Using the Calendar

The BlueStep™ Calendar

The calendar was constructed for use in several BlueStep products with adaptations specific to the various applications. For instance, in HQ™ the personal calendar appears in My Office™, with a general scheduling calendar available through the Office Manager. My Office modules or general calendars may also be applied to Connect™ pages or pagelets, as desired. The Team™ version of the calendar appears as a standard calendar, with events displayed that are specific to the Team.

The personal calendar (as seen in My Office, for instance) presents only those events to which the logged in user has been added as an attendee. The general scheduling calendar contains all the events that have been entered by and for every person, organization-wide. This allows for a central scheduling individual, one who has all the information necessary to conveniently coordinate meetings and make appointments for individuals or groups. The standard calendar displays all events entered by Team members, presuming that the only events entered would be those that apply to the Team.

Calendar Navigation
To view the details on any calendar item, click on its underlined name. A summary giving the Event Time, Location, Event Type, and full Event Details will be presented. Selecting the edit icon 🖊 returns the original data entry page, where you may make any changes needed. Clicking the delete icon 🗑 removes this event from the calendar.

The date displayed in the dark bar at the top of the schedule identifies the date to which the schedule applies (date defaults to the present day). On either side of the date are arrows allowing quick navigation to previous and future days. The Today's Date link returns you to the present day, if you are currently displaying a past or future schedule.

The schedule view defaults to the view set through the Calendar Preferences button (see **Using Calendar Preferences** below). To temporarily change views to display an entire week or entire month, use the three buttons on the upper right.

        ⊞ Displays the entire current month

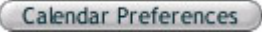   ▬ Displays the entire current week

        ▪ Returns to the current day

Below the schedule are miniature calendars of the present, preceding and next month with links to jump back or forward five months, making the entire twelve-month schedule easily accessible.

You may also select any specific date and enter it into the field below the miniature calendars or use the Go Today button to return to today's schedule if you have been viewing other dates.

Using Calendar Preferences
The Calendar Preferences button [Calendar Preferences] opens a screen with options to set display variables.

Calendar Preferences

Time Zone
All times displayed on the calendar will be converted to the time-zone you specify.

[(GMT-07:00) Mountain Time ▼]

Calendar Opening View
Select the view you want to start in when you go to calendar. This setting will not change your current calendar view.

[Month View ▼]

Typical Work Day
Select the hours that start and end your typical work day. These settings determine the minimum amount of time represented on the Day View of the calendar.

[8am ▼] to [5pm ▼]

Interval on Day View
Select the time interval for the Day View of the calendar.

[30 min. ▼]

(Save) (Cancel)

Time Zone
For events to record accurately for your location, it is important to set the Time Zone field. When set properly, events that are scheduled in other time zones, will auto-correct for time differences when seen on your schedule. For instance, you may be party to a telephone conference at 10:00 AM Eastern Time. If your time zone is two hours behind Eastern Time, the event will display at 8:00 AM on your schedule.

Calendar Opening View
The Calendar view seen in the Office Manager is set in this field. Please note that it does **not** reset the schedule view as seen on the My Office Schedule (Today) or the screen that is accessed from the Schedule link. Month, Week and Day Views are available.

Typical Work Day
This field lets you customize the span of hours that will be shown on the daily schedule. The span selected for the sample schedule page seen below is 8 AM to 5 PM.

Interval on Day View
You may set the time intervals displayed during the day with this field. The schedule may be divided into 10, 15, 20 or 30 minute periods or into one-hour intervals. The interval selected for the sample schedule page seen below is 30 minutes.

Aaronson, Andrew

New Event

Today's Date: May 28, 2004

	◀︎ **May 28, 2004** ▶︎
All Day	
8:00am	• 8:00am - 9:00am Breakfast Board Meeting - Aaronson, Andrew ✎🗑
:30	
9:00am	
:30	
10:00am	• 10:00am - 2:00pm Intermountain Therapists Conference - Aaronson, Andrew ✎🗑
:30	
11:00am	
:30	
12:00pm	
:30	
1:00pm	
:30	
2:00pm	
:30	
3:00pm	• 3:00pm - 4:00pm Grief Counseling Session - Aaronson, Andrew ✎🗑
:30	
4:00pm	• 4:00pm - 5:00pm Systems Class - Aaronson, Andrew ✎🗑
:30	
5:00pm	

Go To	April 2004							May 2004							June 2004							Go To
November 2003	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	July 2004
December 2003					1	2	3							1			1	2	3	4	5	August 2004
January 2004	4	5	6	7	8	9	10	2	3	4	5	6	7	8	6	7	8	9	10	11	12	September 2004
February 2004	11	12	13	14	15	16	17	9	10	11	12	13	14	15	13	14	15	16	17	18	19	October 2004
March 2004	18	19	20	21	22	23	24	16	17	18	19	20	21	22	20	21	22	23	24	25	26	November 2004
	25	26	27	28	29	30		23	24	25	26	27	28	29	27	28	29	30				
								30	31													

(Go) 05/28/2004 * (Go Today)

(Calendar Preferences)

New Events

Prior to entering any new events, the Event Types and Attendee Status lists need to be created. Organization Administrators or those who are familiar with your organization and its planning practices are usually the best qualified to decided the content of these two lists.

