Name
- Export Location (URL)
- Username/Password Field
- Start Date:
- End Date
- Time to Begin Exporting
- Time to End Exporting
- Export Interval
- Active: Change to active or inactive from this area.

You cannot modify the type of export from push to pull, and you cannot modify the contents of what type of events are included in the export.

NAVIGATION OPTIONS WITHIN PERSISTENT EXPORT

To **CANCEL** out of the Manage Persistent Export area, click the **CANCEL** button and you will be returned to the main menu of Calendar and no changes will be saved.
Click the **FINISH** button to finalize your Persistent Event Export modifications.

Delete Persistent Export

To navigate to the EXPORT EVENTS area, click on the EVENTS tab and then select EXPORT: DELETE. You will see a list of current persistent exports, select the export you want to delete and use the drop-down under the column entitled "Actions" in order to select the Delete option.

From this screen you can confirm your delete export action.

Click the YES radio button and hit the FINISH button to finalize your deletion of the persistent export, or click the NO radio button and hit the FINISH button to exit out of the delete action and navigate back to the View Persistent Export Feeds screen.

Select the CANCEL button to exit out of the Export area completely and you will be navigated back to the Main Menu of Active Data Calendar. Your export will not be deleted.

Data Included in Export Files

Active Data Calendar supports exporting event data in comprehensive XML and CSV formats. The data exported into these files is described in the table that follows.

Note on Large Export Files

When exporting large files which contain more than 1000 event occurrences, it is required that the persistent event export process be used in a “one-time” fashion instead of the usual one-time download process. Exporting large files in this way will ensure that a long running export cannot time out and be incomplete.

To create a one-time export, using the persistent export interface, you can select the same start and end date and setup your start and end time and interval so that the export only occurs/runs once. An example of this would be:

- Start Date: 05/21/2009
- End Date: 05/21/2009
- Time to Being Exporting: 10:00 AM
- Time to End Exporting: 10:15 AM
- Export Interval: 15 minutes

Since there is only one interval of 15 minutes that can be run within the time period identified, this export would run only once.

Exporting CSV

The format for a CSV export file includes the following:

> "Event Name,Event Description,Contact Name,Contact Phone,Contact Email,Department Name,Categorization,Private Flag,Highlight,Facilities,Room Link,Internal Comments,ExternalField1,ExternalField2,ExternalField3,ExternalField4,All Day Flag,Start Date,Start Time,End Date,End Time,Recur Type,Recur Days,Recurring End Date,Address 1,Address 2,City,State,Zipcode,Phone,Location Url,Import Series Id,Import Occurrence Id,Created On,Modified On,Room Setup Name,Room Setup Time,Room Tear Down Time,Room Capacity,Information Status,Setup Notes,User Setup Time,User Tear Down Time,User Setup Count,User Setup Notes,Internal Custom 1,Internal Custom 2,Internal Custom 3,Internal Custom 4,County,Country,Registration - Enabled,Registration - Max Registrants,Registration - Display Available,Registration - Type,Registration - Template,Resources - CatSubcat,Resources - Resource,Resource - Quantity,Resource - Notes,External Series Id,External Occurrence Id,Event Owner,External Import ID,Event Owner Name"

Exporting XML Enterprise

The elements in the XML file also include the same fields as specified for the CSV (organized into a slightly different node and name structure) plus two additional fields for image and attachment data and an event details URL.

CSV Field Name	XML Element / Attribute Name	Length	Possible Values
Event Name	Name	100	Alphanumeric
Event Description	Description	6000	Alphanumeric
Contact Name	ContactName	255	Alphanumeric
Contact Phone	ContactPhone	50	Alphanumeric
Contact Email	ContactEmail	255	Alphanumeric
Department Name(*)	Department	50	Alphanumeric
Categorization (*)	Categorization	50	Alphanumeric
Private Flag (*)	PrivateFlag	1	"Y", "N", "B"
Highlight (*)	Highlight	1	"Y", "N"
Facilities (*)	*Locations - LocationName, BuildingName, RoomName, RoomDivisionName(See example XML document)	*75	Alphanumeric
Room Link	Roomlink	265	Alphanumeric
Internal Comments	InternalComments	1000	Alphanumeric
ExternalField1	ExternalField1	500	Alphanumeric
ExternalField2	ExternalField2	500	Alphanumeric
ExternalField3	ExternalField3	500	Alphanumeric
ExternalField4	ExternalField4	500	Alphanumeric
All Day Flag	AllDay	1	"Y", "N"
Start Date	StartDate	N/A	Valid date in "m/dd/yyyy" format
Start Time	StartTime	N/A	Valid time in "h:mm AM"or "h:mm PM"format (Minutes 00, 15, 30, or 45)
End Date	EndDate	N/A	Valid date in "m/dd/yyyy" format
End Time	EndTime	N/A	Valid time in "h:mm AM"or "h:mm PM" format (Minutes 00, 15, 30, or 45)

Recur Type (*)	RecurType	N/A	See below
Recur Days (*)	RecurDays	N/A	See below
Recurring End Date	RecurEndDate	N/A	See below
Address 1	Address1	50	Alphanumeric
Address 2	Address2	50	Alphanumeric
City	City	50	Alphanumeric
State	State	2	Alphanumeric
Zipcode	Zipcode	25	Alphanumeric
Phone	Phone	50	Alphanumeric
Location Url	InternetAddress	110	Alphanumeric
Import Series ID	ImportSeriesId	255	Alphanumeric
Import Occurrence Id	ImportOccurrenceId	255	Alphanumeric
Created On	CreatedOn	N/A	Valid date in “m/dd/yyyy” format
n/a	EventGUID	36	Valid GUID in 32 hexadecimal digits plus 4 hyphens
n/a	EventURL	110	Alphanumeric URL to event details

Department: This is the department that the event was posted to.

Category: This is the category and subcategory that an event was posted to. See the examples below. An event to the category “Alumni” and the “Upcoming Events” subcategory… “Alumni::Upcoming Events”
An event to the category “Alumni” and the “Upcoming Events” subcategory and also to the category “Student Events” and the “Future Events” subcategory… “Alumni::Upcoming Events||Student Events::Future Events”
An event to the category “Sporting Events” and the category “Fall Activities”… “Sporting Events||Fall Activities”

Private Flag: This determines whether the event is displayed on the private calendar (“Y”), public calendar (“N”), or both (“B”). If you have not purchased the private calendar module, then “N” will display in this field.

Highlight: This determines whether the event was highlighted. Values possible would be “Y” to highlight an event or “N” for a normal event.

Facilities:
In the XML file format the exact tree structure of the multiple facilities is broken down into elements under a node named “Locations” similar to the XML snippet listed below:

```
<Locations type="group">
<Location type="group">
<LocationName type="text">Rouses Point</LocationName>
<SetupNotes>Facility Notes</SetupNotes>
<Building type="group">
<BuildingName type="text">RP-IT</BuildingName>
<Room type="group" roomsetupname="Double Conference Table" roomsetuptime="0" roomteardowntime="0"
    roomcapacity="1000" roomlink="" usersetuptime="0" userteardowntime="0" usersetupcount="1000"
    usersetupnotes="">
<RoomName type="text">101</RoomName>
</Room>
</Building>
</Location>
```

```
<Location type="group">
<LocationName type="text">Bethlehem</LocationName>
<SetupNotes>Facility Notes</SetupNotes>
<Building type="group">
<BuildingName type="text">Hotel</BuildingName>
<Room type="group" roomsetupname="" roomsetuptime="0" roomteardowntime="0" roomcapacity="0"
    roomlink="" usersetuptime="0" userteardowntime="0" usersetupcount="0" usersetupnotes="">
<RoomName type="text">200</RoomName>
</Room>
</Building>
</Location>
</Locations>
```

In the CSV file format, the location, building and room column have been collapsed into a single “Facilities” column which contains a delimited list of the exact facilities associated with the event occurrence. For example, if an event occurrence was assigned to the location “Bethelehem”, the building “Hotel”, and the room “100” and also the room “202” in room division “202B”, the supplied CSV Facilities column would be as follows:

Bethlehem::Hotel::100||Bethlehem::Hotel::202::202B

Start Date: The event’s starting date. XML records are sorted by this date. (Previous to release 3.14, XML records were sorted by EventID.)

Recur Type:

One Time, Interval#, Weekly, Weekly#, Monthly by Date#, Monthly by Position#, Yearly by Date. Interval1 would be every day, Interval2 would be every 2 days, Interval# would be every # days… Weekly1 would be every week, Weekly2 would be every 2 weeks, Weekly# would be every # weeks…

Monthly by Date1 would be every month on the date, Monthly by Date2 would be every 2 months on the date, Monthly by Date# would be every # months on the date…

Monthly by Position1 would be every month at a certain position, Monthly by Position2 would be every 2 months at a certain position, Monthly by Position# would be every # months at a certain position…

Yearly by Date would be every year on a certain date.

Recur Days: Recur days can be Monday, Tuesday, Wednesday, Thursday, Friday, Saturday or Sunday. They can be a comma separated list. These values are only used when the Recur Type is Weekly#. If the start date and end date of an event are not on the same day, this value will be blank as this does not apply to multi day recurring weekly events.

Recurring End Date: This date is used with recurring events. The event will show up on the calendar up to and including the value specified. In other words, it is the “repeat until” date for a recurring event.

Created On and Modified On Fields: The two final fields (created on and modified on) both include a date and time element. Between the date and time there can be only one single space separating the two values.

EventGUID [XML only]: a 36-position globally unique identifier (GUID) assigned to the event.

EventURL [XML only]: A fully-qualified HTTP address from the Calendar server to retrieve and display the event.

Room Setup Name, Room Setup Time, Room Tear Down Time, Room Capacity, Setup Notes
These fields define the parameters for a room setup type and time to setup & teardown.

Information Status: This field allows for the import process to designate whether or not the event in question should be marked as cancelled “C” or rescheduled “R” or deleted “D” from the system entirely. A status of “A” or blank is the default value for approved events.

***IMPORTANT INFORM ATION ABOUT THIS FIELD**: This field constitutes the overall Marketing Status of an event. When the Facilities Module is enabled, the status of associated resource and facility requests are also based off this status. For example: if the "Information Status" field has a status of "A", then all facilities and resources associated with the event are considered to be approved as well.

User Setup Time, User Tear Down Time, User Setup Count, User Setup Notes
These fields define the parameters for user setup & teardown times.

Internal Custom Fields - These fields allow the importing process to specify event information which can be used for internal filtering only and are not displayed to visitors of the calendar.

Registration Fields - These fields specify whether or not registration was enabled for the event. If registration was enabled (Y) the other registration fields noted with an asterisk (*) are required.

Resources - These fields specify the resources and resource categorizations associated with the event.

Event Owner - This is the ID of owner of the event. This field is an integer field that is linked to the Account table. It is not required but if its populated, it must be a valid Account ID.

External Import ID - This is a user set import id that will link this import to other imports. When used in conjunction with the External Series ID and External Occurrence ID, it will form a link between records that will allow for updates of existing event records.

Event Owner Name - This is a text field that is used during the export process. In order to allow calendar exports to be re- imported into the same calendar or a central calendar, this field is required to be included. It is not required to be populated with data.

AttachmentBinary and ImageBinary Fields (XML Only) - These fields contain base64 encoded image and attachment data if the event has an associated image and/or attachment(s). Please note that only an example of an image binary is included in the sample XML below. An example of an attachment binary would be too large for this document.

Exporting iCal - All iCal events must contain a "SUMMARY" value, a Start Date "DTSTART" value and an End Date "DTEND" value. These values determine the name of the event and when it starts and ends.

Other fields that are included are "DESCRIPTION", "RESOURCES", "LOCATION" and "CATEGORIES".

Field Name	Length	Possible Values
Summary	100	Alpha numeric
Start Date	N/A	Valid date in "m/dd/yyyy" format
End Date	NN/A	Valid date in "m/dd/yyyy" format
Description	6000	Alpha numeric
Resources	255	Alpha numeric
Location	75	Alpha numeric
Categories	50	Alpha numeric

Summary: This is the Event Name from the Calendar.

Tips on Exporting Data

Creating a persistent Export URL is based on where you are looking to push the file on the web. Below are some general guidelines to point you in the right direction regarding getting an export feed setup. If you need further assistance it would fall outside of traditional product support as we would need to consult on how to set up FTP and paths on the server to accept the export files.

Overall Items of Note

1. All export options selected must define a file name at the end of the URL to save the file.
2. All export options selected must have proper permission to write files to the save location; this can involve settings in IIS and on the file systems itself.

Using WebDav (http://www.webdavsite.com/export.xml)

1. In IIS under the "Web Service Extensions" node "WebDAV" must be allowed.
2. In IIS under the "Web Sites" node right click the folder that will be used to receive a persistent export and select "Properties". This folder must be accessible using http.
3. On the "Directory" tab the check boxes for "Read" and "Write" must be selected.
4. Permissions can be adjusted through the file system by right clicking the directory and selecting "Properties" and the security tab and using the Add/Remove options.

Using a File Share

(\\share\folder\export.xml)

Using a Local/Mapped Drive

(C:\folder\export.xml)

Using FTP

(ftp://ftpsite.com/export.xml) - FTP sites normally require a username and password.

Import Data

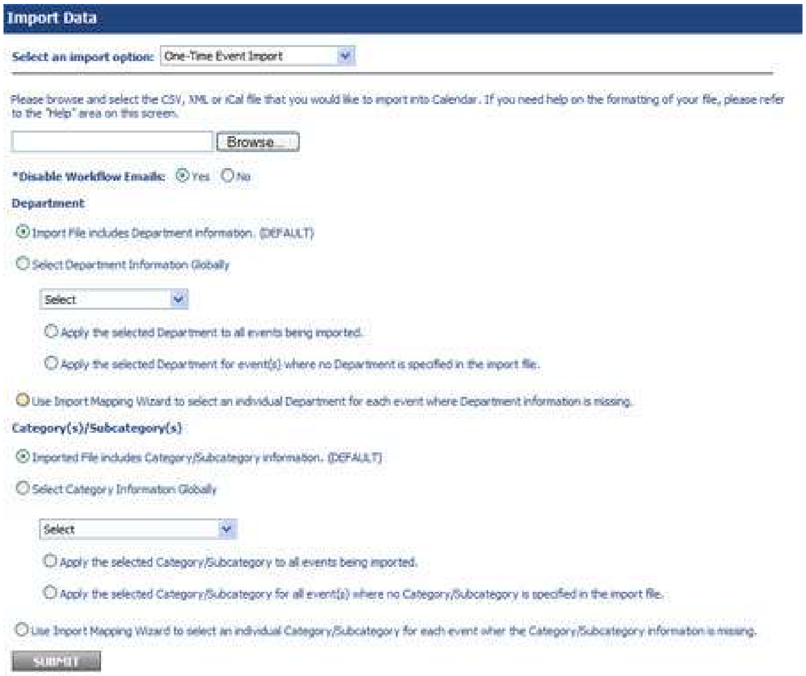
Administrative users with the privilege to Import Data can use this area to import events, categorization or locations.

Add One-Time Event Import

Users can access this area to upload a CSV, iCal or XML file. To navigate to the IMPORT EVENTS area, click on the EVENTS tab and then select IMPORT: ADD.

The Import Events feature will allow you to import events into the calendar as either a one-time event import or as a persistent event feed. The files used for import can be either a CSV, iCal or XML file format. There are differences in how each file type must be formatted and they are identified below.

The new ability to schedule multiple facilities per event occurrence within Active Data Calendar 3.8 necessitated the creation of a new comprehensive "enterprise" XML and CSV import and export formats (Note: the iCal format remains supported and unchanged in 3.8 and 3.9.). Backward compatibility with the previous XML and CSV import formats supported in Active Data Calendar 3.7 and 3.8 will be maintained in 3.9.



TIP: For one-time imports you do not need to select the file type before browsing for your file. Simply browse and find your file (CSV, iCal and XML are all supported) and then select from the other options listed.

One time imports are a good option if you are simply trying to migrate/bring over a bulk group of events from another calendar application and do not plan on maintaining an active connection and updates from the other system.

For additional tips on how to Import Data into Active Data Calendar, see your Clients Only page for Tips and Tricks on "Importing Events".

Please refer to the existing 3.7 or 3.8 tip sheet to review the details on importing events in the older formats.

The Import Events feature allows you to import events into the calendar as either a one-time event import or as a persistent event feed. CSV, iCal and XML files are supported. Each file type has its own formatting requirements, which are identified below.

Events can be deleted by import file or persistent feed via a “purge” feature. This new feature supports iterative testing of import files as they are being developed.

Note on Large Import Files

When importing large files which contain more than 1000 event occurrences, it is required that the persistent event feed process be used in a “one-time” fashion instead of the usual one-time upload process. Importing large files in this way will ensure that a long running import cannot time out and be incomplete.

To create a one-time import, using the persistent import interface, you can select the same start and end date and setup your start and end time and interval so that the import only occurs/runs once. An example of this would be:

- Start Date: 05/21/2009
- End Date: 05/21/2009
- Time to Being Retrieving: 10:00 AM
- Time to End Retrieving: 10:15 AM
- Import Interval: 15 minutes

Since there is only one interval of 15 minutes that can be run within the time period identified, this import would run only once.

Setting an Import Update Schedule
The import process of Active Data Calendar 3.9 is a single threaded process. As such, this should be taken into consideration when creating your import update schedule. The add persistent import screen requires that you enter a start time and end time for the Calendar application to poll the URL specified in order to look for updates.

The interval entered within this area will tell the Calendar application how long after the last import was successfully performed and completed, should the application kick off a new process to look for updates.

Please NOTE: The interval entered does not set a hard time schedule. As such, if you set the following schedule:
Start Time: 8:00 AM End Time: 9:00 AM Interval: 5 minutes

The system does not set a schedule of updates to automatically run at:

8:00 AM
8:05 AM
8:10 AM
8:15 AM
8:20 AM Etc.

The schedule is not predetermined by the start time, end time and interval selection, it is a dynamic process that kicks off the next update at the interval entered at the finalization of the previous import cycle.

Example:
Start Time: 8:00 AM End Time: 9:00 AM Interval: 5 minutes
Import takes 2 minutes to complete process.
Start Time 8:00 AM
First import cycle: 8:00 AM – 8:02 AM
System waits until 5 minutes following 8:02 AM to kick off next update.
Second import cycle: 8:07 AM – 8:09 AM (if the second cycle also takes 2 minutes to complete)

IMPORTANT: If you have created more than one persistent import, then the import updates are performed in a queue. They do not occur concurrently.

For example: 2 Imports are added into Active Data Calendar.

Import 1
Start Time: 8:00 AM End Time: 8:30 AM Interval: 5 minutes
Import Time to Complete: 2 minutes per update

Import 2
Start Time: 8:00 AM End Time: 9:00 AM Interval: 5 minutes
Import Time to Complete: 3 minutes per update

Sample Calendar Thread Schedule/Process Times

8:00 AM:	Import 1 kicks off
8:02 AM:	Import 1 complete
8:07 AM:	Import 2 kicks off (5 minutes after import 1 complete and per update interval)
8:10 AM:	Import 2 complete
8:15 AM:	Import 1 kicks off
8:17 AM:	Import 1 complete
8:22 AM:	Import 2 kicks off

8:25 AM: Import 2 complete
8:30 AM: Import 1 kicks off
8:32 AM: Import 1 complete
8:37 AM: Import 2 kicks off
8:40 AM: Import 2 complete
8:45 AM: Import 2 kicks off (Import 1 was set to only poll until 8:30AM, so Import 2 will continue in its own cycle until the end time for that import – 9:00 AM)

Please NOTE: Clients who do not have the Facilities Module will notice that in the new 3.9 requirements there are fields included that you will not need to populate since your installs do not include these fields. However, if you have facilities data and would like to include them in your import for future use, you can do so. These fields will stay populated in the database but the data will not be used anywhere in your install until the Facilities Module is enabled:

Room Setup Name Room Setup Time Room Tear Down Time Room Capacity
Setup Notes
User Setup Time
User Tear Down Time User Setup Count User Setup Notes
Resources – CatSubcat Resources – Resource Resource – Quantity Resource - Notes

Importing CSV Enterprise

The format for a CSV file is very specific, and it must be followed exactly for the events to import properly. The following is a list of all of the fields that need to be provided and some guidelines to make the import process easier. Each field must contain a value that properly handles embedded commas and quotes according to the CSV standard in order to be imported properly. In order to skip (omit) a value for a given field, your CSV file must still supply a comma as a field place holder. There must be a header row supplied that matches the following text exactly:

"Event Name,Event Description,Contact Name,Contact Phone,Contact Email,Department Name,Categorization,Private Flag,Highlight,Facilities,Room Link,Internal Comments,ExternalField1,ExternalField2,ExternalField3,ExternalField4,All Day Flag,Start Date,Start Time,End Date,End Time,Recur Type,Recur Days,Recurring End Date,Address 1,Address 2,City,State,Zipcode,Phone,Location Url,Import Series Id,Import Occurrence Id,Created On,Modified On,Room Setup Name,Room Setup Time,Room Tear Down Time,Room Capacity,Information Status,Setup Notes,User Setup Time,User Tear Down Time,User Setup Count,User Setup Notes,Internal Custom 1,Internal Custom 2,Internal Custom 3,Internal Custom 4,County,Country,Registration - Enabled,Registration - Max Registrants,Registration – Display Available,Registration - Type,Registration - Template,Resources - CatSubcat,Resources - Resource,Resource - Quantity,Resource - Notes,External Series Id,External Occurrence Id,Event Owner,External Import ID,Event Owner Name"

Importing XML Enterprise

The elements in the XML file also include the same fields as specified for the CSV (organized into a slightly different node and name structure) plus two additional fields for image and attachment data and three additional fields noted below this chart. A detailed example XML file is included later in this document for reference purposes.

NOTE: All values imported by the user must be within the allowable field lengths set in the database as indicated in the table below. Also, the CSV field and XML element names are case sensitive and must be entered as listed below.

CSV Field Name	XML Element / Attribute Name	Length	Possible Values	Required
Event Name	Name	100	Alpha numeric	Y
Event Description	Description	6000	Alpha numeric	Y (If excluded, then the event name will become)
Contact Name	ContactName	255	Alpha numeric	N
Contact Phone	ContactPhone	50	Alpha numeric	N
Contact Email	ContactEmail	255	Alpha numeric	N
Department Name(*)	Department	50	Alpha numeric	Y
Categorization (*)	Categorization	50	Alpha numeric	Y
Private Flag (*)	PrivateFlag	1	"Y", "N", "B"	Y
Highlight (*)	Highlight	1	"Y", "N"	Y
Facilities (*)	*Locations (LocationName, BuildingName, RoomName, RoomDivisionNam e(See example XML document)	*75	Alpha numeric	N
Room Link	roomlink	265	Alpha numeric	N
Internal Comments	InternalComments	1000	Alpha numeric	N
ExternalField1	ExternalField1	500	Alpha numeric	N
ExternalField2	ExternalField2	500	Alpha numeric	N
ExternalField3	ExternalField3	500	Alpha numeric	N
ExternalField4	ExternalField4	500	Alpha numeric	N
All Day Flag	AllDay	1	"Y", "N"	Y
Start Date	StartDate	N/A	Valid date in "m/dd/yyyy" format	Y
Start Time	StartTime	N/A	Valid time in "h:mi AM"or "h:mi PM"format (minutes 00, 15, 30, or 45)	Y
End Date	EndDate	N/A	Valid date in "m/dd/yyyy" format	Y
End Time	EndTime	N/A	Valid time in "h:mi AM"or "h:mi PM" format (minutes 00, 15, 30, or 45)	Y
Recur Type (*)	RecurType	N/A	See below	Y
Recur Days (*)	RecurDays	N/A	See below	N (unless Recur)
Recurring End Date	RecurEndDate	N/A	See below	N
Address 1	Address1	50	Alpha numeric	N

Address 2	Address2	50	Alpha numeric	N
City	City	50	Alpha numeric	N
State	State	2	Alpha numeric	N
Zipcode	Zipcode	10	Alpha numeric	N
Phone	Phone	25	Alpha numeric	N
Location Url	InternetAddress	110	Alpha numeric	N
Import Series Id	ImportSeriesId	N/A	Alpha numeric	Y
Import Occurrence Id	ImportOccurrenceId	N/A	Alpha numeric	Y
Created On	CreatedOn	N/A	Valid date in "m/dd/yyyy" format	N*
			(single space) Valid time in "h:mi AM"or "h:mi PM"format	
Modified On	ModifiedOn	N/A	Valid date in "m/dd/yyyy" format (single space) Valid time in "h:mi AM"or "h:mi PM"format (Minutes 00, 15, 30, or 45)	N*(Modified date must be greater than last import
Room Setup Name	roomsetupname	50	Alpha numeric	N
Room Setup Time	roomsetuptime	N/A	Integer	N
Room Tear Down Time	roomteardowntime	N/A	Integer	N
Room Capacity	roomcapacity	N/A	Integer	N
Information Status	InformationStatus	1	Character A (or blank) – Approved R – Rescheduled C – Cancelled	N
Setup Notes	SetupNotes	255	Alpha numeric (This gets linked to the lowest level of the facility.)	N
User Setup Time	usersetuptime	N/A	Integer	N
User Tear Down Time	userteardowntime	N/A	Integer	N
User Setup Count	usersetupcount	N/A	Integer	N
User Setup Notes	usersetupnotes	255	Alpha numeric	N
Internal Custom 1	InternalCustom1	1000	Alpha numeric	N
Internal Custom 2	InternalCustom2	1000	Alpha numeric	N
Internal Custom 3	InternalCustom3	1000	Alpha numeric	N
Internal Custom 4	InternalCustom4	1000	Alpha numeric	N
County	County	255	Alpha numeric	N
Country	Country	255	Alpha numeric	N
Registration – Enabled	RegistrationEnabled	1	"Y", "N"	Y
Registration – Max Registrants	RegistrationMaxReg	N/A	Integer (Required if Registration is enabled)	N*

Registration – Display Available	RegistrationDisplaySpaceAvail	N/A	“Y”, “N” (Required if Registration is enabled)	N *
Registration – Type	RegistrationType	N/A	(May be “Single”, “Partial” or “Series”) - (Required if Registration is enabled)	N*
Registration – Template	RegistrationTemplate	N/A	Integer (Required if Registration is enabled) Alpha numeric (Valid Form Name) This field is validated against the forms table.	N*
Resources – CatSubcat	ResourceCat / ResourceSubc	50	Alpha numeric (50 allowed for Category and 50 for	N*
Resources – Resource	ResourceName	100	Alpha numeric	N
Resource – Quantity	ResourceQuantity	N/A	Integer	N
Resource - Notes	ResourceNotes	225	Alpha numeric	N
Event Owner	EventOwner	NA	Integer (Validated against the account table.)	N
External Import ID	ExternalImportID	255	Alpha numeric	N
Event Owner Name	EventOwnerName	N/A	Alpha numeric (Not used in import file.)	N
Images (XML Only)	ImageBinary	N/A	Binary or Reference Link	N
Attachments (XML Only)	AttachmentBinary	N/A	Binary or Reference Link	N

XML Nodes Not Included in CSV

These fields are only included in XML and NOT CSV files. If the fields are not included in an XML file then the nodes will be skipped and the import will run through and not be halted.

- <DateUp type="text">mm/dd/yyyy hh:mm AM</DateUp>
- <DateDown type="text"> mm/dd/yyyy hh:mm AM</DateDown>
- <HideEndDateTime type="text">Y</HideEndDateTime>

Department: This is the department that the event is being posted to. If the value provided is not already in the Calendar database, a new department will be created. ***NOTE ON DEPARTMENTS:** Department selections cannot be modified for occurrences of a series in the application or in data coming in from an import.

Category: This is the category and subcategory that an event is being posted to. If the value provided is not in the calendar database, a new category will be created. If you wish to specify subcategory, place a double colon (::) between the category name and subcategory name. If you wish to specify multiple category/subcategory pairs, place double bar (||) between them. Please note that a subcategory is not required. See the examples below.

To specify an event to the category "Alumni" and the "Upcoming Events" subcategory… "Alumni::Upcoming Events"
To specify an event to the category "Alumni" and the "Upcoming Events" subcategory and also to the category "Student Events" and the "Future Events" subcategory…
"Alumni::Upcoming Events||Student Events::Future Events"
To specify an event to the category "Sporting Events" and the category "Fall Activities"… "Sporting Events||Fall Activities"

NOTE ON CATEGORIES: Category/Subcategory selections cannot be modified for occurrences of a series in the application or in data coming in from an import.

Private Flag: This determines whether the event is displayed on the private calendar ("Y"), public calendar ("N"), or both ("B"). If you have not purchased the private calendar module, then use "N" for this field.

Highlight: This determines whether the event is to be highlighted. Highlighted events are displayed first when using the"Event List" view for a specific day or month. Use "Y" to highlight an event or "N" for a normal event.

Facilities:

Facilities information is not required. If it is supplied, any locations, buildings, rooms, and room divisions which are specified for the event occurrence will be added to the calendar database if they do not already exist.

In order to support the concept of multiple facilities per event occurrence, both the CSV and XML enterprise import formats have been modified. In the XML file format the exact tree structure of the multiple facilities is broken down into elements under a node named "Locations" similar to the XML snippet listed below:

```
<Locations type="group">
<Location type="group">
<LocationName type="text">Rouses Point</LocationName>
<SetupNotes>Facility Notes</SetupNotes>
<Building type="group">
<BuildingName type="text">RP-IT</BuildingName>
    <Room type="group" roomsetupname="Double Conference Table" roomsetuptime="0"
roomteardowntime="0" roomcapacity="1000" roomlink="" usersetuptime="0"
userteardowntime="0" usersetupcount="1000" usersetupnotes="">
<RoomName type="text">101</RoomName>
</Room>
</Building>
</Location>
<Location type="group">
<LocationName type="text">Bethlehem</LocationName>
<SetupNotes>Facility Notes</SetupNotes>
```

<Building type="group">
<BuildingName type="text">Hotel</BuildingName>
<Room type="group" roomsetupname="" roomsetuptime="0" roomteardowntime="0" roomcapacity="0" roomlink="" usersetuptime="0" userteardowntime="0" usersetupcount="0" usersetupnotes="">
<RoomName type="text">200</RoomName>
</Room>
</Building>
</Location>
</Locations>

In the CSV file format, the location, building and room column have been collapsed into a single "Facilities" column which contains a delimited list of the exact facilities associated with the event occurrence. For example, if an event occurrence was assigned to the location "Bethlehem", the building "Hotel", and the room "100" and also the room "202" in room division "202B", the supplied CSV Facilities column would be as follows:

Bethlehem::Hotel::100||Bethlehem::Hotel::202::202B

Recur Type:
One Time, Interval#, Weekly, Weekly#, Monthly by Date#, Monthly by Position#, Yearly by Date. The # must be replaced by a number.

Interval1 would be every day, Interval2 would be every 2 days, Interval# would be every # days… Weekly1 would be every week, Weekly2 would be every 2 weeks, Weekly# would be every # weeks…

Monthly by Date1 would be every month on the date, Monthly by Date2 would be every 2 months on the date, Monthly by Date# would be every # months on the date…

Monthly by Position1 would be every month at a certain position, Monthly by Position2 would be every 2 months at a certain position, Monthly by Position# would be every # months at a certain position…

Yearly by Date would be every year on a certain date.

Recur Days:
Recur days can be Monday, Tuesday, Wednesday, Thursday, Friday, Saturday or Sunday. They can be a comma separated list. These values are only used when the Recur Type is Weekly#. If the start date and end date of an event are not on the same day, this value must be blank as this does not apply to multi day recurring weekly events.

Recurring End Date: This date is used with recurring events. The event will show up on the calendar up to and including the value specified. In other words, it is the "repeat until" date for a recurring event.

Created On and Modified On Fields:
The two final fields (created on and modified on) both require a date and time element. Between the date and time there can be only one single space separating the two values.

While these two fields are not mandatory for a CSV import to work correctly, if they are included and you are creating a persistent import feed, then the Calendar application can successfully look for events that were updated in your source feed and appropriately update them in Active Data Calendar. Without these two values, you will need to include in your persistent feed file, only new events for import with unique Import Occurrence IDs.

Room Setup Name, Room Setup Time, Room Tear Down Time, Room Capacity, Setup Notes
These fields define the parameters for a room setup type and time to setup & teardown. You can also define the number of attendees to prepare for.

Information Status
This field allows for the import process to designate whether or not the event in question should be marked as cancelled "C" or rescheduled "R" or deleted "D" from the system entirely. A status of "A" or blank is considered to be the default value for approved events.

***IMPORTANT INFORMATION ABOUT THIS FIELD**: This field constitutes the overall Marketing Status of an event. If the Facilities Module is enabled, the status of associated resource and facility requests are also based off this status. For example: if the "Information Status" field has a status of "A", then all facilities and resources associated with the event are considered to be imported as approved as well.

User Setup Time, User Tear Down Time, User Setup Count, User Setup Notes
These fields define the parameters for user setup & teardown times. You can also define the number of attendees for which the facility should be prepared.

Internal Custom Fields
These fields allow the importing process to specify event information which can be used for internal filtering only and will not be displayed to visitors of the calendar.

Registration Fields
These fields specify whether or not the imported event should have registration enabled. If registration is enabled (Y) the other registration fields noted with an asterisk (*) above are required.

Resources – CatSubcat
This is the categories and subcategories for which a resource can be classified. If the value provided is not in the calendar database, a new category will be created. Each resource category must have a resource subcategory in order to add resource items. Please place a double colon (::) between the category name and subcategory name. If you wish to specify multiple category/subcategory pairs, place double bar (||) between them. Please note that a subcategory is required. See the examples below.

"AV Equipment::Televisions"

To specify multiple category and subcategory combinations: "AV Equipment::Televisions||AV Equipment::DVDs"

Event Owner
This is the ID of owner of the event. This field is an integer field that is linked to the Account table. It is not required but if it's populated, it must be a valid Account ID.

External Import ID
This is a user set import id that will link this import to other imports. When used in conjunction with the External Series ID and External Occurrence ID, it will form a link between records that will allow for updates of existing event records.

Event Owner Name
This is a text field that is used during the export process. In order to allow calendar exports to be re-imported into the same calendar or a central calendar, this field is required to be included. It is not required to be populated with data.

AttachmentBinary and ImageBinary Fields (XML Only):
These fields contain base64 encoded image and attachment data if the event has an associated image and/or attachment(s). Please note that only an example of an image binary is included in the sample XML below. An example of an attachment binary would be too large for this document.

Example of Enterprise XML and CSV Import Files
The links to sample files are provided in your client's only area.

Importing iCal
The format for an iCal file is much more forgiving than the above CSV or XML formats, but it must be followed exactly for the events to import properly. The following is a list of all of the fields that need to be provided and some guidelines to make the import process easier. Please note that iCal event files do not contain a "department" field. Therefore, during the import of any iCal file, a destination department within calendar under which the events will be placed must be specified.

In order for the file to be processed the SUMMARY, DTSTART (including starting time) and DTEND (end time is recommended but not required) must be in the file

Other fields that are checked during an iCal import are "DESCRIPTION", "RESOURCES", "LOCATION" and "CATEGORIES", these fields are not required in the iCal.

NOTE: All values imported by the user must be within the allowable field limits set in the database.

Field Name	Length	Possible Values	Required
Summary	100	Alpha numeric	Y
Start Date	N/A	Valid date in "m/dd/yyyy" format	Y
End Date	N/A	Valid date in "m/dd/yyyy" format	N
Description	6000	Alpha numeric	N
Resources	255	Alpha numeric	N
Location	75	Alpha numeric	N
Categories	50	Alpha numeric	N

Summary: This is the Event Name that is being posted in the Calendar.

Description: Once the iCal is imported, Description will be displayed within the Event Description.

Resources: Once the iCal is imported, Resources will be displayed within the Event Details.

Example of Enterprise XML and CSV Import Files The links to sample files are provided in your client's only area.

To begin the import process:

Click **BROWSE** to locate the CSV, XML or iCal that you would like to import into the calendar. You can use the following options to add Departments and Categories to your event data.

Department and Category information is required in Calendar. You can use the following options to add Departments and Categories to your event data if they are missing from your CSV, XML or iCal file:

Departments

There are three main radio button options within this area. Read them carefully since they relate to how your data will be imported and will ultimately determine the success of the import process for the file that you have selected.

Import File includes Department Information: This is the default selection and if maintained, your import file should already contain information in all Department fields for each event in the import. If any Department fields are missing data and this option is selected, then your entire import will not complete and you will receive a message that the import was not successful.

Select Department Information Globally: If selected, then the Department name that you select from the drop-down will be applied globally to the entire import file based off the rules that you select for the sub-set options within this area:

- Apply the selected Department to all events being imported: This will replace any and all Department field information with the Department that you select from the drop-down menu. This includes any Department fields that already contain Department information within your file.

- Apply the selected Department for event(s) where no Department is specified in import file: This will place the Department name selected from the drop-down into any Department fields for events that do not already contain Department information.

Use Import Mapping Wizard to select an individual Department for each event where Department information is missing: This will allow you to select a Department name from a drop-down for each event that the import wizard recognizes as not containing Department information. You will make these selections on an event-by-event basis on the next screen, once you have clicked the **SUBMIT** button on the bottom of this screen.

Category(s)/Subcategory(s)

There are three main radio button options within this area. Read them carefully since they relate to how your data will be imported and will ultimately determine the success of the import process for the file that you have selected.

Import File includes Category/Subcategory Information - This is the default selection and if maintained, your import file should already contain information in all Category fields for each event in the import. If any Category fields are missing data and this option is selected, then your entire import will not complete and you will receive a message that the import was not successful.

Select Category Information Globally - If selected, then the Category/Subcategory name that you select from the drop- down will be applied globally to the entire import file based off the rules that you select for the sub-set options within this area:

- Apply the selected Category/Subcategory to all events being imported - This will replace any and all Category field information with the Category/Subcategory that you select from the drop-down menu. This includes any Category fields that already contain Category information within your file.

- Apply the selected Category/Subcategory for event(s) where no Category is specified in import file - This will place the Category name selected from the drop-down into any Category fields for events that do not already contain Category information.

Use Import Mapping Wizard to select an individual Category/Subcategory for each event where Category information is missing - This will allow you to select a Category name from a drop-down for each event that the import wizard recognizes as not containing Category information. You will make these selections on an event-by-event basis on the next screen, once you have clicked the **SUBMIT** button on the button of this screen.

SUBMIT your selections and you will receive a summary of the events.

- **Total Event:** This calculates the total number of events being added to the calendar database from your CSV, XML or iCal.
- **Approved Events:** This calculates the total number of event that were successfully added to the calendar database.
- **Rejected Events:** This will calculate the total number of events that were not added due to an error within the CSV, XML or iCal file. These errors can be easily viewed by using the "click here" link.

  Click here to get a detailed report on the events that were rejected. It is recommended that you save the file to your hard drive, make the required changes, and then upload the new file. Remember to remove all the error text and blank lines from the file before uploading the modifications. If rejected events are not fixed they will not be imported into the calendar.

  NOTE: Transfer those events with error into a new CSV, XML or iCal to avoid having events duplicated within the Calendar application. Also, the values imported by the user must be within the allowable field limits set in the database.

Import Categorization

To import categorization, simple BROWSE, find the TXT file on your network or local drive and upload the file into Calendar. The categorization list can include Categories and Subcategories if formatted as Public::Category:Subcategory or Private::Category::Subcategory.

Import Locations

To import locations, simple BROWSE, find the TXT file on your network or local drive and upload the file into Calendar. The location list can only include main locations and not buildings or rooms information. Room lists can be uploaded under Add or Modify Rooms.

One-Time Location/Building CSV Import

Administrative users with the privilege to Import Data can use this area to upload a CSV file.

Adding your Import File

Click the **BROWSE** button and locate the CSV file on your network/hard drive that you would like to import into the Calendar.

Formatting of your CSV File

The Import Data area includes new options for selecting to upload CSV file format of all Location data and Building data in separate files through the Active Data Calendar "Import: Add" area. Each file may include the following details about each Location or Building:

Import Domestic Location Details

- Location Name
- Address 1
- Address 2
- City
- State
- ZIP County Phone Fax
- Internet Address
- Internal Notes

Import Domestic Building Details

- Location Name
- Building Name
- Address 1
- Address 2
- City
- State
- ZIP
- County
- Phone
- Fax
- Internet Address
- Internal Notes

Click SUBMIT to import your Location list.

View Persistent Import Feeds

To navigate to the VIEW IMPORT EVENTS LIST area, click on the EVENTS tab and then select IMPORT: VIEW.

Administrative users with the privilege to Import Events can manage their import feeds, check current status of a feed, view logs for ongoing feed status and modify or delete a feed. All import feeds are listed in a table and the columns include:

- **Import Name**: The import name is listed.
- **Polling Dates**: The start and end dates for polling of this import are listed.
- **Polling Time**: The start and end times for polling of this import each day, on the dates entered, are listed.
- **Frequency of Polling**: The interval at which the calendar application should poll the import URL to find updates and import them into Calendar. The number listed is the number of minutes that Calendar should wait until it runs the import thread for that feed.

- **Feed Status**: This column displays the current feed status in general. Status options that may display include: Active (import currently has an active status), Inactive (import currently has an inactive status and is not running regardless of schedule), Future (the start date of the import is in the future) or Expired (the end date for the import has past and the import is no longer running)
- **Last Run Result**: This column displays the results that Calendar encountered the last time it ran the import thread for this import feed. Status options that may display include:
    - **Failed**: The import currently has a failed status and was not able to import events on the last import run
    - **Success**: The import is running successfully.

  The status displayed will also be displayed as a link and the user can click the link to go to a detail screen showing the entire log of each import run and the status per import run.
- Action: Options include Modify and Delete. If Modify is selected, then the user is navigated to the Modify Import screen. If Delete is selected, then the user is navigated to the Delete Import confirmation screen.

Manage Import Service

At the top of this screen there is an area noting the current status of your organization's Calendar import thread. The import thread may be stopped completely and if so, you will see a message stating this and that will inform you that all imports are currently in a stopped status and are not running. You can click the "Start" button to restart the import thread and begin running all imports again. Or, if for some reason you need to stop the import thread, you can do that as well by clicking the "Stop" button.

Add Persistent Import Feed

To navigate to the ADD PERSISTENT IMPORT area, click on the EVENTS tab and then select IMPORT: ADD. Select "Persistent Import Feed" from the drop-down menu.

Administrative users with the privilege to Import Events can use this area to add persistent import feeds from other applications/systems where they are managing event information. All import feeds into Active Data Calendar must adhere to the Calendar data definitions required and those fields required for an import can be found in the Tips & Tricks documentation linked from your Client Portal page.

To add a new event feed, complete the following fields:

- **Import Name**: Please enter an import name that will identify the events that are being imported. This is a required field and has a maximum character limit of 50 alpha-numeric characters.
- **Import Type**: Please select the file type that you will be importing. Options include iCal, CSV or XML.
- **Import URL**: Please enter the URL where Active Data Calendar should poll to find event updates. The import URL is a required field and the maximum characters cannot exceed 255 alpha-numeric characters.
- **Username/Password Fields**: These fields must only be completed if the URL that you are using for the event import feed is secure and requires login information. Each field can accept a maximum of 50 alpha-numeric characters.
- **Assign Events to**: Please select a user account from the drop-down. The user selected will become the owner of all events imported from this feed.
- **Disable Workflow Emails**: The default radio button selected is "Yes". If maintained, then no workflow emails will be sent to the User identified for this import when the events are imported at each scheduled interval. If the radio button for "No" is selected, then the User identified for this import feed will receive workflow email notifications each time events are imported.
- **Start Date**: Date to start the event import feed.

- **End Date**: Date to end the event import feed. Events will no longer update from this feed once this date is past.
- **Time to Begin Retrieving**: The time each day when the Calendar import feed should begin looking for new event updates from this event feed.
- **Time to End Retrieving**: The time each day when the Calendar import feed should stop looking for new event updates from this feed.
- **Import Interval**: The interval, in minutes, that Calendar should check the import feed URL (between the start and end times identified) in order to look for event updates.
- **Active**: The default selection is "Active". If maintained, then the import feed will be active once finalized. If the selection for "No" is chosen, then the import will be added when the user clicks "Finish" but the import will not run (regardless of dates/times entered for import), until the status is changed to "Active".
- **Departments**: Select a Department from the drop-down provided and then select from the two main radio button options within this area. Read them carefully since they relate to how your data will be imported and will ultimately determine the success of the import process for the file that you have selected.
    - Apply the selected Department for event(s) where no Department is specified in import file: This will place the Department name selected from the drop-down into any Department fields for events that do not already contain Department information.
    - Select Department Information Globally: If selected, then the Department name that you select from the drop-down will be applied globally to the entire import file.
- **Category(s)/Subcategory(s)**: Select a Category or Category/Subcategory from the drop-down provided and then select from the two main radio button options within this area. Read them carefully since they relate to how your data will be imported and will ultimately determine the success of the import process for the file that you have selected.
    - Apply the selected Category for event(s) where no Category is specified in import file: This will place the Category name selected from the drop-down into any Category field for events that do not already contain Category information.
    - Select Category Information Globally: If selected, then the Category name that you select from the drop-down will be applied globally to the entire import file.

Once all required information has been entered, click the SUBMIT button to add the import feed.

NAVIGATION OPTIONS WITHIN THIS AREA

To **CANCEL** out of the Add Persistent Import Feed area, click the CANCEL button and you will be returned to the main menu of Calendar and no changes will be saved.

Click the **FINISH** button to finalize your Persistent Event Import. Or, click the View Import Feeds link to navigate to the View screen listing all current Persistent Event Imports.

Modify Persistent Import

To navigate to the MODIFY PERSISTENT IMPORT area, click on the EVENTS tab and then select IMPORT: MODIFY. You will see a list of current persistent imports, select the import you want to modify and use the drop-down under the column entitled "Actions" in order to select the Modify option.

All persistent imports can be modified. The information that can be modified includes:

- Import Name
- Import Type

- Import URL
- Username/Password
- Assign Events to
- Disable Workflow Emails
- Start Date/End Date
- Start Time/End Time for Retrieving Updates
- Import Interval
- Active: Change to active or inactive from this area.
- Category for mapping all imported events in the feed
- Department for mapping all imported events in the feed

NAVIGATION OPTIONS WITHIN THIS AREA

To **CANCEL** out of the Modify Persistent Import area, click the **CANCEL** button and you will be returned to the main menu of Calendar and no changes will be saved.

Click the **SUBMIT** button to finalize your Persistent Event Import modifications.

Delete Persistent Import

To navigate to the DELETE PERSISTENT IMPORT area, click on the EVENTS tab and then select IMPORT: DELETE. You will see a list of current persistent imports, select the import you want to delete and use the drop-down under the column entitle "Actions" in order to select the Delete option.

Click the **YES** radio button and hit the **FINISH** button to finalize your deletion of the persistent import, or click the **NO** radio button and hit the **FINISH** button to exit out of the delete action and navigate back to the View Persistent Import Feeds screen.

Select the **CANCEL** button to exit out of the Import area completely and you will be navigated back to the Main Menu of Active Data Calendar. Your import will not be deleted.

Registration

Adding Registration to an Event

A user is granted this privilege sees the **Enable Registration** options on the Add Event: *Contact and Other Information* page in the Calendar's administration area:

TIPS: If you would like to keep your registration spaces open/unlimited, then do not enter anything in the space for maximum registrants.
You can also choose to enter in a maximum number of registrants but choose not to display that maximum number on the event details screen.
The maximum number that is set for a series event is automatically applied to every occurrence in the series. You can always go in and modify an individual occurrence to change the number of maximum spaces for a particular date!

