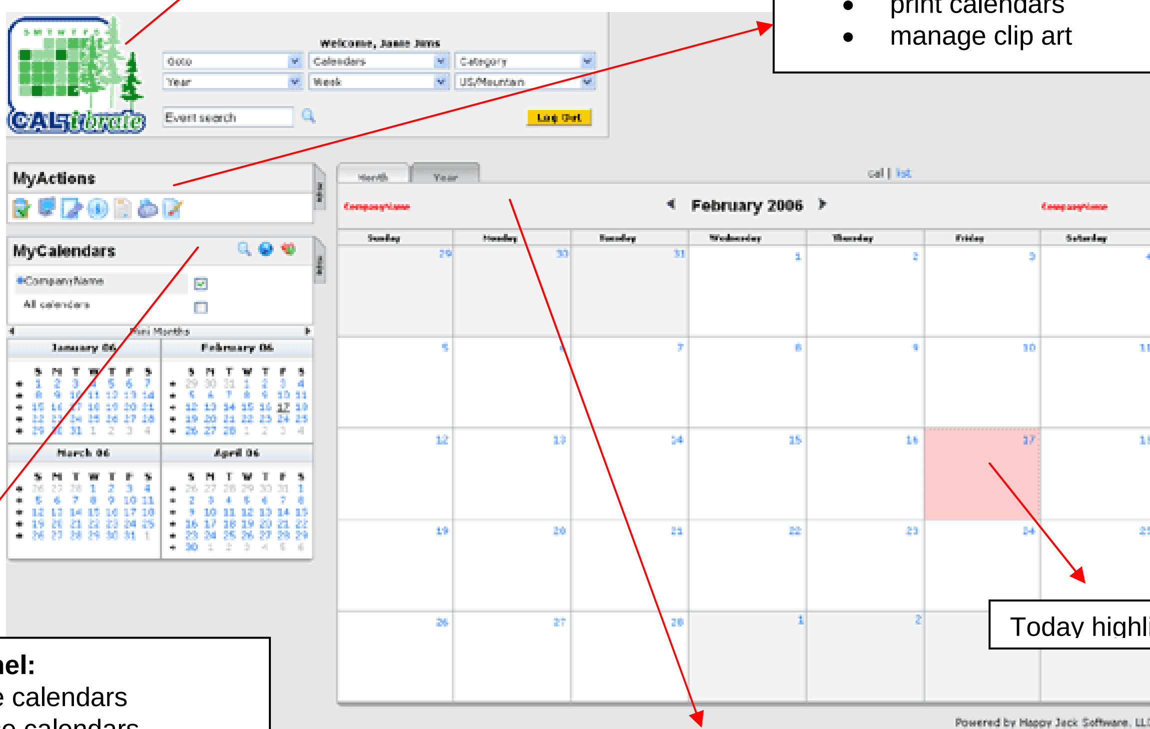
CALibrate Groups Quick Start - Company Edition

When you log into your company calendar for the first time, you will see the following view (figure 1). Let's take a moment and discuss what this view is and how to get started with setting up your company and building calendars. To set things up can take as little as 10 minutes!

Home Panel:
- select timezone
- search for events
- select categories
- log out
- brand with your logo

Action Panel:
- create an appointment
- use the administration pages
- manage URLs
- get help from the FAQ
- create reports
- print calendars
- manage clip art



Calendar Panel:
- create calendars
- choose calendars
- search for calendars
- publish calendars
- use/change "mini months"

Today highlighted

Month Panel
- add events
- navigate to other months and the Year Panel
- view events in a grid or a list

(figure 1)

tip #1: tool tips
put your mouse on any icon on a page, and use the tool tip for the icon to identify the purpose of the icon.

Company Setup

Use the control panel to set up your company and the employees within your company. To access the contol panel, use the **Action Panel** and select the **control panel** icon.

When the control panel is displayed, choose **Company & Employee Setup**

After selecting **Company & Employee Setup**, the **Company Setup** page will display

Press the Start icon and go through the **Company Setup** in order, steps 1-4.

Step 1: Add Company Information

In this section, you will be able to add an abbreviation name for the company. You will also be able to brand your own calendar by adding your company logo and the web site you want the to link with the logo.