Event Types

The Edit Event Types button (Edit Event Types) opens a screen that will let you enter and save each new type.

General Information | **Permissions**

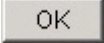# New Event Type

* Required

General Information
Fill in a name for your event type and choose a color (optional).

Name * [Board Meeting]

Color [#9999FF] ▶ ▮

Additionally, you may color code event types, which applies a highlighting behind the event name when it appears on the calendar. Click the arrow button ▶ to access the color picker. To select, click any color or enter a hexadecimal color code. When you are satisfied with the color, click the OK button [OK] on the color picker, then click the Save button (Save) on the New Event Type screen.

The event type will appear on a list similar to that shown below. You should have at least one type, but may add as many others at needed.

One useful method to organize event types is to select those that correspond to groups, departments or branches in your organization. Another is to select types that correspond to specific functions or operations in your organization. As with all creation screens, please remember to click the Done button (Done) at the bottom of the screen.

Attendee Statuses
For many events that your organization holds, you will want to track attendance. The Edit Attendee Statuses button allows you to create a customizable list based on the need you have for attendance statistics.

Attendee Statuses can be used to monitor staff creation, attendance and participation in events, for instance. In that case, you would list such items as, "Initiated Event", "Organized Event", "Attended Event", "Conducted Event", etc. Or it may be your organization's policy to charge clients based upon their request for or attendance at various events. In that case, you would list such items as, "Requested Meeting", "Requested, but did not attend", "Attended", "Participated", etc.

Scheduling Calendar

New Status

Attendee Statuses

Attendee Status Name	Edit	Delete
Committed	✎	🗑
Cancelled	✎	🗑
Assigned	✎	🗑
Available	✎	🗑
Unavailable	✎	🗑
Attending	✎	🗑
Schedule Conflict	✎	🗑

Types and Statuses need to be created only once in the system. When this is done, these items become available for use in entering any subsequent new Events. Types and Statuses are easily added, edited or deleted at any time, by those with the proper permissions. This means that the Scheduling Manager can always respond to the changing calendar requirements of your organization.

Adding New Events

To add a new event to the calendar, click the New Event button ⬚New Event⬚. On the resulting screen, the event Title, Start Date & Time, End Date & Time and Time Zone fields are required. All others are optional.

General Information | Attendees | Permissions

New Event

★ Required

General Information
Fill in a name, location, and details for your event.

Title ★ District Manager's Meeting

Location Third floor, Dayton's office

Type Administration Meeting ▼

Event Details

We'll be discussing quarterly updates. Also, bring your financials. Marsha Mason from Central will be attending.

Date and Time
Fill in the date and time when this event will take place. If time of day does not apply to this event (e.g. New Years Day), check the all day event box.

Start Date & Time ★ 06/10/2004 10:00am ★

End Date & Time ★ 06/10/2004 12:00pm ★

Time Zone ★ (GMT-05:00) Eastern Time ▼

☐ **This is an all day event.**

Repeating Events
Fill in these options to repeat your event on a regular basis.

Event Repeats The event repeats ------------ Event Is Not Recurring ------------ ▼

Repeats Until until

Under General Information, choose a title for your event, type in its location and select a type from the list previously created (see **Event Types**, above). The editor box is a place where you can enter all details pertinent to the event, such as a speaker's name, materials required, appropriate graphics, links to documents stored on your site or elsewhere available on the Internet, etc. Icons are available to perform standard word processing functions, such as font style and size, text colors, bulleting, inserting tables, etc.

If you choose to add a graphic to the Event Details, the recommended size is 200 X 200 pixels or 1.4 X 1.4 inches.

Under Date and Time, enter the start and end dates and the time for each, then check to be sure the time zone field is correct for your time zone, so that events will record accurately on organization-wide calendars. There is also a box to indicate that an event lasts for a full day.

When set properly, events that are scheduled in the Office Manager will auto-correct for time differences when seen on all attendee's schedules. For instance, if your office is hosting a telephone conference at 10:00 AM Eastern Time and participants are in a time zone a two-hours behind Eastern Time, the event will display at 8:00 AM on the participant's schedule.