An available "space" is only removed from your total remaining, once you approve a registrant. Example: You may have set your limit of spaces to 25 but have 50 pending registrants. You can approve up to 25 of those pending registrants. Once you approve the 25th registrant, your registration icon will disappear from the event details screen.

You cannot select to have your maximum number of registrants exceed the maximum capacity for the facility that you request for your event.

Event Registration - Standard Calendar Installs (without Advanced Registration Module)

Enable Registration: Users who have been granted the privilege to enable event registration will see a checkbox at the bottom of this screen for "Enable Registration". If selected, then the registration icon will be enabled on the event details screen and visitors to the event details can click the registration icon to complete an interactive form requesting registration for the event.

Registration Type: Select from the drop-down menu if you would like to setup specific registration rules that are based on the type of registration options you would like to provide to visitors. This drop-down only appears if the event is setup as a series (pattern or custom). Options include:

- **Mandatory Complete Series Registration Only** - If selected, Calendar visitors may only register for the series in its entirety. This means that no event occurrences may be registered for individually and that series registration will be removed from the event after the first date/time of the series has passed.
- **Series Registration Enforced with Partial Series Allowed** - If selected, Calendar visitors may only register for the series in its entirety, with no event occurrences available for individual registration. However, this option differs from "Mandatory Complete Series Registration Only" in that a visitor may still register for the series, even if one or more of the series occurrence dates/times has passed. Registering after the

series has already "started" simply registers the visitor for all other date/time occurrences remaining in the series.

- **Single Occurrence Level Registration Only Enforced** - If selected, Calendar visitors will see the registration option available from all occurrence dates and will be able to register for any one single occurrence that they choose. Once the visitor is approved for registration for one occurrence in the series, then they will no longer be able to register for any other dates/times in the series. If the visitor attempts to register for a second occurrence in the series, they will receive a message that they are already registered and may not register for more than one occurrence and the date/time of the occurrence for which they are already registered will appear.
- **Multiple Occurrence Registration Allowed** - If selected, Calendar visitors will need to register for each occurrence in the series individually. If a visitor would like to register for multiple or all dates in the series, then they will see an option to "Register for other Dates in the Series" and they will have the option to select multiple occurrences, all occurrences or a single occurrence within the series by selecting the appropriate checkboxes. The visitor may or may not be approved for all dates/times that they request since approval/denial of registrants for these types of events is on an occurrence by occurrence basis.

Maximum Number of Registrants: In addition to enabling registration for the event, you may also select to set a maximum number of event registrants and if the number of available registration spaces should display on the event details screen. The maximum number of registrants is based off the number of approved registrations in the administration area.

Registration Deadline: A valid date (mm/dd/yyyy) can be manually entered into the text field or the Calendar Date Selector can be used to select a valid date from the interactive Calendar grids. *NOTE: For rules on selection of valid deadline dates, see the User Manual for more information. If a registration deadline is selected/entered, then registration will be automatically turned off from the front-end Calendar screens on that dateat the end of the day, regardless of whether the maximum registrants has been reached or not. You may always go into Modify Event to extend the date or make the deadline sooner, however the date selected must always be after the current date. If maximum registrants are set and a registration deadline is set, then the first “rule” met will supersede the other.

Cancellation Deadline: You may use this field to signify the last point at which registration cancellations will be accepted, and any monies may be refunded, if applicable. A valid date (mm/dd/yyyy) can be manually entered into the text field or the Calendar Date Selector can be used to select a valid date from the interactive Calendar grids. If cancellation date is entered, the registration will be be canceled at the end of the day of the date specified. Alternatively, you may select a number of hours to specify precisely when registration may be cancelled, such as 24 hours before the event begins.

Display Registration Spaces Still Available: Options include "Yes" and "No" radio buttons. The default is set to "No" which means that the number of registration spaces still available for the event will not show with the event details on the front-end Calendar views. If "Yes" is selected, then a message will display at the top of the event details screen on all Public and Private Front-End Calendar Event Details Views .

Display text when no spaces are remaining: The default text displayed where no registration spaces are remaining/available is, "There are no registration spaces remaining for this event." If you would like a custom message displayed with the event details on the front-end Calendar view screens, please edit the text within the field provided. This field allows for up to 100 maximum alpha-numeric characters to be entered.

Registration Type

- **Mandatory Complete Series Registration Only**
  If selected, whenever a Calendar visitor clicks on a registration icon from a series event, they will see only the option to register for the entire series and not for individual occurrences within the series. By completing the registration, the event administration area will include only one "event" listing for approving/denying, etc. the registrant for the entire series. When clicking on the registrant link, the user managing the registrants can see the series details and all dates included but only process at the series level.

  With this option selected, the Calendar interface will only display the registration option for the series up to the start date/time of the first occurrence in the series. Once the first occurrence start date/time has passed, registration will be removed from the event, including the first date/time occurrence and all occurrences thereafter. This is due to the fact that selecting this option enforces that the registrant is signing up to attend all event occurrences and since one is "past" they cannot complete that requirement, so registration is removed.
- **Series Registration Enforced with Partial Series Allowed**
  This means that whenever a Calendar visitor clicks on a registration icon from a series event, they will see only the option to register for the entire series and not for individual occurrences within the series. By completing the registration, the event administration area will include only one "event" listing for approving/denying, etc. the registrant for the entire series. When clicking on the registrant link, the user managing the registrants can see the series details and all dates included but only process at the series level.

  With this option selected, the Calendar interface continues to display the registration option throughout the entire series date/time span, up to the start date/time of the last occurrence in the series. By selecting this option the user is saying that even though series registration is enforced, visitors may register to attend the series, even when they have missed occurrences because the start date/time of one or more occurrences has passed. This allows for registration at the series level up to the last occurrence date/time. By completing the registration, the event administration area will include only one "event" listing for approving/denying, etc. the registrant for the entire series. When clicking on the registrant link, the user managing the registrants can see the series details and all dates included but only process at the series level. The only way that the user managing registrants knows which registrants attended all occurrences vs. registered after the series commenced, is by reviewing the registration date/time stamp in the administration area.
- **Single Occurrence Level Registration Only Enforced**
  This means that when a Calendar visitor clicks on a registration icon from any date/time occurrence in a series, they will see the registration option for that occurrence ONLY and they will not see the link to see all other occurrences in the series. They are only allowed to register for one occurrence and if the registration process is completed and approved, and they attempt to register for another occurrence, they will be presented with a message that they cannot register for more than one occurrence in the series as well as the details on the occurrence for which they are already approved.

  The registration icon will display and if the visitor is already registered for an occurrence in the series and selects the icon, then the registration form screen will not display the registration form fields, but rather a message stating that "You are already registered for the event date/time listed below. You may not register for more than one data/time within this event series." The occurrence name and date/time that the visitor is already registered for will display for informational purposes only. There will also be text included regarding how the member can withdraw/cancel their existing registration. That text is current set to "If you would like to cancel your existing registration and register for a new date/time, then please use the cancellation option available in the email confirmation that was sent when your registration was approved."

- **Multiple Occurrence Registration Allowed**
  This means that when a Calendar visitor clicks on a registration icon from any date/time occurrence in a series, they will see the registration option for that occurrence as the default on the top of their registration form, however they will ALSO see the option to "Click here to register for other occurrences within this series." and if selected this option will function as it does in 3.6 of Active Data Calendar where all future occurrence dates and times will display as individual options for registration and the visitor may check any checkboxes for those occurrences that they would like to register.

  Within the administration area of Calendar, each occurrence in a series that has "Multiple Occurrence Registration Allowed" will display individually as a separate "event" with separate registrants that can be processed on an event occurrence basis.

Registration Deadline: A valid date (mm/dd/yyyy) can be manually entered into the text field or the Calendar Date Selector can be used to select a valid date from the interactive Calendar grids. If a registration deadline is selected/entered, then registration will be automatically turned off from the front-end Calendar screens on that date at the end of the day, regardless of whether the maximum registrants has been reached or not. You may always go into Modify Event to extend the date or make the deadline sooner, however the date selected must always be after the current date. If maximum registrants are set and a registration deadline is set, then the first “rule” met will supersede the other.

Cancellation Deadline: You may use this field to signify the last point at which registration cancellations will be accepted, and any monies may be refunded, if applicable. A valid date (mm/dd/yyyy) can be manually entered into the text field or the Calendar Date Selector can be used to select a valid date from the interactive Calendar grids. If cancellation date is entered, the registration will be be canceled at the end of the day of the date specified. Alternatively, you may select a number of hours to specify precisely when registration may be cancelled, such as 24 hours before the event begins.

Maximum Number of Registrants: In addition to enabling registration for the event, you may also select to set a maximum number of event registrants and if the number of available registration spaces should display on the event details screen. The maximum number of registrants is based off the number of approved registrations in the administration area.

The maximum number of registrations cannot be set to a number that exceeds the maximum capacity of the room scheduled for the event (and based off the setup chosen). If you attempt to make the number great than the maximum capacity, they will receive the following warning message when they click the “NEXT” or “FINISH” buttons:

> The maximum number of registrants entered exceeds the maximum capacity for the room and setup that you selected. Please adjust your maximum number of registrants or use the BACK button in the navigation options on this screen to return to your event location/schedule area and modify your selections.

Display Registration Spaces Still Available: Options include "Yes" and "No" radio buttons. The default is set to "No" which means that the number of registration spaces still available for the event will not show with the event details on the front-end Calendar views. If "Yes" is selected, then a message will display at the top of the event details screen on all Public and Private Front-End Calendar Event Details Views that states the number of registration spaces remaining for the event.

Display text when no spaces are remaining: The default text displayed where no registration spaces are remaining/available is, "There are no registration spaces remaining for this event." If you would like a custom message displayed with the event details on the front-end Calendar view screens, please edit the text within the field provided. This field allows for up to 100 maximum alpha-numeric characters to be entered.

Registration Payment Information

- **Event Cost**: The event cost text field allows you to enter up to 12 numeric characters, however, regardless of what is entered; the total cost will be rounded to the closest 2 decimal dollar value. If the event has mandatory series registration selected for registration type, then the cost is for the entire series. If any other registration type is selected, then the cost entered is for each occurrence and if the registrant is allowed to select more than one occurrence, their total will be the number of occurrences selected multiplied by the event cost.

Additional Registrant Information (requires the Advanced Registration Module)

You can set up an event to accept multiple registrants from one registration form. Multiple registrant types are globally configured in the Registration Tab - Registrants - Type area. The ability to allow multiple registrant types to an event registration provides additional flexibility to offer discounts by registrant type, the cost per registrant type, and restrict the maximum number of each registrant type per event registration.

If the event requires a payment and no registrant type cost is added to the registrant type, then the event amount will be used. Below the edit section, the current registrant types associated with this event is listed.

- Registrant Type: You may specify multiple registrant types for each type of registrant you would like to offer. This allows you to offer registration for more than one type of registrant, such as a senior citizen registration, student registration, or even to register for a premium (such as a free t-shirt) if you would like to offer that as part of or separately from general registration
- Registrant Display Name: This denotes how you would like the additional registrant to be displayed, such as “freeT-shirt” or “Senior Citizen registration”
- Maximum Registrant Type Limit: To use the occurrence limit, leave this field blank; otherwise, enter the maximum number of this type of registrants allowed/available (for example, if it is to register for a handicapped spot at a show, the maximum would be the number of handicapped equipped spaces available
- Registrant Type Cost: To use the occurrence cost, leave this field blank; otherwise you may specify a separate price or apply a discount to the cost for this registrant type.
- Apply Discounts to Registrant Type: Check to apply the discount specified in the original registrant type; otherwise, leave blank
- Include in Spaces Remaining Count Check**:** to include count against the “Spaces Remaining”count
- Current Status**:** Choose Active or Inactive to activate or deactivate this registrant type
- Require Additional Information**:** Checking this box places an empty field next to the registrant type for the registrant to provide additional information
- Include information on Name Tags**:** Check this box to include registrant information (such as whether the registrant has signed up for a free t-shirt) on the list of printable name tags for the event.

- **Discount Code Setup**
  - **Select Codes**: This link displays a table of discount codes that have been entered by all users through the Calendar system and have been designated as "Allow General Use". Calendar does

not allow for duplicate discount codes and therefore you may select from previously entered codes to easily add them to your event.

- **Discount Code**: This text field allows for up to 12 alpha-numeric characters to be entered as a unique discount code. Discount codes are not case sensitive when added by registrants.
- **Discount Type**: Drop-down with two options Percentage Discount and Fixed Dollar Discount. Based off the selection chosen, the field for discount details will have different business rules. If a discount code is added, then this is a required field selection.
- **Discount Details**: If percentage is selected, then you must enter in a value between 1 and 100%. This field supports discounts that include decimal points up to 2 placeholders following the decimal point (99.99%). Rounding will be applied to the total cost if the cost plus discount creates a final cost that is more than two placeholders. If Fixed Dollar Discount is selected, then a dollar amount must be entered in the field for Discount Details and that fixed dollar amount can have a decimal with two placeholders as well. The maximum number of characters for this field is 12. Please do not enter in the % or $ signs.
- **Applies To**: If percentage is selected, then the discount must always be applied to the total and this option will be disabled. If fixed dollar amount is chosen, then you may select to apply the discount to each individual occurrence in the series (thus providing a possibly higher discount total amount) or to the total registration cost (including all occurrence costs combined).
- **All General Use:** Select this checkbox if you would like your discount code to be added to the general list that can be access and applied by other users within their events. Be aware that any results related to discount codes will then be across all events where the discount is applied and not directly tied to any one event.

ADD Button: Select this button to add the Discount Code to your event. You may add as many discount codes as you would like to your event, including unique discount codes and also those pulled from the General Use list. Registrants however will only be able to apply one discount code to their event registration. Discount Codes added to the event will appear in a list on the screen. You may delete any discount codes that you need from your list until you are ready to proceed with your event entry.

Add Event - Rules with Advanced Registration Module and Base off Event Schedule Type

Event Process	Primary Action	Secondary Choices	Rules
Add Event - Individual (Single Date)			
	Select to Enable Registration		
		Select Form Template	A form template must always be selected. In standard registration only the “Standard Form” is available. In Advanced Registration, the forms for which the user has been granted permission when the form was added/last modified display in the dropdown.
		Registration Type (Select One)	
		Multiple Occurrence Registration Allowed	Visitor may register more than once for the single occurrence event or if there is multiple occurrence setups on the single day, they may register for as many as they like from those that are available.
		Single Occurrence Level Registration Only Enforced	Visitor may only register for one occurrence if there is more than one setup for the single day event. Once the visitor is approved for registration for one occurrence then they will no

			longer be able to register for any other time(s)/occurrence(s) on that date.
		Set Max Number of Registrants	
		Registration Deadline	Deadline can be any date prior to the start date of the event but not before the current date when the event is being added (or modified).
		Cancellation Deadline	Indicate the last date and time or number of hours prior to which registration cancellations will be accepted;
		Enable or Disable View of Remaining Slots	
		Event Cost	Any value can be entered based off the character size allowed.
		Discount Code	New discount codes may be added or users can select from previously entered discount codes that were selected as General Use Codes.
Add Event - Series (SERIES REGISTRATION ONLY)			
	Select to Enable Registration		
		Select Form Template	A form template must always be selected. In standard registration only the “Standard Form” is available. In Advanced Registration, the forms for which the user has been granted permission when the form was added/last modified display in the dropdown.
		Registration Type (Select One)	
		Multiple Occurrence Registration Allowed	Visitors may register for each occurrence in the series individually. If a visitor would like to register for multiple or all dates in the series, then they will see an option to "register for other Dates in the Series" and they will have the option to select multiple occurrences, all occurrences or a single occurrence within the series by selecting the appropriate checkboxes. The visitor may or may not be approved for all dates/times that they request since approval/denial of registrants for these types of events is on an occurrence by occurrence basis.
		Single Occurrence Level Registration Only Enforced	Visitors will see the registration option available from all occurrence dates and will be able to register for any one single occurrence that they choose. Once the visitor is approved for registration for one occurrence in the series, then they will no longer be able to register for any other dates/times in the series. If the visitor attempts to register for a second occurrence in the series, they will receive a message that they are already registered and may not register for more than one occurrence and the date/time of the occurrence for which they are already registered will appear
		Mandatory Complete Series Registration Only	All details entered are for series registration. This setting enforces that all registrants will automatically be registered for every occurrence in the series if approved. This means that no event occurrences may be registered for individually and that series registration will be removed from the event after the first date/time of the series has passed.
		Series Registration Enforced with Partial Series Allowed	Visitors may only register for the series in its entirety, with no event occurrences available for individual registration. However, this option differs from "Mandatory Complete Series Registration Only" in that a visitor may still register for the series, even if one or more of the series occurrence dates/times has passed. Registering after the series has already "started" simply registers the visitor for all date/time occurrences remaining in the series.
		Set Max Number	Max Number of Registrants cannot exceed the maximum

		of Registrants	number of space allowed in Room (If Facilities Module is Enabled). The maximum registrant number cannot exceed the maximum capacity set for the smallest room within the series.
		Registration Deadline	If Mandatory Series Registration is enabled then the deadline can be any date prior to the start date of the first occurrence in the series. The deadline cannot be before the current date when the event is being added (or modified). If Single Occurrence or Multiple Occurrence is selected then the registration deadline is for that particular occurrence. One thing to note is that if a visitor is attempting to register for more than one occurrence (multiple occurrence registration allowed), then it is possible that one of the occurrences that they select has past its deadline date and would show as disabled in the list of available occurrences. The registration deadline enables or disables the event from registration. It should show in the list as an event in the series but disabled from selection. (Same as currently how the display is handled when an occurrence date is past.)
		Cancellation Deadline	Indicate the last date and time or number of hours prior to which registration cancellations will be accepted;
		Enable or Disable View of Remaining Slots	
		Event Cost	Any value can be entered based off the character size allowed. If Mandatory series was selected as the registration type, then the amount entered is the cost for the entire series. If any of the other three occurrence level registration types was selected, then the cost entered is on a per occurrence basis. Occurrence default cost is saved on Event Add and if a user wants to make any individual occurrences a different cost, they must modify the occurrence.
		Discount Code	New discount codes may be added or users can select from previously entered discount codes that were selected as General Use. Discount Codes added for mandatory series registration are applied to the entire series cost. Discount Codes added for single or multiple occurrences are applied based off the selection to apply codes to individual occurrences or to the combined total registration amount.

Modifying Events

Rules with Advanced Registration Module and Base off Event Schedule Type

Event Process	Primary Action	Secondary Choices	Rules
Modify Event - Individual (Single Date)			
		RULES for modifying schedule of event to add more than one occurrence.	If an event was originally added as a one-time event and then is modified to have more than one occurrence (making it a series), then the option for selecting series or occurrence level registration will display ONLY if there are no current registrants for the individual occurrence. Otherwise, only occurrence level registration is allowed and the field does show but it shows as selected as single occurrence level registration only enforced and is able to be modified. **Please Note**: If there are active registrants already tied to the event, then you will not be allowed to modify the schedule. It is recommended that you copy the event and create a new event with the additional dates and include your new registration options within the copied event.
		RULES for	Cannot modify the date and time of the event if there is at least

		modifying individual occurrence date/time.	one registrant. Registrants must be deleted first or event should be cancelled so the system automatically notifies all registrants that the event was cancelled (and issues payment credits if applicable based off the event).
	Select to Enable Registration		Cannot select to disable registration from here if it was previously enabled and there is at least one registrant. If there are no registrants then registration can be disabled and all fields are set back to their default "null" parameters as though nothing was ever selected. If there are registrants, then the event owner/admin can only disable registration from the Manage Registrants screen and it does not remove registrations from the event but rather temporarily disable the ability for anyone new to register. To completely remove registration from the event, the event owner/user must first delete all registrants and then the event can be modified to completely remove event registration.
		Select Form	The form cannot be modified if there is at least one active registration (pending or approved).
		Registration Type	This option can only be modified if there are no pending or active registrants tied to this event.
		Set Max Number of Registrants	The number of registrants can be increased as long as the number does not exceed the maximum allowed for capacity of the selected room (if Facilities Module is enabled). The max number cannot be decreased to be less than the current number of approved registrants.
		Registration Deadline	Can be modified at any time up to the date of the event. The registration deadline simply enables or disables the ability for visitors to see the registration icon to register. If the registration deadline is past but there are still registrants pending that completed registration prior to the deadline modification, then they remain pending and can be processed.
		Cancellation Deadline	Indicate the last date and time or number of hours prior to which registration cancellations will be accepted;
		Enable or Disable View of Remaining Slots	This can always be modified.
		Event Cost	This field can be modified and the new cost will be applied to all new registrants (no approved, denied or cancelled registrants are affected, they remain as is with original information as entered and processed).
		Discount Code	New discount codes may be added or discount codes may be removed from the event which makes those codes deactivated for any new registrants attempting to enter them in for that particular event.
Modify Event - Series (Registration Not Enabled during Event Add) - ***(MANDATORY COMPLETE SERIES REGISTRATION ONLY is SELECTED)***			
		RULES for modifying schedule of event from a series to a one-time event.	Since registration was not originally enabled there are no limitations to making the event a onetime event if it was originally a series. If the user does decide to enable registration for the event once it is modified to be one-time, then they will not see the option for enabling series level registration.
		RULES for modifying the date/time of	Since registration was not originally enabled there are no limitations to modifying the series dates/times or pattern.

		any occurrences within the series and or modifying the pattern of the series.	
	Select to Enable Registration		
		Select Form Template	A form template must always be selected. In standard registration only the "Standard Form" is available. In Advanced Registration, the forms for which the user has been granted permission when the form was added/last modified display in the dropdown.
		Registration Type Select One	
		Multiple Occurrence Registration Allowed	Visitors may register for each occurrence in the series individually. If a visitor would like to register for multiple or all dates in the series, then they will see an option to "register for other Dates in the Series" and they will have the option to select multiple occurrences, all occurrences or a single occurrence within the series by selecting the appropriate checkboxes. The visitor may or may not be approved for all dates/times that they request since approval/denial of registrants for these types of events is on an occurrence by occurrence basis.
		Single Occurrence Level Registration Only Enforced	Visitors will see the registration option available from all occurrence dates and will be able to register for any one single occurrence that they choose. Once the visitor is approved for registration for one occurrence in the series, then they will no longer be able to register for any other dates/times in the series. If the visitor attempts to register for a second occurrence in the series, they will receive a message that they are already registered and may not register for more than one occurrence and the date/time of the occurrence for which they are already registered appears.
		Mandatory Complete Series Registration Only	All details entered are for series registration. This setting enforces that all registrants will automatically be registered for every occurrence in the series if approved. This means that no event occurrences may be registered for individually and that series registration will be removed from the event after the first date/time of the series has passed.
		Series Registration Enforced with Partial Series Allowed	Visitors may only register for the series in its entirety, with no event occurrences available for individual registration. However, this option differs from "Mandatory Complete Series Registration Only" in that a visitor may still register for the series, even if one or more of the series occurrence dates/times has passed. Registering after the series has already "started" simply registers the visitor for all date/time occurrences remaining in the series.
		Set Max Number of Registrants	Max Number of Registrants cannot exceed the maximum number of space allowed in Room (If Facilities Module is Enabled). The maximum registrant number cannot exceed the maximum capacity set for the smallest room within the series.
		Registration Deadline	Can be modified at any time up to the date of the event. The registration deadline simply enables or disables the ability for visitors to see the registration icon to register. If the registration deadline is past but there are still registrants pending that completed registration prior to the deadline modification, then they remain pending and can be processed.
		Cancellation Deadline	Indicate the last date and time or number of hours prior to which registration cancellations will be accepted;
		Enable or Disable	

		View of Remaining Slots	
		Event Cost	Cost can only be modified for the series up until the registration deadline date/date of the event. Since registration was not previously enabled for this event there would be no approved registrants to cost follows the same rules as on an event add for a series.
		Discount Code	New discount codes may be added or discount codes may be removed from the event which makes those codes deactivated for any new registrants attempting to enter them in for that particular event.
Modify Event - Series (Registration was Enabled during Event Add) - ***(MANDATORY COMPLETE SERIES LEVEL REGISTRATION ONLY ORIGINALLY SELECTED)***			
		RULES for modifying schedule of event from a series to a one-time event.	The event schedule cannot be modified for any event series that has at least one pending or approved registrant. If there are no registrants pending or approved, then the event schedule can be modified. All denied, cancelled or deleted registrants are deleted and not maintained for any audit trail. You will be presented with a message that states, "You will lose all registrants."
		RULES for modifying the date/time of any occurrences within the series and or modifying the pattern of the series.	The event schedule cannot be modified for any event series that has at least one pending or approved registrant. If there are no registrants pending or approved, then the event schedule can be modified. All denied, cancelled or deleted registrants are deleted and not maintained for any audit trail. You will be presented with a message that states, "You will lose all registrants."
	Select to Enable Registration		Cannot select to disable registration from here if it was previously enabled and there is at least one registrant. If there are no registrants then registration can be disabled and all fields are set back to their default "null" parameters as though nothing was ever selected. If there are registrants, then the event owner/admin can only disable registration from the Manage Registrants screen and it does not remove registration from the event but rather temporarily disables the ability for anyone new to register. To completely remove registration from the event, the event owner/user must first delete all registrants and then the event can be modified to completely remove event registration.
		Select Form Template	The form cannot be modified/changed if there is at least one active registration (pending or approved).
		Registration Type Select One	
		Multiple Occurrence Registration Allowed	Visitors may register for each occurrence in the series individually. If a visitor would like to register for multiple or all dates in the series, then they will see an option to "register for other Dates in the Series" and they will have the option to select multiple occurrences, all occurrences or a single occurrence within the series by selecting the appropriate checkboxes. The visitor may or may not be approved for all dates/times that they request since approval/denial of registrants for these types of events is on an occurrence by occurrence basis.

		Single Occurrence Level Registration Only Enforced	Visitors will see the registration option available from all occurrence dates and will be able to register for any one single occurrence that they choose. Once the visitor is approved for registration for one occurrence in the series, then they will no longer be able to register for any other dates/times in the series. If the visitor attempts to register for a second occurrence in the series, they will receive a message that they are already registered and may not register for more than one occurrence and the date/time of the occurrence for which they are already registered will appear.
		Mandatory Complete Series Registration Only	All details entered are for series registration. This setting enforces that all registrants will automatically be registered for every occurrence in the series if approved. This means that no event occurrences may be registered for individually and that series registration will be removed from the event after the first date/time of the series has passed.
		Series Registration Enforced with Partial Series Allowed	Visitors may only register for the series in its entirety, with no event occurrences available for individual registration. However, this option differs from "Mandatory Complete Series Registration Only" in that a visitor may still register for the series, even if one or more of the series occurrence dates/times has passed. Registering after the series has already "started" simply registers the visitor for all date/time occurrences remaining in the series.
		Set Max Number of Registrants	Max Number of Registrants cannot exceed the maximum number of space allowed in Room (If Facilities Module is Enabled). The maximum registrant number cannot exceed the maximum capacity set for the smallest room within the series.
		Registration Deadline	Can be modified at any time up to the date of the event. The registration deadline simply enables or disables the ability for visitors to see the registration icon to register. If the registration deadline is past but there are still registrants pending that completed registration prior to the deadline modification, then they remain pending and can be processed.
		Cancellation Deadline	Indicate the last date and time or number of hours prior to which registration cancellations will be accepted;
		Enable or Disable View of Remaining Slots	
		Event Cost	This field can be modified and the new cost will be applied to all new registrants (no approved, denied or cancelled registrants are affected; they remain as is with original information as entered and processed).
		Discount Code	New discount codes may be added or discount codes may be removed from the event which makes those codes deactivated for any new registrants attempting to enter them in for that particular event.
Modify Event - Occurrence part of Series (Registration Not Enabled during Event Add Series for Series or the Particular Occurrence Now Being Modified)			
	Select to Enable Registration		Registration can be enabled at the occurrence level and is only then for that occurrence.
		Select Form Template	
		Registration Type Select One	
		Multiple Occurrence Registration Allowed	Visitor may register more than once for the single occurrence event or if there are multiple occurrences setup on the single day, they may register for as many as they like from those that are available.

		Single Occurrence Level Registration Only Enforced	Visitor may only register for one occurrence if there is more than one setup for the single day event. Once the visitor is approved for registration for one occurrence then they will no longer be able to register for any other time(s)/occurrence(s) on that date.
		Set Max Number of Registrants	Max Number of Registrants cannot exceed the maximum number of space allowed in Room (If Facilities Module is Enabled).
		Registration Deadline	Deadline can be any date prior to the start date of the event but not before the current date when the event is being modified.
		Cancellation Deadline	Indicate the last date and time or number of hours prior to which registration cancellations will be accepted;
		Enable or Disable View of Remaining Slots	
		Event Cost	Any value can be entered based off the character size allowed.
		Discount Code	New discount codes may be added or users can select from previously entered discount codes that were selected as General Use Codes.
Modify Event - Occurrence part of Series (Registration Enabled during Event Add Series and Mandatory Complete Series Level Registration Only was Selected) - *(OCCURRENCE REGISTRATION MODIFICATION RULES)*			
		RULES for modifying the date/time of any occurrences within the series when series level registration is enabled.	The event schedule cannot be modified for any event occurrence that has at least one pending or approved registrant at the series level. If there are no registrants pending or approved for the series, then the event schedule can be modified for the occurrence.
	Select to Enable Registration		Shows as Not Available
		Select Form Template	Shows as Not Available
		Registration Type	Shows as Not Available
		Set Max Number of Registrants	Shows as Not Available
		Registration Deadline	Shows as Not Available
		Cancellation Deadline	Shows as Not Available
		Enable or Disable View of Remaining Slots	Shows as Not Available
		Event Cost	Shows as Not Available
		Discount Code	Shows as Not Available
Modify Event - Occurrence part of Series (Registration Enabled during Event Add Series and Occurrence Level Registration was Selected) - *(OCCURRENCE REGISTRATION MODIFICATION RULES)*			
		RULES for modifying the date/time of any occurrences within the series when series level registration is enabled.	The event schedule cannot be modified for any event occurrence that has at least one pending or approved registrant at the series level. If there are no registrants pending or approved for the series, then the event schedule can be modified for the occurrence.
	Select to Enable Registration		Cannot select to disable registration from here if it was previously enabled and there is at least one registrant for the

			occurrence. If there are no registrants for the occurrence then registration can be disabled and all fields are set back to their default "null" parameters as though nothing was ever selected.
		Select Form Template	You cannot modify the form at the occurrence level if at least one registrant is pending or approved for the occurrence.
		Registration Type	Shows as Not Available
		Set Max Number of Registrants	Max Number of Registrants cannot exceed the maximum number of space allowed in Room (If Facilities Module is Enabled).
		Registration Deadline	Can be modified at any time up to the date of the event. The registration deadline simply enables or disables the ability for visitors to see the registration icon to register. If the registration deadline is past but there are still registrants pending that completed registration prior to the deadline modification, then they remain pending and can be processed.
		Cancellation Deadline	Indicate the last date and time or number of hours prior to which registration cancellations will be accepted;
		Enable or Disable View of Remaining Slots	This can always be modified.
		Event Cost	This field can be modified and the new cost will be applied to all new registrants (no approved, denied or cancelled registrants are affected, they remain as is with original information as entered and processed).
		Discount Code	New discount codes may be added or discount codes may be removed from the event which makes those codes deactivated for any new registrants attempting to enter them in for that particular event.

Cancelling or Deleting Events - Rules with Advanced Registration Module and Based off Event Schedule

Cancel Event - Series (Registration Enabled during Event Add at the Series Level and Payment was enabled for event.)
If the series is cancelled and there are registrants who are approved, they are automatically cancelled and an email is sent to them from the Calendar Registration Form area based off what was configured for cancellations. This is also the case if the individual registrant cancels their own registration. There is a chance that additional emails are sent from the payment gateway associated with the event if PayPal or Credit Card (TouchNet) payment options were available for the event.
Cancel Event - Occurrence or Single Day Event
If an occurrence is cancelled and there are registrants who are approved, they are automatically cancelled and an email is sent to them from the Calendar Registration Form area based off what was configured for cancellations. This is also the case if the individual registrant cancels their own registration. There is a chance that additional emails are sent from the payment gateway associated with the event if PayPal or Credit Card (TouchNet) payment options were available for the event.
Delete Event - Series
An event cannot be deleted that has payment tied to it if at least one registrant was approved. The delete option will be disabled once that event is selected for modify/delete.
Delete Event - Occurrence or Single Day Event
An event cannot be deleted that has payment tied to it if at least one registrant was approved. The delete option will be disabled once that event is selected for modify/delete.
Purge Events
If a purge event process is performed and an event that would normally meet the purge criteria selected has registration payment enabled and there is at least one approved registrant, the event will not be purged.

GENERAL RULES SYNOPSIS

1. If there are active or pending registrants tied to an event you cannot change registration form template or registration type.
2. If a series level registration is selected for an event series you cannot change any registration parameters at the occurrence level.
3. If there are any occurrence changes you cannot modify any registration parameters at the series level.
4. If a series level registration is selected for an event series you cannot changed any registration parameters at the occurrence level including cost and discount codes.
5. If there are any occurrence changes you cannot modify any registration parameters at the series level including deadline or cost.
6. Rules that apply throughout are Amounts must use commas, have two digits after the decimal point, use the $ and have USD behind them. Percentages must use the %.

Event Details - Standard Registration Form Details

Once registration is enabled for an event, visitors who view the event details will be able to click this icon 

to see a pop-up screen with a standard registration form. For clients utilizing the Standard Registration functionality included within Active Data Calendar, this form is not configurable and contains these standard fields:

First Name*	Last Name*
Email Address*	Company/Organization Name
Job Title	Address 1
Address 2	City
State	Zip/Postal Code
Country (If International)	Phone Number
Fax	

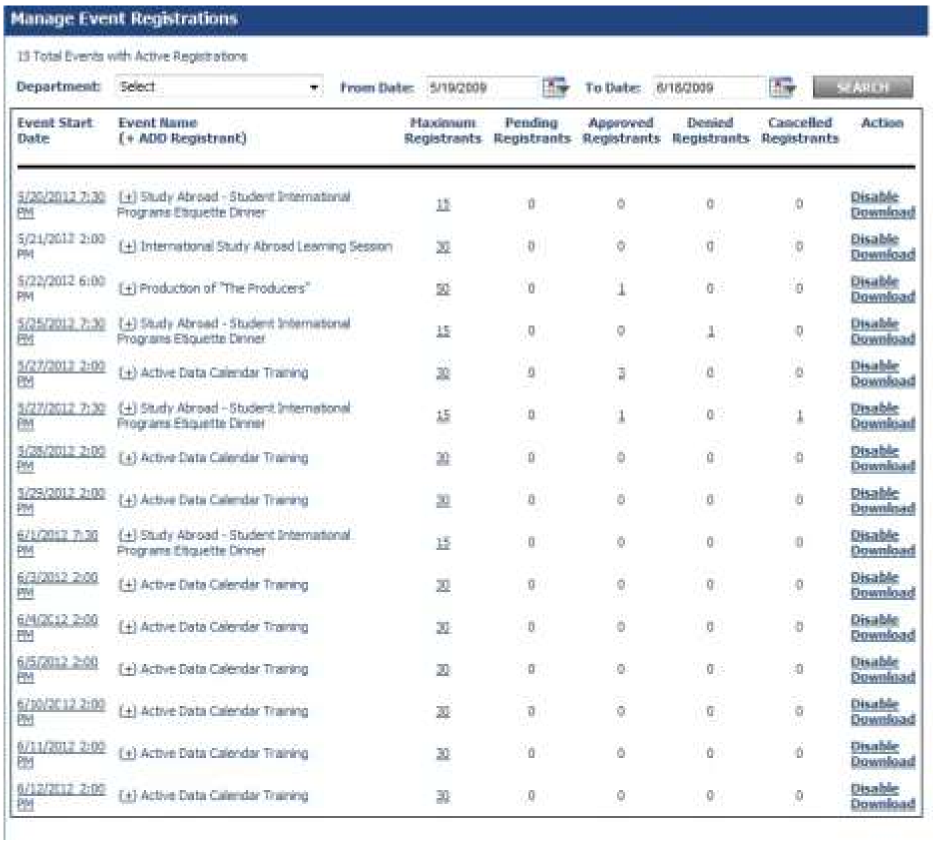
*Required Field

The top of the screen includes some details of the event. If the event is part of a series, there is a link "Register for Other Series Dates" that if selected refreshes the screen to show all dates in the series available for registration. The visitor can select multiple from that screen in order to register for more than one occurrence date in the series at the same time. Occurrence dates that have already passed will be "grayed" out and not selectable. Only future occurrence dates that have available spaces will display for selection. There are "Select All" and **"Deselect All"** links included for fast selection or de-selection options.

If a visitor wants to register for multiple occurrence dates they must select the checkboxes beside each date for which they would like to register and then click the link **FINALIZE SELECTIONS**. This will refreshes the form and display all dates that they have selected for finalization of their registration.

NAVIGATION OPTIONS ON THE REGISTRATION FORM

Visitors can SUBMIT their registration request by clicking on the SUBMIT button. This will navigate them to a confirmation screen. On the confirmation screen they can either click the BACK button to go back to the form and make changes to their entries and selections, or they can click SUBMIT to finalize their registration. There is also a CANCEL button from each screen where the visitor can elect to CANCEL out of the registration process and they



Manage Event Registrations

13 Total Events with Active Registrations

Department: Select From Date: 5/19/2009 To Date: 6/18/2009 SEARCH

Event Start Date	Event Name (+ ADD Registrant)	Maximum Registrants	Pending Registrants	Approved Registrants	Denied Registrants	Cancelled Registrants	Action
5/20/2012 7:30 PM	(+) Study Abroad - Student International Programs Etiquette Dinner	15	0	0	0	0	Disable Download
5/21/2012 2:00 PM	(+) International Study Abroad Learning Session	30	0	0	0	0	Disable Download
5/22/2012 6:00 PM	(+) Production of "The Producers"	50	0	1	0	0	Disable Download
5/25/2012 7:30 PM	(+) Study Abroad - Student International Programs Etiquette Dinner	15	0	0	1	0	Disable Download
5/27/2012 2:00 PM	(+) Active Data Calendar Training	30	0	3	0	0	Disable Download
5/27/2012 7:30 PM	(+) Study Abroad - Student International Programs Etiquette Dinner	15	0	1	0	1	Disable Download
5/28/2012 2:00 PM	(+) Active Data Calendar Training	30	0	0	0	0	Disable Download
5/29/2012 2:00 PM	(+) Active Data Calendar Training	30	0	0	0	0	Disable Download
6/1/2012 7:30 PM	(+) Study Abroad - Student International Programs Etiquette Dinner	15	0	0	0	0	Disable Download
6/3/2012 2:00 PM	(+) Active Data Calendar Training	30	0	0	0	0	Disable Download
6/4/2012 2:00 PM	(+) Active Data Calendar Training	30	0	0	0	0	Disable Download
6/5/2012 2:00 PM	(+) Active Data Calendar Training	20	0	0	0	0	Disable Download
6/10/2012 2:00 PM	(+) Active Data Calendar Training	30	0	0	0	0	Disable Download
6/11/2012 2:00 PM	(+) Active Data Calendar Training	30	0	0	0	0	Disable Download
6/12/2012 2:00 PM	(+) Active Data Calendar Training	30	0	0	0	0	Disable Download

TIP: You can change the number of maximum registrants allowed to register for an event from the Modify Event Wizard or by clicking on the Maximum Number on the Manage Event Registration screen and launching a pop-up window.

You cannot change the maximum number of registrants to a number that exceeds the maximum capacity of your facility if you have chosen a

TIP: To temporarily disable an event registration, click the Disable link. To re-enable the registration click enable.

will be returned to the Event Details screen.

Manage Event Registrations – Active (Standard Registration & Advanced Registration)

Events with active registration can be managed from the Manage Event Registrations area. Click on the REGISTRATION tab and then select REGISTRANTS: ACTIVE.

Only those departments to which you have been granted permission will display for selection of sorting. The date range option searches for any event with registration that is active during the date range selected and for which you have permission.

The fields included on the Manage Active Event Registration List screen include:

- **Event Start Date**: The date and time when the event is scheduled to take place.
- **Event Name**: The name of the event.

    - **(+ Add Registrant)**: If an event has remaining spaces available, then a (+) sign will display to the left of the event name within the list. If selected, the (+) sign will navigate the user to the administrative "Add Registrant" screen.
- **Maximum Registrants**: Displays the maximum number of registration spaces that were set for the event. If "Unlimited" is displayed, then no maximum number of registrants was selected. Click the "Unlimited" link to open a pop-up window where you can enter in a maximum number of registrants for the event. The maximum registrants allowed cannot be set to a less than the current number of approved registrants. Leave the text field blank to allow for unlimited registration. Users also cannot change the maximum number of registrants to a number that exceeds the maximum capacity of your facility if you have chosen a facility that is locked and has a maximum capacity set.
- **Pending Registrants**: Displays the number of registrants currently pending for the event. Click the pending number to navigate to the Pending Registrants screen and process the registrants for this event.
- **Approved Registrants**: Displays the number of currently approved registrants for the event. Click the approved number to navigate to the Approved Registrants screen and view the currently approved registrants for this event.
- **Denied Registrants**: Displays the number of currently denied registrants for the event. Click the denied number to navigate to the Denied Registrants screen and view the currently denied registrants for this event.
- **Cancelled Registrants**: Displays the number of currently cancelled registrants for the event. Click the cancelled number to navigate to the Cancelled Registrants screen and view the currently cancelled registrants for this event.
- **Action**: This column displays a DOWNLOAD button that allows you to download all registrants in one CSV file, along with their respective registration details (internal and external fields are included) and current status. There is also a DISABLE link beside each event that if selected will temporarily disable the registration link from the event details screen for this event. No new registrants will be able to access the registration form until you choose to re-enable the registration option by navigating back to this area and clicking the link which will now read ENABLE.

Add Registrant

The Add Registrant screen, within the Calendar administration area, includes both external and internal only registration fields broken down on the screen under main heading titles. Any required field, both external and internal, must be completed from this screen in order to add a new registrant.

When adding a registrant from the administration area, there is also an option to add a registrant with the status of Approved, Denied or Cancelled. This is in case you would like to make a note of a registrant who had been within another system or who elected to cancel their registration through a manual process and not through the system.

From the administration area "Add Registrant" screen, it is possible for an administrator to attempt to add an approved registrant for an occurrence within a series that has the rule for "Single Occurrence Registration Only", and the registrant already exists as approved for an occurrence within the series, then the administrator will receive a warning message: "This registrant is already approved for another occurrence in this series." You will also see the date/time of the occurrence for which the registrant is already approved. However, from the backend, the administrator can choose to go ahead and elect to add the registrant anyway. This is considered an override option. The warning is only there for informational purposes and to flag the user adding the registrant.

Fields available when adding a registration from the administration area:

The top of the screen includes details about the event, including the event name, start date, end date, start time, end time and recurrence schedule if applicable. The event cost associated with this event will also display if your installation has the Advanced Registration Module and if cost/payment was setup for this event. The fields included for adding a new registrant from within the administration area includes:

Registrant Details

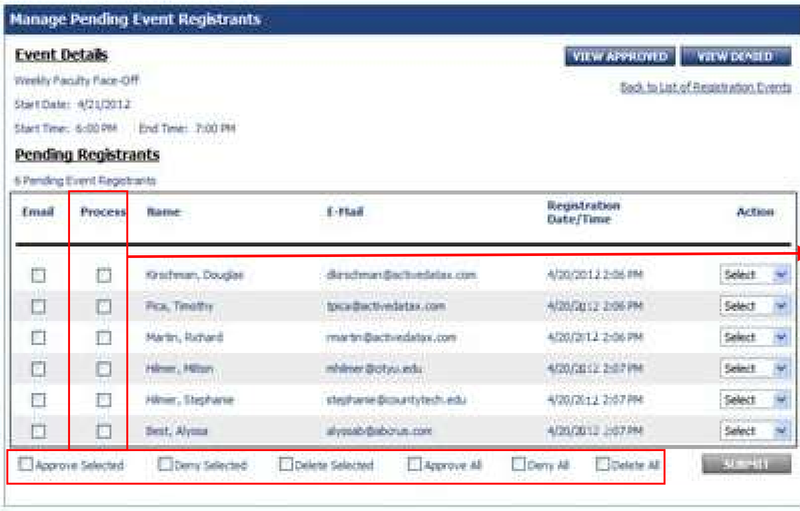
- **First Name**: Required field - 100 maximum alpha-numeric characters.
- **Last Name**: Required field - 100 maximum alpha-numeric characters.
- **Email**: Required field - 100 maximum alpha-numeric characters.

And any other fields that were added to the event registration screens available from the Public and Private Calendar(s).

- **Status**: When adding a registrant from the administration area, there is also an option to add a registrant with the status of Approved, Denied or Cancelled. It is required that the user adding the new registrant select the status for the registrant. If payment is associated with the event, then this option will be disabled as all new registrants for events with payment must be added as approved. (Please note that once added the registrant may be modified to change status.)
- **Internal Registrant Information**: If any fields were added to the registration form as "internal only" fields, then they will appear below the main registrant detail fields for completion. Those fields that were added as required fields will display with an asterisk to show that they must be completed in order to successfully add a new registrant. *NOTE: If you are attempting to add a new registrant for an occurrence that is part of a series that has been set for "Single Occurrence Registration Only", and the registrant already exists as approved for an occurrence within the series, then you will be presented with a warning message: "This registrant is already approved for another occurrence in this series." Within the administration area it is possible to ignore this warning message and override the single occurrence rule by choosing to go ahead and elect to add the registrant. This is considered an override option. The warning is only there for informational purposes and to provide a warning regarding adding the registrant when they are already approved for another occurrence.

Pending Event Registrants - (Standard Registration & Advanced Registration)

This area allows you to view pending registrants for a particular event. The top of the screen includes details about the event, including the event name, start date, end date, start time, end time and recurrence schedule if applicable.