> **tip #2: branding with your own logo**
> make sure your logo fits well. the best size is a maximum height of 135 pixels by 200 pixels in width.

You may also add categories.

A category is a way to group related calendar events or give a type to a calendar event. Categories are also a way to filter events with reporting or searching. For example, you might create the category of 'sales meetings' as a category for your company. And every time you create a calendar event you may assign that event to that category. You may add as many company categories as you want.

When you have finished filling out the company information, move on to Step 2.

Step 2: Company Roles

In this section, you will be able to add company roles.

Company roles are roles that people may have within your company. By default, there are two built-in roles for your company. One is Employee and the other is Administrator. Every user added to CALibrate Groups is defined as an Employee. The person or people who administer CALibrate (add employees, set up groups, etc.) are Administrators. There may be multiple administrators to CALibrate, but we do not encourage this situation.

Since permissions (see next section) may be based on roles, you may choose to use roles.

When you are finished adding your foles or If you are unsure how and if your company uses roles, move on to Step 3.

Step 3: Company Groups

In this section, you will be able to add company groups and assign roles to these groups.

Company groups are a flexible way to goup people. If you want several different people across the company to share a calendar then create a group for them.

Permissions (see next section) may also be based on groups.

For example, you might want to create a 'sales group' so that all the sales people can collaborate with the 'sales' calendar.

Group roles are similar in function to company roles. By default, there is one built-in group role. It is the member role. Every person in a group has, by default, the role of member. You may add more roles associated with the group. For example, if you create the 'Research' group, you might have roles such as 'Lead Scientist' or 'Developer' within that group.

When you have finished adding groups and group roles or if you are unsure how and if your company will use groups or group roles, move on to Step 4

Step 4: Company Employees

In this section, you will be able to add company employees and assign them to the roles and groups you built in Step 2 and Step 3.

Add the first name, last name, title, and email. All of these fields except title is required.

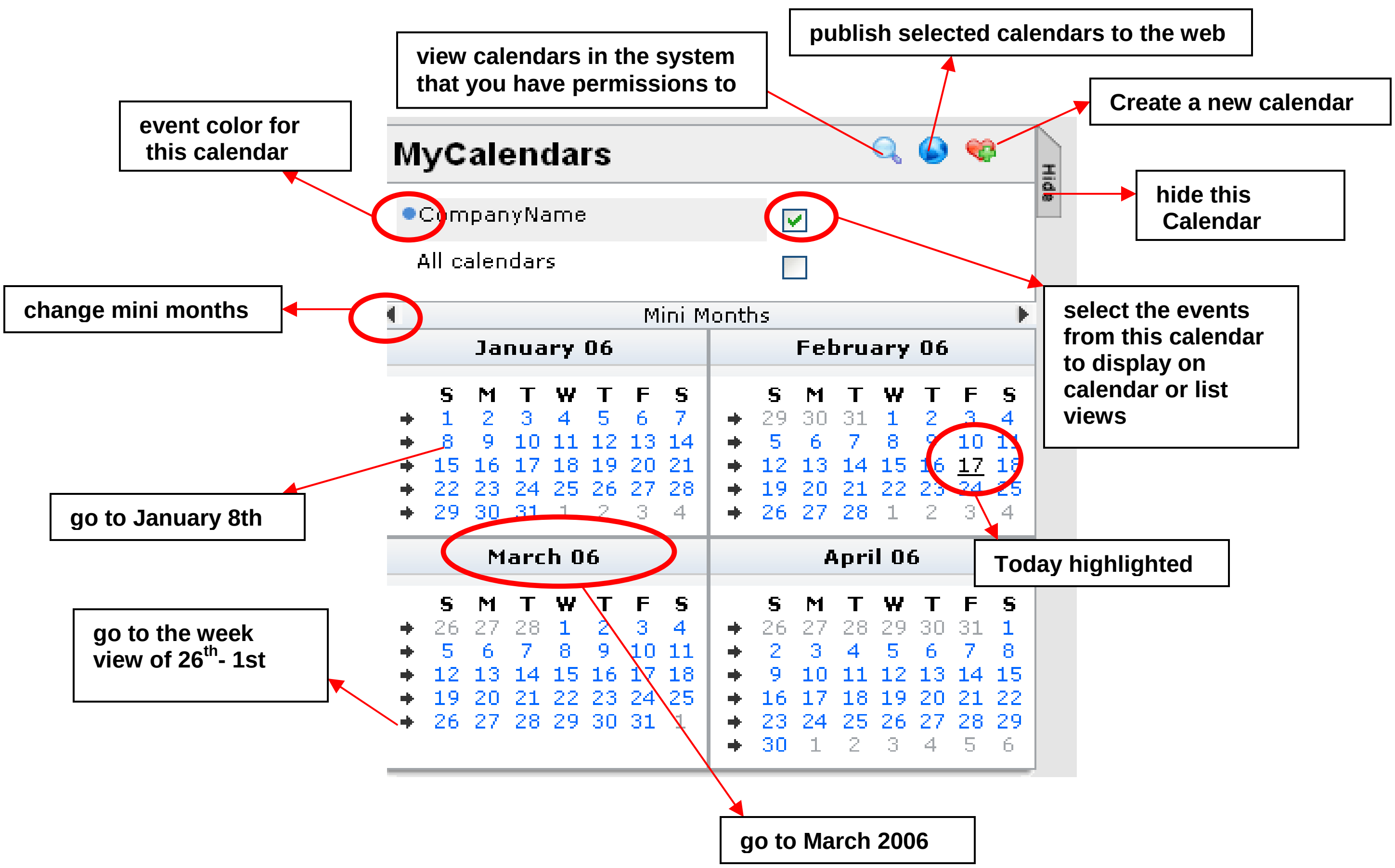
Give a username and password for the employee. When they log into CALibrate, they can change their username and password.