Under Repeating Events, you can identify those meetings, classes and appointments that regularly reoccur and place them on the schedule with a single new event submission. The drop-down in the Event Repeats field has several options, based upon either the day you have entered in the Start Date & Time or on the current date.

As in the illustration below, if you have selected June 10th, which is also a Thursday, the options include repeating the event on every June 10th, on various Thursday possibilities or every day.

If there is an end to the event recurrence, enter the date in the field provided below the Event Repeats box, labeled Repeats Until.

If you do not select specific attendees at this point, be sure to click the Save button when finished with the New Event page.

Attendees
When the calendar is used in conjunction with My Office and Office Manager, attendees who have been selected for a specific event are the only ones (besides the Office Manager) who will see the event on their calendar. For other calendar applications, attendees will be specifically listed for the event, but distribution of the event information is not limited to attendees only.

To add an event to the individual calendars seen in My Office, click the Attendees tab to the right of General Information. If you have already saved the event, access it again through the edit icon , then go to Attendees.

Using the New Attendee button on the upper right, you may add as many or as few attendees to the event as you wish from an All Users Query or a My Relationships screen, both seen below, depending upon the application.
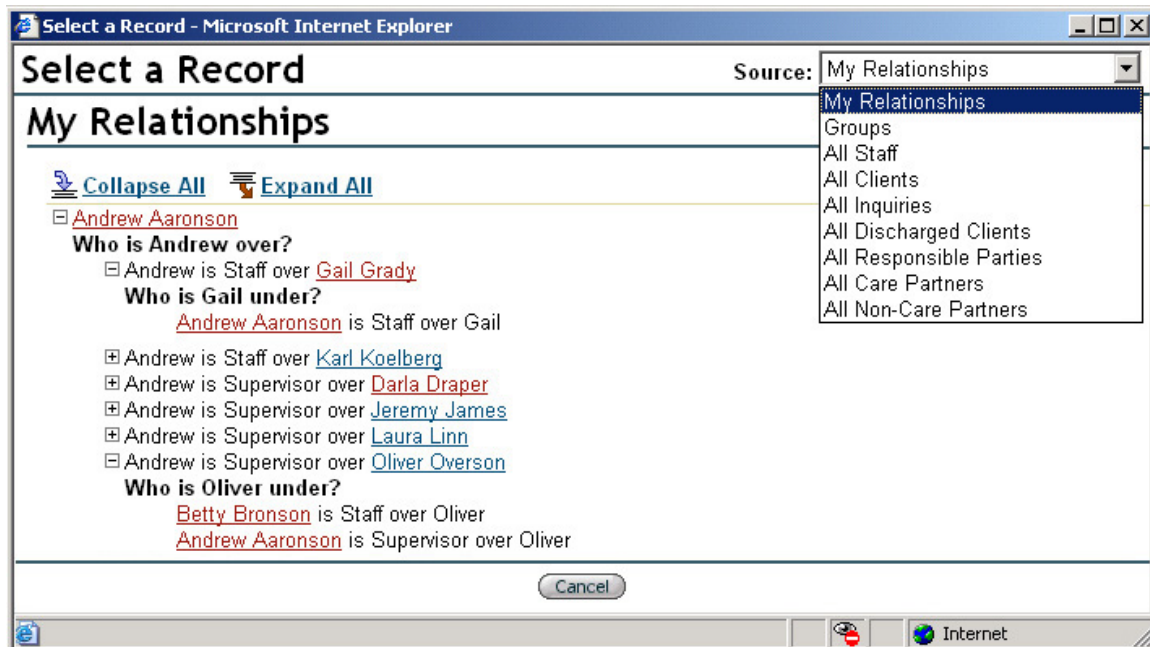

The options on the Relationships screen allow you to select from any category of individuals, by clicking on the category name in the Source drop-down. The relationship tree for the chosen category will display on the main part of the page and you may click on any underlined individual shown there to add them as an attendee.

This will return you to the Attendees screen, where you may select a status from the drop-down (see **Attendee Statuses**, above). The Remove button [Remove All Attendees] deletes all attendees from the event. To delete a single individual, click the delete icon [🗑] opposite the individual's name. Remember to click Save [Save] when done and you will be returned to the main calendar view, where the new event will be shown.

Step-by-Step in the Calendar

Adding New Events
- Click the New Event button
- Enter a title and location. Select a type from the drop-down,
- Enter any event details, start date/time, end date/time and time zone or repeating data.
- Click the Save button
- To add attendees, see below

Adding Attendees
- Click New Event button and create an event or select an existing event using the edit icon
- Click the Attendees tab
- Click the New Attendee button
- Select a category of individuals from the Source drop-down
- Click on the desired name
- Select a status from the Status drop-down
- Click the Save button when done adding all attendees