TIP: You can process registrants individually by using the drop-down options under "Action". Or, click the checkboxes under "Process" beside multiple registrants and then select from the "bulk" processing options and click SUBMIT in order to process multiple registrants at a time. There are also options for processing all registrants at the same time by choosing "Approve All", "Deny All" or

The fields included on the Manage Pending Event Registrants List screen include:

- **Send Email**: Displays a checkbox and if selected and the SUBMIT button at the bottom of the screen is also selected, will navigate you to the Send Email Notice area of the product with the registrant's email automatically selected for creating and sending an email notice about this particular event. NOTE: A "Select ALL/DESELECT ALL" option is included so that you can easily have all checkboxes either selected or deselected that are currently displayed in your list.
- **Process**: Displays a checkbox and if selected and one of the other processing option checkboxes at the bottom of the pending registrants list is also selected and you click the SUBMIT button, you can process registrants in bulk. Options for using this checkbox to process registrants in bulk include:
    - **Approve Selected**: If this checkbox is selected and the SUBMIT button is also selected, then any registrant that has been selected for processing will be automatically approved and will receive an email with their registration confirmation number.
    - **Deny Selected**: If this checkbox is selected and the SUBMIT button is also selected, then any registrant that has been selected for processing will be automatically denied and will receive an email with their registration denial information. This option will be disabled for an event with payment associated.
    - **Delete Selected**: If this checkbox is selected and the SUBMIT button is also selected, then any registrant that has been selected for processing will be automatically deleted and will receive an email that their registration request has been deleted. This option will be disabled for an event with payment associated.
    - **Cancel Selected**: If this checkbox is selected and the SUBMIT button is also selected, then any registrant that has been selected for processing will be automatically cancelled and will receive an email that their registration request has been cancelled. Please note that if you select to cancel a registrant and payment has been associated with the event, you will be navigated to a refund/credit screen to select if you would like to issue a refunds to the registrant(s).
    - **Approve All**: If this checkbox is selected and the SUBMIT button is also selected, then all event registrants currently listed on this pending screen will be automatically selected and will be approved in bulk. Each registrant will receive an email notifying them that they have been approved and the email will include their registration confirmation number.
    - **Deny All**: If this checkbox is selected and the SUBMIT button is also selected, then all event registrants currently listed on this pending screen will be automatically selected and will be

denied in bulk. Each registrant will receive an email notifying them that they have been denied. This option will be disabled for an event with payment associated.
    - **Delete All**: If this checkbox is selected and the SUBMIT button is also selected, then all event registrants currently listed on this pending screen will be automatically selected and will be deleted in bulk. Each registrant will receive an email notifying them that they have been deleted. This option will be disabled for an event with payment associated.
    - **Cancel All**: If this checkbox is selected and the SUBMIT button is also selected, then all registrants that have been selected for processing will be automatically cancelled and will receive an email that their registration request has been cancelled. If you select to cancel a registrant and payment has been associated with the event, you will be navigated to a refund/credit screen to select if you would like to issue an refunds to the registrant(s).
- **Registrant Name**: Displays as a link which if selected will navigate you to the Manage Pending Registrant Details screen for that particular registrant.
- **Email**: Displays as a link and if selected opens your default mail client with the registrant's email automatically inserted into the TO: field of your mail client.
- **Registration Date/Time**: Display the date and time when this registration request was submitted.
- **Action**: This column displays a drop-down selection box with the following action options:
    - **Approve**: If selected, this will automatically approve the registrant and the registrant will receive an email with their registration confirmation number.
    - **Cancel**: If selected, this will automatically cancel the registrant and the registrant will receive an email with the cancellation information.
    - **Deny**: If selected, this will automatically deny the registrant and the registrant will receive an email notifying them that they have been denied for registration to the event. (This does not display as an option if the registration has payment associated.)
    - **Modify**: If selected, this will navigate you to the Modify Registrant screen where you can make changes on this particular event registrant.
    - **Delete**: If selected, you will be prompted to confirm your delete action. If you confirm the action, the registrant will be deleted from the registration area and the registrant will receive an email that they have been deleted.   (This does not display as an option if he registration has payment associated.)
    - **View**: If selected, this will take you to the View Registrant Details screen for the selected registrant.

The top of the list displays the current number of pending registrants for the event.

NAVIGATION OPTIONS WITHIN THIS AREA

To view all registrants already approved, click the button for VIEW APPROVED. To view all registrants already denied, click the button VIEW DENIED. There is also a text link entitled "Back to List of Registration Events" in order to navigate back to the main list of all events with active registration. VIEW CANCELLED is a link to go to the Cancelled list of registrants.

Registrant Details - (Standard Registration & Advanced Registration)

This screen allows you to view the details about a registrant including name and contact information. The options available from this screen change slightly depending on how you navigate to the registrant details.

Information included on this screen:

Event Details: Event Name, Start Date/Time and End Date/Time, etc.

Registrant Details - For STANDARD REGISTRATION

- Title
- First Name
- Last Name
- Address 1
- Address 2
- City
- State (or State/Province/Prefecture depending on if the domestic or International Fields are enabled)
- Zip/Postal Code
- County (or Country depending on if Domestic or International Fields are enabled)
- Phone
- Fax
- Email
- Registration ID Number
- Current Status: Pending, Approved, Denied (Depending on the Registrants actual status for the event)
- Action: Options include Approve, Deny, Delete and Modify

Organization

- Title
- First Name
- Last Name
- Address 1
- Address 2
- City
- State (or State/Province/Prefecture depending on if the domestic or International Fields are enabled)
- Zip/Postal Code
- County (or Country depending on if Domestic or International Fields are enabled)
- Phone
- Fax
- Email
- Registration ID Number
- Current Status: Pending, Approved, Denied (Depending on the Registrants actual status for the event)
- Action: Options include Approve, Deny, Delete and Modify

Modify Event Registrant - (Standard Registration for Advanced Registration)

This area allows you to view the details of a particular event registrant and make modifications to any field. The top of the screen includes details about the event, including the event name, starting and ending dates and times, and recurrence schedule if applicable, along with some other event details.

Standard Registration

The fields included for modification on the Modify Event Registrant Details screen include:

- Organization
- Title
- First Name
- Last Name
- Address 1

- Address 2
- City
- State (or State/Province/Prefecture) depending on if Domestic or International Fields are enabled.
- ZIP/Postal Code
- County (or Country) depending on if Domestic or International Fields are enabled.
- Phone
- Fax
- Email
- Registration ID Number: Displays but cannot be modified.
- Current Status: Options for display include Approved, Denied or Pending. To modify the status, use the action drop-down.
- Action: Options can include Approve, Deny, Delete, Cancel or Modify, and are dependent on the status of the registrant when this screen is accessed. To change the status, select your status option from the drop-down.

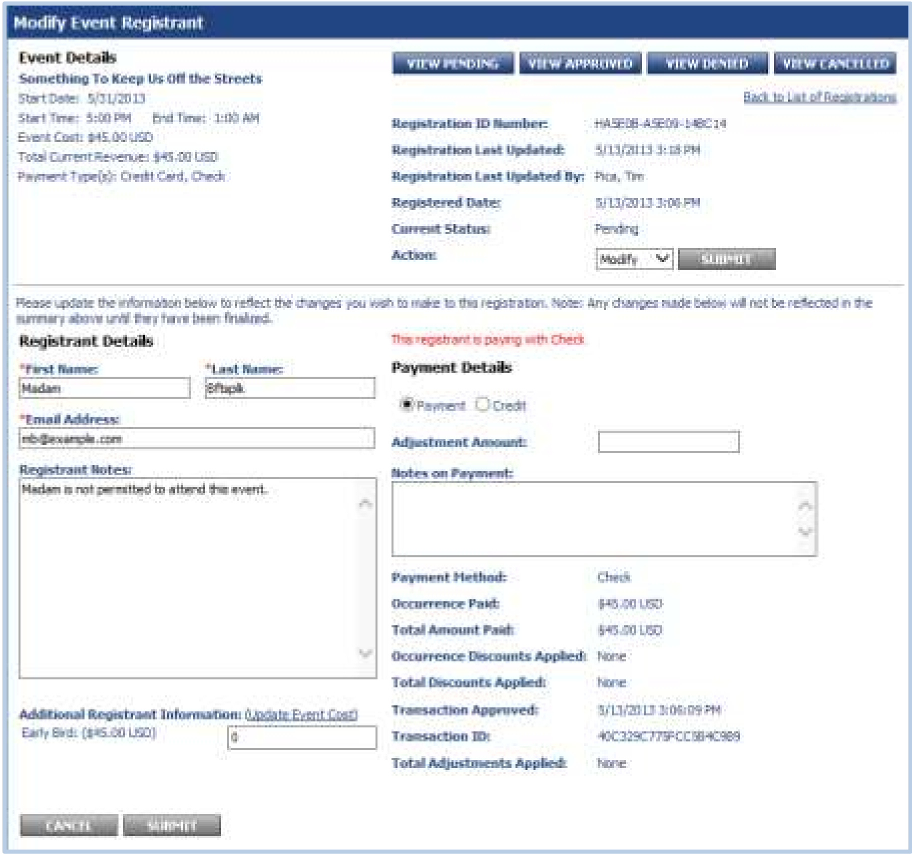
Internal Registrant Information: If any fields were added to the registration form as "internal only" fields, then they will appear below the main registrant detail fields in a list format.

Other Registrant Details

- **Registration ID Number**
- **Current Status**: Options include Approved, Denied or Pending
- **Action**: Options may include Approve, Deny or Delete and are dependent on the current status of the registrant when this screen is accessed. To change the status, select your status option from the drop-down and then click SUBMIT. If a registrant is being approved, denied or deleted from this screen, then the appropriate email will be sent to the registrant depending on the selected action.
- **Registration Last Updated**: Date when the registrant was last modified.
- **Registration Last Updated By**: User account name (displayed as Last Name, First Name) that last modified the registrant details.
- **Registration Date**: The date of the original registration submission into Calendar.

NAVIGATION OPTIONS WITHIN THIS AREA

Here is an example of the Modify Event Registrant page:



Major functionals include:

- **VIEW APPROVED** button: Shows already approved registrations
- **VIEW DENIED** button: Shows already denied registrations
- **VIEW PENDING** button: Shows registrations awaiting approval
- **VIEW CANCELED** button: Displays a list of registrations that were canceled.
- **Back to List of Registration Events** link: Returns to the list of all events with active registration

Note that you can take notes of a conversation, or related to payment history, in the areas provided.

If you choose to take action on the registrant from this screen or modify any of the registrant fields, click the SUBMIT button to finalize your action selection. You can also RESET all values back to their last saved status by clicking the RESET button or CANCEL out of this area completely, which returns to the Main Menu without saving any of your modifications.

Deleting Event Registrants

If you select to delete an event registrant you will be asked to confirm your delete action. Once a registrant is deleted there is no notion of their registration saved within the Active Data Calendar system and they cannot be restored without registering for the event once again.

NOTE for installs with Advanced Registration: On the administration side, you cannot deny or delete a registrant that has registered for an event with payment. You can only modify or cancel them.

Approved Event Registrants

This area allows you to see a snapshot of all current approved registrants for a particular event. The top of the screen includes details about the event, including the event name, start date, end date, start time, end time and recurrence schedule if applicable.

TIP: Registrants that have been approved are automatically assigned a unique registration number from the Calendar system. This registration number may actually be a combination of letters, numbers and special characters and will appear on the Approved list screen as well as the Registrant Details screen.
Even after you have approved a registrant you can always change their status by selecting a different "Process" option. All "Approved" options are automatically disabled.

This area allows you to see a snapshot of all current approved registrants for a particular event. The top of the screen includes details about the event, including the event name, start date, end date, start time, end time and recurrence schedule if applicable.

The Event Cost and Total Current Revenue associated with this event will also display if your installation has the Advanced Registration Module and if cost/payment was setup for this event. *Total Current Revenue* is the sum of amounts paid for approved registrations.

The fields included on the Manage Approved Event Registrants List screen include:

- **Email**: Displays a checkbox and if selected and the SUBMIT button at the bottom of the screen is also selected, will navigate you to the Send Email Notice area of the product with the registrant's email automatically selected for creating and sending an email notice about this particular event.

- **Change Status**: Displays a checkbox and if selected and one of the other processing option checkboxes at the bottom of the pending registrants list is also selected and you click the SUBMIT button, you can process registrants in bulk. Options for using this checkbox to process registrants in bulk include:

  - **Deny Selected**: If this checkbox is selected and the SUBMIT button is also selected, then any registrant that has been selected for processing will be automatically denied and will receive an email with their registration denial information. This option will be disabled for an event with payment associated.
  - **Delete Selected**: If this checkbox is selected and the SUBMIT button is also selected, then any registrant that has been selected for processing will be automatically deleted and will receive an email that their registration request has been deleted. This option will be disabled for an event with payment associated.

- **Cancel Selected**: If this checkbox is selected and the SUBMIT button is also selected, and then any registrant that has been selected for processing will be automatically cancelled and will receive an email that their registration request has been cancelled.
- **Deny All**: If this checkbox is selected and the SUBMIT button is also selected, then all event registrants currently listed on this pending screen will be automatically selected and will be denied in bulk. Each registrant will receive an email notifying them that they have been denied. This option will be disabled for an event with payment associated.
- **Delete All**: If this checkbox is selected and the SUBMIT button is also selected, then all event registrants currently listed on this pending screen will be automatically selected and will be deleted in bulk. Each registrant will receive an email notifying them that they have been deleted. This option will be disabled for an event with payment associated.
- **Cancel All**: If this checkbox is selected and the SUBMIT button is also selected, then all registrants that have been selected for processing will be automatically cancelled and will receive an email that their registration request has been cancelled.

- **Registrant Name**: Displays as a link which if selected will navigate you to the Modify Registrant Details screen for that particular registrant. Registrant names are displayed as last name, first name and the list of registrants is sorted by this column in alphabetical ascending order.
- **Registrant Email**: Displays as a link and if selected opens your default mail client with the registrant's email automatically inserted into the TO: field of your mail client.
- **Registration Date/Time**: Display the date and time when this registration request was submitted.
- **Registration Number**: This column displays the unique Registration Number assigned to this registrant for this particular event.
- **Action**: This column displays a drop-down selection box with the following action options:
  - **Cancel**: If selected, this will automatically cancel the registrant and the registrant will receive an email with the cancellation information.
  - **Delete**: If selected, you will be prompted to confirm your delete action. If you confirm the action, the registrant will be deleted from the registration area and the registrant will receive an email that they have been deleted. (This does not display as an option if the registration has payment associated.)
  - **Deny**: If selected, this will automatically deny the registrant and the registrant will receive an email notifying them that they have been denied for registration to the event. (This does not display as an option if the registration has payment associated.)
  - **Modify**: If selected, this will navigate you to the Modify Registrant screen where you can make changes on this particular event registrant.
  - **View**: If selected, this will take you to the View Registrant Details screen for the selected registrant. The top of the list displays the current number of approved registrants for this event.

NAVIGATION OPTIONS WITHIN THIS AREA

To view all registrants already denied, click the button for VIEW DENIED. To view all registrants still pending, click the button VIEW PENDING. There is also a text link entitled "Back to List of Registration Events" in order to navigate back to the main list of all events with active registration. VIEW CANCELLED is a link to go to the Cancelled list of registrants.

Denied Event Registrants

This area allows you to see a snapshot of all current denied registrants for a particular event. The top of the screen includes details about the event, including the event name, start date, end date, start time, end time and recurrence schedule if applicable.

SPECIAL TIP: Use your Denied Registrants list as a "Waiting List". You can deny a registrant if you do not have enough available spaces, but click the "Email" option to send them a special email informing them that if additional spaces become available or if there is a cancellation you will let them know. Then if you have spaces opened, come back to the denied screen, select the registrant(s) and click to change their status to approved! You can use the checkboxes beside each registrant to email multiple registrants at once!

This area allows you to see a snapshot of all current denied registrants for a particular event. The top of the screen includes details about the event, including the event name, start date, end date, start time, end time and recurrence schedule if applicable.

The Event Cost and Total Current Revenue associated with this event will also display if your installation has the Advanced Registration Module and if cost/payment was setup for this event. *Total Current Revenue* is the sum of amounts paid for approved registrations. The fields on the *Manage Denied Event Registrants List* page are:

- **Email**: Displays a checkbox and if selected and the SUBMIT button at the bottom of the screen is also selected, will navigate you to the Send Email Notice area of the product with the registrant's email automatically selected for creating and sending an email notice about this particular event. There is also a SELECT ALL option to quick check off all pending registrants currently shown in the list. You must click the SUBMIT button to navigate to the Send Email Notice area.
- **Change Status**: Displays a checkbox and if selected and one of the other processing option checkboxes at the bottom of the pending registrants list is also selected and you click the SUBMIT button, you can process registrants in bulk. Options for using this checkbox to process registrants in bulk include:
  - **Approve Selected**: If this checkbox is selected and the SUBMIT button is also selected, then any registrant that has been selected for processing will be automatically approved and will receive an email with their registration confirmation number.
  - **Delete Selected**: If this checkbox is selected and the SUBMIT button is also selected, and then any registrant that has been selected for processing will be automatically deleted and will receive an email that their registration request has been deleted. This option will be disabled for an event with payment associated.
  - **Cancel Selected**: If this checkbox is selected and the SUBMIT button is also selected, and then any registrant that has been selected for processing will be automatically cancelled and will receive an email that their registration request has been cancelled. Please note that if you select

to cancel a registrant and payment has been associated with the event, you will be navigated to a refund/credit screen to select if you would like to issue an refunds to the registrant(s).

- **Approve All**: If this checkbox is selected and the SUBMIT button is also selected, then all event registrants currently listed on this pending screen will be automatically selected and will be approved in bulk. Each registrant will receive an email notifying them that they have been approved and the email will include their registration confirmation number.
- **Delete All**: If this checkbox is selected and the SUBMIT button is also selected, then all event registrants currently listed on this pending screen will be automatically selected and will be deleted in bulk. Each registrant will receive an email notifying them that they have been deleted. This option will be disabled for an event with payment associated.
- **Cancel All**: If this checkbox is selected and the SUBMIT button is also selected, and then all registrants that have been selected for processing will be automatically cancelled and will receive an email that their registration request has been cancelled. Please note that if you select to cancel a registrant and payment has been associated with the event, you will be navigated to a refund/credit screen to select if you would like to issue an refunds to the registrant(s).

- **Registrant Name**: Displays as a link which if selected will navigate you to the Modify Registrant Details screen for that particular registrant. Registrant names are displayed as last name, first name and the list of registrants is sorted by this column in alphabetical ascending order.
- **Registrant Email**: Displays as a link and if selected opens your default mail client with the registrant's email automatically inserted into the TO: field of your mail client.
- **Registration Date/Time**: Display the date and time when this registration request was submitted.
- **Action**: This column displays a drop-down selection box with the following action options:
  - **Approve**: If selected, this will automatically approve the registrant and the registrant will receive an email with their registration confirmation number.
  - **Cancel**: If selected, this will automatically cancel the registrant and the registrant will receive an email with the cancellation information.
  - **Modify**: If selected, this will navigate you to the Modify Registrant screen where you can make changes on this particular event registrant.
  - **Delete**: If selected, you will be prompted to confirm your delete action. If you confirm the action, the registrant will be deleted from the registration area and the registrant will receive an email that they have been deleted. (This does not display as an option if the registration has payment associated.)
  - **View**: If selected, this will take you to the View Registrant Details screen for the selected registrant. The top of the list displays the current number of denied registrants for this event.

NAVIGATION OPTIONS WITHIN THIS AREA

To view all registrants already approved, click the button for VIEW APPROVED. To view all registrants still pending, click the button VIEW PENDING. There is also a text link entitled "Back to List of Registration Events" in order to navigate back to the main list of all events with active registration. VIEW CANCELLED is a link to go to the Cancelled list of registrants.

Cancelled Event Registrants

This area allows you to see a snapshot of all current cancelled registrants for a particular event. The top of the screen includes details about the event, including the event name, start date, end date, start time, end time and recurrence schedule if applicable.

The Event Cost and Total Current Revenue associated with this event will also display if your installation has the Advanced Registration Module and if cost/payment was setup for this event. *Total Current Revenue* is the sum of amounts paid for approved registrations. Fields shown on the *Manage Cancelled Event Registrants List* are:

- **Email**: Displays a checkbox and if selected and the SUBMIT button at the bottom of the screen is also selected, will navigate you to the Send Email Notice area of the product with the registrant's email automatically selected for creating and sending an email notice about this particular event. There is also a SELECT ALL option to quick check off all pending registrants currently shown in the list. You must click the SUBMIT button to navigate to the Send Email Notice area.
- **Change Status**: Displays a checkbox and if selected and one of the other processing option checkboxes at the bottom of the pending registrants list is also selected and you click the SUBMIT button, you can process registrants in bulk. Options for using this checkbox to process registrants in bulk include:
    - **Delete Selected**: If this checkbox is selected and the SUBMIT button is also selected, then any registrant that has been selected for processing will be automatically deleted and will receive an email that their registration request has been deleted. This option will be disabled for an event with payment associated.
    - **Delete All**: If this checkbox is selected and the SUBMIT button is also selected, then all event registrants currently listed on this pending screen will be automatically selected and will be deleted in bulk. Each registrant will receive an email notifying them that they have been deleted. This option will be disabled for an event with payment associated.
- **Registrant Name**: Displays as a link which if selected will navigate you to the Modify Registrant Details screen for that particular registrant. Registrant names are displayed as last name, first name and the list of registrants is sorted by this column in alphabetical ascending order.
- **Registrant Email**: Displays as a link and if selected opens your default mail client with the registrant's email automatically inserted into the TO: field of your mail client.
- **Registration Date/Time**: Display the date and time when this registration request was submitted.
- **Action**: This column displays a drop-down selection box with the following action options:
    - **Delete**: If selected, you will be prompted to confirm your delete action. If you confirm the action, the registrant will be deleted from the registration area and the registrant will receive an email that they have been deleted.
    - **View**: If selected, this will take you to the View Registrant Details screen for the selected registrant. The top of the list displays the current number of cancelled registrants for this event.

NAVIGATION OPTIONS WITHIN THIS AREA

To view all registrants already approved, click the button for VIEW APPROVED. To view all registrants still pending, click the button VIEW PENDING. To view all denied registrants, click the button VIEW DENIED. There is also a text link entitled "Back to List of Registration Events" in order to navigate back to the main list of all events with active registration.

Manage Event Registrations - Archive (Standard Registration and Advanced Registration)

Events with archived registration can be managed from the Manage Event Registrations area. Click on the REGISTRATION tab and then select REGISTRANTS: ARCHIVE.

This area allows you to see a snapshot of all past events (archived) that had registrations enabled on the Calendar. Events with registration enabled are automatically moved to this archive list once the date/time of the event has passed. You can sort the list by department or by date range. Only those departments to which you have been granted permission will display for selection of sorting. The date range option searches for any event with registration that was active during the date range selected and for which you have permission. The fields included on the Manage Archived Event Registration List screen include:

- **Event Date/Time**: The date and time when the event took place.
- **Cancelled**: Shows with an "X" in the column if the Event was cancelled prior to the start date/time
- **Event Name**: The name of the event.
    - (+ Add Registrant):
    - If an event has remaining spaces available, then a (+) sign will display to the left of the event name within the list. If selected, the (+) sign will take you to the administrative "Add Registrant" screen.
- **Pending Registrants**: Displays the number of pending registrants at the time the event took place. You may click on the number displayed to go to list of registrants.
- **Approved Registrants**: Displays the number of approved registrants at the time the event took place. You may click on the number displayed to go to list of registrants.
- **Denied Registrants**: Displays the number of denied registrants at the time the event took place. You may click on the number displayed to go to list of registrants.
- **Cancelled Registrants**: Displays the number of cancelled registrants at the time the event took place. You may click on the number displayed to go to list of registrants.
- **Total Attendees**: Displays the number of registrants who have been marked as attendees. To mark a registrant as an attendee, you must click on the Approved number and then from the Approved Registrants screen (for an archived event) select to mark each registrant as Yes or No.
- **Action**: This column displays a DOWNLOAD button that if selected allows you to download all registrants in one CSV file, along with their respective registration details and status at the time the event registration was archived.

Manage Registrant Types – Add and View Types (Advanced Registration)

Registrant Types allows for you to do a number of things with collection more information on registration forms that deal with cost and quantity. You can setup an event to accept multiple registrants from one registration form. The ability to allow multiple registrant types to an event registration provides additional flexibility to offer discounts by registrant type, the cost per registrant type, and restrict the maximum number of each registrant type per event registration. If the event requires a payment and no registrant type cost is added to the registrant type, then the event amount will be used. Below the edit section, the current registrant types associated with this event is listed.

These fields appear on the Manage Registrant Type pages:

- **Add Registrant Type Details**
    - Registrant Type Name: This is the name of the registrant type such as “T-Shirts”, “Other Guests”, etc.
    - Current Status: Choose from “Active” or “Inactive” to have the registrant type either available or not available for use when adding an event.
    - Users/Groups who can Modify/Delete/View Registrant Type: Chose from the list of users/groups to determine who can modify/delete/view the selected registrant type.
- **View Registrant Types**

- Edit: This option brings up the “Add Registrant Type” sceen with all previously filled out information showing.
- Delete: This option allows the “Registrant Type” to be deleted.

Export Registrants (Standard Registration and Advanced Registration)

Functionality to create both one time and persistent registrant exports can be found under the REGISTRATION tab and then select EXPORT: ADD.

One-Time Registrant Download

This area is available for both standard and advanced registration clients and includes options for you to create a one-time registrant download file with specific registrants. This feature was previously only available to those clients who have purchased the Advanced Registration Module, but is now available with Basic Registration. However, the Advanced Registration module allows for you to select from the drop-down to navigate to "Add Persistent Export Feed" and create an export feed that is continually updated based off criteria entered regarding the persistent export.

New search criteria can be selected each time the download screen is used. This area will allow you to download a comma separated value (CSV) or XML document file for import into the program of your choice. After clicking on the “Submit” button, you are prompted to save the file. The file can then be saved by the user with an appropriate file name.

Use the following instructions to complete the one-time registrants download process.

Select the File Format for downloaded registrants:

- Download CSV
- Download XML

Select the Type of Download

- **Series ID**: This is the Master ID that identifies the series to which the registrant belongs.
- **Occurrence ID**: This is the ID that uniquely identifies a registrant no matter what series it belongs to.
- **Created On**: This tells when the registrant was created.
- **Modified On**: This tells when the last time the occurrence has been modified.
- With these values the advanced import knows where to map the data relating to the occurrence and series. It also knows if a registrant needs to be updated by comparing the dates passed in the file with the dates currently stored in the database for a registrant.

Searching for Registrants to Download

The following fields are included for searching:

- **Download All Registrants**: A check box for selecting to download “All Registrants”.
- Or, you can select to narrow the registrants you would like to download by searching the database for specific registrants.
- **Range**: Drop down menus for start date and end date, with the ability to select month, day and year. The date range searches against the registrant start and end date. The default start date is the date of the earliest data within the registrant database.

- **Time Span**: Drop down menus for start time and end time, with the ability to select hours, minutes and time of day (AM/PM). This time range searches against the registrant start and end time. This field remains disabled unless the date range is selected.
- **Registrant Type**: This drop-down selection only displays if your installation includes the license of the Private Calendar Module. If enabled this drop-down allows you to select to include registrants marked as Private Only, Public Only or Both (set to post to both the Public and Private Calendars).
- **Keyword(s)**: An open text field that allows the user to enter in keywords separated by commas. The field allows for up to 255 characters. The keywords entered are searched against the following fields: Registrant Name, Registrant Description, Contact Info (Name & Email fields), Details, Admission Info and Remarks (Or your custom field names if setup within the Configuration Area).
- **Categorization**: Drop-down menu with the ability to select all or select one from the drop-down directly. Or, users can click "select multiple" to launch the full list of category(s)/subcategory(s) to select more than one.
- **Department(s)**: A list box that includes all (active) the departments, sorted in alphabetical, descending order (with "All" as the first selection).
- **User Account(s)**: A list box that includes all (active) user names sorted in alphabetical, descending order (with "All" as the first selection).
- **Location(s)**: A list box that includes all (active) locations added within the registrant database. All users can see all locations and the list is sorted in alphabetical, descending order (with "All" as the first selection.) The first selection in the list box will always be "No location" which means that if selected the downloaded list will include any registrant where no location was selected.

***NOTE**: For any list box you can choose as many selections as needed for inclusion in your search/download list.

NAVIGATION OPTIONS WITHIN THIS AREA

The RESET button can be clicked to reset the screen values to their default settings. Choose SUBMIT to finalize your selections and begin the download process. Please follow the instructions displayed on the screen for either opening or saving the file. CANCEL can be clicked in order to cancel your actions and return to the Main Menu of Active Data Calendar.

Add Persistent Registrant Export Feed

This area includes options for you to navigate to the screen for creating a one-time registrant download file with specific registrants, or complete the current screen to setup a persistent registrant export feed that is continually updated based off criteria entered regarding the persistent export.

Persistent Registrant Export Feed

Administrative users with the privilege to Download/Export Registrants can use this area to add persistent export feeds for use with other applications/systems where they are managing registrant information. All export feeds from Active Data Calendar will be formatted according to the Calendar data definitions.

To add a new registrant export feed, complete the following fields:

- **Export Name**: Please enter an export name that will identify the registrants that are being exported. This is a required field and has a maximum character limit of 50 alpha-numeric characters.
- **Export Type**: Please select if the export file should be pushed to a location/URL that you will specify in the next available field "Export Location/URL" or if you will be pulling the export updates from a URL that we specify once you click the SUBMIT button.

- **Export Location/URL**: If you select to Setup Export as a Push, please enter the URL where Active Data Calendar should push registrant updates. The export URL is a required field and the maximum characters cannot exceed 255 alpha-numeric characters.
- **Username/Password Fields**: These fields must only be completed if the URL that you are using for the registrant export feed is secure and requires login information. Each field can accept a maximum of 55 alpha-numeric characters.
- **Start Date**: Date to start the registrant export feed.
- **End Date**: Date to end the registrant export feed. Registrants will no longer update from this feed once this date is past.
- **Time to Begin Exporting**: The time each day when the Calendar export feed should begin exporting new registrant updates from this registrant feed.
- **Time to End Exporting**: The time each day when the Calendar export feed should stop exporting new registrant updates from this feed.
- **Export Interval**: The interval, in minutes, that Calendar should place an updated export file at the desired location/URL (between the start and end times identified).
- **Active**: The default selection is "Active". If maintained, then the export feed will be active once finalized. If the selection for "No" is chosen, then the export will be added when you click "Finish" but the export will not run (regardless of dates/times entered for export), until the status is changed to "Active".

You can then setup the criteria for what registrant data should be included in your export feed by selecting from the following criteria:

Select the File Format for exported registrants:

- CSV
- XML

Select the Type:

- Series ID: This is the Master ID that identifies the series to which the registrant belongs.
- Occurrence ID: This is the ID that uniquely identifies an registrant no matter what series it belongs to.
- Created On: This tells when the registrant was created.
- Modified On: This tells when the last time the occurrence has been modified.

With these values the advanced import knows where to map the data relating to the occurrence and series. It also knows if an registrant needs to be updated by comparing the dates passed in the file with the dates currently stored in the database for an registrant.

Searching for Registrants to Export

The following fields are included for searching:

Export All Registrants: A check box for selecting to export “All Registrants”.
Or, you can select to narrow the registrants you would like to export by searching the database for specific registrants.

- **Date Range**: Drop down menus for start date and end date, with the ability to select month, day and year. The date range searches against the registrant start and end date. The default start date is the date of the earliest data within the registrant database.

- **Time Span**: Drop down menus for start time and end time, with the ability to select hours, minutes and time of day (AM/PM). This time range searches against the registrant start and end time. This field remains disabled unless the date range is selected.
- **Registrant Type**: This drop-down selection only displays if your installation includes the license of the Private Calendar Module. If enabled this drop-down allows you to select to include Registrants marked as Private Only, Public Only or Both (set to post to both the Public and Private Calendars).
- **Keyword(s)**: An open text field that allows the user to enter in keywords separated by commas. The field allows for up to 255 characters. The keywords entered are searched against the following fields: Registrant Name, Registrant Description, Contact Info (Name & Email fields), Details, Admission Info and Remarks (Or your custom field names if setup within the Configuration Area).
- **Categorization**: Drop-down menu with the ability to select all or select one from the drop-down directly. Or, users can click "select multiple" to launch the full list of category(s)/subcategory(s) to select more than one.
- **Department(s)**: A list box that includes all (active) the departments, sorted in alphabetical, descending order (with “All” as the first selection).
- **User Account(s)**: A list box that includes all (active) user names sorted in alphabetical, descending order (with “All” as the first selection).
- **Location(s)**: A list box that includes all (active) locations added within the registrant database. All users can see all locations and the list is sorted in alphabetical, descending order (with “All” as the first selection.) The first selection in the list box will always be "No location" which means that if selected the downloaded list will include any registrant where no location was selected.

***NOTE**: For any list box you can choose as many selections as needed for inclusion in your search/download list.

View Export Feeds: Can be clicked to navigate to the View Export Feeds area and view all current export feeds Calendar.

NAVIGATION OPTIONS WITHIN THIS AREA

The RESET button can be clicked to reset the screen values to their default settings. Choose SUBMIT to finalize your selections and begin the download process. Please follow the instructions displayed on the screen for either opening or saving the file. CANCEL can be clicked in order to cancel your actions and return to the Main Menu of Active Data Calendar.

View Persistent Registrant Export Feeds

Administrative users with the privilege to Export Registrants can use this area to manage their export feeds, check current status of a feed, view logs for ongoing feed status and navigate to modify or delete a feed. All export feeds are listed in a table format and the columns include:

- **Export Name**: The export name is listed.
- **Polling Dates**: The start and end dates for polling of this export are listed.
- **Polling Time**: The start and end times for polling of this export each day, on the dates entered, are listed.
- **Frequency of Polling**: The interval (in minutes) at which the calendar application should poll the export url to find updates and import them into Calendar.
- **Feed Status**: This column displays the current feed status in general. Status options that may display include: Active (export currently has an active status), Inactive (export currently has an inactive status and

is not running regardless of schedule), Future (the start date of the export is in the future) or Expired (the end date for the export has past and the export is no longer running).

- **Last Run Result**: This column displays the results that Calendar encountered the last time it ran the export thread for this export feed. Status options that may display include: Failed (export currently has a failed status and was not able to export registrants on the last export run) or Success (export is running successfully). The status displayed will also be displayed as a link and the user can click the link to go to a detail screen showing the entire log of each export run and the status per export run.
- **Action**: Options include Modify and Delete. If Modify is selected, then the user is navigated to the Modify Export screen. If Delete is selected, then the user is navigated to the Delete Export confirmation screen.

Manage Export Service

At the top of this screen there is an area noting the current status of your organization's Calendar export thread. If the export threadis stopped, you can click the "Start" button to restart the export thread and begin running all exports again. Or, if for some reason you need to stop the export thread, you can do that as well by clicking the "Stop" button.

Groups

Add User Group(s)

To navigate to the Add User Group functionality, click on the WORKFLOW tab and then select GROUP(S): ADD. This function is used to add the general details about the User Account that you are entering.

This function is used to add the general details about the User Group that you are entering, including the group name and to select the users to be added into the new group you are creating.

Step 1: Add User Group - Select Group Members

This screen allows you to add your user group name and search for users to add to your group.

- User Group Name: (50 character limit - alpha-numeric)
- Add Users to Group

To search for users to add to your group you can enter in alpha-numeric characters into any one of the following three search criteria and click SEARCH. The more text you enter in these three fields, the more restrictive your search criteria.

- Last Name
- First Name
- User Name

Once a search is performed, a window opens showing the matching users. The top area of the window displays the user accounts in the Calendar that match your search criteria. To select an account and add it to your group, simply click on the name of the user and select the "ADD" arrow. To add all of the user accounts from the top list box into your group, use the "ADD ALL" arrow. If you add someone to your group and need to remove them, click the name of the user account from the bottom list box entitled "Accounts to Add to Group" and click the "REMOVE" arrow.

NAVIGATION OPTIONS WITHIN THIS AREA

Continue to the next step of the Add User Group process by clicking the NEXT button. Click the FINISH button to save the User Group at any time. You will receive a message that the User Group has been added successfully.

If there have been fields that have not been completed correctly you will receive an error message indicating the fields that must be changed before finishing the process. Please correct these and click either the NEXT or FINISH button to complete the process, depending on your intended action. The BACK button is disabled on this screen.

Step 2: Add User Group - Department Permission(s) and Role(s)

This screen includes options for setting up individual department permission(s) and role(s) or universal permission(s) and role(s).

First you must select the option for "Setup Department Permissions" to let the application know that you would like to add Department permissions for this User Group. NOTE: You may bypass this screen completely if you only want to add the Users in the Group with Facility Owner or Category Owner Permissions.

Select the type of Department Permission(s) that you would like to setup for this User Group. Options include:

- Add Group members as User Role Permission to All Departments: This is the default selection and if maintained, all users in the group will be added to every department at the user level. A "User" level role does not allow the users of the new group to post events live to the Calendar. All events submitted by users in this group will need to be processed by a Department Administrator or a Category Owner, unless any of the users in the group have individual permissions at the Category Owner or Department Administrator level.

- Add Group members as Administrator Role Permission to All Departments: If this selection is chosen, then all user accounts in this group will be added to all departments at the administrator level. An "Administrator" level role allows the users of the group to post events live to the Calendar. All events submitted by users of this group will automatically post live and will not require processing/approval.
- Add Group members and Select Roles and Permission by Department: If this selection is chosen, then a new window will open on the right side of the screen and the function will include the capability for you to select individual department roles.

NAVIGATION OPTIONS WITHIN THIS AREA

Continue to the next step of the Add User Group process by clicking the NEXT button. Click the FINISH button to save this User Group at any time. You will receive a message that the User Group has been added successfully.

If there have been fields that have not been completed correctly you will receive an error message indicating the fields that must be changed before finishing the process. Please correct these and click either the NEXT or FINISH button to complete the process, depending on your intended action.

Step 3: Add User Group - Department Privilege(s)

This function includes options for setting up Calendar privilege(s).

Use the following instructions to complete Step 3.

Add User Group - Privilege(s)

System Administration Privileges

- Configure Calendar
- Download/Export Event Data
- Purge Event Data
- Add/Modify/Delete/View Registration Payment Accounts (Only available on installations with Advanced Registration Module.)
- View Reports
- Import Event Data
- Download/Export Registrant Data (Only available on installations with Advanced Registration Module).
- Add/Modify/Delete Categorizations
- View All Private Events

Department/Workflow Privileges

- Add/Modify/Delete/View User Groups
- Add/Modify/Delete Users for Departments with Administrative Roles
- View User Accounts
- Add/Modify/Delete Users for any Department
- Add/Modify/Delete Departments

Facilities Privileges

- Add/Modify/Delete Locations/Buildings/Rooms

Event Marketing Privileges

- Add/Modify/Cancel/Delete Public Events
- Add/Modify/Cancel/Delete Private Events (only appears for installations with the Private Module)

Additional Options for Public/Private Event Marketing

- Enable Highlighted Events
- Enable WYSIWYG Editor for Event Management
- Send Email Notifications
- Add/Modify/Delete Syndication Templates
- Enable Event Registration
- Upload Images & Attachments
- Generate Syndication, RSS and Quick Links
- Add/Modify/Delete/View Registration Forms (Available on installations with Advanced Registration Module)

NAVIGATION OPTIONS WITHIN THIS AREA

Click the FINISH button to save the changes to this User Group at any time. You will receive a message that the User Group has been added successfully.

If there have been fields that have not been completed correctly you will receive an error message indicating the fields that must be changed before finishing the process. Please correct these and click either the NEXT or FINISH button to complete the process, depending on your intended action.

Step 4: Add User Group - Category Permissions

When a Category is being added, the Administrative User Account adding the Category, can choose to lock the category. When a Category is "locked", then at least one Category Owner must be selected for management of events that are submitted to that particular Category. However, multiple Category Owners can be selected for a locked Category. This step in the "Add User Group" wizard will allow the user to select to Setup Category Permissions and then if selected, choose from the following subset options:

- User Group has Category Owner Permissions for All Current Locked Category(s)
- User Group has Category Owner Permissions for Selected Categories
- User Group has Category Owner Permissions but Category Ownership will be selected late

If a User Group is Added as Category Owner(s) to Individual Locked Category(s) and the Administrator would like to select the Category(s) from within the Add User Group Wizard

Click the appropriate radio button "User Group has Category Owner Permissions for Selected Categories". Window is opened on the right side of the screen:

- Select from the list of available Locked Category(s) those which the users in the group should manage as the Category Owner(s)
- Click the **SUBMIT** button to save your selections and return back to the main wizard screen for adding the User Account Group - Step 4
- If you need to change your selections, click the CHANGE button beside the list box showing your current Locked Category selections and the window will launch with the previously selected Category(s) checked and you will have the ability to make modifications

Other buttons on this window include:

RESET: Can be clicked to reset the window values to their default settings.
SUBMIT: Finalizes selections, closes the window and brings you back to the main wizard step that they were on before opening the window.
CANCEL: Cancels out of the current window and brings you back to the main “Add User Group – Step 4" screen with no categories selected. The checkbox for "Lock Category" should no longer be selected.

***NOTE**: Every time an event is added to a locked category, the Category Owner for that locked category is notified that the event requires approval. (This bypasses the normal Department review and approval process for that particular Category. However, if the event was also added to non-locked Category(s), then the event is processed according to the standard Department review process). If there are multiple Category Owners for a locked category, then all Category Owners are notified and the event is processed according to the first Category Owner who takes action on the event. When a Category Owner posts an event to the category to which they are the owner, then their event is approved automatically.

NAVIGATION OPTIONS WITHIN THIS AREA
Continue to the next step of the Add User process by clicking the **NEXT** button. Click the **FINISH** button to save this User Account at any time. You will receive a message that the User has been added successfully.

Add User Group - Confirm and Finalize Account

This screen allows you to preview the details of your new User Group before "Finishing" the Add User Group Wizard. Once the User Group information has been finalized you can use the FINISH button to finish your action.

This is the final screen in the Add User Group process and therefore the NEXT button is disabled on this screen.

Modify/Delete User Group - Select User Group

This function is used to Modify/Delete a current User Group for your installation of Active Data Calendar. You can either modify a User Group's permissions/privileges and general details or completely delete the User Group from the system.

NOTE: Deleting a User Group does not delete the users from the Calendar database.

Use the following instructions to begin the modification/deletion process:

Select a User Group Name: Use the drop-down to select the name of the group that you would like to modify or delete. The user group names are listed in alphabetical, ascending order.

Then select the action you would like to take from the two radio button options:

- Modify: Allows you to change user group information including privileges, permissions and/or users added to the group.
- Delete: Navigates you to the Delete User Group Confirmation area where once you confirm your action will remove the User Group completely from the Calendar database and it will no longer be available for any purposes in the Calendar application.

Click the **SUBMIT** button to finalize your action and proceed to either the first step in the modification process or to the Delete User Group confirmation screen.

Step 1: Modify User Group

This function is used to add or remove users from the user group.

Modify User Group - Select Group Members

This screen allows you to change your user group name and/or search for users to add or remove from your group.

- User Group Name: (50 character limit - alpha-numeric)
- Add Users to Group

To search for users to add to your group you can enter in alpha-numeric characters into any one of the following three search criteria and click SEARCH. The more text you enter in these three fields, the more restrictive your search criteria.

- Last Name
- First Name
- User Name

Once a search is performed, a window opens on the right side with the matching users. The top area of the window displays the user accounts in the Calendar that match your search criteria. To select an account and add it to your group, simply click on the name of the user and select the "ADD" arrow. To add all of the user accounts from the top list box into your group, use the "ADD ALL" arrow. If you add someone to your group and need to remove them, click the name of the user account from the bottom list box entitled "Accounts to Add to Group" and click the "REMOVE" arrow.

NAVIGATION OPTIONS WITHIN THIS AREA

Continue to the next step of the Modify User Group process by clicking the NEXT button. Click the FINISH button to save the User Group changes at any time. You will receive a message that the User Group has been modified successfully.

If there have been fields that have not been completed correctly you will receive an error message indicating the fields that must be changed before finishing the process. Please correct these and click either the NEXT or FINISH button to complete the process, depending on your intended action. The BACK button is disabled on this screen.

Step 2: Modify User Group - Department Permission(s) and Role(s)

This function includes options for setting up or changing individual department permission(s) and role(s) or universal permission(s) and role(s).

Use the following instructions to complete Step 2.

Rules for modifying Department Permissions on an existing User Group:

- If the User Group currently DOES NOT have Department Permissions, then the checkbox for "Setup Department Permissions" should not show as checked/enabled. If you elect to check off this checkbox then you are telling the Calendar application that you would like to add Department Permissions to this User Group. If this is the case, then you will be promoted to select the type of Department Permission(s) that you would like to setup for this User Group.

Options include:

- Add Group members as User Role Permission to All Departments: This is the default selection and if maintained, all users in the group will be added to every department at the user level. A "User" level role does not allow the users of the new group to post events live to the Calendar. All events submitted by users in this group will need to be processed by a Department Administrator or a Category Owner, unless any of the users in the group have individual permissions at the Category Owner or Department Administrator level.
- Add Group members as Administrator Role Permission to All Departments: If this selection is chosen, then all user accounts in this group will be added to all departments at the administrator level. An "Administrator" level role allows the users of the group to post events live to the Calendar. All events submitted by users of this group will automatically post live and will not require processing/approval.
- Add Group members and Select Roles and Permission by Department: If this selection is chosen, then a new window will open on the right side of the screen and the function will include the capability for you to select individual department roles.
- If the User Group currently DOES have Department Permissions, then the checkbox for "Setup Department Permissions" should show as checked/selected. You may choose to either:
  - Change the Departments/Roles for the User Group - to do this simply select from the radio button options shown above under "Options include".
  - Remove ALL Department Permissions and Roles by deselecting the checkbox for "Remove All Department Permissions and Roles".

NAVIGATION OPTIONS WITHIN THIS AREA

Continue to the next step of the Modify User Group process by clicking the NEXT button. Click the FINISH button to save the changes to this User Group at any time. You will receive a message that the User Group has been modified successfully.

If there have been fields that have not been completed correctly you will receive an error message indicating the fields that must be changed before finishing the process. Please correct these and click either the NEXT or FINISH button to complete the process, depending on your intended action.

Step 3: Modify User Group - Privilege(s)

This function includes options for setting up or changing Calendar privilege(s).

System Administration Privileges

- Configure Calendar
- Download/Export Event Data
- Purge Event Data
- Add/Modify/Delete/View Registration Payment Accounts (Available for installations with the Advanced Registration Module).
- View Reports
- Import Event Data
- Download/Export Registrant Data (Available for those with Advanced Registration Module)
- Add/Modify/Delete Categorizations
- View All Private Events

Department/Workflow Privileges

- Add/Modify/Delete/View User Groups
- Add/Modify/Delete Users for Departments with Administrative Roles
- View User Accounts
- Add/Modify/Delete Users for any Department
- Add/Modify/Delete Departments

Facilities Privileges

- Add/Modify/Delete Locations/Buildings/Rooms

Event Marketing Privileges

- Add/Modify/Cancel/Delete Public Events
- Add/Modify/Cancel/Delete Private Events (only appears for installations with the Private Module)

Additional Options for Public/Private Event Marketing

- Enable Highlighted Events
- Enable Event Registration
- Enable WYSIWYG Editor for Event Management
- Upload Images & Attachments
- Send Email Notifications
- Generate Syndication, RSS and Quick Links
- Add/Modify/Delete Syndication Templates
- Add/Modify/Delete/View Registration Forms (only appears for installations with the Advanced Registration Module)

NAVIGATION OPTIONS WITHIN THIS AREA

Continue to the next step of the Add User Group process by clicking the NEXT button. Click the FINISH button to save this User Group at any time. You will receive a message that the User Group has been added successfully.

If there have been fields that have not been completed correctly you will receive an error message indicating the fields that must be changed before finishing the process. Please correct these and click either the NEXT or FINISH button to complete the process, depending on your intended action.

Step 4: Modify User Group - Category Permissions

This function includes options for setting up and modifying the permissions for the users in the group to be Category Owner(s). Only Super Users will be presented with this Step in the Modify User Group Wizard.