If you have added roles, along with the two default roles describe above in Step 2, they will be displayed. Assign the employee to the roles that apply. If you want them to be an Administrator in CALibrate then assign them to the role Administrator. By default they are assigned to the role Employee and that cannot be changed.

If you have added groups, you will be able to select all groups the employee belongs to. Keep adding employees through the [Add another Employee] link until you are finished. When you are finished, select the FINISH icon.

Building Calendars

In this section we will discuss how to build or modify a calendar. Let's take a look at the Calendar Panel and point out its features and explain how calendars are built.



tip #3: changing the color of your events for a calendar
right click on the calendar name in the Calendar Panel and select **Pick Color** from the menu. An interface will display all available colors. Pick a color you want.

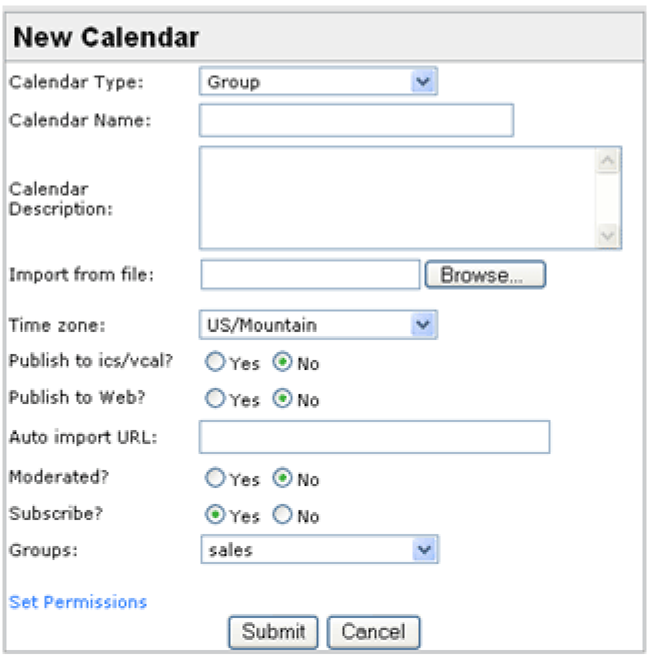
There are three calendar types within the CALibrate system. They are: Company, Group, & Personal. The Company Calendar cannot be deleted. It is automatically built for the company when the company is created and its name is the name of the Company. The purpose of the company calendar can be to keep all employees informed about things such as important company dates, 401K signup times, insurance training, or even company picnics.

Every employee added in the company is automatically subscribed and given subscribe permission to this calendar. (We will explain these permissions in the next section)

Group Calendars are for the groups you build in your Company. If you have built the Sales group, it might be that they want a group calendar associated with their group.

All other calendars are simply Personal. Most calendars will be Personal.

To add a calendar select the **Create a new calendar** icon. The **New Calendar** interface will display. Below we will briefly describe each of these columns.



Calendar Type: If you have built groups within your company, the pulldown will have both types available. If you have not built a group yet, the only type available is Personal.

If you are building a calendar for a group, pick Group from the pulldown and select the appropriate group that you are building the calendar for from the Groups pulldown (right before Set Permissions). Otherwise, select Personal.

Calendar Name: Name the calendar anything you deem reasonable

Calendar Description: Describe the calendar anyway you deem reasonable. Others will see this description so it might be wise to describe it appropriately.

Import from file: Instead of starting from scratch with a calendar, you may

Time zone: Select the timezone that you want events on this calendar to be in.

Publish to ics/vcal: If you want to publish your calendar nightly at 1:30am as a ics file select the radio button yes. This would be used if you take a CALibrate calendar and import it into another application on a regular basis.

Publish to the Web: If you want to make your calendar public for others to view (on a webpage), select yes, otherwise select no. This permits outside users to only view your calendar.

Auto import URL: This lets you auto import an ics file from some other web page. If the calendar is not new, all events are deleted off the calendar and then all the events from the imported ics file are placed on the calendar. This happens every night.

Moderated? A moderated calendar is a calendar in which a single person is assigned to allow or disallow events to the calendar. By selecting the yes radio button, you create the calendar as moderated. By default the CALibrate administrator is the moderator. Employees in the system may add events (if given appropriate permissions) to the calendar but they do not automatically appear on the calendar until the moderator allows them.

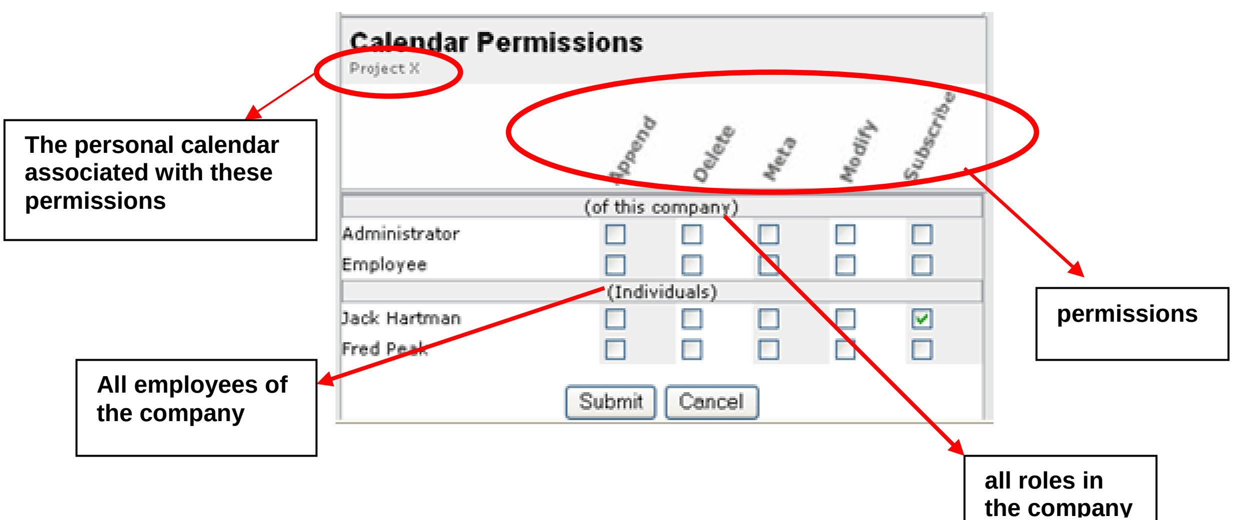
Subscribe? By default the creator of the calendar is given subscribe permission to the calendar they are creating.

> **tip #4: quickly building a calendar**
> a calendar can be built in seconds. Give the calendar a name and leave all the defaults as they are set (they are safe settings). Later, if you want to change things, you may modify the calendar.

Granting Permissions (at the Calendar Level)

Granting permissions, while very easy, is very powerful. Permissions can be set at either at the event level or at the calendar level. This section will describe permissions at the calendar level.

The permission interface for a Personal Type calendar will be described and then we will discuss how permissions are set and used.