When a Category is being added, the Administrative User Account adding the Category, can choose to lock the category. When a Category is "locked", then at least one Category Owner must be selected for management of events that are submitted to that particular Category. However, multiple Category Owners can be selected for a locked Category. This step in the "Modify User Group" wizard will allow the user to select if the user accounts in the group will be granted Category Owner Permissions or not. If the checkbox is selected for Category Owner permissions then the user can select from the following three radio button selection options:

- User Group has Category Owner Permissions for All Current Locked Category(s) - (This includes Public and Private if the Private module is enabled)
- User Group has Category Owner Permissions for Selected Categories
- User Group has Category Owner Permissions but Category Ownership will be selected later

If a User Group is Added as Category Owner(s) to Individual Locked Category(s) and the Administrator would like to select the Category(s) from within the Add User Group Wizard

- Click the appropriate radio button "User Group has Category Owner Permissions for Selected Categories".
- Window is opened on the right side of the screen
- Select from the list of available Locked Category(s) those which the users in the group should manage as the Category Owner. Categories are marked as Public or Private (if Private Module is enabled)
- Click the SUBMIT button to save your selections and return back to the main wizard screen for modifying the User Group - Step 4

If you need to change your selections, click the CHANGE button beside the list box showing your current Locked Category selections and the window will launch with the previously selected Category(s) checked and you will have the ability to make modifications.
***NOTE**: Every time an event is added to a locked public or private category, the Category Owner for that locked category is notified that the event requires approval. (This bypasses the normal Department review and approval process for that particular Category. However, if the event was also added to non-locked Category(s), then the event is processed according to the standard Department review process). If there are multiple Category Owners for a locked public or private category, then all Category Owners are notified and the event is processed according to the first Category Owner who takes action on the event.

NAVIGATION OPTIONS WITHIN THIS AREA
Continue to the next step of the Modify User process by clicking the NEXT button. Click the FINISH button to save the changes to this User Group at any time. You will receive a message that the User Group has been modified successfully. If there have been fields that have not been completed correctly you will receive an error message indicating the fields that must be changed before finishing the process.

Modify User Group - Confirm and Finalize Account

This screen allows you to preview the details of your modified User Group. Once the User Group information has been finalized you can use the FINISH button.

View User Groups - List

The ability to view user groups within your installation of Active Data Calendar is a privilege that must be assigned to a particular User Group. The default list that is presented is a display of ALL User Groups in the database. However, there is also a drop-down at the top of the screen that allows you to sort the list by Department as well.

The columns of information displayed for each User Group in the list includes:

- **Group Name**: This displays as a link and if selected, takes the user to the User Group Details screen.
- **# Users**
- **Max. Dept Role**: This displays the highest department role that the User Groups has been granted within the Calendar application.
- **Category Role**: If the User Group has been granted Category Owner status of at least one Category, the Owner will display in this column, otherwise, nothing is displayed in this column for the user group.
- **Group Status**: Options for display in this column are Active or Inactive.

From this screen you can either click on a User Group name to go to the User Group Details screen or click on the link in the upper right corner entitled "Search User Groups" and navigate to a separate screen where you can further refine your User Group View List.

Accounts (USERS)

Add Users

To navigate to the Add Users functionality, click on the WORKFLOW tab and then select ACCOUNT(S): ADD.

Step 1: Add User - Login Information

All fields are required.

- **First Name**: (50 character limit - alpha-numeric)
- **Last Name**: (50 character limit - alpha-numeric)
- **Login ID**: (50 character limit - alpha-numeric)
- **Password**: (minimum 6 characters - 12 character limit.) You are required to include at least 6 characters with 2 of them being numeric. If you attempt to enter in a password that is not to this specification, then you will receive an error message. Keys entered will display as an asterisk (*) within this field for security purposes.
- **Confirm Password**: The same alpha-numeric selections as entered in Password field must be re-entered in this field for confirmation purposes.
- **User Email**: (100 character limit.)
- **Phone Number**: (50 character limit - alpha- numeric)
- **Fax Number**: (50 character limit - alpha-numeric)
- **Active**: This field determines if the account is active (Yes) or inactive (No).

NAVIGATION OPTIONS WITHIN THIS AREA

Continue to the next step of the Add User process by clicking the NEXT button. Click the FINISH button to save the User Account additions at any time. If all required fields can be validated you will receive a message that the User has been added successfully. If there have been fields that have not been completed correctly you will receive an error message indicating the fields that must be changed before finishing the process.

If you elect to FINISH from this step and do not add any department permission(s) or role(s), then the user will not be able to login until you assign at least one department related permission and role.

NOTE: If LDAP is enabled this feature will not be functional. Please review the area later in this User Guide that describes the LDAP functionality.

Step 2: Add User - Department Permission(s) and Role(s)

This function includes options for setting up individual department permission(s) and role(s) or universal permission(s) and role(s).

First select the option for "Setup Department Permissions" to add Department permissions for this User account. NOTE: You may bypass this screen completely if you only want to add the User Account as a Facility Owner or Category Owner.

Select the type of Department Permission(s) that you would like to setup for this User Account. Options include:

Add as a User Account to All Departments: This is the default selection and if maintained, the User Account is added to every department at the user level. A "User" level role does not allow the new User Account to post events live to the Calendar. All events submitted by this User Account will need to be processed by a Department Administrator or a Category Owner.

Add as an Administrator Account to All Departments: If this selection is chosen, then the User Account will be added to all departments at the administrator level. An "Administrator" level role allows the new User Account to post events live to the Calendar. All events submitted by this User Account will automatically post live and will not require processing/approval.

Add Individual Department Roles: If this selection is chosen, then a new window will open on the right side of the screen and the function will include the capability for you to select individual department roles.

NAVIGATION OPTIONS WITHIN THIS AREA
Continue to the next step of the Add User process by clicking the NEXT button. Click the FINISH button to save this User Account at any time. If all required fields can be validated then you will receive a message that the user has been added successfully. If there have been fields that have not been completed correctly you will receive an error message indicating the fields that must be changed before finishing the process.

Step 3: Add User Department Privilege(s)
This function includes options for setting up department privilege(s). Only the Super User account will have the ability to see and assign Administrative level privileges such as the ability to add other User Accounts. Only Super Users may grant administrative privileges to users.

Privileges are broken down into two main "levels".

1. **Administrative Level Privileges** - these privileges are those assigned to a Super User as a default. However, when adding a User Account, the Super User can elect to pass along these privileges to another User Account.

2. **Non-Administrative Privileges** - anyone adding User Accounts, other than the Super User, can only assign these non- administrative level privileges to the User Accounts that they are adding.

***NOTE**: The privileges of a traditional User Account, by default, includes only the ability to Add/Modify/Cancel/Delete Events to those Departments that the User is added. If a user is not given a specific privilege than that functional tab/link should not display on their user menu for selection.

The privileges of an Administrator User Account, by default include the ability to Add/Modify/Cancel/Delete Events to those Departments that they have been added as an Administrator and the ability to Highlight Events that they add as well as those that they are processing for standard User Accounts within their department.

NAVIGATION OPTIONS WITHIN THIS AREA
Continue to the next step of the Add User process by clicking the NEXT button. Click the FINISH button to save this User Account at any time. If all required fields are validated, then you will receive a message that the User has

been added successfully. If there have been fields that have not been completed correctly you will receive an error message indicating the fields that must be changed before finishing the process.

Step 4: Add User - Category Permissions

This function includes options for setting up the privilege for the user account to be a Category Owner. Only Super Users will be presented with this Step in the Add User Wizard.

Step 4: Add User - Category Privilege(s)

When a Category is being added, the Administrator adding the Category can choose to lock the category. When a Category is "locked", one or more Category Owners must be selected for management of events that are submitted to that Category. This step in the "Add User" wizard will allow the user to select a checkbox that the user should be assigned Category Ownership permissions. After the checkbox is selected, the user is prompted to select from three radio buttons:

- User has Category Owner Permissions for All Current Locked Category(s)
- User has Category Owner Permissions for Selected Categories
- User has Category Owner Permissions but Category Ownership will be selected later

If a User is Added as a Category Owner to Individual Locked Category(s) and the Administrator would like to select the Category(s) from within the Add User Account Wizard

- Click the appropriate radio button "User has Category Owner Permissions for Selected Categories".
- Window is opened on the right side of the screen
- Select from the list of available Locked Category(s) those which the User Account should manage as the Category Owner
- Click the **SUBMIT** button to save your selections and return back to the main wizard screen for adding the User Account - Step 4
- If you need to change your selections, click the **CHANGE** button beside the list box showing your current Locked Category selections and the window will launch with the previously selected Category(s) checked and you will have the ability to make modifications

Other buttons on this window include:

- **RESET:** Can be clicked to reset the window values to their default settings.
- **SUBMIT:** Finalizes selections, closes the window and brings you back to the main wizard step that they were on before opening the window.
- **CANCEL:** Cancels out of the current window and brings you back to the main "Add User – Step 4" screen with no categories selected. The checkbox for "Lock Category" should no longer be selected.

***NOTE:** Every time an event is added to a locked category, the Category Owner for that locked category is notified that the event requires approval. (This bypasses the normal Department review and approval process for that particular Category. However, if the event was also added to non-locked Category(s), then the event is processed according to the standard Department review process). If there are multiple Category Owners for a locked category, then all Category Owners are notified and the event is processed according to the first Category Owner who takes action on the event. When a Category Owner posts an event to the category to which they are the owner, then their event is approved automatically.

NAVIGATION OPTIONS WITHIN THIS AREA

Continue to the next step of the Add User process by clicking the **NEXT** button. Click the **FINISH** button to save this User Account at any time. You will receive a message that the User has been added successfully. If there have been fields that have not been completed correctly you will receive an error message indicating the fields that must be changed before finishing the process.

Modify/Delete User - Select User Account

To navigate to the Modify/Delete User functionality, click on the WORKFLOW tab and then select ACCOUNT(S): MODIFY/DELETE.

This function is used to Modify/Delete a User Account. You can either modify a User's permissions/privileges and general accounts details or completely delete the User Account from the system. You can also Copy a User Account in order to more quickly setup another new User Account with exact or similar privileges and/or permissions.

Use the following instructions to begin the modification/deletion process:

Select a User Account Name: Use the drop-down to select the name of the account that you would like to modify or delete.

Then select the action you would like to take from the two radio button options:

- **Modify:** Allows you to change user account information including privileges, permissions and/or general account details. You can also select MODIFY if you would like to COPY the user account to create a new account. From the Modify Wizard you will see the COPY button option.
- **Delete:** Navigates you to the Delete User Account Confirmation area where once you confirm your action will removes the User Account completely from the Calendar database and it will no longer be available for any purposes in the Calendar application.

Click the **SUBMIT** button to finalize your action and proceed to either the first step in the modification process or to the Delete User Account confirmation screen.

Modify User

This function is used to Modify/Delete a current User Account for your installation of Active Data Calendar. You can either modify a User's permission(s)/privilege(s) and general account details or completely delete the User Account from the system. You can also Copy a User Account in order to more quickly setup another new User Account with exact or similar privileges and/or permissions.

IMPORTANT TO NOTE FOR CLIENTS WITH LDAP/AD CONNECTIONS ENABLED

The only user details that can be modified on this screen include:

- **First Name:** If the account that was imported from LDAP does not have a First Name specified from within LDAP/AD then this field will be enabled for data entry. Otherwise this field will not be displayed. You will be required to enter in a First Name for the new account before proceeding forward in the

Modify User Wizard.

- **Last Name:** If the account that was imported from LDAP does not have a Last Name specified from within LDAP/AD then this field will be enabled for data entry. Otherwise this field will not be displayed. You will be required to enter in a Last Name for the new account before proceeding forward in the Modify User Wizard.
- **Active:** This field determines if the account is active (Yes) or inactive (No) and is automatically defaulted to (No) for user accounts imported from LDAP. You must select (Yes) to enable the account so that they can begin to login to the Calendar product.

NAVIGATION OPTIONS WITHIN THIS AREA

You will still need to click the FINISH button at the bottom of the screen to completely finish/finalize your modification. You can also use the CANCEL button at the bottom of the screen to cancel out of this modify action but you will be navigated back to the Main Menu.

Delete User

This function includes options for confirming or canceling a **DELETE** action.

User Name - The user name is listed here (last name, first name). The User Account details are also displayed on the bottom portion of this screen. Review the User Account and associated details to ensure that this is the User you would like to delete.

Yes/No Radio Selection: Click the radio button associated with the action that you would like to take. Select "Yes" if you do want to finalize the delete process. Select "No" if you want to end this action.

NAVIGATION OPTIONS WITHIN THIS AREA

Click the FINISH button at the bottom of the screen to completely finish/finalize your selection. You can also use the CANCEL button at the bottom of the screen to cancel out of this delete action but you will be navigated back to the Main Menu.

NOTE: Beginning with version 3.8, you may reassign event ownership of events for a user account that is being deleted (or made inactive). If you attempt to delete a user with active events associated with the user ID, then you will receive the following warning message:

> Reassign Event Ownership
>
> The user you have selected to delete has active and/or past events assigned to their account. Please select the user account to reassign event ownership for all events per department. If not user account is selected for any or all departments listed, then Active Data Calendar will automatically assign event ownership to the Super User account. Event actions taken by this user account will be retained in the Change Log but any new actions will be assigned to the user(s) selected.

Arts & Theatre: Select

Bookstore: Select

You will see the departments to which the user has permission and active events associated and be able to select another user account within that department to reassign event ownership.

View User Accounts - Search

To navigate to the View User Accounts functionality, click on the WORKFLOW tab and then select ACCOUNT(S): VIEW and use the link on the screen entitled "Search Users". Selections available for User Account searching include:

- Select Department: A single Department can be selected from this drop-down to narrow your search/list to a specific department of User Accounts.
- Select Role: Options include Category Owner, Department Administrator, User or All (All is the default)
- Keyword (User Name): The keyword field searches the fields for First Name and Last Name.
- Account Status: Options include Active, Inactive or All (All is the default)

When the “Search” button is selected, you will be navigated back to the View User Account List with the search results displayed on the View User Accounts List screen.

There is also a link in the upper right corner of the search screen that says “Back to Full List” to enable you to return to the full list.

View User Accounts - List

To navigate to the View User Accounts functionality, click on the WORKFLOW tab and then select ACCOUNT(S): VIEW.

The ability to view user accounts within your installation of Active Data Calendar is a privilege that must be assigned to a particular User Account. The default list that is presented is a display of ALL User Accounts in the database. However, there is also a drop-down at the top of the screen that allows you to sort the list by Department as well.

The columns of information displayed for each User Account in the list include:

- **Last Name:** This displays as a link and if selected, takes the user to the User Account Details screen.
- **First Name**
- **Email**
- **Max. Dept Role:** This displays the highest department role that the User has within the Calendar application. If the user is an Administrator for at least one department, then Admin would display in this column.
- **Category Role:** If the User is a Category Owner of at least one Category, then Owner will display in this column, otherwise, nothing is displayed in this column for the user account.
- **Account Status:** Options for display in this column are Active or Inactive.

From this screen you can either click on a User Account name to go to the User Account Details screen or click on the link in the upper right corner entitled "Search Users" and navigate to a separate screen where you can further refine your User Account View List.

View User Accounts - Details

This screen allows you to view all the account details for the User selected from the list view.

Details included per account include:

- General Account Information - All details are displayed except for User password information.

- Administrative and Non-Administrative Privileges
- Department Permission(s) and Role(s)
- Category Owner Permission(s)

There is also a link included in the upper right corner to return to the full list.

My Profile

To navigate to the My Profile functionality, click on the WORKFLOW tab and then select ACCOUNT(S): MY PROFILE.

This screen allows you to set default values and selections for various fields throughout the Calendar administration area for your particular user account. When selecting these profile settings, they will only be saved for your account and will not affect any global Calendar settings.

- **Default Department when adding events:** The Department selected here will become the default department selected each time your user account goes to add a new event.
- **Default Categories when adding events:** Categories and Subcategories selected here will be selected as default category/subcategory selections each time your user account goes to add a new event.

Department

Add Department

This function allows you to add departments and contact information to be used for administering events. Departments are used to group calendar users. This is effective in managing events by a specific department, with administrators who can manage the calendar and "User" level accounts for the specific department.

To navigate to the Add Department functionality, click on the WORKFLOW tab and then select DEPARTMENT(S): ADD.

Use the following information to complete adding your Department.

The only required field is Department Name. Other information you may choose to include is:

- **Contact Name**: This will become the default contact name for any event added to this department.
- **Contact E-mail Address**: This will become the default contact email address for any event added to this department.
- **Contact Phone**: This will become the default contact phone number for any event added to this department.
- **Department Address**: This information does not display on any of the front-end views available to visitors. Fields enabled in this area depend on if the administrator of the Calendar has enabled

International Location and Contact Fields or not. If International options are enabled then fields include:

- Address 1
- Address 2
- City
- State/Province/Prefecture
- ZIP/Postal Code
- Country

If International options are not enabled then the State field will be a drop-down of selectable options and the Country field is not displayed.

- **Fax Number**: This information does not display on any front-end views available to visitors.
- **Department Internet Address**: This information does not display on any front-end views available to visitors.
- **Department Description**: This information does not display on any front-end views available to visitors.

*NOTE: Those fields not viewable on the front-end can be used to help manage the users associated with the departments from within the Administration.

TIP: The contact information (contact name, phone and email) that are entered here, become the default contact information that is pre-populated for any event that is added within the department. This helps users within a department to quickly add events that have the same default contact information. When adding the event, you can choose to maintain the default contact information or edit the contact for any particular event if necessary.

NAVIGATION OPTIONS WITHIN THIS AREA

You will still need to click the FINISH button at the bottom of the screen to completely finish/finalize your addition. You can also use the CANCEL button at the bottom of the screen to cancel out of this add department action but you will be navigated back to the Main Menu.

Modify/Delete Department - Select Department

This function is used to Modify/Delete a current Department from installation of Active Data Calendar. You can either modify a Department's details or completely delete the Department from the system.

To navigate to the Modify/Delete Department functionality, click on the WORKFLOW tab and then select DEPARTMENT(S): MODIFY/DELETE.

Select a Department Name: Use the drop-down to select the name of the department that you would like to modify or delete. The department names are listed in alphabetical, ascending order.

Then select the action you would like to take from the two radio button options:

- Modify: Allows you to change department information including department name.
- Delete: Navigates you to the Delete Department confirmation area where once you confirm your action it will remove the Department completely from the Calendar database and application.

***NOTE**: You can only delete a department that currently does not have any events pending processing.

Click the **SUBMIT** button to finalize your action and proceed to either the first step in the modification process or to the Delete Department confirmation screen.

Modify Department

This function allows you to modify departments and contact information to be used for administering events from within the administration area of the Active Data Calendar program.

Use the following information to complete modifying your Department.

The only required field is Department Name. Other information you may choose to include is:

- **Contact Name**: This will become the default contact name for any event added to this department.
- **Contact E-mail Address**: This will become the default contact email address for any event added to this department.
- **Contact Phone**: This will become the default contact phone number for any event added to this department.
- **Department Address**: This information does not display on any of the front-end views available to visitors. Fields enabled in this area depend on if the administrator of the Calendar has enabled International Location and Contact Fields or not. If International options are enabled then fields include:
    - Address 1
    - Address 2
    - City
    - State/Province/Prefecture
    - ZIP/Postal Code
    - Country

  If International options are not enabled then the State field will be a drop-down of selectable options and the Country field is not displayed.
- **Fax Number**: This information does not display on any front-end views available to visitors.
- **Department Internet Address**: This information does not display on any front-end views available to visitors.
- **Department Description**: This information does not display on any front-end views available to visitors.

***NOTE**: Those fields not viewable on the front-end can be used to help manage the users associated with the departments from within the Administration.

NAVIGATION OPTIONS WITHIN THIS AREA

You will still need to click the FINISH button at the bottom of the screen to completely finish/finalize your modification. You can also use the CANCEL button at the bottom of the screen to cancel out of this modify action but you will be navigated back to the Main Menu.

Delete Department

This function includes options for confirming or canceling out of your DELETE action. Use the following instructions to complete the delete Department process.

Department Name - The department name is listed here. The department details are also displayed on the bottom portion of this screen.

Yes/No Radio Selection: Click the radio button associated with the action that you would like to take. Select "Yes" if you do want to finalize the delete process. Select "No" if you want to end this action.

NAVIGATION OPTIONS WITHIN THIS AREA
You will still need to click the FINISH button at the bottom of the screen to completely finish/finalize your selection. You can also use the CANCEL button at the bottom of the screen to cancel out of this delete action but you will be navigated back to the Main Menu.

View Departments – List
To navigate to the View Departments List functionality, click on the WORKFLOW tab and then select DEPARTMENT(S): VIEW.

The list that is presented is a display of ALL Departments in the database.

- Department Name: This displays as a link and if selected, takes the user to the Department Details screen. This is also the column that the list is sorted by with the list displaying in alphabetical, ascending order, starting with "A" at the top of the list.
- Contact Name
- E-mail
- Phone Number
- # of Users: Displays the total number of user accounts assigned to this Department with "User" level privileges.
- # of Administrators: Displays the total number of user accounts assigned to this Department with "Admin" level privileges.

The top of the list also displays the total number of Departments currently active within your installation of Active Data Calendar.

View Department - Details

The department details that display are for the department name selected from the list screen.

The detailed information displayed for the selected department includes:

- Department Name
- Active/Inactive
- Contact Name: Default contact name for any event added to this department.
- Contact E-mail Address: Default contact email address for any event added to this department.
- Contact Phone Number: Default contact phone number for any event added to this department.
- Department Address: Information displayed in this area depends on if the administrator of the Calendar has enabled International Location and Contact Fields or not. If International options are enabled then information may include:
    - Address 1
    - Address 2
    - City
    - State/Province/Prefecture
    - ZIP/Postal Code
    - Country

  If International options are not enabled then Country information is not displayed.

- Fax Number
- Department Internet Address
- Department Description
- User(s) with Permission to Department: List box displays all user accounts assigned to this Department with "User" level privileges and "Admin" level privileges displayed beside each account as appropriate.
- Department Description

The top right side of the screen also includes a link to return to the full list.

Categorization

This function allows you to add a category and determine if it should be "Locked" for event publishing/processing. Categories are used for classifying how events are displayed to visitors on the front end views of your Calendar. Every event must be added to at least one Category, but they may be added to multiple Category(s) or Category/Subcategory combinations.

TIP: For additional tips on how to maximize event classification and to see sample categorization lists by industry, see your Client Portal page for Tips and Tricks on "Sample Categories and Subcategories".

Add Category

To navigate to the Add Category functionality, click on the CATEGORIZATION tab and then select CATEGORY(S): ADD. Use the following information to complete adding your Category.

The only required field is **Category Name**.

- **Category Name**: This field allows for up to 50 characters to be entered to create your Category Name.
  ***NOTE**: Calendar clients who have purchased the Private Calendar module must enter an asterisk (*) as the first character in any Category Name that is intended for display on the Private Calendar only. For example: "*Meetings".
- **Category Type**: Select from the drop-down to determine if the Category is a Public Events Calendar Category (Public), Private Events Calendar Category (Private) or available on Both Public and Private Events Calendars (Both). This drop-down only displays if your installation of Calendar includes the private module.
- Gantt Category Color: Select a 6-digit HTML color code to represent the background (fill) color of the event to be displayed on the Gantt view of the calendar. (For a quick list, go here: http://html-color-codes.com).
- Gantt Category Font Color: Select a 6-digit HTML color code to represent the font (text) color of the event to be displayed on the Gantt view of the calendar.
- **Lock This Category**: Click this checkbox if you want this Category to be locked and you will then be presented with a new window where you can assign Category Owner(s). To add a Category Owner at a later time, you can go to Modify Category, Add User Account and assign a User as a Category Owner at that time, or you can also go through Modify User Account and select to make a current User a Category Owner of the new locked Category

Once all of the selections have been made from the “Select Category Owner(s) window, you can then select from the following buttons within that window:

- **CANCEL**: Cancels out of the window, does not save any of the selections, closes the window and brings you back to the Add Category screen with no Category Owner selections showing on the screen.

- **RESET**: Resets all your current selections.
- **SUBMIT**: Submits the form contents, saves the selections and displays the selections back on the main Add Category screen, under "Current Category Owner(s)" in a list box that is not editable.

Once you "Submit" your selections, the area within the Add Category screen where the "Lock this Category" selection appeared, there will now be a list of Category Owner(s), along with a CHANGE button to the right that you can click to launch the "Select Category Owner(s)" window and change your selections.

There is also a new checkbox displayed at the bottom of the screen entitled "Remove Locked Category Status". If selected, this will unlock the category and deassociate the Category Owner(s).

***WORKFLOW NOTE**: Every time an event is added to a locked category, the Category Owner for that locked category is notified that the event requires approval. (This bypasses the normal Department review and approval process). If there are multiple Category Owners for a locked category, then all Category Owners are notified and the event is processed according to the first Category Owner who takes action on the event.

If an event is added to multiple categories and only certain categories it is being added to are locked, then the event will be processed according to the Category Owner process for those locked Categories and approved for the remainder of the Categories based off the standard Department workflow approval process. An event being submitted to multiple locked categories must be approved individually for each locked category, even if the same user is the Category Owner for each of the locked Categories that were selected.

When a Category Owner posts an event to the category to which they are the owner, their event is approved automatically. However, if the Category Owner posts an event to the category that they own and to other categories, the event must follow the appropriate approval process for the additional categories it is being added within.

Restrict User Access to Add Events or Request Resources within this Category: Click this checkbox if you would like to restrict event entry or resource requesting within this category to a select user or group of users. Once you click the checkbox a window will display with all available user accounts in Calendar. Click the checkbox beside those users that you would like to have access to this Category.

Once all of the selections have been made from the "Restrict User Access to Add Events to this Category" window, you can then select from the following buttons within that window:

CANCEL: Cancels out of the window, does not save any of the selections, closes the window and brings you back to the Add Category screen with no restricted user access selections showing on the screen.

SUBMIT: Submits the form contents, saves the selections and displays a list of users.

RESET: Resets all your current selections.

Once you "Submit" your selections, the area within the Add Category screen where the "Current User(s) with Access" selection appeared, a list displays those User(s) chosen, along with a CHANGE button to the right that you can click to launch the "Restrict User Access" window and change your selections.

Options for Public and Private Categories
Category Display Configuration: There are various options for determining when a category will display on the public and/or private calendars as well as the header and footer that should be displayed for each category.

Do not include in the master category search list (on front-end view screens): This option is only available for organizations that have the private Calendar module. If this checkbox is selected, the category will not display in the master public/private category search drop-down for selection. The only way to navigate to this category will be through a quick link.

Do not include in the Open Entry Submission Form: This option is only available for organizations that have the Open Entry Module (public, private or facilities). If this checkbox is selected, the category will not be included in the category drop-down on the open entry submission form.

Setup custom Category View Configuration: This option includes the ability to upload a custom header and/or footer .html file to be displayed as the header and footer if this category is selected for viewing of events on the front-end view screens.

***NOTE**: Calendar header and footer files that are uploaded must be HTML files (.htm and .html) in file format. You cannot upload .gif, .jpg or any other file type for your header/footers.

TABLE ATTRIBUTES

Table attributes specified in the header will affect the entire page. When uploading headers and footers through the Install Package for display on the Public and/or Private Calendar Front-End it is important to be aware of the width of these components. Web page width can be determined in two ways, pixel width (ex. 800) and percentage (ex. 100%). The differences between these two methods can greatly impact the visual appearance of your calendar configuration, however most clients follow the same look as their site to maintain uniform look and feel.

Fixed and Percentage Page Width

Fixed page width guarantees that the maximum width of the content will not exceed the specified number, for example 800 pixels. A percentage page width will “auto-expand” as the browser width is adjusted. As a result the content will resize itself as the browser width increases and decreases. It is also recommended that 768 pixels be the minimum page width when working in a fixed width format. There are no size restrictions on the Calendar Header height, but you will want to take into consideration how the header size affects the overall view/presentation of your Calendar information and search options.

INSTALLATION METHOD

The table that contains the Calendar content begins in the header and ends in the footer. This means that all Active Data Calendar content in between these two points in the code conforms to table attributes width, alignment, and padding, etc. To do this open a new table row and cell <tr><td> directly after the header content ends. The Calendar content will live here. To complete the process the footer content begins with an end table cell and row </td></tr> to close the cell and row. Essentially the Calendar content is now nested between the header and footer.

Upload Default Image

Allows you to upload an image that will display for events in the selected category when an event itself does not contain an image.

All links to external objects (ex. images, javascript, links, etc.) must be absolute. (Ex. http://www.yoursite.com/images/header.jpg)

NAVIGATION OPTIONS WITHIN THIS AREA
You will still need to click the **FINISH** button at the bottom of the screen to completely finish/finalize your addition. You can also use the **CANCEL** button at the bottom of the screen to cancel out of this action but you will be navigated back to the Main Menu.

Modify/Delete Category - Select Category

To navigate to the Modify/Delete Category functionality, click on the CATEGORIZATION tab and then select CATEGORY(S): MODIFY/DELETE.

This function is used to select a Category that you would like to modify or delete from within the Active Data Calendar program.

Use the following instructions to begin the modification/deletion process:

Select a Category Name: Drop-down displays a list of Category Names available in alphabetical, ascending order starting with "A" at the top of the list.

Select the name of the Category that you would like to modify/delete from the drop-down and then select the action you would like to take from the two radio button options:

- **Modify**: Allows you to change Category information, including Category Name and Locked Status.
- **Delete**: Removes the Category completely from the Calendar database and it will no longer be available for any purposes in the Calendar application.

Click the **SUBMIT** button to finalize your action and proceed to either the first step in the modification process or to the Delete Category confirmation screen.

Modify Category

This area allows you to modify a category and the associated business rules, including choosing a setting that determines if the category should be "Locked" for event publishing/processing. Categories are used for classifying how events are displayed to visitors on the front end views of your Calendar. Every event must be added to at least one Category, but they may be added to multiple Category(s) or Category/Subcategory combinations.

The only required fields are Category Name and Category Type.

- **Category Name**: This field allows for up to 50 characters to be entered to create your Category Name.
- **Category Type**: Select from the drop-down to determine if the Category should be available for public events only, private events only or both. This drop-down only displays if your installation of Calendar includes the private module.
- **Lock This Category**: Click this checkbox if you want this Category to be locked and you will then be presented with a new window where you can choose to assign one or multiple Category Owner(s) to this new locked Category. You can lock a Category and choose to not select a Category Owner at this time also. To add a Category Owner at a later time, you can go to Modify Category, Add User Account and assign a User as a Category Owner at that time, or you can also go through Modify User Account and select to make a User a Category Owner.

Once all of the selections have been made from the “Select Category Owner(s)" window, you can then select from the following buttons within that window:

CANCEL: Cancels out of the window, does not save any of the selections, closes the window and brings you back to the Add Category screen with no Category Owner selections showing on the screen.

SUBMIT: Submits the form contents, saves the selections and displays the selections back on the main Add Category screen, under "Current Category Owner(s)” in a list box that is not editable.

RESET: Resets all your current selections.

Once you “Submit” your selections, the area within the Add Category screen where the "Lock this Category" selection appeared, a list will display the selected Category Owner(s), along with a CHANGE button to the right that you can click to launch the “Select Category Owner(s)” window and change your selections.

There is also a new checkbox displayed at the bottom of the screen entitled "Remove Locked Category Status". If selected, this will remove the current status of "Locked" from the new Category and it will also remove the list box of all currently selected Category Owners. The Category is then set as non-locked.

***WORKFLOW NOTE**: Every time an event is added to a locked category, the Category Owner for that locked category is notified that the event requires approval. (This bypasses the normal Department review and approval process). If there are multiple Category Owners for a locked category, then all Category Owners are notified and the event is processed according to the first Category Owner who takes action on the event.

If an event is added to multiple categories and only certain categories it is being added to are locked, then the event will be processed according to the Category Owner process for those locked Categories and approved for the remainder of the Categories based off the standard Department workflow approval process. An event being submitted to multiple locked categories must be approved individually for each locked category, even if the same user is the Category Owner for each of the locked Categories that were selected.

When a Category Owner posts an event to the category to which they are the owner, then their event is approved automatically. However, if the Category Owner posts an event to the category that they own and to other categories (that are locked and have other Category Owners) or which are not locked, then the event must follow the appropriate approval process for the additional categories it is being added within.

Once you have locked a category, you can always click on the CHANGE button to change your category owner selections or click the checkbox entitled "Remove Locked Category Status" in order to remove the locked category setting and make the category open for event publishing.

- Restrict User Access to Add Events to this Category: Click this checkbox if you would like to restrict event entry within this category to a select user or group of users. Once you click the checkbox a window will display with all available user accounts in Calendar. Click the checkbox beside those users that you would like to have access to this Category for event publishing.

  Once all of the selections have been made from the “Restrict User Access to Add Events to this Category" window, you can then select from the following buttons within that window:

  - **CANCEL**: Cancels out of the window, does not save any of the selections, closes the window and brings you back to the Add Category screen with no restricted user access selections showing on the screen. You can then select to click on "Restrict User Access" again to re-open the window.
  - **SUBMIT**: Submits the form contents, saves the selections and displays the selections back on the main Add Category screen, under "Current User(s) with Access" in a list box that is not editable.
  - **RESET**: Resets all your current selections.

Once you "Submit" your selections, the area within the Add Category screen where the "Current User(s) with Access" selection appeared, there will now be a un-editable list box/text box that displays those User(s) chosen, along with a CHANGE button to the right that you can click to launch the "Restrict User Access" window and change your selections.

- Category Display Configuration: There are various options for determining when a category will display on the public and/or private calendars as well as the header and footer that should be displayed for each category.

  - **Do not include in the master category search list (on front-end view screens)**: This option is only available for organizations that have the private Calendar module. If this checkbox is selected, the category will not display in the master public/private category search drop-down for selection. The only way to navigate to this category will be through a quick link.
  - **Do not include in the Open Entry Submission Form**: This option is only available for organizations that have the Open Entry Module (public, private or both). If this checkbox is selected, the category will not be included in the category drop-down on the open entry submission form.
  - **Setup custom Category View Configuration:** This option includes the ability to upload a custom header and/or footer .html file to be displayed as the header and footer if this category is selected for viewing of events on the front-end view screens. *NOTE: Calendar header and footer files that are uploaded must be HTML files (.htm and .html) in file format. You cannot upload .gif, .jpg or any other file type for your header/footers.

TABLE ATTRIBUTES

Table attributes specified in the header will affect the entire page. When uploading headers and footers through the Install Package for display on the Public and/or Private Calendar Front-End it is important to be aware of the width of these components. Web page width can be determined in two ways, pixel width (ex. 800) and percentage (ex. 100%). The differences between these two methods can greatly impact the visual appearance of your calendar configuration, however most clients follow the same look as their site to maintain uniform look and feel.

Fixed and Percentage Page Width

Fixed page width guarantees that the maximum width of the content will not exceed the specified number, for example 800 pixels. A percentage page width will "auto-expand" as the browser width is adjusted. As a result the content will resize itself as the browser width increases and decreases. It is also recommended that 768 pixels be the minimum page width when working in a fixed width format. There are no size restrictions on the Calendar Header height, but you will want to take into consideration how the header size affects the overall view/presentation of your Calendar information and search options.

INSTALLATION METH**OD**

The table that contains the Calendar content begins in the header and ends in the footer. This means that all Active Data Calendar content in between these two points in the code conforms to table attributes width, alignment, and padding, etc. To do this open a new table row and cell <tr><td> directly after the header content ends. The Calendar content will live here. To complete the process the footer content begins with an end table cell and row </td></tr> to close the cell and row. Essentially the Calendar content is now nested between the header and footer.

All links to external objects (ex. images, javascript, links, etc.) must be absolute. (Ex. http://www.yoursite.com/images/header.jpg)

NAVIGATION OPTIONS WITHIN THIS AREA

Click the FINISH button at the bottom of the screen to finalize your modification. You can also use the CANCEL button at the bottom of the screen to cancel out of this action.

Delete Category

This function includes options for confirming or canceling out of your DELETE action.

Use the following instructions to complete the delete Category process.

- **Category Name** - The category name is listed here.
- **Yes/No Radio Selection**: Click the radio button associated with the action that you would like to take. Select "Yes" if you do want to finalize the delete process. Select "No" if you want to end this action.

***NOTE**: A Category cannot be deleted if there are active events or events requiring processing.

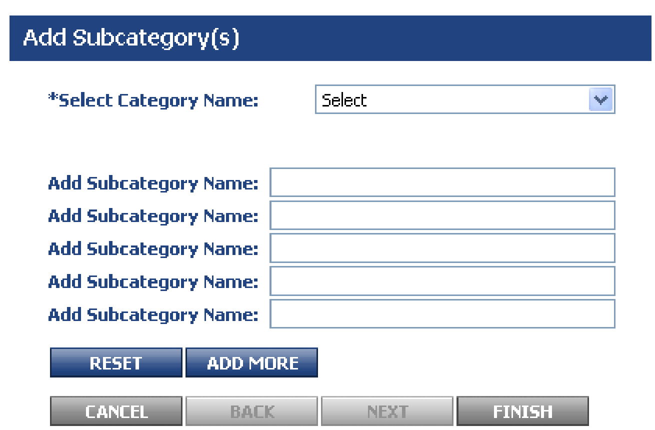
NAVIGATION OPTIONS WITHIN THIS AREA

You will still need to click the FINISH button at the bottom of the screen to completely finish/finalize your selection. You can also use the CANCEL button at the bottom of the screen to cancel out of this delete action but you will be navigated back to the Main Menu.

Add Subcategory

To navigate to the Add Subcategory functionality, click on the CATEGORIZATION tab and then select SUBCATEGORY(S): ADD.

This function allows you to add Subcategory(s) to available Category(s). Subcategories are used for classifying how events are displayed to visitors on the front end views of your Calendar. Every event must be added to at least one Category, but they may be added to multiple Category(s) or Category/Subcategory combinations.



Select the category to which you will be adding the new subcategories.

Category Name: Drop-down selection that allows you to pick a single category name. Select a category name and the screen refreshes with a list of any current subcategory name(s) within that category.

Subcategory Name(s): By default, five (5) Subcategory Name text fields are provided where you can enter Subcategory Name(s) for classification within the Category selected. Each Subcategory Name cannot exceed 50 alpha-numeric characters. If you would like to add more than five (5) Subcategory(s) at any one time, click the ADD MORE button. You can click the ADD MORE button multiple times to add the complete list of Subcategory(s) within a given Category. Note: You can always come back to Add Subcategory(s) at any time to add new Subcategory Name(s) to any available Category.

Lock This Subcategory: Click this checkbox if you want this Subcategory to be locked and you will then be presented with a new window where you can assign Subcategory Owner(s). To add a Subcategory Owner at a later time, you can go to Modify Subcategory, Add User Account and assign a User as a Subcategory Owner at that time, or you can also go through Modify User Account and select to make a current User a Subcategory Owner of the new locked Subcategory.

Once all of the selections have been made from the "Select Subcategory Owner(s) window, you can then select from the following buttons within that window:

- **CANCEL**: Cancels out of the window, does not save any of the selections, closes the window and brings you back to the Add Category screen with no Category Owner selections showing on the screen.
- **RESET**: Resets all your current selections.
- **SUBMIT**: Submits the form contents, saves the selections and displays the selections back on the main View Subcategory screen, under "Current Subcategory Owner(s)" in a list box that is not editable.

Once you "Submit" your selections, the area within the Add Subcategory screen where the "Lock this Category" selection appeared, there will now be a list of Subcategory Owner(s), along with a CHANGE button to the right that you can click to launch the "Select Subcategory Owner(s)" window and change your selections.

There is also a new checkbox displayed at the bottom of the screen entitled "Remove Locked Subcategory Status". If selected, this will unlock the category and deassociate the Subcategory Owner(s).

***WORKFLOW NOTE**: Every time an event is added to a locked Subcategory, the Subcategory Owner for that locked Subcategory is notified that the event requires approval. (This bypasses the normal Department review and approval process). If there are multiple Subcategory Owners for a locked category, then all Subcategory Owners are notified and the event is processed according to the first Subcategory Owner who takes action on the event.

If an event is added to multiple categories and only certain categories it is being added to are locked, then the event will be processed according to the Subcategory Owner process for those locked Subcategory and approved for the remainder of the Categories/ Subcategory based off the standard Department workflow approval process. An event being submitted to multiple locked subcategories must be approved individually for each locked subcategory, even if the same user is the Subcategory Owner for each of the locked Subcategories that were selected.

When a Subcategory Owner posts an event to the subcategory to which they are the owner, their event is approved automatically. However, if the Subcategory Owner posts an event to the subcategory that they own and to other subcategories, the event must follow the appropriate approval process for the additional categories / subcategories it is being added within.

Restrict User Access to Add Events or Request Resources within this Subcategory: Click this checkbox if you would like to restrict event entry or resource requesting within this Subcategory to a select user or group of users. Once you click the checkbox a window will display with all available user accounts in Calendar. Click the checkbox beside those users that you would like to have access to this Subcategory.

Once all of the selections have been made from the “Restrict User Access to Add Events to this Subcategory " window, you can then select from the following buttons within that window:

CANCEL: Cancels out of the window, does not save any of the selections, closes the window and brings you back to the Add Subcategory screen with no restricted user access selections showing on the screen.

SUBMIT: Submits the form contents, saves the selections and displays a list of users.

RESET: Resets all your current selections.

Once you “Submit” your selections, the area within the Add Subcategory screen where the "Current User(s) with Access" selection appeared, a list displays those User(s) chosen, along with a CHANGE button to the right that you can click to launch the “Restrict User Access” window and change your selections.

Options for Public and Private Subcategories
Subcategory Display Configuration: There are various options for determining when a subcategory will display on the public and/or private calendars.

Do not include in the master category search list (on front-end view screens): This option is only available for organizations that have the private Calendar module. If this checkbox is selected, the subcategory will not display in the master public/private category/subcategory search drop-down for selection. The only way to navigate to this subcategory will be through a quick link.

Do not include in the Open Entry Submission Form: This option is only available for organizations that have the Open Entry Module (public, private or facilities). If this checkbox is selected, the subcategory will not be included in the category drop-down on the open entry submission form.

***NOTE**: You will want to take into consideration the complete width of your Category selection drop-down on the front- end Calendar views that are presented to your Calendar visitors, when adding/modifying Subcategory Name(s). While 50 characters are allowed as the maximum for the field, you may want to limit the names to a maximum of 30 in order to maximize the space that the drop-down allows on the front-end. However, if you choose to have lengthy Category and/or Subcategory names, then your visitors may need to click on "Select Multiple" to open the pop-up window on the front-end where they can view all the Category/Subcategory names/options in full.

NAVIGATION OPTIONS WITHIN THIS AREA
Click the FINISH button at the bottom of the screen to finalize your addition. You can also use the CANCEL button at the bottom of the screen to cancel out of this action but you will be navigated back to the Main Menu.

Modify/Delete Subcategory - Select Subcategory

To navigate to the Modify/Delete Subcategory functionality, click on the CATEGORIZATION tab and then select SUBCATEGORY(S): MODIFY/DELETE.

This function is used to select a Subcategory that you would like to modify or delete from within the Active Data Calendar program.

Select a Category Name: Drop- down displays a list of Category Names in alphabetical order. Select a Category first to then see a drop-down list of the associated Subcategory Names that can be selected for modification/deletion.

Select a Subcategory Name: Drop-down displays a list of Subcategory Names in alphabetical order. The Subcategory Names displayed are only those related to the Category that was selected.

Select the name of the Subcategory that you would like to modify/delete from the drop-down and then select the action you would like to take from the two radio button options:

- **Modify**: Allows you to change Subcategory information, including Subcategory Name.
- **Delete**: Removes the Subcategory completely from the Calendar database and it will no longer be available for any purposes in the Calendar application.

Click the SUBMIT button to finalize your action and proceed to either the first step in the modification process or to the Delete Subcategory confirmation screen.

Modify Subcategory

This function allows you to modify a subcategory name. If a Subcategory Name is changed, it will change the Subcategory Name within the administration area and also throughout all views displayed on the front-end Calendar(s).

- **Subcategory Name**: This field allows for up to 50 characters to be entered to create your Subcategory Name.
- **Subcategory Fields**: These fields will present the previously entered and saved configurations.
  - Remove Locked Category Status
  - Restrict User Access to Add Events to this Subcategory
  - Do not include in the master category search list (on front-end view screens).
  - Do not include in the Open Entry Submission Form.

NAVIGATION OPTIONS WITHIN THIS AREA

Click the FINISH button at the bottom of the screen to finalize your modification. You can also use the CANCEL button at the bottom of the screen to cancel out of this action.

Delete Subcategory

This function includes options for confirming or canceling out of your DELETE action.

- **Subcategory Name**: The subcategory name is listed here.

- **Yes/No Radio Selection**: Click the radio button associated with the action that you would like to take. Select "Yes" if you do want to finalize the delete process. Select "No" if you want to end this action.

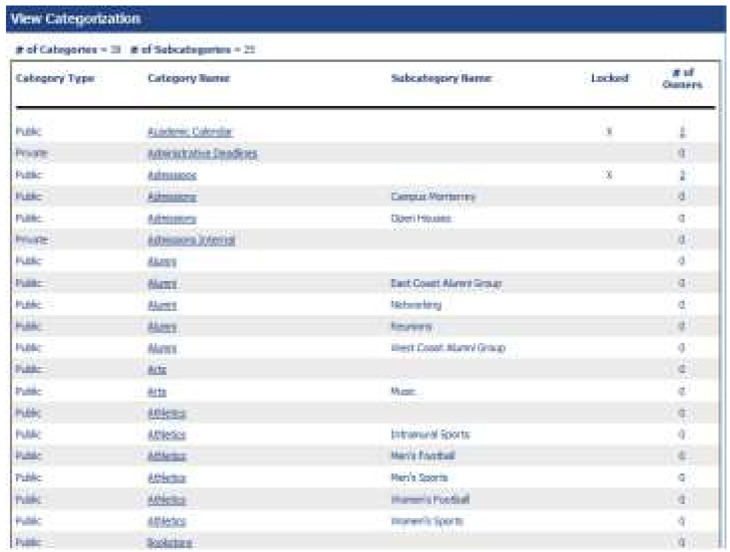
*NOTE: You cannot delete a Subcategory that has active events or events that currently require processing.

NAVIGATION OPTIONS WITHIN THIS AREA

Click the FINISH button at the bottom of the screen to finalize your selection. You can also use the CANCEL button at the bottom of the screen to cancel out of this delete action.

View Categorization – List

To navigate to the View Categorization List functionality, click on the CATEGORIZATION tab and then select the VIEW link.



The list that is presented is a display of ALL Category(s)/Subcategory(s) in the database. The total number of Category(s) and Subcategory(s) currently added to your installation of Active Data Calendar will display at the top of the screen.

- **Category Name**
- **Subcategory Name**: The Category that the Subcategory belongs to is listed beside each Subcategory Name.
- **Locked**: This column displays an "X" if the Category is locked (not inclusive of the locked subcategory owners; these must be determined by clicking to the details view of the subcategory.
- **# of Owners**: If the Locked column displays an "X" then this column can either show "0" or any number greater than "0". If "0" is displayed then it means that no Category Owner(s) have been assigned to this Category and any events added to this locked Category will automatically go to the Super User Account for processing until at least one Category Owner is assigned. If the number is greater than "0", then it will display as a link that can be selected in order to open a small pop-up window displaying a list of name(s) for the current Category Owner(s) assigned to the locked Category.

View Categorization Details

This screen provides you with the details regarding the category type, user access status and other important information. Details that can be viewed for each Category includes:

- **Category Name**: The Category Name appears as a link and can be selected to navigate to the Category details screen.
- **Category Type**: Public or Private
- **Category Display Configuration**
  - Category is included in the master category search list or not
  - Category is included in the open entry submission form or not
  - Custom Category View Configuration is set up or not (if yes, then the custom header and footer names will display)

- **Subcategory Name(s)**: A list box displays that includes the names of all Subcategory(s) within this Category
- **Category Locked Status**: The Category is noted as either Locked or Open. If Locked, then a list box displays with the name(s) of the Category Owner(s).
- **Category User Access Status**: The Category is noted as either Restricted or Open. If Restricted, then a list box displays with the names(s) of the Users that have access to post events within this Category. If the access status is noted as Open, then all users have the ability to post to the Category.

Facilities

This function allows you to add locations to be used for adding events from within the administration area of the Active Data Calendar program.

TIP: For additional tips on how to maximize your location management, see your Client Portal page for Tips and Tricks on "Location Management".

Before you can take full advantage of Location Management in Calendar, it is important to understand how Calendar defines each element of location setup.

- **Locations**: Main locations and/or areas where buildings are clustered.
- **Buildings**: Buildings, centers or areas at a defined location.
- **Rooms**: Rooms are located inside buildings, centers, or areas at a defined location.

The location setup area within Calendar can allows you to setup the three tiered structure for administering your events and then you can also configure your Calendar (under the Configuration tab: Setup Calendar) to display the location information that you choose.

***NOTE**: When setting up your Calendar location structure remember that locations can be used for all of the following functions inside the Calendar software:

- **Site Visitors**: If enabled in Configuration / Setup Calendar - Visitors to your Calendar can search and sort events by location - down to the room level. Location information can also include links to other sites, maps/directions and campus map attachments.
- **Calendar Administrators**: Administrators can see possible conflict notification warnings if events are being scheduled for the same date and time and at the same location/building.
- **Event Planners/Managers**: The Calendar Location View can be used to see if other events are taking place in the same locations or buildings and plan events on dates where they can achieve optimal attendance.
- **Facility Planners**: Who can be notified of internal requests related to events and responds accordingly. Calendar can help bridge the gap between event planning, marketing and facilities scheduling.

Add Location

To navigate to the Add Location functionality, click on the FACILITIES tab and then select the LOCATION: ADD link.

Use the following information to complete adding your Location. The only required field is Location Name. Other information you may choose to include is:

- **Location Address** (Address 1 & 2, City, State, ZIP and County if Domestic enabled): This information displays along with the Location Name on the Event Details screen for any event that is taking place at this location. If you have chosen to enable International Options, then the County Field will display as Country instead. Also, some other field names may be slightly different to accommodate International options. (i.e. State/Province/Prefecture)

- **Phone**: Phone information will display on the front-end Event Details view screen for events that are taking place at this location.
- **Internet Address**: Internet Address will display on the front-end Event Details view screen for events that are taking place at this location.
- **Internal Notes**: This open text field allows you to enter notes about the location which will be viewable for users adding and managing events but will not appear on the front-end view screens available to visitors.

***NOTE**: When an event is added or modified you will also have the ability to enter in a Room # and Room Link to further refine your event location information.

NAVIGATION OPTIONS WITHIN THIS AREA

Click the FINISH button at the bottom of the screen to finalize your addition. You can also use the CANCEL button at the bottom of the screen to cancel out of this action.

Modify/Delete Location - Select Location

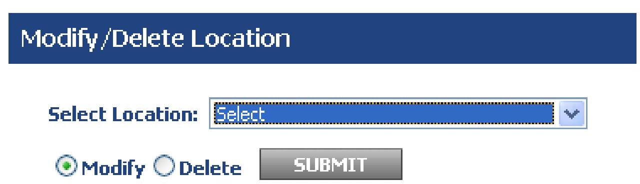
To navigate to the Modify/Delete Location functionality, click on the FACILITIES tab and select LOCATION(S): MODIFY/DELETE. This function is used to Modify/Delete a current Location. You can either modify a Location's details or completely delete the Location from the system.

Select a Location Name: Use the drop-down to select the name of the location that you would like to modify or delete. The location names are listed in alphabetical order.

Then select the action you would like to take from the two radio button options:

- **Modify**: Allows you to change location information including location name.
- **Delete**: Navigates you to the Delete Location confirmation area.

Click the SUBMIT button to finalize your action and proceed to either the first step in the modification process or to the Delete Location confirmation screen.



Modify Location

This function allows you to modify locations already added.

The only required field is Location Name. Other information you may choose to include is:

- **Location Address** (Address 1 & 2, City, State, ZIP and County if Domestic enabled): This information displays along with the Location Name on the Event Details screen for any event that is taking place at this location. If you have chosen to enable International Options, then the County Field will display as Country instead. Also, some other field names may be slightly different to accommodate International options. (i.e. State/Province/Prefecture)
- **Phone**: Phone information will display on the front-end Event Details view screen for events that are taking place at this location.

- **Internet Address**: Internet Address will display on the front-end Event Details view screen for events that are taking place at this location.
- **Internal Notes**: This open text field allows you to enter notes about the location which will be viewable for users adding and managing events but will not appear on the front-end view screens available to visitors.

*NOTE: When an event is added/modified you will also have the ability to enter in a Room # and Room Link to further refine your event location information.

NAVIGATION OPTIONS WITHIN THIS AREA
Click the FINISH button at the bottom of the screen to finalize your modification. You can also use the CANCEL button at the bottom of the screen to cancel out of this action.

Delete Location

This function includes options for confirming or canceling out of your DELETE action.

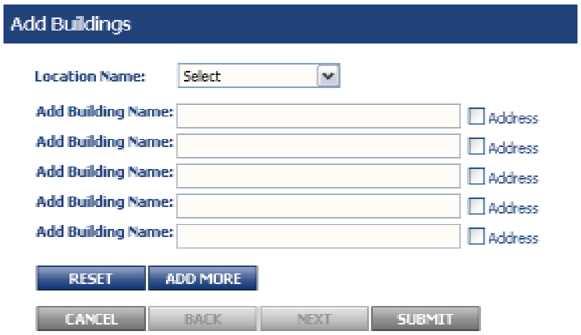
- **Location Name** - The location name is listed here. The location details are also displayed on the bottom portion of this screen.
- **Yes/No Radio Selection**: Click the radio button associated with the action that you would like to take. Select "Yes" if you do want to finalize the delete process. Select "No" if you want to end this action.

***NOTE**: If you select to DELETE a location which is actively being used by a live event, then you will receive an error message that the location cannot be deleted. You will first have to select new location information (or No Location) for those events currently utilizing the location you wish to delete.

NAVIGATION OPTIONS WITHIN THIS AREA
Click the FINISH button at the bottom of the screen to finalize your delete action. You can also use the CANCEL button at the bottom of the screen to cancel out of this action.

Add Building

To navigate to the Add Building functionality, click on the FACILITIES tab and select BUILDING(S): MODIFY/DELETE.



This function allows you to add Building(s) to available Location(s). Buildings are used for classifying how events are displayed to visitors on the front end views of your Calendar.

Before adding Building(s), you must first select the Location to which you will be adding the new Building(s).

Location Name: Drop-down selection that allows you to pick a single Location Name. Location Name(s) are listed in alphabetical, ascending order in the drop-down. Select the Location Name and then the screen will be refreshed to display a small box on the right which lists current Building Name(s) within that Location.

Building Name(s): By default, five (5) Building Name text fields are provided where you can enter Building Name(s) for classification within the Location selected. Each Building Name cannot exceed 50 alpha-numeric characters.

You can click the **ADD MORE** button to add the complete list of Buildings(s) within the Location that you have selected. **Note**: You can always come back to Add Buildings(s) at any time to add new Building Name(s) to any available Location.

- **Building Address**: By default the address of your building will be the address of the location that it was added within. If you would like to change the building address, then click the Address checkbox to launch a window where you can add specific building information. You will see the location address information pre-populated in this screen. You can change the information in the fields to have custom building information. If you click the "Use Location Address" checkbox, then the fields for entering custom building address information will be disabled. Click **SUBMIT** on this screen to finalize your building address information and return to the main screen of Add Building or click **CANCEL** to cancel out of this screen and not save the building address changes made.

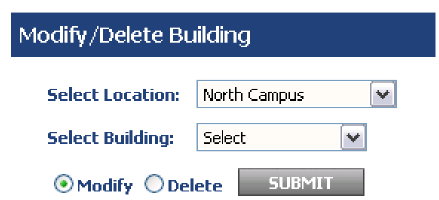
***NOTE**: You will want to take into consideration the complete width of your Location selection drop-down on the front-end Calendar views that are presented to your Calendar visitors, when adding/modifying Building Name(s). While 50 characters are allowed as the maximum for the field, you may want to limit the names to a maximum of 30 in order to maximize the space that the drop-down allows on the front-end. However, if you choose to have more lengthy Location and/or Building names, then your visitors may need to click on "Select Multiple" to open the pop-up window on the front- end where they can view all the Location/Building names/options in full.

NAVIGATION OPTIONS WITHIN THIS AREA
Click the FINISH button at the bottom of the screen to completely finish/finalize your addition. You can also use the CANCEL button at the bottom of the screen to cancel out of this action.

Modify/Delete Buildings - Select Building(s)

To navigate to the Modify/Delete Building functionality, click on the FACILITIES tab and select BUILDING(S): MODIFY/DELETE.

This function is used to select a Building that you would like to modify or delete from within the Active Data Calendar program.



Select a Location Name: Drop-down displays a list of Location Names in alphabetical order. Select a Location first to then see a drop-down list of the associated Building Names that can be selected for modification or deletion.

Select a Building Name: Drop-down displays a list of Building Names in alphabetical order. The Building Names displayed are only those related to the Location that was selected. Select the name of the Building that you would like to modify/cancel/delete from the drop-down and then select the action you would like to take from the two radio button options:

- **Modify**: Allows you to change Building information, including Building Name and address.
- **Delete**: Removes the Building completely from the Calendar database and application.

Click the SUBMIT button to finalize your action and proceed to either the first step in the modification process or to the Delete Building confirmation screen.

Modify Building

This function allows you to modify a Building name. If a Building Name is changed, it will change the Building Name within the administration area and also throughout all views displayed on the front-end Calendar(s).

- **Building Name**: This field allows for up to 50 characters to be entered for your Building Name.

NAVIGATION OPTIONS WITHIN THIS AREA
Click the FINISH button at the bottom of the screen to finalize your modification. You can also use the CANCEL button at the bottom of the screen to cancel out of this action.

Delete Building

This function includes options for confirming or canceling out of your DELETE action.

- **Building Name** - The Building name is listed here.
- **Yes/No Radio Selection**: Click the radio button associated with the action that you would like to take. Select "Yes" if you do want to finalize the delete process. Select "No" if you want to end this action.

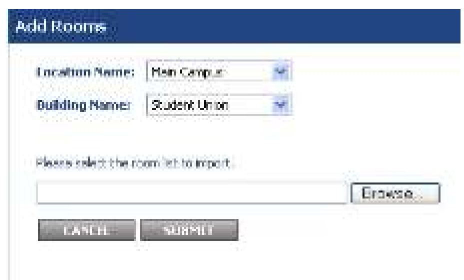
***NOTE**: You cannot delete a Building that has active events or events that currently require processing.

NAVIGATION OPTIONS WITHIN THIS AREA
Click the FINISH button at the bottom of the screen to finalize your delete action. You can also use the CANCEL button at the bottom of the screen to cancel out of this action.

Add Room(s)

To navigate to the Add Rooms functionality, click on the FACILITIES tab and select ROOM(S): ADD.

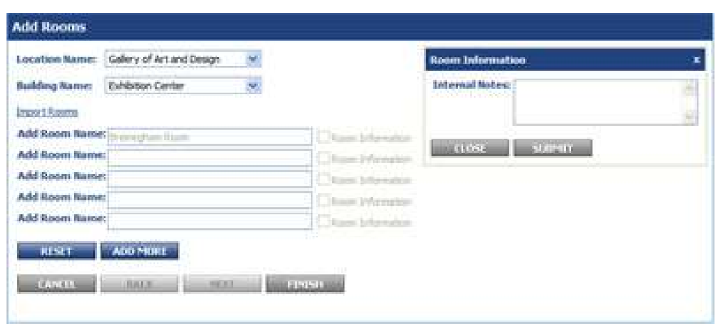
This function allows you to add Room(s) to available Building(s). Rooms are used for classifying how events are displayed to visitors on the front end views of your Calendar. Rooms are also used for helping to identify possible event conflicts in scheduling between events within the Calendar system.



Before adding Room(s), you must first select the Location/Building to which you will be adding the new Room(s).

Once a Location is selected, then a second drop-down will be displayed with all Building(s) available for selection within that Location. A Building must be selected and then you will see various options for adding your Room(s).

When the screen is refreshed you will see:



- **Import Rooms**: Click this link to refresh the screen and there will be a field where you can **BROWSE**, find your file and upload it into the field. Once uploaded, click **SUBMIT** and the list will be automatically imported and you will be returned to the main "Add Rooms" screen with the Rooms included in your file listed in the available Room Name fields.

Add Room Names: There will be five (5) Room Name fields displayed by default. Continue to click the ADD MORE button to add to the available fields for entering your Rooms.

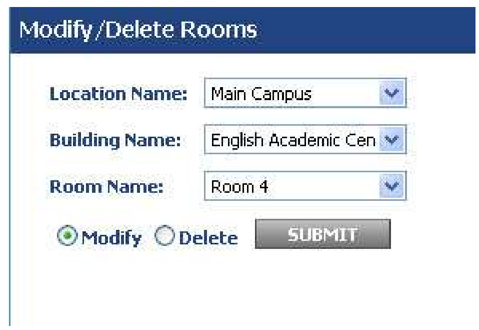
***NOTE**: Your list of rooms that are being added can be a combination of rooms brought into the system from an import file and also manually entered. You can also import multiple room files into Calendar to complete your final room list for a building.

NAVIGATION OPTIONS WITHIN THIS AREA
Click the FINISH button at the bottom of the screen to finalize your room additions. You can also use the CANCEL button at the bottom of the screen to cancel out of this action.

Modify/Delete Room - Select Room

To navigate to the Modify/Delete Rooms functionality, click on the FACILITIES tab and select ROOM(S): MODIFY/DELETE.

This function is used to Modify/Delete a current Room. You can either modify a Room Name or completely delete the Room from the system.



Select a Room Name: Use the drop-down to select the name of the room that you would like to modify or delete.

Then select the action you would like to take from the two radio button options:

Modify: Allows you to change the room name.
Delete: Navigates you to the Delete Room confirmation area where once you confirm your action will remove the Room completely from the Calendar database and application.

Click the **SUBMIT** button to finalize your action and proceed to either the first step in the modification process or to the Delete Room confirmation screen.

Modify Room

This function allows you to modify a Room name. If a Room Name is changed, it will change the Room Name within the administration area and also throughout all views displayed on the front-end Calendar(s).

- **Room Name**: This field allows for up to 50 characters to be entered for your Room Name.

NAVIGATION OPTIONS WITHIN THIS AREA
Click the FINISH button at the bottom of the screen to finalize your modification. You can also use the CANCEL button at the bottom of the screen to cancel out of this action.

Delete Room

This function includes options for confirming or canceling out of your **DELETE** action. Use the following instructions to complete the delete Room process.

- Room Name - The Room name is listed here.

- Yes/No Radio Selection: Click the radio button associated with the action that you would like to take. Select "Yes" if you do want to finalize the delete process. Select "No" if you want to end this action.

***NOTE**: You cannot delete a Room that has active events or events that currently require processing.

NAVIGATION OPTIONS WITHIN THIS AREA
Click the FINISH button at the bottom of the screen to finalize your delete action. You can also use the CANCEL button at the bottom of the screen to cancel out of this action.

View Locations

To navigate to the View Locations functionality, click on the FACILITIES tab and select LOCATION(s): VIEW. The list that is presented is a display of ALL Locations in the database.

The columns of information displayed for each Location in the list includes:

- **Location Name**: This link takes the user to the Location Details screen. This is also the column that the list is sorted by with the list displaying in alphabetical order.
- **Building Name**: Only displays if there was a building name associated with the Location. To the right of the Building Name there may be a link entitled "(show rooms)". If this link displays then the Building includes Rooms that are available for adding and managing events. Click the link to expand the list and view the list of Rooms.

The top of the list also displays the total number of Locations currently active within your installation of Active Data Calendar.

View Location - Details

The location details that display are for the location name selected from the list screen. The detailed information displayed for the selected location includes:

- Location Name
- Building Name
- Location Address Information: Address 1, Address 2, City, State (Province/Prefecture), ZIP/Postal Code, County (or Country if International Options are enabled)
- Phone Number
- Internet Address
- Internal Notes

The top right side of the screen also includes a link "Back to Full List".

Marketing

Templates

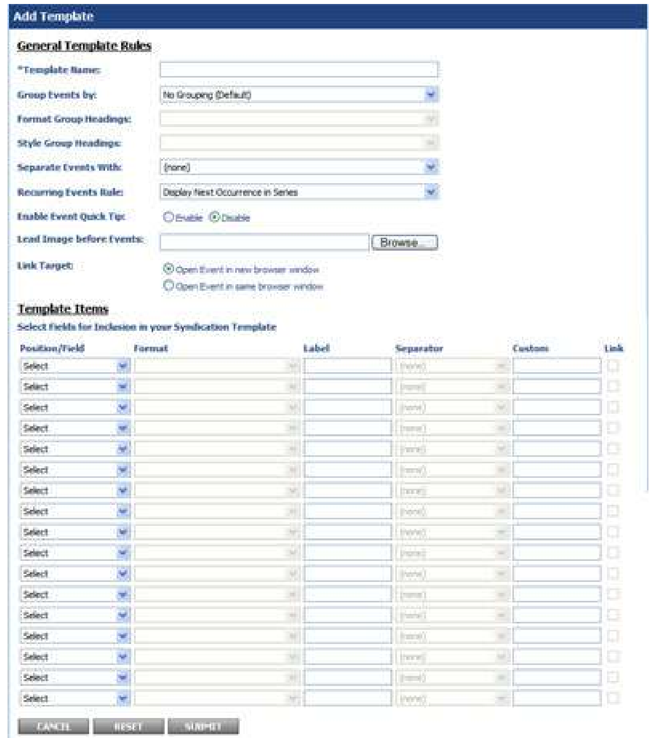
Add Template
This area allows you to add a style template that can be applied to any generated syndication code script. There are three pre-defined templates automatically included by default, however Calendar supports an unlimited number of templates.

To navigate to the Add Template functionality, click on the TEMPLATE tab and select TEMPLATE(S): ADD.

Templates allow you to decide which event fields are output as part of your syndication, along with their position, labeling, separation between fields and also which fields will appear as links to the full event details.

General Template Rules

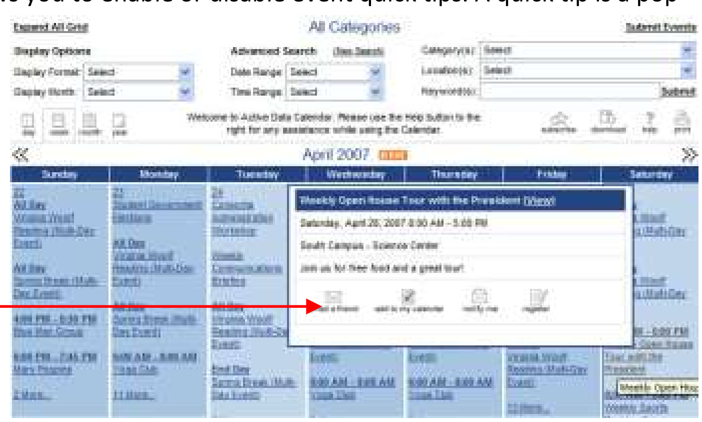
The only required field is Template Name.



- **Template Name**: This field allows for up to 50 characters to be entered to create your Template Name.
- **Group Events by:** This drop-down includes options for selecting how to group your events when sorted and displayed in the syndicated list. Options Include:
  - No Grouping: This is the default selection Events will be sorted by date/time but there will be no group headings displayed and there will be no grouping format options available for selection.
  - Categorization: Users can also select from various formatting and style options. Events will display in the syndicated list grouped by the Categorization information that is selected under "Format Group Headings".
  - Start Date: If selected, users can also select from various formatting and style options. Events will display in the syndicated list grouped by the Event Start Date information that is selected under "Format Group Headings".
  - Location: If selected, users can also select from various formatting and style options. Events will display in the syndicated list grouped by the Location information that is selected under "Format Group Headings".
- **Format Group Headings**: Options change based off the selection made under "Group Events by".
  - Categorization Options:
    - Category
    - Subcategory
    - Category : Subcategory
    - Category/Subcategory
    - Category – Subcategory
  - Start Date Options:
    - 8/9
    - 8/9/2012
    - 09-Aug
    - 09-Aug-2002
    - Aug-2002
    - August-2002
    - Saturday, Aug. 9th
    - 08/09/12
    - 08/09/2012
    - 9-Aug-02
    - August
    - August-02
    - August 9,2002
    - Saturday, August 9
    - 08/09/12
    - 9-Aug
    - 9-Aug-2002
    - Aug-02
    - August 9
    - Saturday 9
    - Saturday August 9

- Saturday 8/9
- Saturday August 9 2012

  - Location Options:
    - Location
    - Building
    - Room
    - Location:Building
    - Building:Room
    - Location:Building:Room
    - Location/Building Building/Room
    - Location/Building/Room
    - Location - Building Building – Room
    - Location - Building – Room
- **Style Group Headings**: Options include Bold, Italics, Underline, Bold & Italics, Bold & Underline, Italics & Underline, Bold, Italics & Underline
- **Separate Events with**: This option allows you to select how each event in the list will be separated from the next event in the list.
  - : (colon)
  - , (comma)
  - . (period)
  - - (dash) (line break) (paragraph break)
  - ; (semi-colon) (space)
  - (custom) - If custom is selected, then an open text field will be displayed where you can enter in any custom separator.
- **Recurring Events Rule**: This option allows you to select to display every occurrence in a series or only the next upcoming occurrence in the series.
- **Enable Event Quick Tip**: This option allows you to enable or disable event quick tips. A quick tip is a pop-up window that displays when a visitor rolls over the event link and the pop-up displays select details about the event for quick viewing.



  What is a Quick Tip?
  The preview on the left shows one of the Calendar front-end view options: Grid View. If Quick Tips are enabled, then when a visitor to your Calendar places their cursor over an event name, a "quick tip" pop-up window will open showing them some overview information about the event as well as allow them to take quick action on any features that you have enabled on the Event Details view (Email a Friend, Add to My Calendar, Register, etc.).
- **Lead Image Before Events**: You may select to browse and upload an image to display as the lead image before any event in your syndicated list. The image must be .gif or .jpg in format and cannot exceed 80 KB in size.
- **Link Target**: Select from opening each event details screen in a new browser window or in the same browser window by clicking the applicable radio button.

- **Template Items:** There are no required fields when creating your template. However, if no fields are selected, then no data will be output if the empty template is selected and applied to your generated syndication code. The fields for selection include all fields entered regarding an event's details. Data will be output in the order in which the fields are selected. So, if Event Title is selected as the first drop-down menu, then it will take the first position in the syndication event list output for each event in the list.

Options Include:
Event Name Start Date End Date Start Time End Time
Recurrence Text
Event Description
Contact Information Location/Facility Image
Attachments
Categorization
Custom Field 1: Admission Information
Custom Field 2: Other Details
Custom Field 3: Remarks
Custom Field 4: Ticket Order URL

Format

Many fields include their own set of formatting options. If a field is selected and there are associated formatting options, you will be able to select among formatting options from the shown dropdown menu.

Label

Fields selected for output in a template will only output the actual data entered for each particular event and will not by default include the field title or field label. If you would like to include a label before the actual field data is displayed, then enter the desired label within the open text field provided. *NOTE: You are not required to use the actual field name as the label. For example, if you select the field "Event Name" you can create any label. For example you may enter "Event Title".

Separator

Select from the drop-down what character or spacing you would like to use as a separator between the field you have just selected and the next field you will be selecting. If you choose "Custom", then you can enter in a custom separator in the open text field to the right.

Link

Any field can serve as the link to the full event details screen. You can also choose to have more than one field link to the event details. Click the checkbox beside each field that you would like to appear as linkable to the full event details screen.

NAVIGATION OPTIONS WITHIN THIS AREA

Once you have selected all template rules and field positioning, click the SUBMIT button to save your Template.

You can also use the CANCEL button at the bottom of the screen to cancel out of this action. Use the RESET button to reset all field values back to their default values.

Modify/Delete Template - Select Template

To navigate to the Modify/Delete Template functionality, click on the TEMPLATE tab and select TEMPLATE(S): MODIFY/DELETE.

This function is used to Modify/Delete a current template. You can either modify a template and its associated rules, or completely delete the template from the system.

Select a Template Name: Use the drop-down to select the name of the template that you would like to modify or delete.

Then select the action you would like to take from the two radio button options:

- **Modify**: Allows you to change template information including fields included in template output, link targeting and other template business rules.
- **Delete**: Navigates you to the delete template confirmation area where, once you confirm your action, will remove the template completely from the Calendar database and application.

NAVIGATION OPTIONS WITHIN THIS AREA

Click the SUBMIT button to finalize your action and proceed to either the modification process or to the delete template confirmation screen.

Modify Template

This function allows you to change a previously created event syndication style template. *NOTE: Any modifications made to the template will automatically be applied to any generated syndication code that is active on a web page once the modifications are saved in Calendar. Since generated syndication code is not saved, you will not be able to view a list of syndication code that is actively using this template. So please be careful before making any template modifications.

Templates allow you to decide which event fields are output as part of your syndication, along with their position, labeling, separation between fields and also which fields will appear as links to the full event details.

NAVIGATION OPTIONS WITHIN THIS AREA

Click the SUBMIT button at the bottom of the screen to finalize your modification. You can also use the CANCEL button at the bottom of the screen to cancel out of this action. The RESET button will reset all field values back to what they were at the time the Template was last saved (Add or Modify).

Delete Template

This function includes options for confirming or canceling out of your DELETE action. Use the following instructions to complete the Delete Template process.

Template Name: The template name is listed here along with the template details which are also displayed on the bottom portion of this screen. Review the Template details to ensure that this is the Template you would like to delete.

***NOTE:** You will not be able to see a report of active syndication code currently using the template that you are considering for deletion. It is advised that you only delete templates when you can be certain that they are not being used actively. If a template is deleted and is currently applied to active syndication code, then the default template will be automatically applied to the syndication code which previously was using the deleted template.

Yes/No Radio Selection: Click the radio button associated with the action that you would like to take. Select "Yes" if you do want to finalize the delete process. Select "No" if you want to cancel deletion.

NAVIGATION OPTIONS WITHIN THIS AREA
You will still need to click the FINISH button at the bottom of the screen to completely finish/finalize your deletion. You can also use the CANCEL button at the bottom of the screen to cancel out of this action.

View Templates - List
To navigate to the View Templates - List functionality, click on the TEMPLATE tab and select TEMPLATE(S): VIEW.

This area allows you to view a list of existing syndication templates. The templates displayed include all templates created by any user within the Calendar installation.

The following information is available from this screen for each template:

- **Template Name**: This column includes the template name as a link which can be selected in order to navigate to the Template Details screen.
- **Created**: This column includes the date and time that the template was created.
  Last Modified: This column includes the date and time that the template was last modified. View the last time the template was modified to see if the template output options were changed and therefore it is affecting active syndication code.

View Template Details
This area displays a preview of your Syndication Template that is based off the fields, positioning, labeling and other attributes that you selected. You can also view all of the business rules that were set up for the template.

The following information is available from this screen for the template:

- Template Name
- Group Events By
- Separate Events With
- Recurring Events Rule
- Enable Event Quick Tip
- Lead Image Before Events
- Event Quick Tip

Generate Active Data Syndication Code

To navigate to the Generate Active Data Syndication Code functionality, click on the MARKETING tab and select SYNDICATE: LIST.

Generating syndication code is comprised of two main functions, selecting a syndication template and selecting the event criteria for what events should be included your syndicated list.

First, select a syndication template from the drop-down menu. The syndication template will dictate the formatting of event data, event fields and other formatting criteria.

***NOTE**: Go to View Templates to see a preview of the templates if you are not sure which one to select.

Dynamic List By Criteria Selected

Any combination of the available selection boxes/drop-downs can be chosen in order to comprise the type of events listed in the Syndicated Event(s) List. The more criteria selected, the more selective the results will be within the syndicated event list.

- **Event Type**: Public/Private/Both (This only displays if your installation includes the Private Calendar Module.)
- **Select Categorization**: Select One or All Categories from the drop-down or choose to Select Multiple. If “Select Multiple” is chosen, then the additional window will open to the right of the screen, allowing you to choose multiple Category(s)/Subcategory(s), including hidden categories.
- **Show category header and footer:** this checkbox will allow that if the event is added to a single category that the custom header/footer (if there is one for the category) will show if the event is clicked off of a syndication list or an RSS feed list.
- **Select Department(s)**: Select One or All Departments from the drop-down or choose to Select Multiple. If "Select Multiple" is chosen, then the additional window will open to the right of the screen, allowing you to choose multiple Departments.
- **Select Locations**: A list box of Location Name – Building Name sorted in alphabetical order. You can select multiple locations by holding down the CTRL key.
- **Select Custom Fields**: This option is available if the custom fields set up in Custom Event Administration Settings are selected to be “Front end filter (Will display as Drop Down List)”.
- **Select Events for a Specific Date Range**: There are two options for narrowing your syndicated events by date; range of days and range of dates. Range of Days is a drop-down that includes options such as current day, tomorrow, next 7 days, next 14 days, current month, next month and current year. Range of dates includes drop- down values for selecting an exact starting date and ending date for which to search from.
- **Select Events from Current Date to Future Date or # of Days**: Select to show only events from the current date to a number of days or specific end date in the future.
- **Syndicate Events for a Specific Time of Day**: There are two options for searching by time of day; range of time and exact timeframe. Range of Time is a drop-down that includes options such as midnight to 5 AM, 5 AM to Noon, Noon to 5 PM and 5 PM to Midnight. Exact timeframe includes drop-down values for selecting an exact starting time and ending time.
- **Expire Events** from Syndication List after Start Date/Time of Event
- **Include Only Highlighted Events in Syndicated List**: If selected, the system will only syndicate those events that have been chosen as Highlighted Events and which fall within the other criteria selected.
- **Maximum Number of Events to Display**: This is an open text field that allows you to enter the maximum number of events to display in your list. There is a default value of 5 entered for the maximum number of events to display. Leave this field blank to display all matching events with no maximum limit.
- **Enter in a Custom Message** to Display when there are no events to Syndicate for the Selected Criteria

Select Specific Event(s)

Select the event(s) to syndicate by using the ADD, ADD ALL, or REMOVE arrows. If the event is not listed, use the Search for Events to find the event for syndication.

Click the SUBMIT button to generate the Event Syndication Code which will display in a separate window on the right side of the screen. Cut and paste the Syndication Code displayed into the area of your site where you would like the syndicated list of events to display.

Mini-Grid Syndication Code

To navigate to the Generate Mini-Grid Syndication Code functionality, click on the MARKETING tab and select SYNDICATE: GRID.

Choose any combination of the available selection boxes/drop-downs included on this screen. The more criteria selected, the more selective the results will be when a visitor clicks on a date.

The grid dates will only appear as links on those dates that have active events available for viewing.

- **View Type**: Grid, Category, Date/Time, Location and Event Summary
- **Event Type**: Public/Private/Both (This only displays if your installation includes the Private Calendar Module.)
- **Select Categorization**: Select One or All Categories from the drop-down or choose to Select Multiple. If "Select Multiple" is chosen, then the additional window will open to the right of the screen, allowing you to choose multiple Category(s)/Subcategory(s).
- **Select Locations**: A list box of Location Name – Building Name sorted in alphabetical, ascending order, starting with "A" at the top of the list. You can select multiple locations by holding down the CTRL key.
- **Select Custom Fields**: This option is available if the custom fields set up in Custom Event Administration Settings are selected to be "Front end filter (Will display as Drop Down List)".
- **Syndicate Mini Grids for Number of Months**: Options included in this drop-down include Current Month, Next Month, Current and Next Month, Next 3 Months, Next 4 Months, Next 5 Months, Next 6 Months, Next 7 Months, Next 8 Months, Next 9 Months, Next 10 Months, Next 11 Months, Next 12 Months
- **Links Window Mode**: Select to either open the matching events list view in the current window or a new browser window.

Click the **SUBMIT** button to automatically generate the Mini Grid(s) Syndication Code which will display in a separate window on the right side of the screen. Cut and paste the Syndication Code displayed into the area of your site where you would like the syndicated grid(s) to display.

RSS Syndication

What is RSS?

Really Simple Syndication (RSS) is a web feed format for transmitting information from a server to requesting sites set up to receive, format and display it. It is suitable for rapidly changing data, such as news and calendar feeds. Active Data Calendar supports RSS Syndication for publishing events rapidly to customer web sites and social media services, such as Facebook and Twitter.

How does Active Data Calendar Support RSS?

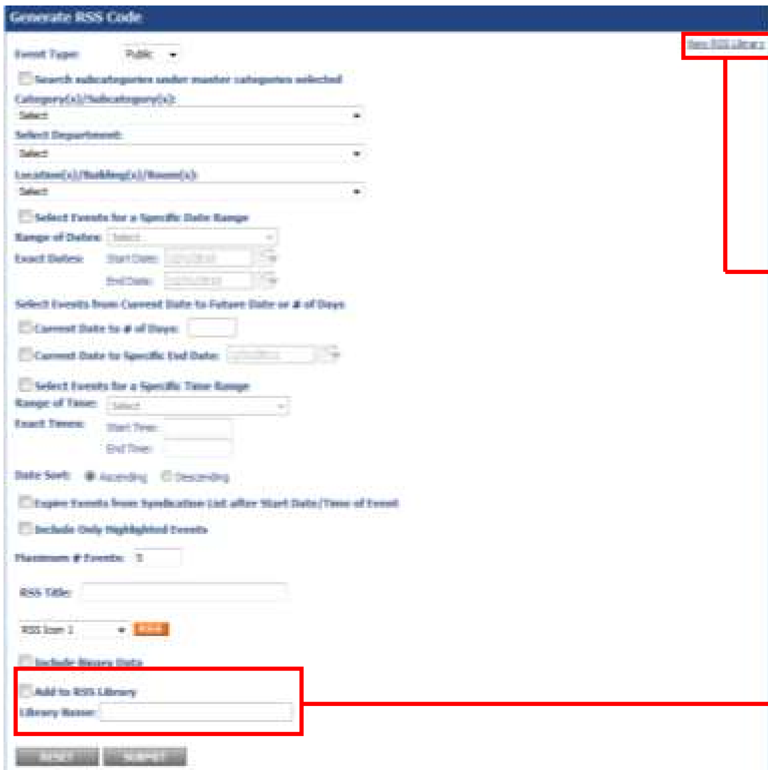
The Calendar supports RSS through an .aspx processing page that runs on the Calendar's back end. The customer's web site calls this page from inside the feed URL, then dynamically displays (that is, *publishes*) the data on the site. The feed URL specifies the events to publish. The back-end page selects those events from the Calendar's database based on pre-set criteria, and the data is shown based on how the customer's website or application interprets an RSS feed URL. Customers often use a CMS (content management system) having a built-in reader for interpreting this, like the RSS webpart in SharePoint. Sometimes they develop a custom transform to display the data in a format to match the exisiting look and feel of their website. They often use the RSS feed URL to assist in populating content on Facebook or Twitter.

Where Do the Code and Templates Come From?

The Calendar generates for you the RSS syndication code that your web maintenance staff inserts into your web page code. That code is an HTTP call to the Calendar's `RSSSyndication.aspx` back-end page, which returns the data that the call specifies. You can select from many options, such as the type of calendar data to push (public or private), the category of event to syndicate, the number of events to display, and the location where events are being held. The complete list of syndication options is given in Generate RSS Code Page Options, below.

Creating Your RSS Syndication Code

From the Calendar's Main Menu click the **Marketing** tab, then click the SYNDICATE submenu's RSS link. The Generate RSS Code page appears:



TIP: Saving RSS Feeds and adding them to your RSS Library allows you to see a list of all RSS Feeds currently generated and added to your site.

Click the link in the upper right area of the Generate RSS Code screen in order to navigate to the RSS Library.

From there, configure the feed according to your needs using that page's options. When you have configured it to your satisfaction, click SUBMIT. A new frame appears to the right, containing your RSS feed URL. Copy that URL and place it (or have it placed) into your web page's code.

Generate RSS Code Page Options

Use the options described here to produce RSS syndication code that requests the event data your web page needs. You can choose any combination of the available check boxes, drop-down lists and other options to receive the events you're looking for. Choosing more criteria narrows the results to just those events you want to display.

Here are the options for configuring your RSS feed:

- **Event Type:** Select *Public*, *Private* or *Both*. This only displays if your installation includes the Private Calendar Module.
- **Search subcategories under master categories selected:** If you select a category beneath this check box, such as Concert, selecting this check box makes the feed search all subcategories under Concert, such as Classical, Jazz, Popular and Zydeco, without checking each subcategory individually.
- **Category(s)/Subcategory(s):** Use one of these three options:
    - Select one category or subcategory from the drop-down list
    - Choose *Select All* from the drop-down list

    - Choose *Select Multiple* from the drop-down list. Choosing this option opens a selection list to the right, from which you can select as many categories and/or subcategories as you require. When you have selected all you want, click SUBMIT to accept your selections, or CANCEL to close the list without selecting any categories or subcategories. Click CHANGE to modify selections you have made.

- **Show category header and footer:** Select this option to display the header and footer configured for the categories having them. (Subcategories do not support their own unique header and footer.)

- **Select Department(s):** Use one of these three options:

    - Select one department from the drop-down list

    - Choose *Select All* from the drop-down list

    - Choose *Select Multiple* from the drop-down list. Choosing this option opens a selection list to the right, from which you can select as many departments as you require. When you have selected all you want, click SUBMIT to accept your selections, or CANCEL to close the list without selecting any departments. Click CHANGE to modify selections you have made.

- **Select Locations:** Here you have three options:

    - Select one location from the drop-down list

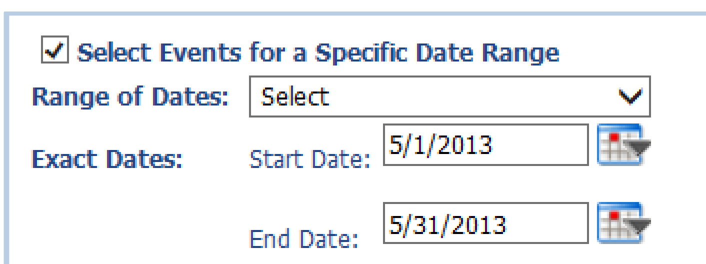
    - Choose *Select All* from the drop-down list

    - Choose *Select Multiple* from the drop-down list. Choosing this option opens a selection list to the right, from which you can select as many locations as you require. When you have selected all you want, click SUBMIT to accept your selections, or CANCEL to close the list without selecting any locations. Click CHANGE to modify selections you have made.

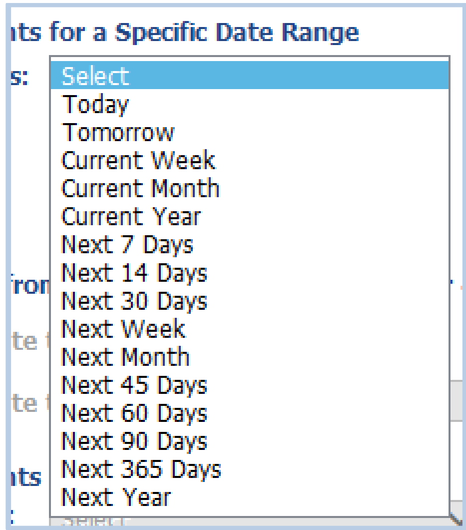
- **Select Events for a Specific Date Range**

  You can use this check box option to specify the events to syndicate by their day or date.

  1. Start by selecting the check box, as shown here:

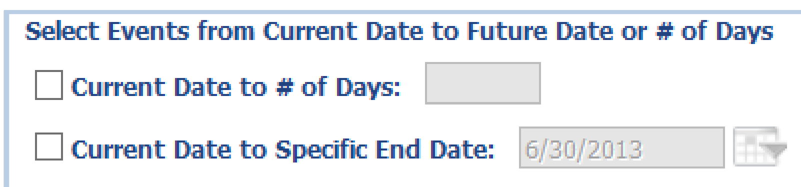


2. To specify *days* as a criterion, select the **Select Events for a Specific Date Range** check box, then click *Select* in the **Range of Dates** drop-down list to reveal the list of day ranges shown here:



Selecting one of these options disables the rest of the date-selection area, including the **Start Date** and **End Date** fields shown above. (You can still specify a *time* range or exact times, below this option, just not a range of dates.)

3. To specify events occurring in a range of dates, make sure the **Select Events for a Specific Date Range** check box is <u>not</u> selected, and use the **Select Events from Current Date** or **Time Range** options shown here:

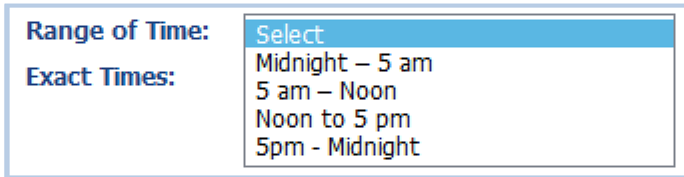


The options for this feature are:

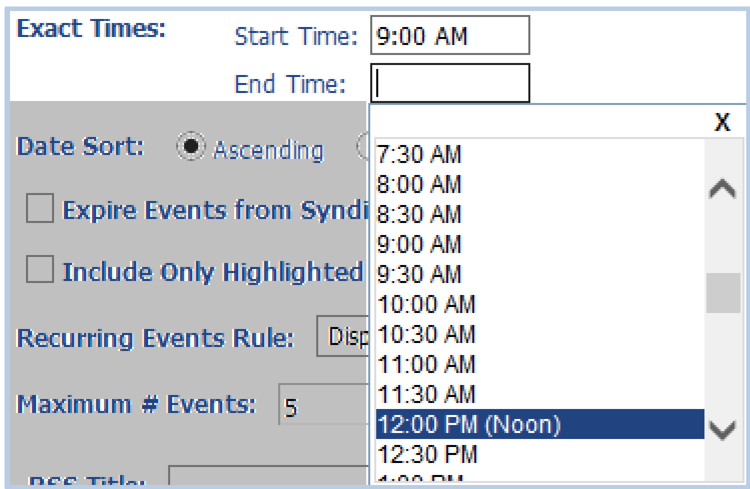
- **Current Date to # of Days:** Select this check box to show events from today's date to a number of days after today.
- **Current Date to a Specific End Date:** Select this check box to show events from today's date to a specific future date that you enter or choose from the date selector pop-up.

4. **Syndicate Events for a Specific Time of Day:** There are two time options for narrowing the events shown when this RSS feed is viewed: predefined ranges of times, and an exact time winow that you define.

   - **Range of Time** is a drop-down that includes these options:



   - **Exact Times** allows specifying exact starting and ending times in half-hour increments, using these fields:



- **Date Sort:** Choose which events to place at the top of the list, the closest in time (*Ascending*) or farthest in time (*Descending*).
- **Expire Events from Syndication List after Start Date/Time of Event:** Setting this flag removes events from the feed if the feed is requested after the event has begun, even if it still meets the other date and time requirements.
- **Include Only Highlighted Events:** Select this check box to limit events returned in the RSS feed to those having their **Highlight this Event** flag set.
- **Recurring Events Rule**
  - **Display Next Occurrence in Series:** Choose this option to limit series events in the RSS feed to only the next occurrence (not the entire series).
  - **Show All Occurences in Series:** Choose this option, and the RSS feed contains all future occurrences in a series.
- **Expire Events from Syndication List after Start Date/Time of Event:** Select this check box to exclude from the RSS feed any events that have already begun (including those that have already finished).
- **Include Only Highlighted Events:** Select this check box to exclude from the RSS feed those events whose **Highlight this Event** flag is not set.

- **Maximum Number of Events to Display:** Limits the number of events sent by the RSS feed each time it runs. Defaults to 5. Enter a different number or leave this field blank to place no limit on the number of events sent.
- **RSS Title:** Enter a name for the feed, that can appear on the page displaying the syndicated events. For example, "Concerts in May, 2013". Holds up to 255 characters.
- **RSS Icon:** Select the button graphic appearing on site pages where you place the RSS Code generated by the Calendar. Clicking the button on those pages opens this RSS feed.
- **Include Binary Data:** Select this option to include binary data, such as event images and attachments, in your RSS feed. Binary data is stored in the Active Data Calendar database, and can also be pulled into XML export files.
- **Add to RSS Library:** Select this option and enter a library name to save this RSS feed and make it available in the Calendar RSS Library. The Calendar RSS Library contains all available RSS Feeds. In the library you can view current feeds, view the current contents of each feed, and generate HTML of the current feed results. You can also automatically open the library from within the Send Event Email WYSIWYG editor to include your RSS feed's events in an email message. Enter an RSS feed name in the **Library Name** box that will help you remember the contents when viewing this feed within the RSS Library list.
- **Enable Facility Feed:** Selecting this check box provides non-calendar users with access to internal calendar information (such as facilities setup details, resources, and registrant data) by embedding it into the syndication iCalendar and RSS feeds. Please note that this option is only available in the Facilites module.

Generate RSS Code Procedure

After selecting all your options and entering all your data on this page, click **SUBMIT**. If you have selected the **Add to Library** option, clicking **SUBMIT** also adds the RSS feed you defined to the Calendar's library of RSS feeds, under the **Library Name** you entered. A **Retrieve RSS Script** frame appears on the right-hand side containing the RSS code for you to place into the web site page code where the syndicated event information should appear. Copy that to code the clipboard, and paste it into your page code where appropriate.

Generating Legacy Script Code

After generating the code, the Calendar also supplies a **Generate Legacy Code** link. Clicking this link's plus sign (+) opens an additional frame that supplies code with an additional flag for "legacy" that is set to "Yes". Copy the code from this frame to use in your calling code if you need legacy Calendar RSS operation. Legacy operation means that the Calendar does not send any binary attachments in the feed or include any HTML in the event fields such as event description. This is useful for receiving systems that need text-only operation, such as digital signage systems.

Viewing and Using RSS Library Contents

If you chose to save this RSS feed to the RSS Library, you can click the View RSS Library link at the upper-right (above the **Retrieve RSS Script** frame). Once in the library, locate the feed you want to view, and:

- Click the feed's name to view some of the feed's settings. Click **Back to RSS Library** to return to the library page.
- Click RSS to open a new tab showing the events the feed is sending at that moment.
- Click HTML to open a new tab showing the HTML the feed is sending. In Internet Explorer of Firefox web brwosers, press Ctrl+U to see the page's HTML source.

Quick Links

To navigate to the Generate Quick Links functionality, click on the **Marketing** tab and click GENERATE: Quick Link.

Choose any combination of check boxes and drop-down lists to define the event types listed from the Quick Link.