The first order of business is to describe the meaning of the permissions.

Append – a person or role may create new events in this calendar.
Delete – a person or role may delete events from this calendar

Meta -a person or role can do anything to this calendar, including delete it, change its name, import onto it, even give permissions to others. This is a very powerful permission and the owner of a calendar has these permissions.
Modify – a person or role may modify events (change their times, description, etc.) on this calendar
Subscribe – a person or role may subscribe (read only) to this calendar

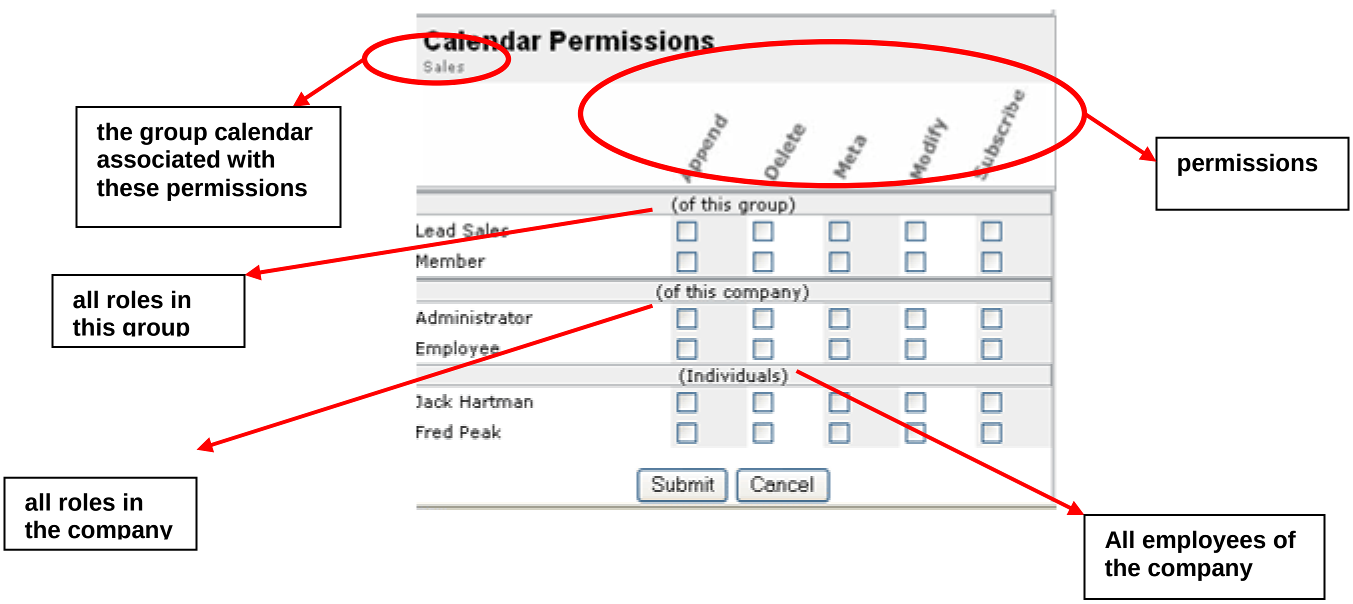
As seen in the interface above, permissions for a personal calendar can be granted either by role (of the company) or by each person (Individuals of this company).

Remember the two built-in roles within the company? Employee and Administrator. Also, our sample company has two employees. We see all these in the interface above.

You can grant permissions through the roles or through the individuals. Or even a combination of both. For example, if you built a calendar named ‘Project X’ and you wanted everybody witin the company to have permissions to this calendar, you could give the appropriate permssion through the role of Employee.

However, if you built a ‘Management’ calendar that you only wanted the management to have permissions to, you might pick out the individual people within the company who are managers and grant them appropriate permissions. Or you might create a role Management, assign the appropriate individuals to this role and than just give permissions through the role. Either way would work.

The permission interface for a Group Type calendar is similar and will now be described. Below is the permission interface for a company that has built a Sales group and has a calendar called Sales associated with this group.



The first thing to note is that the same permissions, Append, Delete, Meta, Modify, and Subscribe exist. They also have the same meaning as described above.

Just as with the personal calendar type, you may grant permissions through roles of the company or the individuals of the company. Or both. With a group type calendar, in addition to those methods of granting permissions, you may also grant permissions through the roles of the group.