- **View Type**: Grid, Category, Date/Time, Location and Event Summary
- **Event Type**: Public/Private/Both (This only displays if your installation includes the Private Calendar Module.)
- **Select Category(s)/Subcategory(s)**: Select One or All Categories from the drop-down or choose to Select Multiple. If "Select Multiple" is chosen, then the additional window will open to the right of the screen, allowing you to choose multiple Category(s)/Subcategory(s), including hidden categories.
- **Select Location(s)/Building(s)**: A list box of Location Name – Building Name sorted in alphabetical order.
- **Select Custom Fields**: This option is available if the custom fields set up in Custom Event Administration Settings are selected to be "Front end filter (Will display as Drop Down List)".
- **Select Events for a Specific Date Range**: There are two date options for narrowing the events shown when navigating from your Quick Link; range of days and range of dates. Range of Days is a drop-down that includes options such as current day, tomorrow, next 7 days, next 14 days, current month, next month and current year. Range of dates includes drop-down values for selecting an exact starting date and ending date for which to search from.
- **Select Events from Current Date to Future Date or # of Days**: Select to show only events from the current date to a number of days or specific end date in the future. Or show an archived date range of a set number of days prior to the current date. NOTE: This is helpful with showing a calendar view of the last 30 days worth of events or news items if using your calendar to enter news items based on date created.
- **Syndicate Events for a Specific Time of Day**: There are two time options for narrowing the events shown when navigating from your Quick Link; range of time and exact timeframe. Range of Time is a drop-down that includes options such as midnight to 5 AM, 5 AM to Noon, Noon to 5 PM and 5 PM to Midnight. Exact timeframe includes drop-down values for selecting an exact starting time and ending time for which to search from.

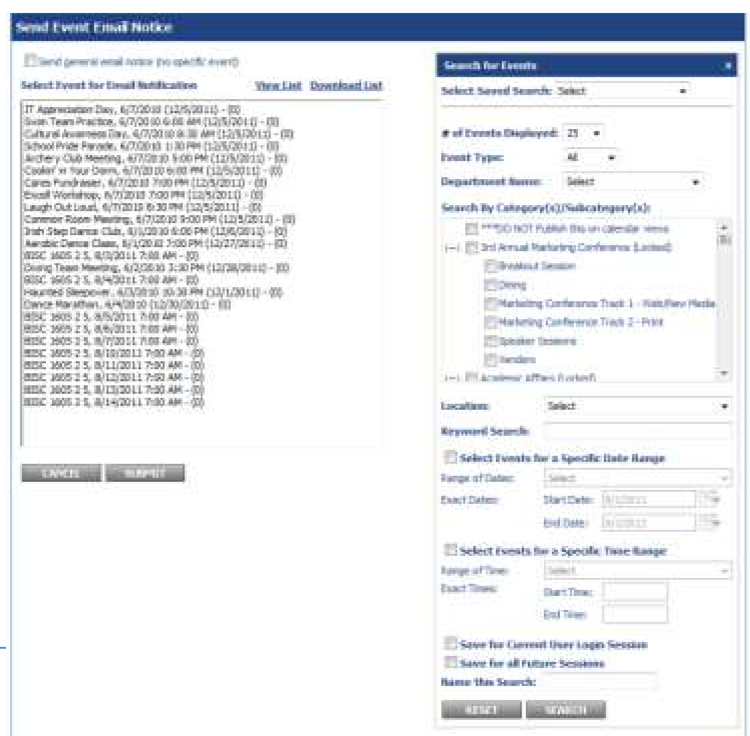
Click the SUBMIT button to automatically generate the Quick Link which will display in a separate window on the right side of the screen. Cut and paste the Quick Link displayed into HTML page or CMS the area of your site where you would like the Quick Link to display.

Send Event Email Notice

To navigate to the Send Event Email Notice page, click the **Marketing** tab and click GENERATE: Email.

This function allows you to send email notifications to calendar users, third party email addresses, and registered event subscribers.

Email notices can be sent for a specific event or general calendar notices not specifically tied to an event.



To send a general email notice that is not tied to a specific event, click the checkbox available and a SUBMIT button will become available for selection in order to move on to the second step in the process for sending the notice.

Email notices can be sent for a specific event or as a general calendar notice.

To select the type of email notice:

- **Send general email notice** (no specific event) - Click this checkbox if you would like to send a general email notice to calendar users or third party recipients. You will not be able to select registered event subscribers since the notice is not being tied to a specific event.
- **Select an Event Name**: This list defaults to displaying the next 25 upcoming events that the user accessing this function has the permission to access.

Events are listed with the following information:

- Event Name
- Event Start Date/Time
- Event Recurs Until Date in Parenthesis (if applicable)
- Number of Event Subscribers in Parenthesis: The number displayed in the parenthesis at the end of the event information represents the number of visitors who subscribe to updates about this event.

  Example: Staff Meeting, 4/16/2011 4:30 PM (4/30/2011) - **(5)**

There are also links included for viewing the list of event subscribers and downloading the list of event subscribers. To use either of these action links, click on the event name and then click one of the action items.

If you do not see the event that you would like to send an email about from this default list, please use the "Search for Events" window on the right side of this screen in order to Search for Events based off your own criteria.

Search for Events Window: This window allows you to search for events that you have either added or are an administrator for, based off your permission level.

- **# of Events Displayed**: Drop-down to select the number of matching events to display in the list box for selection. The default search shows 25.
- **Event Type**: Drop-down including the following Event Types (Private/Public/Both). This drop-down only displays if your user account has been granted the privilege to post both public and private events. Otherwise it will default to either public or private.
- **Department(s)**: Drop-down of Departments to which you have been given Permission.
- **Search by Category(s)/Subcategory(s)**: Select from the list of all available Category(s) and Subcategory(s) and use checkboxes beside of each in order to select multiple.
- **Search by Location(s)**: Select from the list of all available Locations and use checkboxes beside of each in order to select multiple.
- **Keyword Search**: Alpha-numeric, open-text field that allows for up to 50 characters to be entered for searching. The keyword search will search all text fields entered regarding an event including: Event Name, Description, Image Alt Text, Attachment Link Text, Contact Information and all additional detail fields enabled for your Calendar event administration.
- **Select Events for a Specific Date Range**: There are two options for searching by date, range of days and range of dates. Range of Days is a drop-down that includes options such as current day, tomorrow, next 7 days, next 14 days, current month, next month and current year.

- **Select Events for a Specific Time of Day**: There are two options for searching by time, range of time and exact timeframe. Range of Time is a drop-down that includes options such as midnight to 5 AM, 5 AM to Noon, Noon to 5 PM and 5 PM to Midnight.

Once you have completed your selections, you can then click:

- **CANCEL**: Leaves the window without saving any changes.
- **RESET**: Resets all changes made in this window without leaving it.
- **SEARCH**: Submits the form contents and populates the event list.

Select the event name. If the event is a series event, then you will need to select from two radio buttons:

- Send Email Notice for Series
- Send Email Notice for Selected Occurrence(s)- If this option is selected, a window will open with the list of available series occurrences that can be selected.

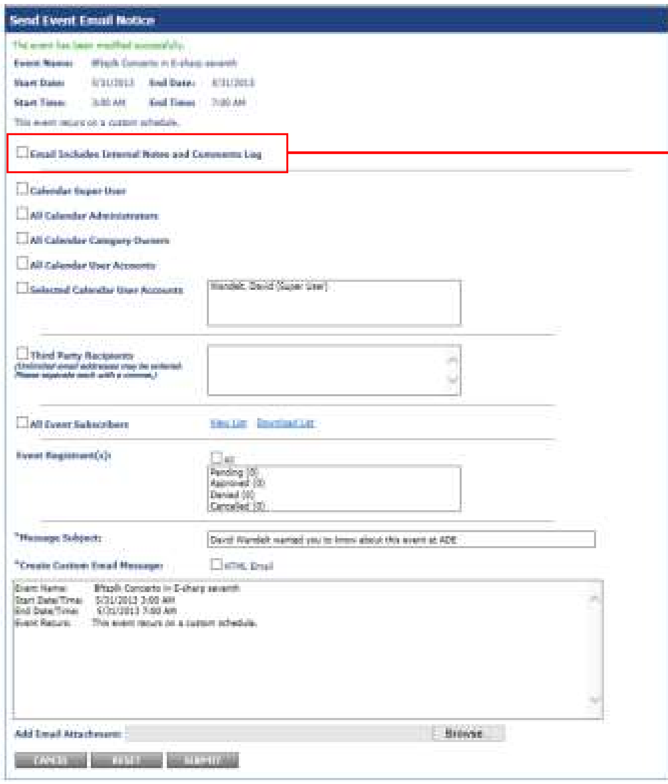
You can select multiple occurrences as long as every field for each of the occurrences selected is the same. You cannot select occurrences that have unique field information.

There are links at the top of the window to help you quickly select all past, future, cancelled and rescheduled occurrences.

NAVIGATION OPTIONS WITHIN THIS AREA
Click the CANCEL button to exit out of the Send Event Email Notice area and you will be navigated back to the main men of Calendar. Click **SUBMIT** to finalize your selections and navigate to the Create Email screen.

Selecting Event Email Notice Details
Once you have selected the event, you will be navigated to the screen where you can select the event information to include in your email notice, along with selecting the Calendar User Accounts, Third Party Recipients and Registered Event Subscribers that you would like to email.

The top of the screen lists the details regarding the event that you selected on the "Send Event Email Notice - Select" screen. If you selected to send a general notice, not specific to a particular event, then no event details will display.



TIP: If you are send an event notice to outside recipients (third party recipients), event update subscribers or event registrants, you will NOT want to select the checkbox that says "Email includes Internal Notes and Comments Log". If selected, this option includes the Internal Notes information about an event as well as adds an area where the recipient can enter in their own comments about an event for planning and informational purposes.

If the third party recipients that you are sending the email notice to happen to be part of a planning committee or are within your organization and should be able to see the internal notes and comments then check the box.

This function allows you to send email notifications to calendar users, third party email addresses, and registered event subscribers.

The top of the screen lists the details regarding the event that you selected on the "Send Event Email Notice - Select" screen. If you selected to send a general notice, not specific to a particular event, then no event details will display.

If you are sending an email notice regarding a specific event then the event details are automatically included in your email body area in the text box on the bottom portion of the screen and you can choose to include the event details or remove the event information from your email body.

Include Internal Notes and Comments Log: If this is not selected, then recipients will only see publicly available event detail information, along with any custom event message or attachment that you send.

The Internal Comments log will not be included, nor will the ability for recipients to add their own comments regarding the event.

Select from the following checkboxes the type of Calendar user, third party recipient(s) or registered event subscriber(s) that you would like to send an email notice:

- **Calendar Super User**
- **All Calendar Administrators**
- **All Calendar Category Owners**
- **All Calendar User Accounts**
- **Selected Calendar User Accounts**: Select multiple account names from the list box provided by using the SHIFT and CTRL key.

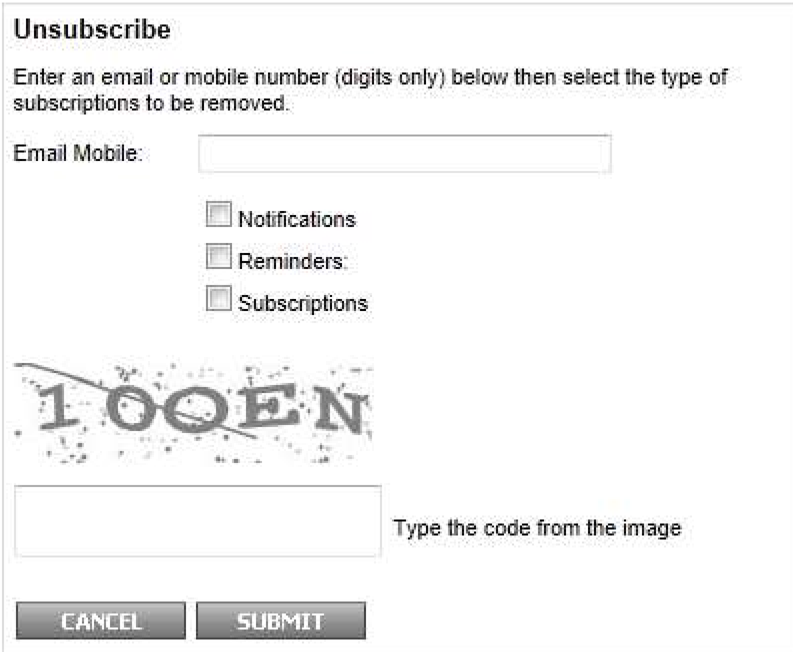
- **Third Party Recipients**: Open Text field that allows for entry of unlimited e-mail addresses separated by commas.
- **All Event Subscribers**: If this checkbox is selected then any email notification being sent for a particular event will be sent to all individuals who entered their email address under the Notify Me option from your Event details screen(s). There are also links for viewing the list of event subscribers and downloading the list of event subscribers.
- **Event Registrant(s)**: Selectable values include Pending, Approved, Denied, and Cancelled. A check box is available to select all. The number to the right of the statuses represents how many registrants are in that status for this event. There are also radio button options for sending to event attendees.

You can also customize the email message sent along with your event information by entering information in the following fields:

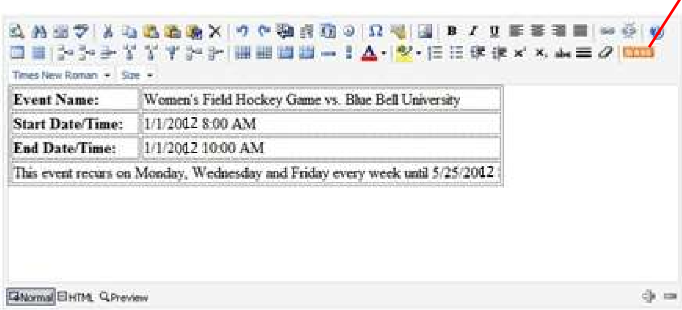
- **Message Subject**
- **Create Custom Email Message**: Enter text in the available text field to create a custom message. This text fields allows for a maximum of 12,000 characters to be entered. If you would like to use the WYSIWYG Editor or enter HTML formatting as part of your email, please click the checkbox entitled "HTML Email". This checkbox, if selected, will enable the WYSIWYG Editor in place of the standard email body text field and will allow you to use WYSIWYG functionality or create custom HTML. Click the (+) sign in the lower left hand corner of the WYSIWYG editor to expand your editor field and click the (-) sign in the lower left hand corner of the WYSIWYG editor to decrease the editor field size.
    - **Normal Mode**: Allows you to use all WYSIWYG functionality buttons to format your email content. *NOTE: The best use of the WYSIWYG Editor is to write your content first and then go back to select text areas and insert formatting. Please see the WYSIWYG in-context Help Icon for help with using the WYSIWYG buttons/options and also visit your personal Client Portal page in order to download a Tip Sheet on creating email notices using the WYSIWYG Editor.
    - **HTML Mode**: Allows you to see the HTML for any text and WYSIWYG formatting selections already made, as well as allows you to enter additional HTML directly within the HTML editor area.
    - **Preview Mode**: Allows you to preview what the email contents would look like if sent at that particular time.
- **Add Email Attachment**: Browse to find your file and then upload the attachment to your email message. The size limitation for these attachments is set as part of your Calendar configuration.
- **Override Outgoing Email Address**: Placing an e-mail address in this field forces that address into the "From" field of all e-mails sent from the Calendar, including event notifications. This field is set on the Configuration: Setup Calendar: Email Settings page:

Unsubscribe

This area of the Calendar allows user accounts with the privilege to "Send Email Notice" to also "Unsubscribe" any emails or phone numbers from Notifications, Reminders or Subscriptions that they receive based on signing up using the Notify Me, Remind Me or Subscribe options on the front end views.


Unsubscribe
Enter an email or mobile number (digits only) below then select the type of subscriptions to be removed.
Email Mobile:
Notifications
Reminders:
Subscriptions
1 OQEN
Type the code from the image
CANCEL
SUBMIT

TIP: Want to send related event information to registered event subscribers? It's easy using the Send Event Email Notice - WYSIWYG RSS Library Insert Feature! Simply select the event that has the subscribers you think would be interested in receiving your other event information, open up the WYSIWYG Editor and click the RSS icon. The RSS Feed Library pane is opened and you can click on a feed VIEW button to see events currently within that feed that might be of interest to your subscribers.



NAVIGATION OPTIONS WITHIN THIS AREA

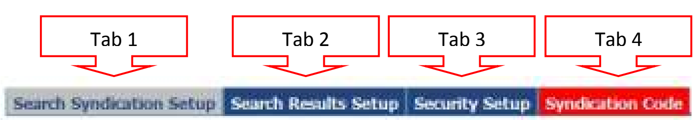
Click the **CANCEL** button to exit out of the Send Event Email Notice area. Click **RESET** to reset all field values on the screen back to their default settings and start over. Clicks **SUBMIT** to finalize and review your email prior to sending it.

Search Syndication

Search Syndication enables you to place search blocks anywhere on your website to allow your calendar users to search and display events based on the criteria they specify. These search blocks are configured in the Calendar Administration area and then can be placed in any location on your website.

Note: Search Syndication will generate web page code that needs to be placed in with the code of your web page(s). You will need to work with your web developers/publishers to have the search boxes placed on your web page(s) in the areas that you wish to place them.

The Search Syndication interface provides tabs so that you can move through the various areas and configure the search quickly and easily.



Tab 1: Search Syndication Setup - This is the only required tab. It allows you to set up the information that the search box can access.

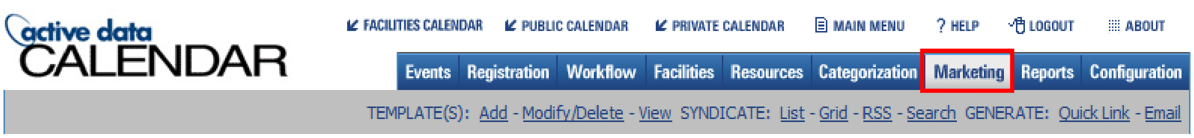
Tab 2: Search Results Setup – Allows you to control how the search results display. You can specify which view (Category, Location, Summary, Grid) and the order that the events will be displayed in according to date and time settings.

Tab 3: Security Setup – This tab allows you to specify URLS that can access the search syndication box. You will have the ability to add and remove URLS as needed. Once a Search Syndication is in use it will also show you traffic statistics for that specific Syndication.

Tab 4: Syndication Code – This tab provides the code to add the search syndication box to your website. It is best to work with your web department to decide how they would like to receive this code (email, xml, etc.).

Search Syndication Security
To create search syndication you will need to have access to the Active Data Calendar Administration Area.

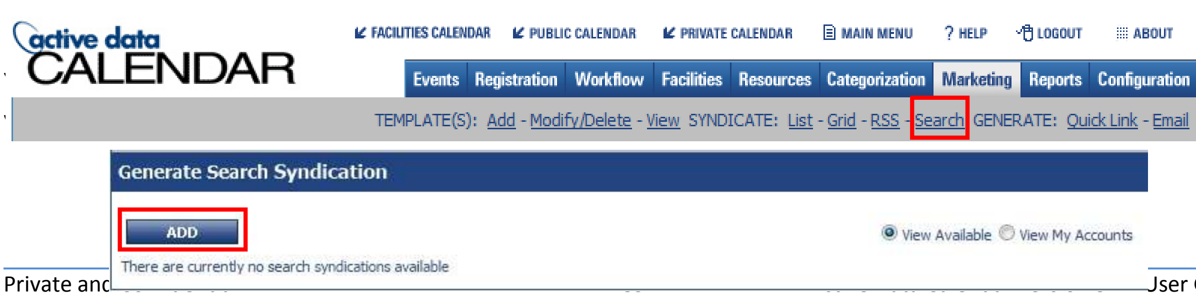
The User account that logs in and creates the search syndication will need to have proper security to generate Syndication, RSS and Quick Links. When you log into the Calendar you should have the Marketing Tab on the blue tab bar.



Security Note: Please be sure to check your organizations security policy before implementing any security changes in any application. Please contact your organizations IT department or Security area with any questions or for confirmation.

If you do not see the Marketing tab please contact your Calendar Administrator or follow your organizations permissions request policy to request access to "Generate Syndication, RSS and Quick Links" in Active Data Calendar. If the permission was recently added to your account, the changes will take effect upon your next login.

Search Syndication Setup
To create Search Syndication you will log into the Active Data Calendar Administration area. You should then click on the Marketing tab and select Search on the gray bar.



You will then have the options to setup the Search Syndication.

The following information is required:

- Search Syndication Title
- Search Syndication Description
- Current Status (this will default to Active. You will only need to change it if you do not want it Active upon saving.)
- At least one search option on the Search Syndication Setup. Options include:

  - **Create a Custom Format for the Search Syndication** – This option allows you to decide which search fields to make available in your Search box. The most common fields are Start Date, Start Time, Keyword and Category. Options are:
    - Category
    - Department
    - End Date
    - End Time
    - Facility
    - Keyword
    - Start Date
    - Start Time
  - **Event Registration** – Allows you to select if you want to see Registration, Non-Registration, or both.
  - **Event Type** – You can see Public, Private or both.
  - **Maximum # Events** – You can specify how many events you will allow to be produced by the search. If left blank, a full list of events fitting the search criteria will be displayed.
  - **Setup Date and Time Restrictions** – You can place date and time restrictions on the search. Options are:
    - **Range of Dates** – Can be the next day to next year depending on options chosen.

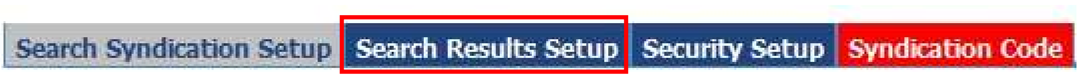
        - **Exact Dates** – Specify start dates and end dates of events that can be retrieved in the search.
    - **Current Date to Specified End Date –** Allows you to specify events from the current date to whatever date is specified in the date field.
    - **Select Events for a Specific Time Range** –
        - **Range of Time** - Allows you to select a range of time (ie. 5am to noon).
        - **Exact Times** – allows you to specify exact times that events must fall into in order to be displayed in the search.
    - **Search Subcategories under Master categories selected** – Allows the system to search not just the main level category but also any subcategories that show under the main category.
    - **Category(s)/Subcategory(s)** – Select an individual category, multiple categories, or all categories, including hidden categories. Note: Hidden categories are a part of the Private Calendar module.
    - **Select Department(s)** – Select one, multiple, or all departments to be included in your search.
    - **Location(s)/Building(s)/Room(s)** – Select the location to include in your search. You may select one location, multiple locations, or all locations. You can specify a whole building or a single room as needed.
    - **Pre**-filtering Criteria – You may now set up custom criteria to pre-filter your Syndicated Search. Some examples appear below, but you may choose from all configured Master and Sub-categories.
        - **Venue Type**: choose from the venues you have configured for your calendar
        - **Meeting Type** : Choose form your configured meeting types
        - **Audience**: Choose from your configured list of audiences

> **Note**: You are not required to supply information for every search field listed above. You are required <u>**one**</u> of the above options in order to save your search.

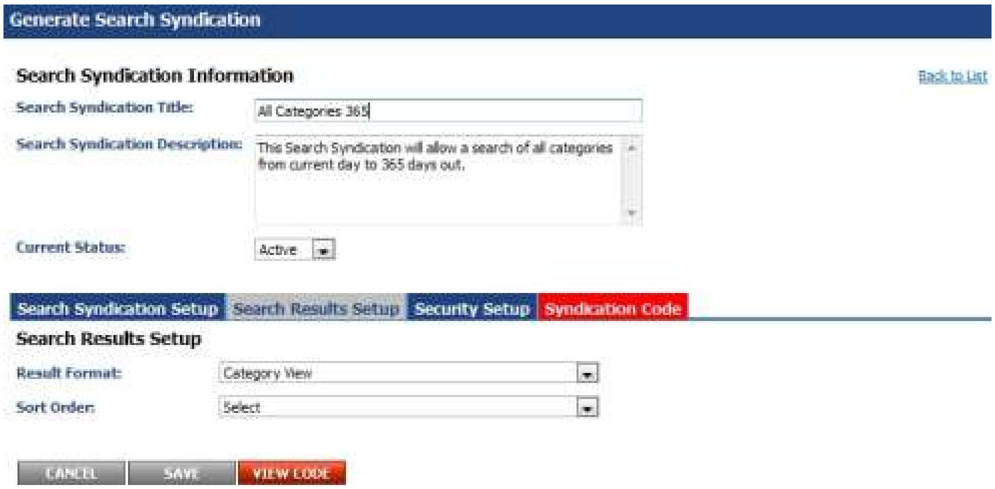
At this point, you can click save and the settings will be saved. You can specify further details of the search or generate code to provide to your web specialist. If you decide to save at this point and not configure further, upon clicking save you will receive notification that the item was saved. You will also be given the option (at the bottom of the screen) to view the code as shown below.

If you would like to configure further click on the Search Results Setup tab (tab 2).

Search Syndication – Search Results Setup Tab



Reminder: The Search Results Setup tab allows you to control how the search results display. You can specify which view (Category, Location, Summary, Grid) and the order that the events will be displayed in according to date and time settings.



The Search Results Setup tab provides you with Result Format configuration and the Sort Order Configuration of the results. By default the Result Format will be set to Category View and the Sort Order will be in order from closest date to furthest date.

Available options for Result Format and Sort order are:

- Result Format
  - Category View
  - Date/Time View
  - Location View
  - Syndication Template
  - XML
- Sort Order
  - Date/Time
  - Date/Time Reverse
  - Event Name
  - Event Name Reverse

<u>Syndication Template for Result Format</u>

When Syndication Template is selected you will be given different options to configure.

- Syndication Template
- Sort Order

The Syndication Template drop down list will give you the list of templates that are currently configured in your calendar. There are some system default templates as well as the templates that you have configured.

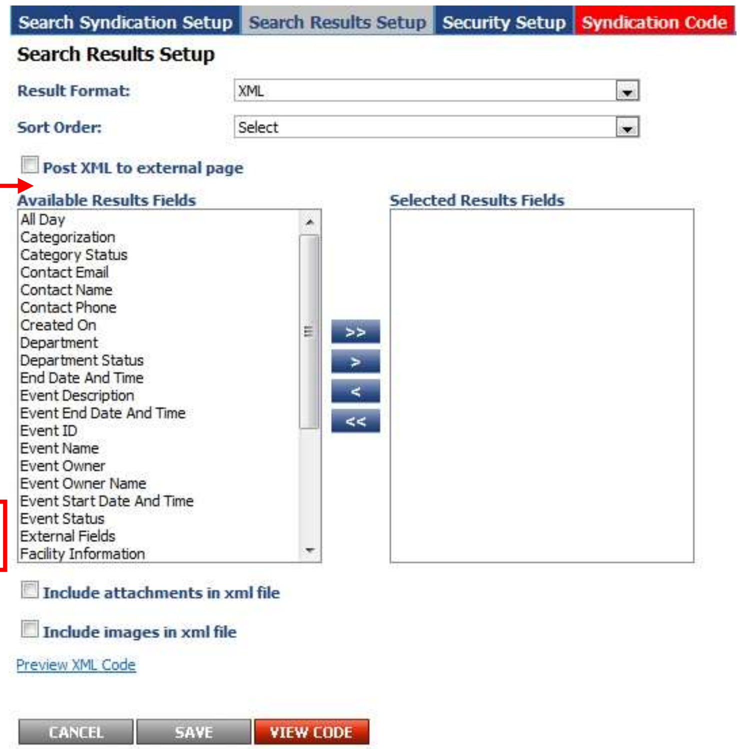
Reminder: You can configure your own templates for syndication by Clicking on the Marketing tab and then on the gray box next to Template select Add. Further details are available under the [Marketing-Template](#) section of this document.

Sort Order changes from the Sort Order for the Calendar Views above to a selection between Ascending and Descending radio buttons

XML for Result Format

Selecting XML as the Result Format generates the following fields:

- Sort Order – This field contains:
    - Date/Time
    - Date/Time Reverse
    - Event Name
    - Event Name Reverse
- Post XML to External page – This allows you to post the results of the search to a web location. When the box is checked the XML Post URL or Page field becomes visible



as shown.

- Available Results Fields – This screen shows the available fields that you can make a part of your XML file. You must select at least 1 field but more will allow for better detail for the people utilizing this list.
- Selected Results Fields – This box will display the fields that are used in the XML output. You can add or remove fields by selecting them and clicking the arrow to move them between the windows. If you wish to add or remove all fields use the blue box with the double arrows to add or remove fields as needed.
- Include Attachments in XML file – The include attachments option allows you to take any attachments on an event and make them a part of the XML output. Upon selecting this option you will be given the option of the type of attachment.
    - Referenced Attachments – Saved in another location.
    - Binary Attachments – Saved with the XML.

- Include images in XML file - The include images option allows you to take any images on an event and make them a part of the XML output. Upon selecting this option you will be given the option of the type of image.
    - Referenced Images – Saved in another location.
    - Binary Images – Saved with the XML.
- Preview XML Code – Allows you to see your XML Code before saving the Search.

Tip: Descriptions of the XML fields (Attributes) is available on your Clients Only Page in the Event Import User Guide document.

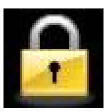
Attachment and Image Note:

Upon selecting to include attachments or to include images the below important note will display at the bottom of the page.

NOTE: Including binary data in the results will increase the amount of data transferred which could cause long delays between the initial search and the results being displayed.

This note is there to be sure you are aware of the impact that binary attachments/images can have on response time. Using referenced images generally results in a much faster load time.

- **Referenced Attachments/Images** – Are not saved as part of the XML file. This generally allows for faster load times with the XML file (depending on how many events the XML is pulling). Referenced attachments/Images stay in the location they are saved in (normally on the web or a server). If someone selects to view the attachment/image the XML file will go to the external location and view the attachment/image.
- **Binary Attachments/Images** – These attachments/images are saved with the XML file itself. This can increase the size of the XML file which can result in slower response when the file is being accessed. Opening the attachment/image often is faster because the file is with the XML and the XML does not have to pull from another location.

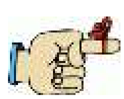


Security Tip: When you select to utilize XML, be sure the data is placed in an area that the calendar has access to or it may not be able to save the file.

Verifying access is also important when placing a search syndication box. Be sure the web location where the search syndication box is being place has access to the calendar and/or the XML file. When deciding on pages and placement we recommend you work with your Web Development team to insure the ease of working with Search Syndication.

Security Setup Tab – Tab 3

The Security Setup tab allows you to apply security to your Search Syndication and is not required.



Reminder: The Security Setup tab allows you to specify URLS that can access the search syndication box. You will have the ability to add and remove URLS as needed. Once a Search Syndication is in use you will also be able to view traffic data for that Syndication.

The Security Setup tab is where you can control what URLS are authorized for the Search Syndication and what message to display if an Unauthorized URL tries to access.

In the Unauthorized URL Message field you enter the error that is to be displayed when access is being denied.

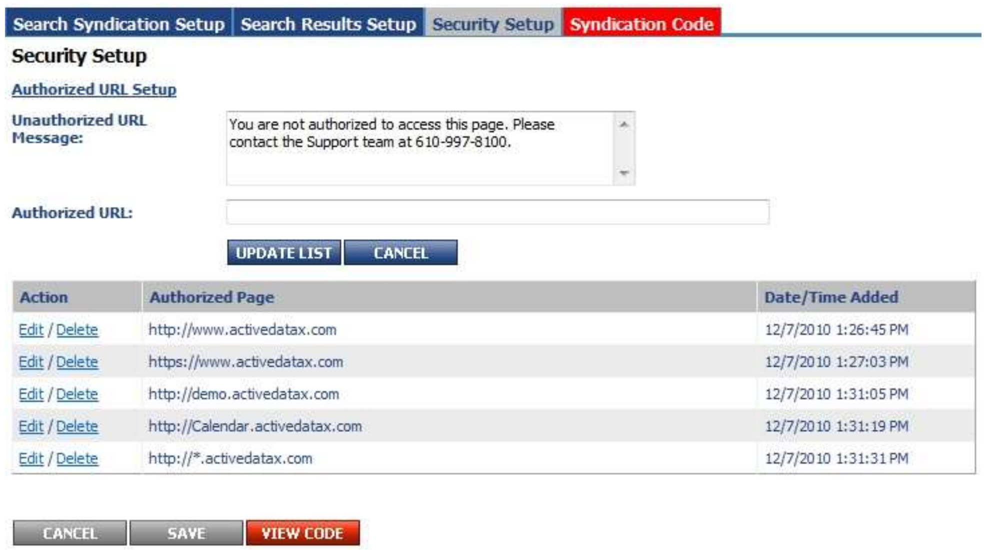
The Authorized URL field is where you would type URL/Web Addresses that DO have access to this page. Once you type in

the address click Update List to add that address to the authorized list.

NOTE: If your address has a regular website (http://) and a secured website (https://) and both need to have access, you will need to add both the http and the https address. See below example.

Authorized URL Example:

Below we provide an example of a Search Syndication with authorized URLs (addresses).



In this example we have configured the message to be displayed if an unauthorized site tries to access the Search Syndication. We have also added some Authorized Pages.

These pages can be edited or deleted at any time by accessing the Syndication Search configuration. When you click Edit next to any of the URL (address) sites it will appear in the Authorized URL box so that you can make changes to it. If you wish to Delete the address just click the Delete link.

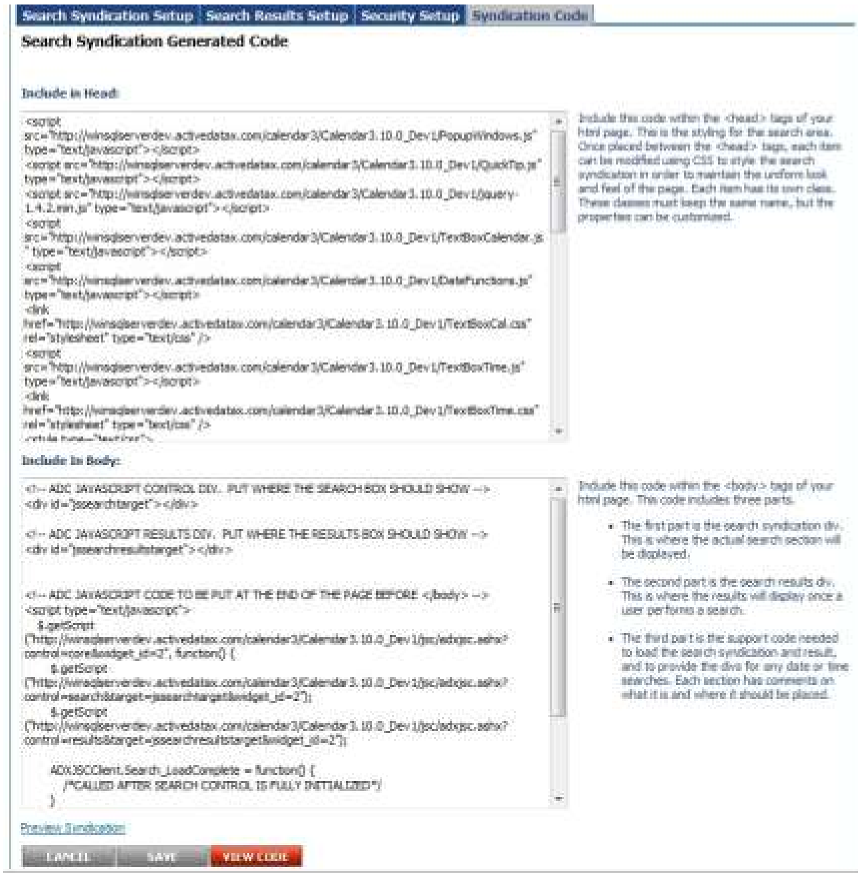
To help explain what each address does we provide the below table where we took the addresses in our example and stated what adding them allows.

Address	What it does
http://www.activedatax.com	Allows access by the regular http site www.activedatax.com site.
https://www.activedatax.com	Allows access by the secured https site www.activedatax.com site as denoted by the S at the end of the http.
http://demo.activedatax.com	Allows access by the regular sub-domain Demo that is on activedatax.com
http://calendar.activedatax.com	Allows access by the regular sub-domain Calendar that is on activedatax.com
http://*.activedatax.com	Allows access to any regular domain or sub-domain address that ends in activedatax.com. If you wanted to add all secure domains or sub-domains that end in activedatax.com then you would also need to make an entry for https://*.activedatax.com

SECURITY TIP: Be careful using the * when specifying addresses that have access to a URL. The * denotes “everything”. In the above example anything that ends in activedatax.com will have access. If you are unsure if you should use the * or not contact your Calendar Administrator or your IT Security Team for further assistance before applying any permissions.

Syndication Code – Tab 4

The Syndication Code tab provides you with the necessary information to publish your search box on any web page available for edit to your organization. This information is intended for the Web Development team of your organization. The options you have selected on the previous setup screens are now contained in code form on this page.



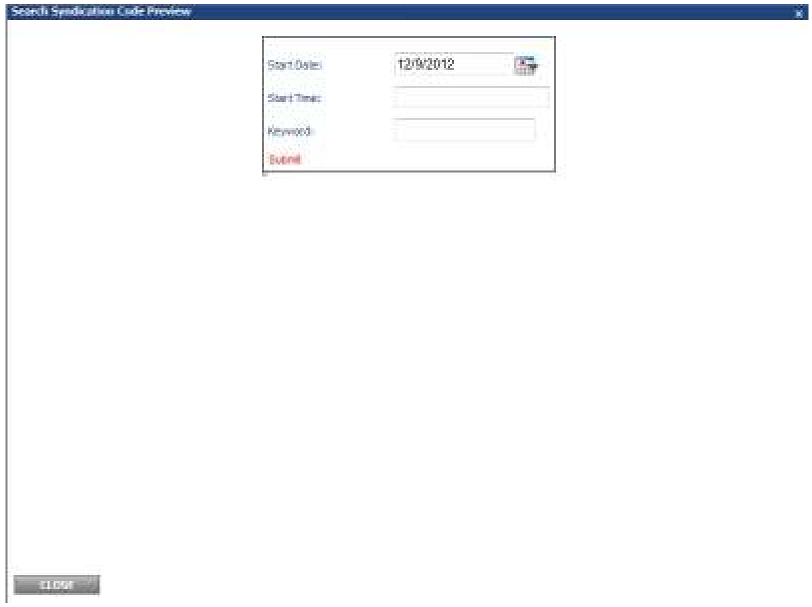
You will either need to supply this information to the person that has the ability to edit web pages for your organization or you will need to have them log in to access this tab and obtain the code themselves. Regardless of which option is chosen there are a few things to note on this screen.

1. You will need to provide the information that is available in both the “Include in Head” and the “Include in Body boxes.
2. It is important to note the information to the right of the boxes that talks about where to include this code.
3. Before applying this code to your web page it is important that you Preview the Syndication using the link at the bottom of the screen to confirm your settings. Items on the preview screen will not all function but will function once the code is added to the web page.
4. The code in the “include in Body” section allows you to display the search box on one part of the page and the results on another part of the page if desired.
5. Most importantly, remember this is web code that goes on the backend of a web page. We suggest that you work with your web team before and after creation to be sure that what you are creating is acceptable and usable by them and that what you create is ok with your organizations policies and coding practices.

Previewing Search Syndication

As stated in the previous section, it is important to preview your search syndication before deploying it to your live website.

At the bottom of the Syndication Code tab,click the “Preview Syndication” to view your search box. Based on your settings this box should have the fields that you selected.



In this case we asked for Start Date, Start Time and Keyword as the search options.

In Preview mode the calendar icon to the right of the Start Date field is not clickable because it is in preview mode. You can type in a new date if you wish as long as it is in the MM/D/YYYY or MM/DD/YYYY format.

The Start Time, Keyword and Submit buttons are also available.

If you click submit the code will actually pull data from your calendar and display it below your search box.

If you would like to make changes to your search, close the preview screen and reconfigure your search box in the Search Syndication Setup. Once complete you should click save and then you can click View Code or Click on the Syndication Code tab to see the code or preview again.

Modifying Search Syndication
With Active Data Calendar Search Syndication you have the flexibility to change options in the Search Syndications that you configure.
Once you change options you will need to replace the current code on the page with the newly featured code.

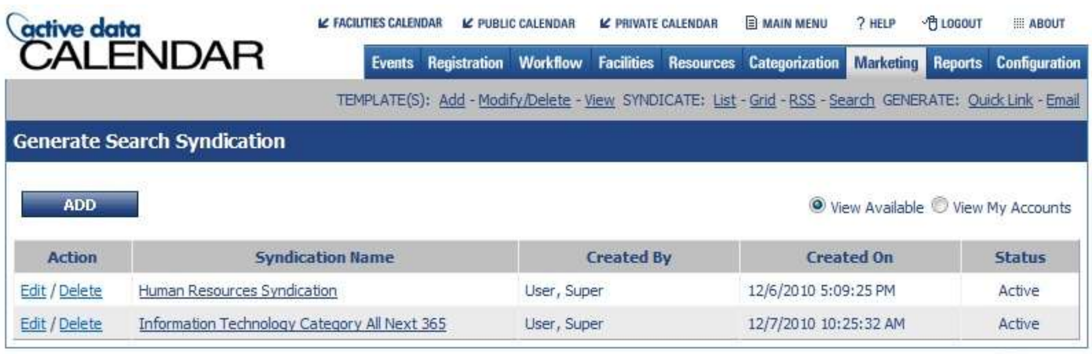
Log into the Calendar Administration area and click on the **Marketing** tab.
On the Gray bar, next to SYNDICATE, click Search.

There are two key things to remember when working on your Search Syndication.

1. **Click Save often**! If your connection to calendar times out or you lose your connection to your calendar for any other reason your unsaved work will be lost.

2. Remember that each time you change your Search Syndication configuration you will need to provide the new code to your web team or your changes will not show on your web page.

You will be given the Generate Search Syndication screen that will list the configured or available Search Syndication widgets configured in your calendar as shown below.



By default, this screen will show all Available Search Syndication as denoted by the filled in radio button next to View Available. If you wish to see only the Syndication that you created, click the radio button next to View My Accounts.

To edit the Search Syndication, click the Edit link in the Action Column. You will be given all the screens that are outlined in the above information just like when you created the Search Syndication. Once changes are complete, click the Save button and then click the View Code button.

Note: Any changes made to the Search Syndication will mean that the code will need to be republished on the location that it points to. If you are working with a Web Developer you will need to provide the code to them again. If you are the Web Developer remember to update each location that the modified Search Syndication appears with the new code.

You DO NOT have to re-apply the code to ALL Search Syndication, just the ones that have changed.

Deleting Search Syndication

Search Syndication can be deleted as it becomes outdated or no longer needed.
Review the list carefully and locate the Search that you would like to remove as an option.
Take note of where this Search Syndication is currently published by checking the Tracking area.

Check the Tracking Area

1. Click on the Syndicate you will be deleting
2. Click on the Security Setup tab
3. At the bottom of the page if there is an option for Syndication Impressions note the listed pages in the Referencing Page column.

This will give you a list of areas where the Syndication will need to be removed from.

Delete the Syndicate

1. Click on the Search link on the gray bar. This will return you to the Syndicate list.
2. Locate the Syndicate you wish to delete.
3. **BE CAREFUL! Once an item is deleted it cannot be restored. Be sure to select the item you are looking for.**
4. In the Action column click the Delete link. The Syndicate will be removed from the Calendars available Syndicates.
5. You will need to remove the Syndicate from the list of URLS pulled in the Check the Tracking Area steps above. If you are not the Web Developer communicate the list you have to your Web team and request the syndicate be removed.

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Tracking Search Syndication

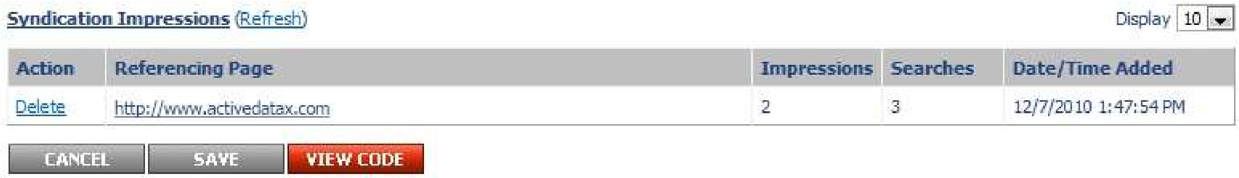
Once your Search Syndication has been added to the page, you can now track it to see how many people viewed the search and how many people performed a search.

To access the tracking area:

1. Click the Marketing tab
2. On the gray bar, next to Syndicate click on the Search link.
3. Select the Syndicate you wish to see your statistics for by clicking on the name of the Syndicate
4. Click on the Security Setup tab

At the bottom of the screen will be Syndication Impressions. Your options are:

- Refresh – Pulls updated information for the Search Syndication.
- Action – Delete the Syndication Impressions Line
- Referencing Page – Identifies the page the Search Syndication is on.
- Impressions – The number of times the Syndication was presented to a visitor.
- Searches – The number of times the visitor actually performed a search.
- Date/Time Added – This is the Date and Time the Search Syndication was added to the Referencing Page.
- Display – This option defaults to 10. If you have the same Search Syndication on multiple pages you will see multiple lines under Syndication Impressions.


Syndication Impressions (Refresh)   Display 10

Action	Referencing Page	Impressions	Searches	Date/Time Added
Delete	http://www.activedatax.com	2	3	12/7/2010 1:47:54 PM

Due to browser caching, it is possible that every single page hit will not be properly accounted for. Every effort has been made to ensure this number is as accurate as possible.

Reports

View Reports - Categorization Statistics Report

To navigate to the Categorization Report, click on the main tab entitled REPORTS and then click on Marketing Reports – Category Stats Report in the drop-down menu provided.
The report that is presented is a display of all Category(s)/Subcategory(s) in the Calendar database.


View Reports - Categorizations Statistics Report

# of Categories = 30   # of Subcategories = 15

Category Name	Subcategory Name	Locked	# of Owners	# of Past Events	# of Future Events
Academic Calendar		X	2	1	107
Administrative Deadlines			0	2	0
Admissions		X	2	87	127
Admissions	Campus Monterrey		0	5	44
Admissions	Open Houses		0	15	39
Admissions Internal			0	0	0
Alumni			0	104	86
Alumni	East Coast Alumni Group		0	18	11
Alumni	Networking		0	13	10
Alumni	Reunions		0	1	6
Alumni	West Coast Alumni Group		0	2	19
Arts			0	19	40
Arts	Music		0	2	21
Athletics			0	369	76
Athletics	Intramural Sports		0	64	14
Gold Certified Partners			0	1	13
Hospitality Events			0	51	2
International Programs			0	9	45
International Studies			0	17	0
Library and Technology		X	1	31	21
On Campus Interviews/Recruiting			0	25	0
Open Houses			0	27	80
President Schedule		X	1	0	0
Registrar			0	0	3
Restricted Category		X	4	0	0
Security			0	94	118
Students Activities			0	400	83
Students Activities	Arts & Entertainment		0	42	0
Students Activities	Chess Club		0	1	0
Students Activities	Lectures & Symposia		0	7	2
Students Activities	Theatre		0	65	15
Summer Sessions			0	5	0

The columns of information displayed for Categorization includes:

- **Category Type**: Public or Private (Displays if the install has Private module enabled) Category Name
- **Subcategory Name**: The Category that the Subcategory belongs to is listed beside each Subcategory Name.
- **Locked**: This column displays an "X" if the Category is locked.
- **# of Owners**: If the Locked column displays an "X" then this column can either show "0" or any number greater than "0". If "0" is displayed then it means that no Category Owner(s) have been assigned to this Category and any events added to this locked Category will automatically go to the Super User Account for processing until at least one Category Owner is assigned. If the number is greater than "0", then it will display as a link that can be selected in order to open a small pop-up window displaying a list of name(s) for the current Category Owner(s) assigned to the locked Category.
- **# of Past Events**: This displays the total number of events that have past for just that category (for Category Name displayed) or displays the number of events that have past for just that Category/Subcategory combination (beside Subcategory name)

- **# of Future Events**: This displays the total number of upcoming events for just that category (for Category Name displayed) or displays the number of upcoming events for just that Category/Subcategory combination (beside Subcategory name)

The top of the list also displays the total number of Categories and Subcategory(s) currently active with your installation of Active Data Calendar

Operations - Locations Statistics Report

The fields included on the Location Report screen include:


View Reports - Locations Statistics Report

# of Locations = 39

Location Name	Building Name	# of Past Events	# of Future Events
No Location	No Building	32	121
Doug's Location		0	0
Doug's Location	Building 1	0	0
Goodman Campus		0	0
Goodman Campus	Annex Building	0	1
Goodman Campus	Goodman Stadium	0	0
Goodman Campus	Stabler Arena	0	1
Goodman Campus	Track Fields	0	0
Goodman Campus	Ulrich Soccer Fields	0	0
Main Campus		4	13
Main Campus	Aquatic Center	0	1
Main Campus	Dining Hall	5	0
Main Campus	Doug's Building	0	0
Main Campus	English Academic Center	3	10
Main Campus	Field House	15	0
Main Campus	Main Academic Center	218	133
Main Campus	Psychology House	2	0
Main Campus	Student Union	158	23
Main Campus	Technology Center	59	95
Monterrey Campus		8	44
Monterrey Campus	Reed Stadium	7	37
North Campus		0	0
North Campus	Aquatic Center	1	0
North Campus	Arts Center	8	0
North Campus	Bookstore	11	5
North Campus	Concert Hall	13	10
North Campus	Dining Hall	20	0
North Campus	Music Center	3	0
North Campus	test	0	0
Off Campus		0	0
Off Campus	Campus Lawn	28	0
Off Campus	Community Center	12	0
Off Campus	Joe's Pub	7	2
Off Campus	Pete's Pub	4	0
South Campus		1	0
South Campus	Dining Hall	1	0
South Campus	Science Center	15	39
South Campus	The Quad	62	28

- **Location Name**: This displays as a link and if selected, takes the user to the Location Details screen.

- **Building Name(s)**: Displays a list of buildings that were entered for a particular Location. Each Building name can be selected to go to the Building Details screen. Buildings that include Room lists will show a link entitled "show rooms". If selected, the screen will list the available rooms within that building. Each room can be selected to go to the Room Details screen.

- **# of Past Events**: This displays the total number of events that have past for just that location (for Location/Building Name displayed or for a particular Room if the list was expanded to show events by Room).

- **# of Future Events**: This displays the total number of events that are scheduled for future dates for just that location (for Location/Building Name displayed or for a particular Room if the list was expanded to show events by Room).

The top of the list also displays the total number of main Locations currently active.

Event Subscribers Report

The default list that is presented when first navigating to this report is the list of all events with active subscribers based off the default search range.

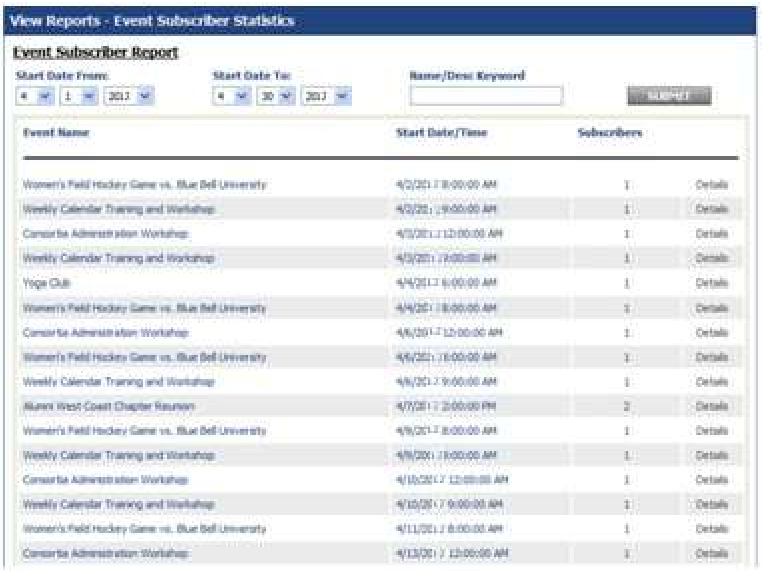
The event subscribers report can be produced by selecting from the following search criteria:

- **Start Date From**: Defaults to the first day of the current month. You can select any date and Calendar will search to find any events that have a start date on or after the date selected.
- **Start Date To**: Defaults to the last day of the current month. You can select any date and Calendar will search to find any events that have a start date based off the "Start Date From" criteria selected, but which also do not have a start date that exceeds the "Start Date To" selected.
- **Event Name/Description Keyword Search**: The keyword search field searches off the event name field to find matching keywords.

To search and find matching events for inclusion in your report, click the SUBMIT button and the bottom portion of the report screen will be updated to reflect your matching events and subscriber information.

Event Subscribers Report Results

Details included within the report table include:



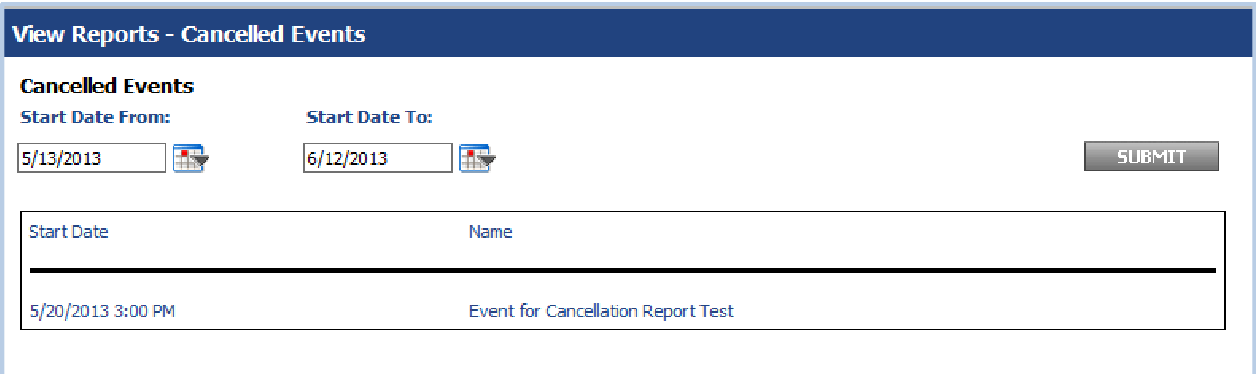
- Event Name: This column includes the event name(s) that match your search criteria.
- Start Date/Time: This column includes the event start date/time for the event name displayed. If the event is part of a series it is possible to have duplicate event names in the event name column, but multiple report line items for each start date/time of each occurrence in the series.
- Subscribers: This column includes the total number of subscribers registered for updates to the event date/time displayed in the report.

To view a list of the actual subscriber information (First Name, Last Name and Email), click on the Details link beside the event line item for which you would like to see a more detailed breakdown of the subscribers.

This report screen also includes totals at the bottom of the screen to show cumulative number of subscribers based off the search results displayed.

Canceled Events Report

As its name implies, this report shows the reports canceled for a ranges of event *start dates* you specify. Here is the page where you both enter the range of dates and receive the report results:



Request the report by entering *from* and *to* dates (or accepting one or both defaults), to be tested against event start dates in your Calendar, and clicking **SUBMIT**.

Event Tracking Statistics Report

The default list that is presented when first navigating to this report is the list of all active events based off the default search range.

The event tracking report can be produced by selecting from the following search criteria:

- Start Date From: Defaults to the first day of the current month. You can select any date and Calendar will search to find any events that have a start date on or after the date selected.
- Start Date To: Defaults to the last day of the current month. You can select any date and Calendar will search to find any events that have a start date based off the "Start Date From" criteria selected, but which also do not have a start date that exceeds the "Start Date To" selected.
- Keyword Search: The keyword search field searches off the event name field to find matching keywords.

To search and find matching events for inclusion in your report, click the SUBMIT button and the bottom portion of the report screen will be updated to reflect your matching events information.

Event Tracking Report Results

Details included within the report table include:

- **Event Name:** This column includes the event name(s) that match your search criteria.

- **Start Date/Time:** This column includes the event start date/time for the event name displayed. If the event is part of a series it is possible to have duplicate event names in the event name column, but multiple report line items for each start date/time of each occurrence in the series.
- **Details View:** This column includes the total number of visits to the details view page for that particular event.
- **Add to My Calendar:** This column includes the total number of visitors who completed the action of downloading the event to their personal calendar.
- **Email a Friend:** This column includes the total number of visitors who completed the action of sending this event to at least one friend.
- **Notify Me:** This column includes the total number of visitors who completed the action of subscribing to receive event updates for this event.
- **Remind Me:** This column includes the total number of visitors who completed the action of signing up for an event reminder for this particular event.

To view a detailed breakdown of the dates and times when each action was performed, click on the Details link beside the event line item for which you would like to see a more detailed breakdown of the event actions.

This report screen also includes totals at the bottom of the screen columns to show cumulative number of actions/views based off the search results displayed.

Page View Statistics Report

The default list that is presented when first navigating to this report includes all views for the current month. The page view(s) report can be produced by selecting from the following search criteria:

- **Report Date From:** Defaults to the first day of the current month. You can select any date and Calendar will search to find any views that occurred between the dates selected.

- **Report Date To:** Defaults to the last day of the current month. You can select any date and Calendar will search to find any views that occurred between the dates selected.

- **Page View (Option):** Select the specific page within Calendar for which you would like to see view statistics. Options include the Grid View, List Views (which is all List Views combined), Event Details (all Event Details combined) and RSS Views.

To search and find matching events for inclusion in your report, click the SUBMIT button and the bottom portion of the report screen will be updated to reflect your results.

Page View Report Results

Details included within the report table include:

- **Date:** This column includes the date of the results. Each day that falls within the date range selected is broken out into an individual line item in this report.

- **Page Name:** This column includes the name of the page within the application selected.

- **Option:** This column includes the name of the page that is viewed by your visitors.

- **Total Hits:** This column includes a total of all view totals for the day.

To view a detailed breakdown of the dates and times when each view was recorded, click on the Details link beside the day line item for which you would like to see a more detailed breakdown of the views.

View Reports - Registrant Summary Report

The report displays the registrant event information based off of selected search criteria.

Registrant(s) Summary Report - Search Criteria

- **First Name**
- **Last Name**
- **Email Address**
- **Company**
- **Search Criteria:** Radio buttons for *All* or *Any* of the search criteria entered

Click FIND to query for registrants, then ADD, ADD ALL or REMOVE any *Matches Found* to the *Registrants Selected* list. After assembling your list of registrants, you can further narrow the search using these fields:

- **Registration Status:** Selectable values include Approved, Denied, Cancelled, and Pending. There is a check box to Select All.
- **Event Date Range**
- **Start Date:** You may either enter in a valid date within the text field provided (mm/dd/yyyy) or you may use the Calendar Date selector to display an interactive Calendar interface to select your start date.
- **End Date:** You may either enter in a valid date within the text field provided (mm/dd/yyyy) or you may use the Calendar Date selector to display an interactive Calendar interface to select your end date.

Results Per Page: Set this to 10, 25, 50, 75, or 100. Controls the number of results shown on each page.

Click GENERATE REPORT after entering all your search criteria.

Registrant Event Summary Details

The top of the report shows the search criteria you entered: *Registrants Selected*, *Registration Status*, and *Event Date Range*.

Columns displayed on the report include:

- Total Pending: Total number of pending registrations
- Total Approved: Total number of approved registrations
- Total Denied: Total number of denied registrations
- Total Cancelled: Total number of cancelled registrations
- Total Registrations: Total number of registrations
- Displaying the number of records returned
- Registration Number: alphanumeric string uniquely identifying the registration
- Registrant Name: Formatted as Last Name, First Name
- Event Name
- Event Start Date/Time
- # of Registrants
- Registrant Status: Approved, Denied, Cancelled, or Pending
- Attended: Yes or No

Click on the (+) link to the left of a Registration Number to see its details, which include:

- First Name: The registrant’s first name
- Last Name: The registrant’s last name
- Email: The registrant's email address that was registered for the event
- Phone: The registrant's phone number that was registered for the event
- Company: The registrant's company that was registered for the event
- Event Name: The name of the event
- Registration Number: The registrant's registration number
- Start Date: Event start date
- Start Time: Event start time
- End Date: Event end date
- End Time: Event end time
- Event Cost: If applicable, the cost of the event
- Total Paid: If applicable, the total this registrant paid for the event
- Total Adjustments: If applicable, the total of adjustments to the cost of the event
- Registered: The date the registrant registered for the event
- Event Location: Where the event is held

View Reports - Registrant Name Tag Report

The report displays the registrant information based off of selected search criteria.

Registrant(s) Name Tag Report - Search Criteria

- From Date
- To Date
- Include Past Events

Click on the SEARCH button to query for events with active registrations. You can then generate a report for one or more events by selecting the checkboxes associated with those events and clicking the SUBMIT button or by clicking the DOWNLOAD FILE link associated with each event. You can configure the report by utilizing the following fields:

- Registrant Status: Selectable values include Approved, Pending or Both. This value will determine whether to print only those registrants that have been approved, only those that are awaiting approval, or all registrants.
- Modified After: You may choose to run a report on registrants added or modified after a specific date. This allows for last minute printings to only account for registrants that have not been processed since the date specified.

Registrant Name Tag Report Details

Columns displayed on the report:

- First Name
- Middle Initial
- Last Name
- Age
- Gender

If no information is provided for a registrant, the following will appear on the report:

Guest of will show as the First Name, and the name of the primary registrant will appear as the Last Name. (For example, Guest of John Smith)

Configure Calendar

Enable & Set Up LDAP/AD

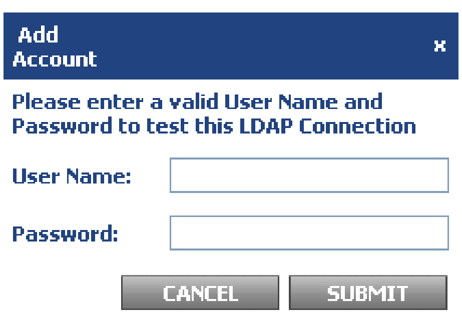
To navigate to the area where LDAP/AD can be enabled, click on the tab entitled CONFIGURATION: ENABLE LDAP. This screen includes the ability to add an LDAP Server Path and run a test to ensure that the path/connection is working to that LDAP Server.

This privilege is only provided to the Super User and cannot be granted by the Super User to any other user.

To begin the LDAP/AD Connection setup process, first click the checkbox to “Enable LDAP/AD for Adding User “Accounts” and additional fields will be displayed for completion.

Use the following fields to complete the setup:

- **Directory Type**: Select either Windows Active Directory or Non-Windows (LDAP)[2].
- **LDAP Server Path**: (255 character limit - alpha-numeric) - This is a required field. Example value: LDAP://ldap.mydomain.com:389/dc=mydomain,dc=com
- **LDAP Filter** (255 character limit - alpha-numeric)- This is a required field. Example value: (&(objectCategory=person)(objectClass=user))
- **LDAP Search Base**: Drop-down menu with three options available for selection (Base, One Level, SubTree)- This is a required field.
- **LDAP Unique Identifier**: (255 character limit - alpha-numeric) - This is a required field. Example value: uid
- **Use Secure Sockets (SSL)**: Drop-down menu with two options available for selection (No, Yes)- This is a required field.



Once you have added the LDAP information, click the SUBMIT button. to launch a window on the right side of the screen where you will be prompted to enter a username and password to test the LDAP connection.

- **Username** (255 character limit - alpha-numeric) - This is a required field.
- **Password** (255 character limit - alpha-numeric) - This is a required field.

***NOTE**: The username and password supplied can be any valid, active LDAP/Active Directory username and password.

[2] Products that have successfully connected with Active Data Calendar include Sun ONE, Planet LDAP, and ATOM. Please note that ADE does not *certify* any particular LDAP solution. On a time-and-materials basis, ADE's Professional Services group will work with a client to implement an LDAP solution.

Buttons available from the Test LDAP Connection Window

SUBMIT: Can be clicked to submit your test account information and be returned to the main screen for Enable & Setup LDAP where you will be presented with a confirmation message of the success or failure of your test.

CANCEL: Cancels the LDAP test.

Once you have submitted your test information the software will run a test of the information entered regarding the LDAP connection and display a message indicating whether or not the test was successful.

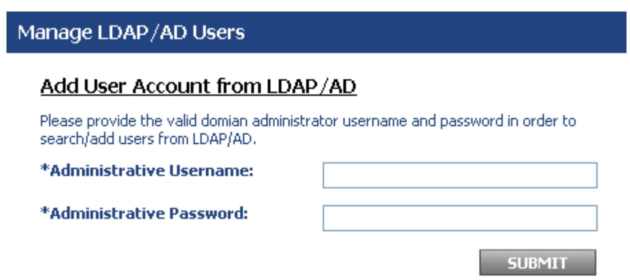
If the test was successful, click the “FINISH” button on the “Enable LDAP/AD” screen to save the LDAP information and finalize the addition of the connection. If your test was unsuccessful, modify the LDAP Connection information and re-run the account test.

***NOTE**: If the checkbox for "Enable LDAP/AD" is deselected at any time (after a connection has already been successfully finalized/saved), then any existing account information that has been imported up to that action will be maintained “as is” in the Calendar database. If usernames, passwords, email addresses, etc. are changed, re-enabling LDAP in the future may cause these accounts to be unusable. For this reason, enabling and disabling LDAP repeatedly is not suggested.

As soon as the “Enable LDAP/AD” checkbox is deselected, then the standard “User” navigation buttons are re-enabled and standard user functions can be used from within the system.

Manage LDAP/AD Users

This function is used to add new accounts into Active Data Calendar from your LDAP/AD service. Once enabled, this area can be found under the tab entitled WORKFLOW. Organizations choosing to use LDAP/AD for adding and authenticating users will have the MANAGE LDAP/AD Users screen replace the standard USERS: ADD area.

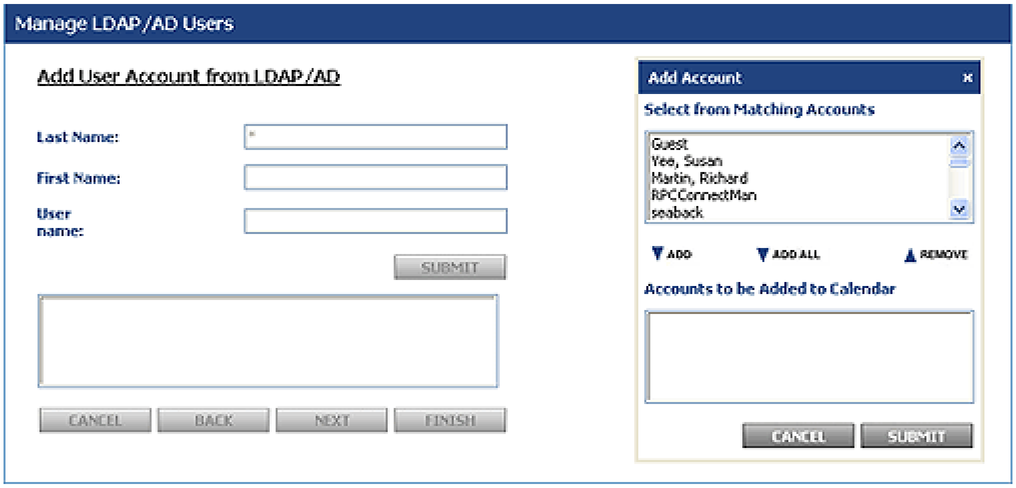


First you must provide the valid domain administrator username and password (both fields are required and allow for up to 255 alpha-numeric characters to be entered) in order to search/add users from LDAP/AD. Once you have entered the domain administrator information, click the SUBMIT button to validate the domain administrator information. Once validated, you will be presented with search fields for performing a look-up on the user accounts within your LDAP/AD Directory.

Use the following fields to search for valid LDAP/AD user accounts to add to Active Data Calendar:

- **Last Name** (50 character limit - alpha-numeric)
- **First Name** (50 character limit - alpha-numeric)
- **Username** (50 character limit - alpha-numeric)

***NOTE**: You can use any combination of the search fields in order to find an active LDAP/AD account, but it is required that you populate at least one of the fields in order to perform a valid search.



Click on the SEARCH button to launch the window on the right side of your screen which will display the results of your search.

Add Account Window

The top portion of this window will include a list box with all of the user accounts from your LDAP/AD that match your search criteria.

Select from Matching Accounts List Box: Matching account results are sorted with those accounts which do not have data populated in LDAP for Last Name and/or First Name displaying at the top of the list box in alphabetical ascending order by their Username. All other matching accounts will display as Last Name, First Name in alphabetical, ascending order using the Last Name for sorting.

Accounts to be Added to Calendar: Accounts in this box have been selected to be added to Calendar. You must still click the SUBMIT button on this window in order to add the new accounts to your full list of user accounts and then "FINISH" the add process from the main "Manage LDAP/AD Users" screen.

Buttons available from the Add Account Window

- **SUBMIT**: Can be clicked to submit your user account selections and return to the main screen for Manage LDAP/AD Users. The new user accounts that you have selected to add will be populated within the list box entitled "List of Accounts to be Added to Calendar" on the main screen.
- **CANCEL**: Can be clicked to cancel out of the window and be returned to the main screen for Manage LDAP/AD Users without saving any selections made from within the window.

***NOTE**: You can perform multiple searches and keep adding the new user accounts into the list box on the main screen, until you have completed selecting all the new accounts that you would like to add from LDAP/AD.

To finalize the action of adding users from LDAP to Active Data Calendar, click the “FINISH” button. Any user account that was displayed within the “Accounts to be Added to Calendar” list box from the main “Manage LDAP/AD Users” screen will then be added to the Calendar database.

When you click the FINISH button you will be prompted to enter in default permissions for this new user account or user accounts that you have elected to add from your LDAP/AD. You may select from the following options for assigning department permissions to the new Calendar user account(s):

- Add Users to this Department: Drop-down selection box for choosing a single department. (Additional departments and permissions can be selected in the Modify User Account area.)
- Department Role: User or Admin
- Account Status: Active or Inactive

Alternatively, you may click CANCEL and instead assign department permissions and other privileges from within the Modify User Account area of the administration menu. New user accounts are automatically added as "inactive" users and they are not added to any departments or with any privileges. Privileges and permissions information must be added and managed through the Modify User area of the product.

IMPORTANT TO NOTE FOR CLIENTS WITH LDAP/AD CONNECTIONS ENABLED

The only user details that can be modified on this screen include:

- **First Name**: If the account that was imported from LDAP does not have a First Name specified from within LDAP/AD then this field will be enabled for data entry. Otherwise this field will not be displayed. You will be required to enter in a First Name for the new account before proceeding forward in the Modify User Wizard.
- **Last Name**: If the account that was imported from LDAP does not have a Last Name specified from within LDAP/AD then this field will be enabled for data entry. Otherwise this field will not be displayed. You will be required to enter in a Last Name for the new account before proceeding forward in the Modify User Wizard.
- **Active**: This field determines if the account is active (Yes) or inactive (No) and is automatically defaulted to (No) for user accounts imported from LDAP. You must select (Yes) to enable the account so that they can begin to login to the Calendar product.

NOTE: Active Data Calendar includes options to use your Active Directory system to authenticate users directly into the system for a *Single Sign On* experience. This is available for PKI / Smart Cards as well. The system will validate against AD for the SSO process and if you are a valid and active system user you will be allowed in without interruption. There is also a new process by which AD groups can be specified and synched to the Calendar; anyone in a "sync group" will automatically be added and a report will be displayed of any user NOT in the group that is still in the Calendar. It also demarks whether there are events associated with that person. There is also an ability to all transfer events between users so that you can activate and deactivate accordingly.

SSO Module Details

- The SSO module takes the user signed in to the computer (from AD) and passes it through to the calendar.
- IF the logged in (to the machine person) matches an ACTIVE user in calendar, they are passed through with no interruption of flow.
- If the logged in user is not found in calendar or they are NOT active in calendar, the user is prompted for a calendar login.
- If (as is the case here) all users are authenticated in calendar, and someone needs to login as the super user, they can click the logout link, which will then prompt them for login credentials for the duration of the session (or until a successful calendar login occurs).

Group Synching

- User group synching is independent of the ability to use SSO.
- This allows the admin to specify a group to synch with.
- If there are members in the group that do not exist in calendar, they are added as active (if license space allows) or inactive (if not).
- If there are users in calendar that are not in the group, they are reported on, as is a count of events associated with them (if any).

For more information on this process or activating it, please contact Active Data Calendar Product Support at support@activedatax.com or 610-997-8100.

Setup Calendar

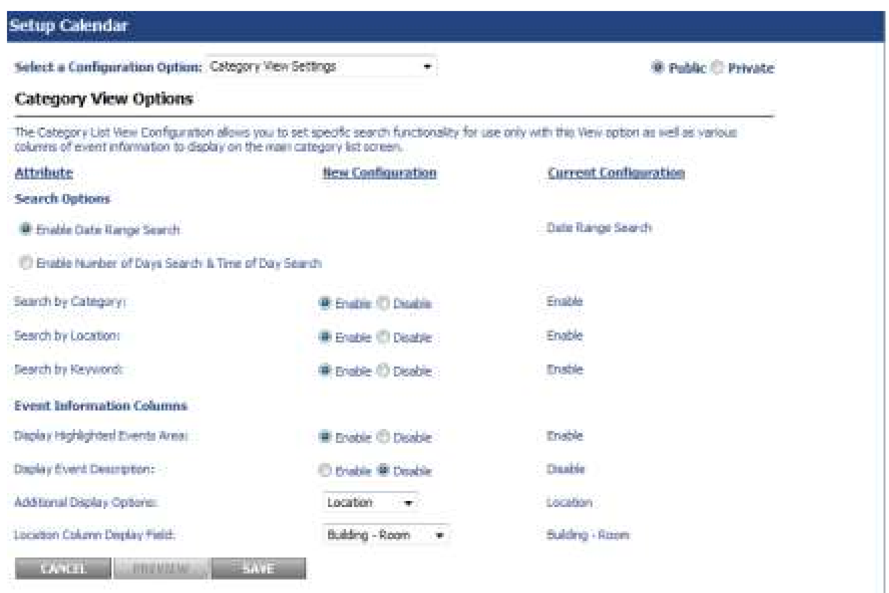
Calendar Title
The Calendar Title controls how the Category/Calendar Title is displayed at the top of the calendar in all View formats. The Calendar Title can include "All Categories", "Multiple Categories" or an individual Category/Subcategory name depending on what search options have been performed or what link was used to navigate to the Calendar. In the Date/Time View, Category View, Location View and Summary View, the color entered below is also applied to the small grid title.

Choose from the following configuration options:

- **Font Size**: Select from the drop down menu provided. Options include 0.5em - 3.4em.
- **Font Color**: Insert standard 6 digit/character hexadecimal color.
- **Font Weight**: Select from Bold or Normal using the radio buttons provided.

Once you complete your selections you can preview your Current Configuration by clicking on PREVIEW, click SAVE to save the settings or click CANCEL to cancel out of the configuration area to abandon your changes.

Category View Configuration
The Category View Configuration allows you to set specific search functionality and specific columns of event information for use only on the Category View.



Search Options

- **Enable Date Range Search or Enable Number of Days Search & Time of Day Search**: Select from these two radio buttons to include either an exact date range search option (Start Date From and Start Day To) or include Range of Days and Range of Time drop-down options.

- **Search by Category**: Choose to enable or disable the category search drop-down selection box on the Category List view.
- **Search by Location**: Choose to enable or disable the location search option (configured as either Location Drop-down or Location: City, State, ZIP, County) to display or not in this view.
- **Search by Keyword**: Choose to enable or disable the keyword search field on the Category List view.

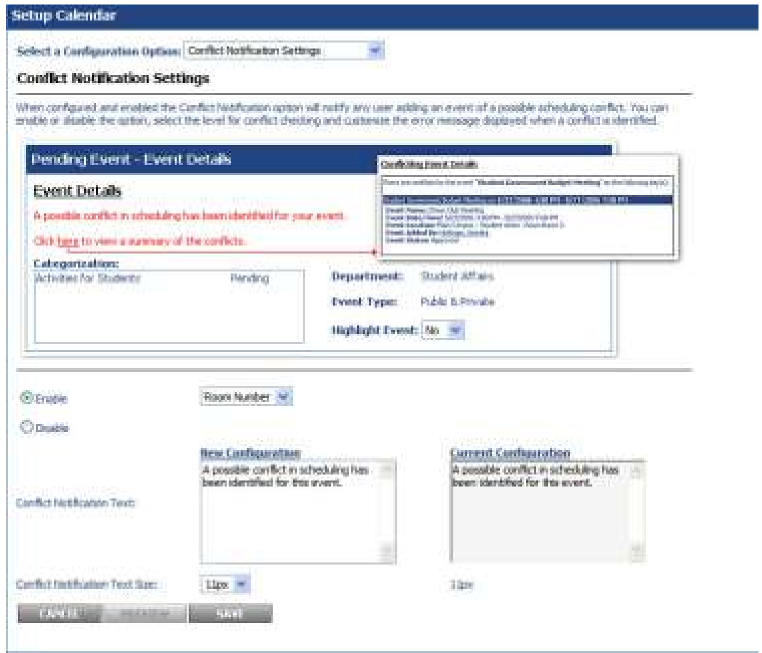
Event Information Columns

- **Display Highlighted Events Area**: If enabled, the highlighted events area will display at the top of your Category event list.
- **Display Event Description**: If enabled, the event description will display in the Category event list column entitled "Event Details" beneath the Event Name which displays in this column as a default.
- **Additional Display Options**: The default selection is "Select". If maintained, then the third column of information regarding events listed will not display. Other selection options include: Registration, Location or one of the custom fields set in "Custom Event Administration Settings." If "Location" is selected, then the Location details will display in the far right third column of the display screen. If "Registration" is selected, then the number of Registration spaces remaining for each event will display in the far right third column of the display screen. If a custom field is selected its values will show in the third column of this view.
- **Location Column Display Field**: If you select to enable the location column, then you will need to select from the drop-down entitled "Location Fields" what location information you would like to display in the column. Options include: Location Name, Building Name, Room Name, Location Name and Building Name or Building Name and Room Name.
-

All current configurations will appear in text to the right. Once you complete your selections, click SAVE to save the settings or click CANCEL to cancel out of the configuration area and you will be navigated to the Main Menu.

Conflict Notifications

Conflict Notifications help to better manage event data and alert users of possible event scheduling conflicts. Conflict Notification(s) will be displayed based off the setting that has been selected by the Super User or Administrator with the privilege to configure the Calendar. Conflict notifications may display if two or more events have been scheduled at the same Location, Building or Room on the same Date and Time.



Enable
When you enable Conflict Notifications, you are required to make additional configuration selections to determine the level at which a conflict will be identified.

- **Location:** If location is selected as the level for conflict checking, then a warning notification will be displayed for any event that conflicts with the event being entered based off the criteria of Date/Time and Location. The possible conflicting events and notification information will be available to view by selecting a link displayed at the top of the preview/finalize event screen.

- **Building:** If building is selected as the level for conflict checking, then a warning notification will be displayed for any event that conflicts with the event being entered based off the criteria of Date/Time and Location - Building. The possible conflicting events and notification information will be available to view by selecting a link displayed at the top of the preview/finalize event screen.

- **Room Number:** If Room Number is selected as the level for conflict checking, then a warning notification will be displayed for any event that conflicts with the event being entered based off the criteria of Date/Time and Location – Building – Room Number. The possible conflicting events and notification information will be available to view by selecting a link displayed at the top of the preview/finalize event screen.

Disable (Default)
If disable is selected, then Conflict Notifications will be turned off.

Conflict Notification Custom Error Field
Here you are able to create a custom conflict notification message that will display on the preview/finalize event screen if there is a conflict. You can also choose to set the conflict notification warning message font size. If you choose to create a custom notification it will override the default message.

All current configurations will appear in text to the right. Also a preview of the current configuration will display. Once you complete your selections, click SAVE to save the settings or click CANCEL to abandon your changes.

Custom Admin Text Configuration

Configurable custom admin text includes the ability to customize the text that is presented to users on the Calendar administration area login screen. You may enter HTML tags within your content for additional linking and formatting options. This field allows up to 5,000 characters.

See the screen shots below for where the custom admin text appears on the login screen to the Active Data Calendar administration area.

The current configuration will appear in the fields on the right for reference. Once you have completed any modifications to your selections, click **SAVE** to apply your new configuration. To **CANCEL** out of this area, click the **CANCEL** button.

Custom Event Administration Information

Custom Event Administration Information allows you to customize up to four default event management fields in order to gather and display event information that is important to your particular organization. There are four default fields included in every event entry wizard including: Admission Information, Other Information, Ticket Order URL and Remarks. All four of these fields are standard text fields that hold a maximum of 500 characters in each field. You can choose to customize any or all of these four fields to be a custom field name, field type and field selection options.

All fields automatically show as selected (checkbox is marked). You can either deselect the checkbox beside of "Enable Custom Field 1" and the field will not show up at all within the event management area, or you can choose to keep the checkbox marked and select a customized field option from the drop-down provided under each checkbox.

External Fields

These fields are available on the last screen of the Add, Modify and Reschedule Event wizards. They enable your organization to gather additional details about an event, of the type that you require. The information entered in these external fields display on the *Event Details* pages of the Public and Private Calendar views.

- **Textbox**: Select this option to provide the event creator with a place to enter textual information. Name the field and select whether it is required.
- **Dropdown**: Select this option to provide the event creator with a list of options in a drop-down list format. Name the list and select whether it should be required or optional. Complete the field by entering

a line of text for entry in the list. *NOTE: The selections are displayed to your users in the order that you enter them.

- **Checkbox**: Select this option to provide the event creator with a list of items to select, each with its own check box. Enter a name for this list, and select whether it is required or optional. Complete the field by entering a line of text for entry in the list. *NOTE: The selections are displayed to users in the order that you enter them.
- **Maximum Attachment Size**: You can also set the maximize size for any attachment added to an event for display on the front-end of Calendar. The default size for each event attachment is 5 MB.
- **# of Event Attachments**: Enter in a number to specify the maximum number of attachments that each user can add to any single event occurrence. This number cannot exceed 50 attachments per event occurrence. The default is 3.

Internal Fields

These fields will be available on the last screen of the Add, Modify and Reschedule Event wizards and will allow your organization to gather additional details about an event based off the type of fields and data that you require. The information entered about an event in these internal only fields will NOT display on any front-end Calendar views (Public or Private or Event Details) and will only display within the Calendar administration area for management purposes.

Under the Internal Fields area there will be no default fields displayed. There will be four additional checkboxes that are each labeled: Enable Internal Custom Field 1, 2, 3 and 4, respectively.

If any one of the Internal Custom Fields is selected to be enabled (by clicking the checkbox), then you will be prompted to select the field type from a drop-down menu and then make other selections based off the field type chosen.

Options for Field Types include:

- Checkboxes
- Comma Separated Text Field
- Drop-down
- Text Field

Once a field type is selected, the options vary depending on which field type was selected:

- **Checkboxes**: If selected, you will be prompted to enter in the checkboxes field name (maximum 100 characters, alpha-numeric) and select if it should be a required field or optional field for selection when events are being added, modified and rescheduled in the Calendar.
  Checkbox Selection Options: A text area displays where you may type the specific checkbox selection options. Each option should be entered on a new line. There is no limit to the number of options or the number of characters per option. Checkbox selection options are best utilized when you want to provide a list of options to choose from, and allow the user to select one or more choices from the list of checkbox options.
- **Comma Separated Text Field**: If selected you will be prompted to enter in the text field name (maximum 100 characters, alpha-numeric) and select if it should be a required field or optional field for data entry when events are being added, modified and rescheduled in the Calendar. A comma separated text field allows users completing the field to enter in a string of data, separated by commas to separate the unique values.
  Other options that can be configured for a comma separated text field includes:

  - **Max Characters**: A max character amount must be entered to complete the field addition and the field should allow for only numeric values and account for up a maximum of 5 numeric characters to be entered (cannot exceed 99999 - i.e. 99,999)
  - **Field Data Type**: Options in the drop-down for selection include Alpha, Alpha-numeric and Numeric. Select is the default but a selection must be chosen to complete the field setup.
- **Drop-down Field**: If selected, you will be prompted to enter in the drop-down field name (maximum 100 characters, alpha-numeric) and select if it should be a required field or optional field when events are being added, modified and rescheduled in the Calendar. A drop-down selection option is best utilized when you want to provide a list of options to choose from, but only allow the user to select one from the drop-down choices.

  Drop-down Selection Options: A text area displays where you may type the specific drop-down selection options. Each option should be entered on a new line. There is no limit to the number of options or the number of characters per option.
- **Text Field**: If selected you will be prompted to enter in the text field name (maximum 100 characters, alpha- numeric) and select if it should be a required field or optional field for data entry when events are being added, modified and rescheduled in the Calendar.

  Other options that can be configured for a text field includes:
  - **Max Characters**: A max character amount must be entered to complete the field addition and the field should allow for only numeric values and account for up a maximum of 5 numeric characters to be entered (cannot exceed 99999 - i.e. 99,999).
  - **Field Data Type**: Options in the drop-down for selection include Alpha, Alpha-numeric and Numeric. Select is the default but a selection must be chosen to complete the field setup.

Other Options for Selecting Custom Event Administration Information

- **Maximum Attachment Size**: Select from a drop-down if you would like to change the maximum size of each attachment that may be uploaded for an event from the default 5 Mb size to any maximum size between .25 Mb and 50 Mb.
- **# of Event Attachments**: The default number of attachments that may be uploaded per event is 3. However, this field allows your organization to set any maximum number of attachments needed for each event. This is an install wide setting and therefore any number entered in this field will become the maximum number of attachments that can be uploaded for any single event occurrence. If the field is left blank, then no attachments may be uploaded for any event, even if the "Upload Images and Attachments" privilege has been granted to a user.

All current configurations will appear on the right under the column "Current Configuration". Once you have completed your selections, click SAVE to save the settings or click CANCEL to cancel out of the configuration area and you will be navigated to the Main Menu.

Custom Text Configuration

The Custom Text Configuration option allows you to configure how most of the front end of your calendar is displayed. It allows for updating Text, buttons, colors, and other display options. This is a separate module available from Active Data Calendar. If you already have this module, please access your Client Portal Page to obtain the User Guide for utilizing the pieces of this module. If you do not have this module but are interested in further information, please contact your Account Executive or call 610-997-8100 for more details.

Custom Graphics Settings

From this screen the Calendar can be configured to match existing website designs seamlessly by incorporating your existing website Headers and Footers. Simply browse and upload the Header and Footer HTML files that you would like to display on the Calendar front end for both the Public and Private Calendar Views. Anytime custom Headers and Footers are not identified the Calendar will use the default Active Data Exchange Headers and Footers.

***NOTE**: Calendar header and footer files that are uploaded must be HTML files (.htm and .html) in file format. You cannot upload .gif, .jpg or any other file type for your header/footers.

TABLE ATTRIBUTES

Table attributes specified in the header will affect the entire page. When uploading headers and footers through the Install Package for display on the Public and/or Private Calendar Front-End it is important to be aware of the width of these components. Web page width can be determined in two ways, pixel width (ex. 800) and percentage (ex. 100%). The differences between these two methods can greatly impact the visual appearance of your calendar configuration, however most clients follow the same look as their site to maintain uniform look and feel.

Fixed and Percentage Page Width

Fixed page width guarantees that the maximum width of the content will not exceed the specified number, for example 800 pixels. A percentage page width will "auto-expand" as the browser width is adjusted. As a result the content will resize itself as the browser width increases and decreases. It is also recommended that 768 pixels be the minimum page width when working in a fixed width format. There are no size restrictions on the Calendar Header height, but you will want to take into consideration how the header size affects the overall view/presentation of your Calendar information and search options.

INSTALLATION METHOD

The table that contains the Calendar content begins in the header and ends in the footer. This means that all Active Data Calendar content in between these two points in the code conforms to table attributes width, alignment, and padding, etc. To do this open a new table row and cell <tr><td> directly after the header content ends. The Calendar content will live here. To complete the process the footer content begins with an end table cell and row </td></tr> to close the cell and row. Essentially the Calendar content is now nested between the header and footer.

All links to external objects (ex. images, javascript, links, etc.) must be absolute. Ex. http://www.yoursite.com/images/header.jpg.

General System Design Attributes

- General Font Color: The General Font Color is the configurable color for the font that is utilized throughout most of the Calendar text. Change the font color by updating the field with the chosen color in hexadecimal format.
- Transparent Images: The background of the following images can be made transparent: Previous, Next and "Select a week" images. The images are utilized on the Public and Private Views. Select Enable or Disable to turn this feature on or off.

Details View Font & Background

- Field Label Font Color: The Field Label Font Color is the configurable color of the font that is utilized in the Event Details. Change the font color by updating the field with the chosen color in hexadecimal format.

- Details View Background Color: The Details View Background Color is the configurable color of the background utilized in the Event Details. Change the background color by updating the field with the chosen color in hexadecimal format.

Custom CSS

It is now possible to supply customized CSS styling for the calendar front end views directly in the application. CSS information can now be entered into the Custom CSS edit box for both the public and private calendars. Styling information entered here will render in the head tag of the page after the calendar.css or calendarprivate.css renders. NOTE: text entered into this field should omit the opening and closing style tags in favor of the actual css text.

As of release 3.14, all front end view, details and registration pages include the Custom CSS information along with any CSS styles listed in the header file. Also, two new classes have been added to Marketing Open Entry forms, called "table600" and "width50pct" for width changes to allow for increased flexibility with responsive design headers and footers.

After making your selections, you can preview your current calendar configuration by clicking on **PREVIEW**. Click **SAVE**, to save the settings or click **CANCEL** to cancel out of the configuration area and you will be navigated to the Main Menu.

Custom View Text Configuration

The configurable custom text includes the text that appears between your organization's header and the events on all pages throughout the calendar. The font text style and text size may also be adjusted by selecting the desired style and size from the drop-down menus provided.

- Font Style for all Calendar Views: Select your desired font style from the drop-down menu. Options include: Arial, Courier New, Impact, Times New Roman, Verdana and Tahoma. The font style selected here will be applied to all text on your front-end Calendar view screens.
- Custom Calendar Text: The custom calendar text field allows you to enter HTML tags within your content for additional linking and formatting options. This field allows for up to 1,000 alpha- numeric characters to be entered.
- Custom Calendar Text Size: Select from the drop down menu provided. Options include 0.5em - 3.4em.

TIP: The text that is entered for the Custom View Text Configuration will appear at the top of every view screen. This is a great please to welcome visitors to your Calendar as well as remind them of valuable information on the options you have chosen to enable or the process for how they can submit events to your Calendar.

The current configuration, if already implemented, will appear in the fields on the right under current configuration for reference. Once complete with modifications and selections, click SAVE to apply your configurations.

Date/Time View Configuration

The Date/Time View Configuration allows you to set specific search functionality and specific columns of event information for use only on the Date/Time View.

Search Options

- **Enable Date Range Search or Enable Number of Days Search & Time of Day Search**: Select from these two radio buttons to include either an exact date range search option (Start Date From and Start Day To) or include Range of Days and Range of Time drop-down options.
- **Search by Categ**ory: Choose to enable or disable the category search drop-down selection box on the Date/Time List view.
- **Search by Location**: Choose to enable or disable the location search drop-down selection box on the Date/Time List view.
- **Search by Keyword**: Choose to enable or disable the keyword search field on the Date/Time List view.

Event Information Columns

- **Display Highlighted Events Area**: If enabled, the highlighted events area will display at the top of your Date/Time event list.
- **Display Event Description**: If enabled, the event description will display in the Date/Time event list column entitled "Event Details" beneath the Event Name which displays in this column as a default.
- **Additional Display Options**: The default selection is "Select". If maintained, then the third column of information regarding events listed will not display. Other selection options include: Registration, Location or one of the custom fields set in “Custom Event Administration Settings.” If "Location" is selected, then the Location details will display in the far right third column of the display screen. If "Registration" is selected, then the number of Registration spaces remaining for each event will display in the far right third column of the display screen. If a custom field is selected its values will show in the third column of this view.
- **Location Column Display Field**: If you select to enable the location column, then you will need to select from the drop-down entitled "Location Fields" what location information you would like to display in the column. Options include: Location Name, Building Name, Room Name, Location Name and Building Name or Building Name and Room Name.

All current configurations will appear in text to the right. Once you complete your selections, click SAVE to save the settings or click CANCEL to cancel out of the configuration area and you will be navigated to the Main Menu.

Display Options

From this screen you can configure the icons/graphics that display on the front-end calendar view screens.

Event Details View

- **Remind Me:** Choose to enable or disable this feature from the front end Event Details Screen for visitors to your Calendar. You may also choose to enable only SMS Text Message Reminders, Email Reminders or Both. The Remind Me feature allows visitors to your Calendar to sign-up for email or text message reminders regarding their selected event.
- **Notify Me:** Choose to enable or disable this feature from the front end Event Details Screen for visitors to your Calendar. The Notify Me feature allows visitors to your Calendar to sign-up for email or text message notifications about any changes to a particular event.
- **Add to My Calendar:** Choose to enable or disable this feature from the front end Event Details Screen for visitors to your Calendar. The Add to My Calendar feature allows visitors to your Calendar to download an iCal or vCal file to their personal Calendar. Visitors can also elect to send a personal meeting request by entering in the desired email address where they would like the meeting request file to be sent.
- **Email a Friend:** Choose to enable or disable this feature from the front end Event Details Screen for visitors to your Calendar. The Email a Friend feature allows visitors to your Calendar to enter multiple email addresses, separated by commas in order to e-mail the details about a particular event to their friends. You can also choose to text message a friend about the event as well as by email.
- **Registration Icon:** Choose from the drop-down list of available registration icons. Each icon can be previewed prior to selecting to "SAVE" the final selection.
- **View Map Website:** Choose the map website tool to enable for providing "View Map" functionality when visitors are viewing event details on the Public (and Private) Calendar. Options include: MapQuest, Bing Maps (Microsoft), and Google Maps.

List View(s)/Grid View

- **Subscribe**: Choose to enable or disable this feature from the front end Event Details Screen for visitors to your Calendar. The Subscribe feature allows visitors to your Calendar to sign-up their email or cell phone to receive updates on any new or modified event within selected Category(s) and Subcategory(s). If the Subscribe icon is selected, the Calendar will create a custom subscription that is based off the currently selected Category(s)/Subcategory(s) in the visitor's active View screen.
- **Download:** Choose to enable or disable this feature from the front end Event Details Screen for visitors to your Calendar. The Download feature allows visitors to your Calendar to download events in a CSV, iCal or XML file format from your front-end Calendar view screens. If selected from a View screen, the Calendar will automatically create a downloadable file that includes all events currently being viewed by the visitor.
- **RSS:** Choose to enable or disable this feature from the front end Event Details Screen for visitors to your Calendar. The RSS feature allows visitors to your Calendar to create a customized RSS feed that is based off the search criteria currently active in their View screen.
- **Printer Friendly Icon:** Choose to enable or disable this from all front end Calendar View Screens.
- **Federal Holidays**: Choose to enable or disable National Federal Holidays for display on the Calendar Grid and Date/List views.
- **Submit Events Link:** Enable or disable this link from displaying on the front end Calendar View Screens. The Submit Events Link is the link that appears in the upper right corner of your Calendar View screens that can be selected by your users/visitors to navigate to the Calendar administration login screen.