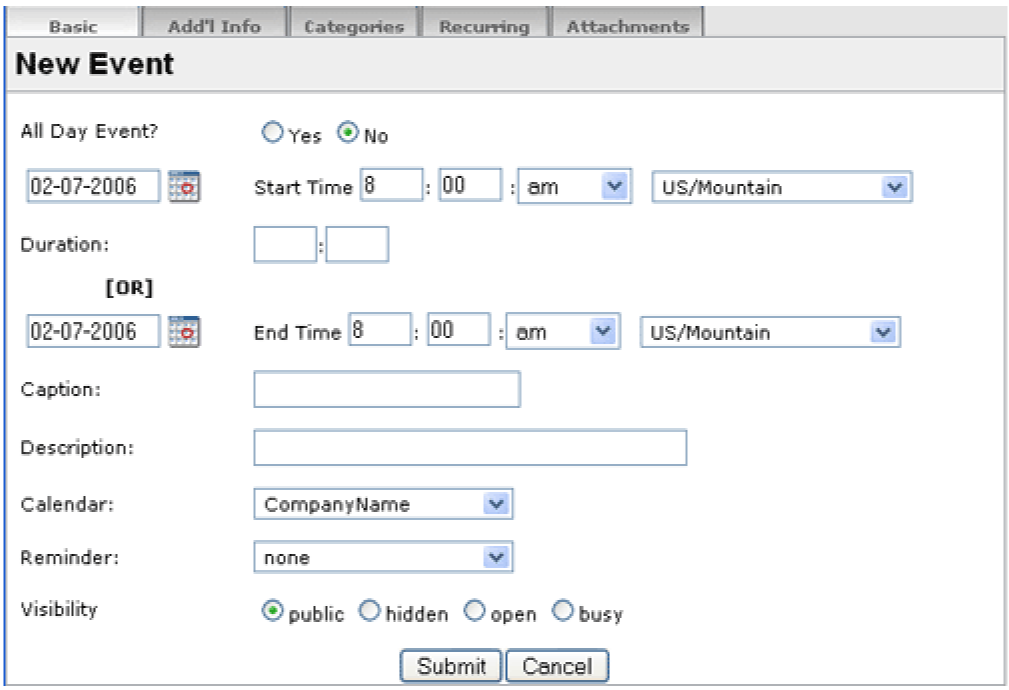
Let’s take an example. Assume you built a Sales Calendar for the group Sales. You gave members of this group Append, Delete, Modify, & Subscribe permissions. You also decided that Jack Hartman, the lead Developer, should be able to view the Sales calendar so that he knows what is coming down the pipe from sales. So you give him Subscribe permissions.

As you can see, granting permissions is both easy and powerful. The granularity in which one wants to apply permissions is up to the owner of a calendar. By default, building a calendar gives no permissions to anybody except the owner of the calendar. The owner must explicity grant permissions before anybody, including the CALibrate administrator has permissions to the calendar.

Adding Events

We have finally gotten around to adding an event to a calendar. You may add events to a calendar in any of the calendar views, but for purposes of simplicity, we will discuss adding an event from the month view.

Just click in the day of the month you are interested in adding an event to. The **New Event** interface will display:



tip #5: Using a MAC (safari browser)
right click on the day and select the **add event** menu item

Appropriately select and check items for your event through the basic portion of the interface. The only thing we will discuss here is the Visibility.

This is a permission system at the event level.

public – everybody who has permission to view my calendar sees the event and all its details
hidden – nobody but the owner can see this event and its details
open – Used for appointments making capabilities of the system only. Indicates a time slot in which you are open for appointments.
busy – show my event caption as BUSY to others but me

If you want the event to be a recurring event, select the Recurring Tab and follow the interface
If you want to add an attachment to the event, select the Attachment Tab and follow the interface
If you want to specify personal categories (not company categories) to the event, select the Categories Tab and follow the interface.
If you want to add a web link for the event or a location in which the event will be, select the Add'l Info Tab and follow the interface.

Summary

At this point you should be able to set up your company and add calendars and events. You should even know how the permissions work. If you still have questions, please refer to the online FAQ or the complete Users Manual. We hope you enjoy your experience with CALibrate Groups!