- **Submit Events Link to a Different URL:** Enter a URL in this field in order to have the "Submit Events" link go to a different URL that you select, opposed to taking visitors to the Calendar Administration area login screen.
- **Submit Link Text Configuration:** If enabled, you can type in custom text to overwrite the current Submit link on the Calendar Grid and View screens.
- **Submit Link Image Configuration:** If enabled you can browse and upload a custom image to overwrite the current Submit link on the Calendar Grid and View screens. At any point the custom image can be removed by clicking on the Remove Custom Submit Image link under the image text field and this will reset the default link on the Calendar grid and view screens.
- **"Calendar Views" Selectable:** If enabled, your visitors will be able to select between five views for their Calendar (Grid, Date/Time View, Category View, Location View and Summary View). If disabled, your visitors will not see this option and the only display will be the default calendar view. There are also radio button selections where you can enable or disable individual views from being available for selection on the front-end View screens.
- **Select Date Display Search Range Type:** Options include Year Offset (default) and Date Range. The default Year Offset is 5 years in the past of the current date/year and 10 years in the future from the current date/year. Choose to either maintain the default year offset selections or select alternate years in the past or future for the date display range. If Date Range is selected, then you will be required to select a specific date range start date and date range end date and the dates will not adjust as an automatic offset. You may either enter in a valid date within the text field provided (mm/dd/yyyy) or you may use the Calendar Date selector to display an interactive Calendar interface to select your start date.
- **Location Search Options:** Choose the structure of how your locations will be displayed for searching of events on the front-end View screens. Options include: Location Drop-down and City, State, ZIP and County search options. The default selection is Location Drop-down.
  - **Location Drop-down Options:** If you selected *Location Drop-down* in *Location Search Options*, this drop-down presents the options: Location, Building, Room, Location - Building, Building - Room or Location - Building - Room.
  - **Include Location Proximity Option:** This option only displays if "City, State, ZIP and County" search option was selected from "Location Search Options" drop-down. Options include:
    - Enable (this is the default selection option) and if maintained, then the field on the front-end for
    - "Miles willing to travel" will display and allow for proximity searching based off ZIP code entered
    - Disable - proximity searching will not be available to Calendar visitors.
  - **Proximity Field Label Text:** If "enable" is selected for the "Include Location Proximity Option", then an open text field (allowing for up to 30 alpha-numeric characters) displays so that you can enter in the desired field label for the drop-down box that will display on the front-end of the Calendar allowing visitors to choose their desired radius for proximity searching. The default field label will display: "Miles willing to travel" but may be edited.
  - **Proximity Search Default:** Proximity search options are available in 5 mile increments starting at 5 miles and going up to 50 miles in radius options. Users can set their desired radius default using this drop-down provided. The default will be "Select". If a user does not choose a value and maintains the "Select" option, then there is no default radius on the front-end and the default on the front-end will display as "Select".
- **Default Calendar View:** This is the view format that visitors see as the default when they navigate to your Calendar main page. Choose between Grid, Date/Time, Category, Location and Summary View formats.

- **Default Display Range:** Options include the next 7 days, next 14 days, current month, 30 days, 60 days, 90 Days and 365 days.
- **Enable Event Quick Tips for all Views:** If selected, when visitors mouse over any event name within a Calendar front-end View screen, a pop-up event quick tip will display with a synopsis of the event details screen. From this event quick tip area, the visitor can click to go to the Event Details or take other actions that you have enabled such as email a friend, download to their personal calendar, etc.

All current configurations will appear in text to the right. Once you complete your selections, click SAVE to save the settings or click CANCEL to abandon your changes.

Email Options

Email configuration allows you to create settings related to emails sent through the *Email a Friend* area as well as text and links that are included in the emails sent to your Calendar visitors and users.

Email Options includes

- **Emails Sent per Calendar Session:** This field allows you to set the maximum number of emails sent from the Email a Friend option.
- **Email Notification Attachments:** Select to Enable or Disable the ability for users with the "Send Notifications" privilege to be able to upload attachments to emails sent through that area of the Calendar.
- **Maximum Notification Attachment Size:** The default maximum attachment size for any attachment that is uploaded to an Event Email Notification is 50 KB. Selecting the checkbox and then changing the drop-down to a different selection will change the maximum size allowed for sending event email notices.
- **Enable Active Data Links in Event Emails:** This option allows you to disable the Active Data Exchange information and links that are automatically included in all event emails as a default setting.
- **Enable Event Workflow Emails:** As a default all event workflow emails are turned on for each install. If you would like to permanently or temporarily disable event workflow notifications to all users, select disable from this configuration setting.

All current configurations will appear in text to the right. Once you complete your selections, click SAVE to save the settings or click CANCEL to abandon your changes.

Gantt Configuration

The Gantt Configuration controls attributes for the days of the week (Mon,Tue,Wed,Thu,Fri,Sat,Sun) displayed on the display of the gantt view. This includes text in the block, the day header, the day number, and the block color. The font color and size is only applied to the calendar grid blocks. An administrator can select any of the following to configure:

Gantt View Configuration:

Day Heading Font Color: Insert a standard 6 digit/character Hexadecimal color.
Day Heading Font Weight: Select from Bold or Normal using the radio buttons provided.
Day Heading Font Size: Insert a standard 6 digit/character Hexadecimal color.
Day Heading Block Color: Insert a standard 6 digit/character Hexadecimal color.
Day Number Font Color: Select from the drop down menu provided. Options include 0.5em - 3.4em.
Day Number Block Color: Insert a standard 6 digit/character Hexadecimal color.
Block Font Size: Select from the drop down menu provided. Options include 0.5em - 3.4em.

Gantt Search / Display Options:

Number of Events Per Gantt Block: Enter a number in the text field provided or select the checkbox for "All". This will determine how many total events are listed in each grid block day by default.

Search Options:

Enable Date Range Search or Enable Number of Days Search & Time of Day Search: Select from these two radio buttons to include either an exact date range search option (Start Date From and Start Day To) or include Range of Days and Range of Time drop-down options.

Search by Category: Choose to enable or disable the category search drop-down selection box on the Gantt view.

Search by Location: Choose to enable or disable the location search drop-down selection box on the Gantt view.

Search by Keyword: Choose to enable or disable the keyword search field on the Gantt view.

All current configurations will appear in text to the right. Once you complete your selections, click SAVE to save the settings or click CANCEL to cancel out of the configuration area and you will be navigated to the main menu.

General System Settings

International Options

International Phone & Address Options: Any user who can configure Calendar can enable or disable the use of International field options for phone and address information throughout the Calendar install. This option, when enabled, changes various location address fields and phone fields to use the International character limits and field names.

- **Location Information**: Address 1, Address 2, City, State/Province/Prefecture, ZIP/Postal Code, Country, Phone (supports country code, area code, phone number and extension if applicable), Fax (supports country code, area code and fax number)
- **Department Information**: Address 1, Address 2, City, State/Province/Prefecture, ZIP/Postal Code, Country, Phone (supports country code, area code, phone number [and extension if applicable), Fax (supports country code, area code and fax number)
- **Registration Standard Form Fields**: Address 1, Address 2, City, State/Province/Prefecture, ZIP/Postal Code, Country, Phone (supports country code, area code, phone number [and extension if applicable), Fax (supports country code, area code and fax number)
- **Event Contact: Phone** (supports country code, area code, phone number and extension if applicable)

Error Messages

The Error Messages controls the font size and font color of all the error messages that may be displayed in the calendar.

- **Font Size**: Select from the drop down menu provided. Options include 0.5em - 3.4em.
- **Font Color**: Insert standard 6 digit/character hexadecimal color.

Other Systemwide Settings

- **Allow Remote Service**: This option, when enabled, allows Active Data Exchange technical support representatives to examine and edit files in the calendar directory. It also allows remote testing of email options, database connectivity, and calendar properties settings.

***Note**: For security reasons, this feature is disabled by default. It should not be enabled unless directed to do so by a technical support representative from Active Data Exchange.

- **Marketing Main Menu Sort**: Select the column that you would like to be used for the default sort of marketing event requests on the main marketing menu. Options include: Department/Category, Event Name or Event Date/Time.
- **Months to Keep Page Log**: The default setting of 6 months will be maintained, unless you choose to enter an alternate numeric value (with a minimum of 1 month up to a maximum of 24 months). The total months entered will be used to control how many months of historic page visits will be maintained in the database log for use in application reporting (Page View Stats Report). Any page view logs that fall outside the number of months selected will be moved to a page log archive location which you may specify below.
- **File System Path to Page** Log Archive: Please enter a file system path which can be accessed by calendar to write out the page log archive text files. If this path is left blank, the calendar will default to writing out the archive text files in the folder named "PageLogArchive" within the calendar virtual directory. Valid values of this file system path may be an absolute path to a directory (example: "D:\mylogfiles") or a network file share path (example: \\winfileserver\logfiles).
- **Marketing Main Menu Sort**
    - Select from the drop-down menu which column you would like the event data sorted on by default on the marketing main menu. Options include: Event Name, Event Date/Time or Department/Category.
- **Allow Imported Events to Override Double Booking Rules** - (Only applicable for clients with the Facilities Scheduling Module)
    - If selected, then any events that are imported into Calendar will automatically be marked as Approved for their associated Rooms and all double booking room conflicts will be ignored. These events will all show on the Facility Gantt Calendar as Approved, but with an exclamation point beside the room/room subdivision name denoting that there is a possible conflict with the event.
- **Event Title character limit:** option to select either 100 or 200 characters. **Note:** the longer titles may cause display issues on the front end or in others of usage such as a script feeding to a website page.
- **Event Description character limit:** option to select either 8000 or 15000 characters. **Note:** the increase assists clients in including more event content often in the form of news items with extended characters.
- **Script Control Settings** - (Only applicable for clients with an Open Entry Module)
- **Script Tag Blocking**: If selected as enabled, then no script tags will be allowed in any event entry fields from any Open Entry Form.
    - All current configurations will appear in text to the right. Also a preview of the current configuration will display where applicable. Once you complete your selections, click SAVE to save the settings or click CANCEL to cancel out of the configuration area and you will be navigated to the main menu.

Communicator Connection

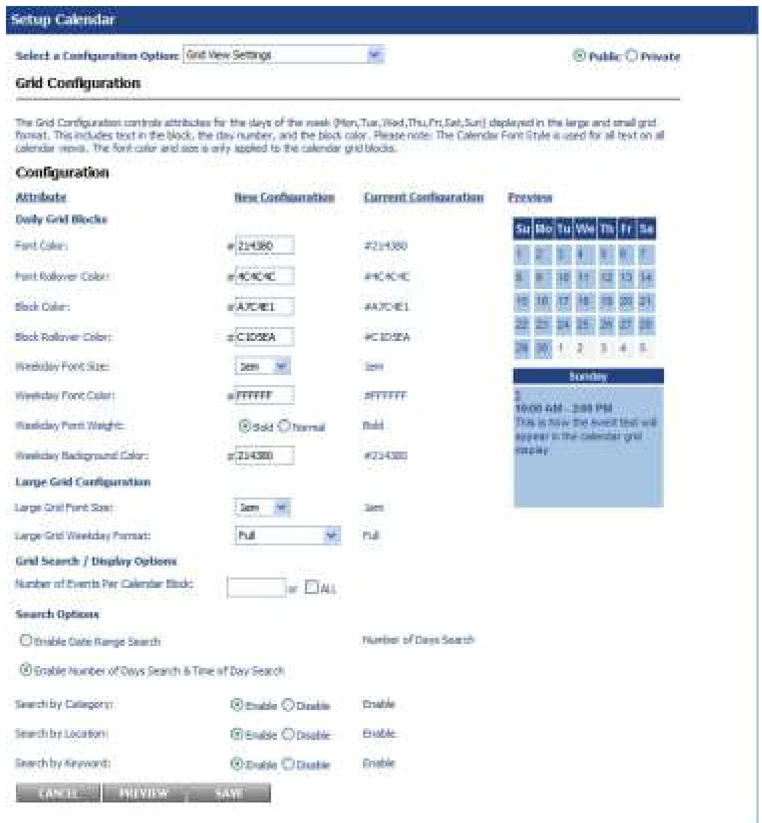
- Communicator Password: If you have the Communicator application installed, set the password in this field.

Grid Configuration

The Grid Configuration controls attributes for the days of the week (Mon,Tue,Wed,Thu,Fri,Sat,Sun) displayed in the large and small grid format. This includes text in the block, the day number, and the block color. Please note: The Calendar Font Style is used for all text on all calendar views. The font color and size is only applied to the calendar grid blocks.

Daily Grid Block Configuration

- **Font Color**: insert standard 6 digit/character Hexadecimal color
- **Font Rollover Color**: insert standard 6 digit/character Hexadecimal color
- **Block Color:** insert standard 6 digit/character Hexadecimal color
- **Block Rollover Color**: insert standard 6 digit/character Hexadecimal color
- **Weekday Font Size**: Select from the drop down menu provided. Options include 0.5em -3.4em.
- **Weekday Font Color**: insert standard 6 digit/character Hexadecimal color
- **Weekday Font Weight**: Select Bold or Normal
- **Weekday Background Color**: insert standard digit/character Hexadecimal color



Large Grid Configuration

- **Large Grid Font Size**: Select from the drop down menu provided. Options include 0.5em -3.4em.
- **Large Grid Weekday Format**: select choice from the drop-down menu provided.

Grid Search / Display Options

- **Number of Events Per Calendar Block**: Enter a number in the text field provided or select the checkbox for "All". This will determine how many total events are listed in each grid block day by default.

Search Options

- **Enable Date Range Search or Enable Number of Days Search & Time of Day Search**: Select from these two radio buttons to include either an exact date range search option (Start Date From and Start Day To) or include Range of Days and Range of Time drop-down options.

- **Search by Category**: Choose to enable or disable the category search drop-down selection box on the Grid view.
- **Search by Location**: Choose to enable or disable the location search option (configured as either Location Drop- down or Location: City, State, ZIP, County) to display or not in this view.
- **Search by Keyword**: Choose to enable or disable the keyword search field on the Grid view.

All current configurations will appear in text to the right. Also a preview of the current configuration will display. Once you complete your selections, click SAVE to save the settings or click CANCEL to cancel out of the configuration area and you will be navigated to the main menu.

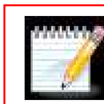
Highlighted Events Header

The highlighted events header area appears on the top of each list view screen and can be configured to display in a different color or based off different criteria.

Select any of the following to configure your highlighted events area:

- **Font Size**: Select from the drop down menu provided. Options include 0.5em - 3.4em.
- **Font Color**: Insert standard 6 digit/character Hexadecimal color
- **Display Highlighted Area with message when no Highlighted Events available**: If enabled, which is the default selection, then your highlighted events area will be displayed, even when there are no highlighted events for display. A message will be displayed within the highlighted events box that states that there are currently no highlighted events to display. You can choose to disable this message and the entire highlighted events box if there are no available highlighted events.
- **Display Table Border Around Highlighted Events Area**: Choose to enable or disable a table border on your highlighted events box.
- **Date Range of Highlighted Events for Display**: Select the date range of highlighted events that you want displayed in your list at any one time. Options include: Current Day, Next 7 days, Next 14 days, Next 30 Days, Next 60 Days, Next 90 Days and All Future Highlighted Events.

All current configurations will appear in text to the right. Also a preview of the current configuration will display. Once you complete your selections, click SAVE to save the settings or click CANCEL to cancel out of the configuration area and you will be navigated to the main menu.

TIP: The highlighted event area can be enabled for each View screen. If enabled it always appears at the top of the List View regardless of what search is performed by your visitors. It is a great way to call special attention to events that you want to promote in advance of the date that they occur. You can give the privilege of highlighting events to only selected users so that you ensure that not all events are selected as highlighted. Otherwise your list may become too overwhelming and lose

Holiday Configuration

In the Holiday Configuration area you are able to configure traditional holidays as well as add your own custom holidays.

How to Access the Holiday Configuration Area

The Holiday configuration section is available through the administration area of Calendar. If you have the Open Entry or Facilities Open Entry modules please note that holiday configuration is not available on these Open Entry screens.

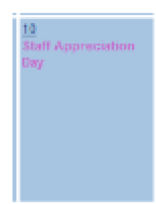
1. Log into the administration area of Calendar.
2. Click on the Configuration tab.
3. On the Select a Configuration Option drop down box, choose Holiday Configuration
4. On this screen you can configure a new holiday or modify an existing holiday.

Configure a New Holiday

Configure a new holiday allows you to add a notation on your calendar for an occasion that may be specific to your location. This feature allows you to configure holidays as Fixed or Floating. Maybe you would like to celebrate the founding of your organization. Maybe you would like to have a day where you honor the staff of your organization. Regardless of what the occasion is this section will allow you to add it to your Calendar system.

Configuring a Fixed Holiday

1. Log into the administration area of Calendar.
2. Click on the Configuration tab.
3. On the Select a Configuration Option drop down box, choose Holiday Configuration.
4. Enter the Holiday Name (this is how it will show on your calendar)
5. Select the Fixed radio button
6. Select the Month and the Day the holiday will be observed.
7. Specify the number of days the holiday will be celebrated.
8. Specify a color for the text of the holiday.
9. Click Save



Your event will now display on the calendar with the configuration you specified above.

Tip: If you have the Private Calendar module, the configured holiday will display on both the public and private calendar. Currently, you are unable to specify if the holiday shows on just the public or just the private calendar.

Configuring a Floating Holiday

1. Log into the administration area of Calendar.
2. Click on the Configuration tab.
3. On the Select a Configuration Option drop down box, choose Holiday Configuration.

4. Enter the Holiday Name (this is how it will show on your calendar)
5. Select the Floating radio button
6. Specify the Month and Week Day that the celebration will occur.
7. Specify the Ordinal Position (1st, 2nd, 3rd or last of the month)
8. Specify the Duration of the celebration (in days)
9. Specify the font color you would like to have this holiday display in.
10. Click Save

Your holiday will now show on the public and private calendar as you configured.

The holiday that was configured is showing in the Font Color selected while creating the holiday on the calendar.

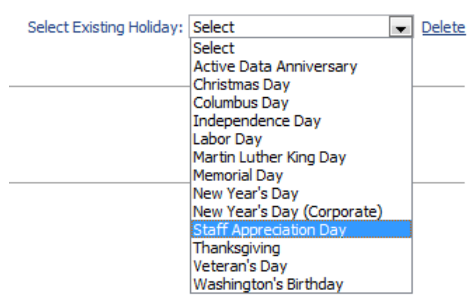
Other holidays will show in the default configuration unless customized differently using the Holiday Configuration area.

Editing a Holiday

Active Data Calendar comes with standard United States holidays.

- Christmas Day
- Independence Day
- Martin Luther King Day
- New Years Day
- Veteran's Day
- Columbus Day
- Labor Day
- Memorial Day
- Thanksgiving
- Washington's Birthday

You have the ability to edit the standard holidays as well as holidays that you have added to the system.



1. Log into the administration area of Calendar.
2. Click on the Configuration tab.
3. On the Select a Configuration Option drop down box, choose Holiday Configuration.
4. On the right side of the screen choose the holiday you would like to edit by selecting it in the Select Existing Holiday drop down box.
5. Once the holiday is selected the current configuration will be displayed.
6. Make the changes desired.
7. Click Save

The changes to the holiday will now be displayed on the calendar.

Deleting a Holiday

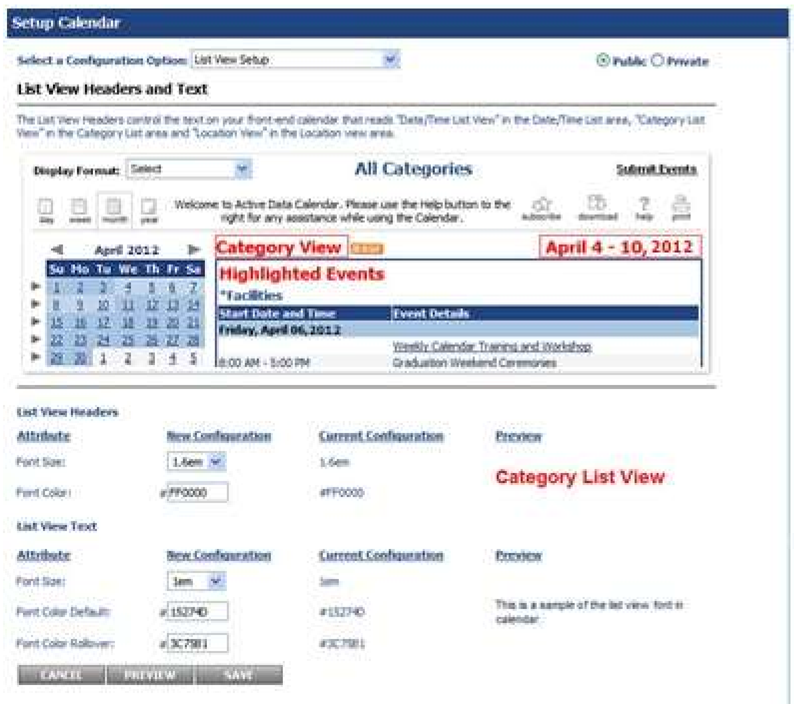
At times it may become necessary to delete a holiday from your Calendar. This is accomplished by using the Calendar Administration area.

1. Log into the administration area of Calendar.
2. Click on the Configuration tab.
3. On the Select a Configuration Option drop down box, choose Holiday Configuration.
4. On the right side of the screen choose the holiday you would like to delete by selecting it in the Select Existing Holiday drop down box.
5. Click the Delete link to the right of the box.

The holiday is now deleted from your calendar.

> **Note**: When a holiday is deleted from the calendar it cannot be restored. To have the holiday visible again you will need to recreate it.

List View Headers and Text



Within this configuration area you can choose front sizes and style options for both the list view headers as well as the list view text areas.

List View Headers

The List View Headers control the text on your front- end calendar that reads "Date/Time View" in the Date/Time List area, "Category View" in the Category List area, "Location View" in the Location view area and "Summary View" in the Event Summary list view area.

- **Font Size**: Select from the drop down menu provided. Options include 0.5em - 3.4em.
- **Font Color**: Insert standard 6 digit/character Hexadecimal color.

List View Text

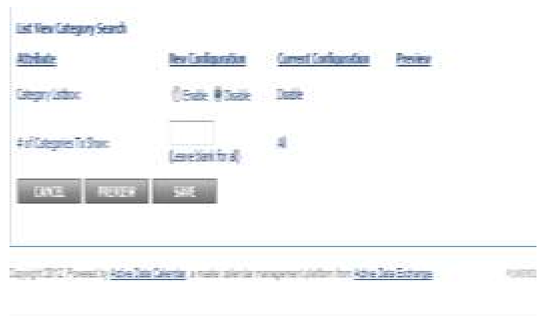
The List View Text controls how the text font size, default color and rollover color are displayed for events in the Date/Time, Category, Location and Summary list views:.

- **Font Size**: Select from the drop down menu provided. Options include 0.5em - 3.4em.
- **Font Default Color**: Insert standard 6 digit/character Hexadecimal color.
- **Font Rollover Co**lor: Insert standard 6 digit/character Hexadecimal color.
- **List View Background Color**: Insert standard 6 digit/character Hexadecimal color. This option changes the main background color for all list view screens.

- **List View Alt. Background Color**: Insert standard 6 digit/character Hexadecimal color. This option changes the alternate background for all list view screens.

List View Category Search

The List View Category Search controls How the category search is viewed on the Front-end of the calendar. A pop-up window with a scroll up/down can be enabled



Category Listbox: Categories can be viewed as a list checkbox in a pop-up window.
# of Categories to Show: A number of categories Can be entered to display up to this amount only. Leave blank to display all categories.

Once you complete your selections you can preview your Current Configuration by clicking on PREVIEW, click SAVE to save the settings or click CANCEL to cancel out of the configuration area and you will be navigated to the Main Menu.

Location View Configuration

The Location View Configuration allows you to set specific search functionality and specific columns of event information for use only on the Location View.

Search Options

- Enable Date Range Search or Enable Number of Days Search & Time of Day Search: Select from these two radio buttons to include either an exact date range search option (Start Date From and Start Day To) or include Range of Days and Range of Time drop-down options.
- Search by Category: Choose to enable or disable the category search drop-down selection box.

Location List view

- Search by Location: Choose to enable or disable the location search option (configured as either Location Drop-down or Location: City, State, ZIP, County) to display or not in this view.
- Search by Keyword: Choose to enable or disable the keyword search field on the Location List view.

Event Information Columns

- **Display Highlighted Events Area**: If enabled, the highlighted events area will display at the top of your Location event list.
- **Display Event Description**: If enabled, the event description will display in the Location event list column entitled "Event Details" beneath the Event Name which displays in this column as a default.
- **Location Column Field Display**: Select from the drop-down what location information you would like to display for sorting of events by location. Options include: Location Name, Building Name, Room Name, Location Name and Building Name, Building Name and Room Name or Location Name, Building Name and Room Name.
- **Additional Display Options**: The default selection is "Select". If maintained, then the third column of information regarding events listed will not display. Other selection options include: Registration, Location

or one of the custom fields set in “Custom Event Administration Settings.” If "Location" is selected, then the Location details will display in the far right third column of the display screen. If "Registration" is selected, then the number of Registration spaces remaining for each event will display in the far right third column of the display screen. If a custom field is selected its values will show in the third column of this view.

All current configurations will appear in text to the right. Once you complete your selections, click SAVE to save the settings or click CANCEL to cancel out of the configuration area and you will be navigated to the Main Menu.

Mobile Settings

The Mobile Settings page will allow you to decide which mobile detect devices you want to enable in your Calendar installation. Caledar will automatically detect the type of mobile device being used based on these items and render your calendar of events in the appropriate mobile format. Mobile detect is turned on by default with the default CSS upon installation. Make sure you go to the Configuration Tab and SAVE one of the Display format views (ex: Grid View Settings) to enforce your style sheet attributes.

Mobile Detections
Various mobile detects are offered out of the box. To delete a mobile detect from the list simply highlight the item, click delete on your keyboard and hit the SAVE button. To revert back to the original default listing, click the option to “Load Original Detections”. Support for mobile devices is native and part of a basic installation with a default CSS for the following operating systems:

- Apple iOS
- Google Android
- Blackberry OS
- Palm OS
- Opera Mini

Custom Header and Custom Footer
- Use the custom header and footer upload areas to upload a new mobile header and footer for the Calendar. There is no header and footer enabled by default.
- See the Creating Mobile Headers & Footers tip sheet for specifics on how to create these files.

Default View: Chose from the following default date ranges of Current Day, Current Week, Current Day +7 and Current Day +14. This setting applies to the default range of dates that an end user will see when they visit your Calendar URL on a mobile device.

Open Entry Module Configuration

The Open Entry Form allows administrators to create an open submission process that funnels events directly into previously customized Calendar workflow. The form can be implemented using a system-generated link based on the calendar base URL (Generate Form) or by placing the generated form code (Generate Code) directly on an external web page. The Marketing version of Calendar (that is, not the Facilities Module version) supports an optional optimized Section 508-compliant form for visually impaired web users or those who are or otherwise unable to view the form by traditional methods. This option only supports “Basic Event Scheduling”.

Please see the Open Entry User Guide for further details on utilizing the Open Entry Module. Note: Open entry is an additional module available from Active Data Calendar.

Private Calendar

This option only displays if the Private Module has been licensed and enabled. The Private Calendar configurations allow you to set category options and the private calendar URL extension.

- **Show Public Categories In Private Calendar**: If enabled, then all Public Categories will also display in your Private Calendar. If disabled, then only Private Categories will be available for selection from the Private Calendar.
- **Private Calendar URL Extension:** Enter in a custom URL extension that you would like the Private Calendar to use in the HTTP query sting used to navigate to your Private Calendar.

All current configurations will appear in text to the right. Once you complete your selections, click SAVE to save the settings or click CANCEL to cancel out of the configuration area and you will be navigated to the Main Menu.

TIP: Please see the Private Calendar Implementation Guide located off the Client Portal area for more details on various ways that you can configure the Private Calendar based off your organization's needs.

Summary View Configuration

The Summary View Configuration allows you to set specific search functionality and specific columns of event information for use only on the Summary View.

Search Options

- **Enable Date Range Search or Enable Number of Days Search & Time of Day Search**: Select from these two radio buttons to include either an exact date range search option (Start Date From and Start Day To) or include Range of Days and Range of Time drop-down options.
- **Search by Category**: Choose to enable or disable the category search drop-down selection box on the

Summary List view

- **Search by Location**: Choose to enable or disable the location search option (configured as either Location Drop-down or Location: City, State, ZIP, County) to display or not in this view.
- **Search by Keyword**: Choose to enable or disable the keyword search field on the Summary List view.
- **Event Information Columns**
- **Display Highlighted Events Area**: If enabled, the highlighted events area will display at the top of your

Summary Event List

- **Display Event Description**: If enabled, the event description will display in the Summary event list column entitled "Event Details" beneath the Event Name which displays in this column as a default.
- **Location Fields to Display** in List: Select from the drop-down what location information you would like to display for sorting of events by location. Options include: Location Name, Building Name, Room Name, Location Name and Building Name, Building Name and Room Name or Location Name, Building Name and Room Name.

- **Display Registration Information**: Select to enable this option if you would like to display a third column of information on the list view screen that shows the number of registration spaces remaining for each particular event.

All current configurations will appear in text to the right. Once you complete your selections, click **SAVE** to save the settings or click **CANCEL** to abandon your changes.

Social Marketing Settings

AddThis

- AddThis Enable/Disable: Choose to enable or disable this feature from the front end Event Details Screen for visitors to your Calendar. If you select to enable this feature, you will be required to select the button style, services to offer, utilization of the "More" option and the configuration text and background colors.

- AddThis - Button Style: Choose from the button styles provided. The fifth display option will not open the services selected in a pop-up window, but will rather display the icons for each service directly within your Event Details. The fifth display option is the only "button style" that will allow you to select to display any number of service icons that you choose. The other "button styles" will only allow you to include up to 10 service icons directly within the pop-up window and then for your visitors to view all other options, they will need to use the "More" option.
- AddThis - Services: Select the checkbox beside of any service that you would like enabled for selection by your Calendar Visitors. Please note that you may only select up to 10 for inclusion in your AddThis pop-up window and if you would like to offer all other services, you will need to select to "enable" the "More" option. The fifth display option is the only "button style" that will allow you to select to display any number of service icons that you choose.
- AddThis - Expand “More” Option: Select to enable this option if you would like your Calendar Visitors to be able to select a “More” option from within your AddThis services pop-up window. If enabled, your visitors will be able to select from all 150+ AddThis Social Marketing services within the "More" interface.
- AddThis - Share Counter: Displays the total number of page shares.
- AddThis - Large Icons: Doubles the size of the toolbox icons.
- AddThis - Text Color: Enter a hexidecimal number here to configure the font color for the event name displayed in the button pop-up window for the AddThis service selection screen.
- AddThis - Background Color: Enter a hexidecimal number here to configure the background color for the top title bar within the AddThis service selection screen.

Facebook

- Facebook Comments: "Comments Box is a social plugin that enables user commenting on your site."
- **F**acebook Comments - Width: The width of the plugin in pixels. Minimum recommended width: 400px.
    - Facebook Comments - Number of posts: The number of comments to show by default.
- Facebook Facepile: "The Facepile plugin displays the Facebook profile pictures of users who have liked your page or have signed up for your site."
    - Facebook Facepile - Width: The maximum number of rows of faces to display.
    - Facebook Facepile - Max Rows: The width of the plugin in pixels.
- Facebook Like: "The Like button lets a user share your content with friends on Facebook. When the user clicks the Like button on your site, a story appears in the user's friends' News Feed with a link back to your website."

- Facebook Like - Send: Specifies whether to include a Send button with the Like button.
- Facebook Like - Layout:
  - Standard - displays social text to the right of the button and friends' profile photos below. Minimum width: 225 pixels. Default width: 450 pixels. Height: 35 pixels (without photos) or 80 pixels (with photos).
  - Button Count - displays the total number of likes to the right of the button. Minimum width: 90 pixels. Default width: 90 pixels. Height: 20 pixels.
  - Box Count - displays the total number of likes above the button. Minimum width: 55 pixels. Default width: 55 pixels. Height: 65 pixels.
- Facebook Like - Width: The width of the Like button.
- Facebook Like - Show Faces: Specifies whether to display profile photos below the button (standard layout only
- Facebook Like - Font: The font to display in the button. Options: 'arial', 'lucida grande', 'segoe ui', 'tahoma', 'trebuchet ms', 'verdana'

Google

- Google - Analytics: "Google Analytics is the enterprise-class web analytics solution that gives you rich insights into your website traffic and marketing effectiveness. Powerful, flexible and easy-to-use features now let you see and analyze your traffic data in an entirely new way. With Google Analytics, you're more prepared to write better-targeted ads, strengthen your marketing initiatives and create higher converting websites. "
- Google Analytics - Code: Text area for generated Google Analytic code that will be inserted on calendar front-end views.
- Google - Event List Rich Snippets: "Google tries to present users with the most useful and informative search results. The more information a search result snippet can provide, the easier it is for users to decide whether that page is relevant to their search..." "Providing this information doesn't affect the appearance of your content on your own pages, but it does help Google better understand and present information from your page. "

LinkedIn

- LinkedIn - Share Button: "Enable users to share your website with LinkedIn's professional audience, and drive traffic back to your site."

Workflow

Workflow allows you to specify how events are approved within the Active Data Calendar administration area and how that affects when they can be viewed on the Public and/or Private Calendar.

- **Department:** If selected (and by default), the department administrator is responsible for approving events that have been posted to all unlocked categories. If the department administrator approves the event, it will show up on the public or private calendar(s) under all unlocked categories for which the event was added. Events will show up on the public or private calendar(s) under locked categories as they are approved by the locked category owners. Both the department administrator(s) and the locked category owner(s) receive notifications simultaneously requesting that they process the event. The event does not need to be approved by the locked category owner(s) before it can be posted live for the unlocked categories.

- **Category:** If selected, the workflow email notifications for processing event are sent to all locked category owners and the system will require that all locked category owner(s) approve the event for all locked category(s) specified before any workflow notifications are sent to the department administrator(s) to process the event. Once all locked categories are approved, then workflow email notifications are sent to the department administrator(s) and they can process the event for all other unlocked categories.

***PLEASE NOTE**: The event will appear under all locked categories once it has been approved for all locked categories that were selected for the event. If the event is approved for the locked categories but then denied later by the department administrator(s), then it will remain in the locked categories until the event is deleted or modified and sent for further processing.

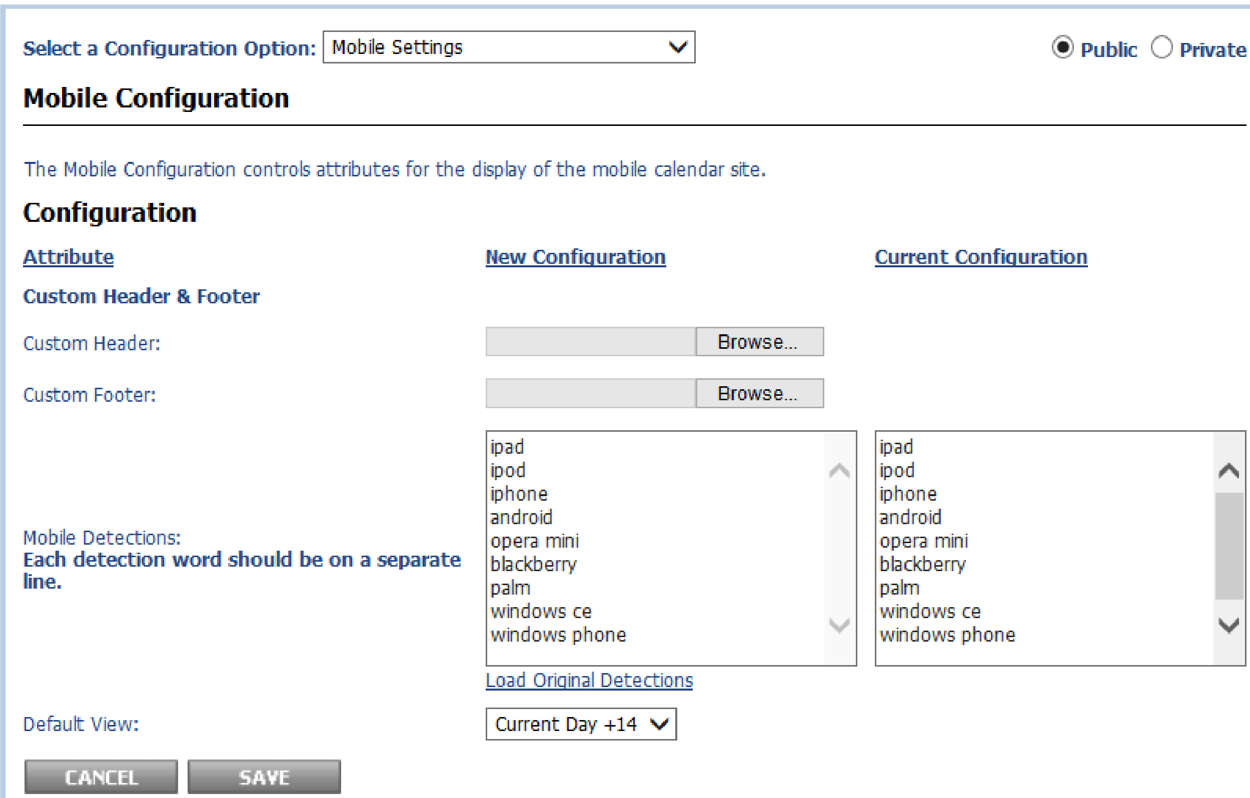
Click the **SAVE** button once you have made your selection and would like to save the change. Click **CANCEL** to abandon your changes.

Mobile Support

Active Data Calendar supports interacting with the public and private calendars from a mobile device. You can configure the types of device the Calendar automatically detects, and to which it applies your mobile CSS (<calendar>/mobile/mobile.css). *Mobile Detect* is enabled by default in the Calendar, tied to a supplied default mobile CSS. To customize your Calendar's mobile look, modify the mobile.css file as desired. Calendar detects the mobile device type in use and renders its views formatted as appropriate for that type.

Mobile Settings

Additional settings are available on the administration area’s CONFIGURATION tab, the Mobile Settings page shown below. Make any changes to the New Configuration column. The Current Configuration column shows the settings that are currently saved (with links to delete any custom header or footer currently loaded).



Public or Private

Select the Calendar, public or private, for which you are setting these values and options.

Mobile Custom Header and Footer

You can upload a new graphic for the header and/or footer on your mobile views. Just click the Browse… button, locate the HTML file you want to use, then click **Open** and **SAVE**. The HTML header and footer you upload this way supersedes the default header and footer supplied with the Calendar. To remove a custom header or footer and return to the Calendar default, click the Remove Current Header or Remove Current Footer link. The document *Active Data Calendar Mobile Headers and Footers*, available on the Client Portal, provides details on creating and uploading mobile header and footer files.

Mobile Detections
Provides a list of device types that the Calendar can detect. If Calendar does detect a mobile device, it applies your mobile style sheet (CSS) to it. The list is editable text, which you create by placing one device type on each line, as shown in the capture above. If you delete a line, and want to restore it, either press Ctrl+Z (Undo) or click Load Original Detections to start again from the Calendar's default list. When finished, click **SAVE**.

Mobile Default View
The **Default View** drop-down list controls the number of days for which results appear in the mobile view. Options run from *Current Day* to *Current Day+14 days*.

Social Marketing Support on Mobile

The Calendar supports social marketing via AddThis. You can enable or disable AddThis on mobile devices by enabling or disabling it for the entire Calendar, on the Admin area's CONFIGURATION tab, Social Marketing page.

Map Services

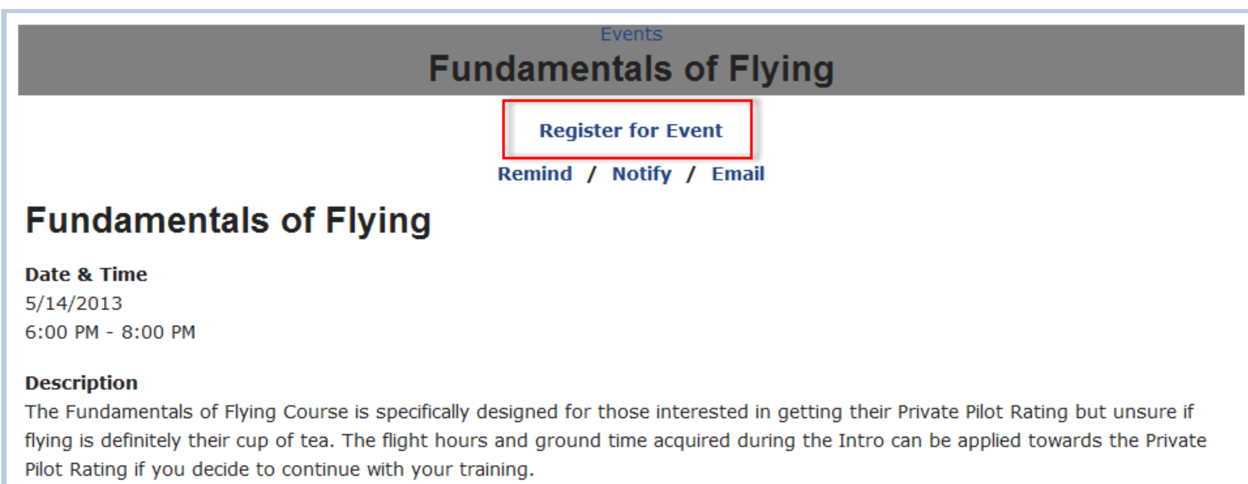
The mobile views use the same map service as the browser-based views. Map services supported are:

- Google
- Bing
- MapQuest

This system setting is found on the **Configuration** tab, under *Display Settings: "View Map" Website*.

Mobile Event Registration

Mobile users can register for events by clicking the *Register for Event* link provided on registration-enabled events' detail pages, as shown here:



Clicking this link takes the visitor to a responsive registration form on the full Calendar site. The form scales according to the mobile device, such as a smart phone or tablet. Customers should review their mobile header and footer to ensure that it can adapt (be as responsive as possible) to take full advantage of this new capability.

Further Information

FAQ’s and Tip Sheets

FAQ’s and Tip Sheets are available to assist with your Calendar. They are available on your Client Portal at http://www.activeddatax.com. These sheets cover information such as Import/Export, Installation help, basic configuration and many other pieces of information to configure and maintain your calendar.

***Note**: Please see your Calendar Administrator to obtain and ID and password for the Client Portal.

User Guides

Active Data Exchange provides multiple modules and User Guides to support these modules on the Client Portal at http://www.activedatax.com. These guides include:

- **Active Data Calendar User Guide** – Available to all Active Data Calendar Clients.
- **Active Data Calendar Facilities User Guide** – Available to Clients with the Facilities Module installed.
- **Active Data Calendar PayFlow Pro User Guide** – Available to Clients using the PayFlow Pro payment gateway.

If you are interested in obtaining further information on any of the above documentation or in looking at some of the Modules offered by Active Data Exchange please contact your Account Executive at Active Data Exchange or call 610-997-8100.

Active Data Calendar Help and Support

If you have any questions or require assistance with the Calendar application please contact Active Data Exchange Support:

- Email: Support@ActiveDataX.com
- Phone: 610-997-8100

Glossary

Below you will find definitions for commonly used terms in Active Data Calendar.

Account – An account is made up of the combined user information, including a Login ID and password, which is added to Active Data Calendar to allow users to login and use the calendar product.

- **User level account** – This account role can log into the calendar and perform functions. Key information for this account level:
    - Add, update, and delete events within their associated department.
    - When adding and updating events to the calendar this user will require an administrator within their department or a Super User to approve the events.
    - This level can also update their login information.
- **Administrator level account** – A department often has an administrator assigned to it. Key information for this account level:
    - This account role can add, update, and delete events in their associated department.
    - Events added by an Administrator will automatically post live to the calendar.
    - They may also process pending events from the "User" level accounts in their department.
- **Super User level account** – The Super user level account is created at the time of the install of Active Data Calendar. Key information for this account:
    - Provided to your organization
    - Performs any function within the calendar product
    - Primarily used to setup the initial configuration and framework of the calendar
    - Only account that can add other administrative user accounts
    - Receives notifications to process any events pending approval
    - Can process any other event inside the Calendar regardless of Department or Locked Category status.

Category – A category is used to group events and help people using your calendar find events more efficiently.

- Events can be displayed by category when viewing the calendar.
- Categories are not specific to a department.
- Categories are available to all users of the calendar.

Department – A department is used to group people together.

- Groups Administrative and Users accounts
- Uses logical groupings by work function/responsibilities
- Examples include but are not limited to "Human Resources", "Marketing", "Admissions", "Student Services", etc.

Event – An event is a gathering/occasion on your calendar.

- Combines date, time and details of a scheduled meeting, concert, sports matches, dinners, fund raisers, etc.
- All users of the calendar can add, update and delete events.

Font Color Numbers – Font colors are configured using what is known as "hexadecimal" numbers/characters. For each color there is a different number that contains a mixture of 6 numbers and/or characters. These numbers are entered anywhere in the configuration of Calendar where the Font Color is requested. For example: White is FFFFFF while Black is 000000, while Yellow (depending on the shade desired) may be FFFF00. Please see your

Client Portal FAQ page for a general list of colors. Additional lists are available by searching the internet for Hexadecimal Colors. You may also contact Active Data Product Support for a general list of colors and their numbers.

Payment Gateway - Company/Organization that provides payment processing. Payment gateway vendors with which the Calendar directly integrates in this release include Mercury and Moneris.

Payment Account - An account setup under a payment gateway that contains information about how to connect to the payment gateway and provide information required by the payment gateway.

Processing Platform - PayPal Payflow Pro connects to processing platforms in order to process credit card transactions. Based on the processing platform used, certain additional parameters can be set. Processing platforms supported include:

- Paypal
- American Express Brighton
- First Data Merchant Services (FDMS) North
- First Data TeleCheck
- Global Payments East
- Elavon (Formerly Nova)
- Paymentech Tampa
- American Express Phoenix
- First Data Merchant Services (FDMS) Nashville
- First Data Merchant Services (FDMS) South
- Global Payments Central
- Merchant e-Solutions
- Paymentech Salem (New Hampshire)
- TSYS Acquiring Solutions (Formerly Vital Processing Services)

Pending Event – An event waiting to be approved by an Administrator or the Super User
- All user level accounts must have events the submit/update approved
- Until the event is approved it is placed in pending status.

LDAP – Stands for Lightweight Directory Access Protocol. It is an Internet protocol that email and other programs use to look up information from a server.

Location – A location is used to allow for a “quick list” of physical locations to be used when adding events. There are three (3) divisions in Locations:
- Locations – Main locations and/or areas where buildings are clustered
- Buildings – Physical buildings, centers or areas at a defined location.
- Rooms – Located inside buildings, centers or areas at a defined location.

Login ID – Information used to log into the calendar program. A Login ID is often referred to as a user account.

RSS – Really Simple Syndication – Allows users to subscribe to their favorite content
- Delivers its information as an XML file called an RSS feed
- Simple XML-based system
- Formats are specified in XML (a generic specification for data formats)
- A program known as a feed reader or aggregator can check a list of feeds on behalf of the user.
- A feed reader displays any updated information (or events) that it finds.

Subcategory – Subcategories are used to further classify events on the calendar.
- When viewing the calendar users can further refine event listings
- Subcategory’s are not required but are recommended.