iEBMS Calendar of Events Configuration

iEBMS Calendar of Events (COE) Configuration ensures allows you to display events on the web for your organization.

Adding a New Calendar of Events Configuration
The COE Configuration can be set at the event level.

1. From the Ungerboeck Main Menu, select Calendar of Events (COE) from the iEBMS menu.

2. Select the Add icon.

3. When the Add Calendar of Events Configuration window opens, you will need to create a Code and Description.
   - The Code must be unique among configurations and the Description is the field that will be selected from the dropdown on various iEBMS applications.

   Examples:
   Code: PUBLIC
   Description: Public Calendar of Events

Creating the Calendar of Events Configuration
After determining your Code and Description you will move on to the two tabs: General and Display Criteria/Search Page. Within each tab, there are a variety of options available for configuration.

Required fields display in green and must be selected prior to saving the COE configuration.

General Tab
- Format – Choose what style you wish to display the calendar from List, Calendar or Column style.

List View	Calendar View	Column View

- Dictionary – The phrases from the selected dictionary will be used on the COE pages. By using a custom dictionary, you can modify the standard phrases in order to generate a specific look and feel. If you need the COE to display in another language, you can select one of the standard foreign language dictionaries.

- Regional Options Location – Dates and times will display on the COE pages according to the format of the regional options selection. The selections are pulled from your Operating System.

- Description – If using alternate descriptions, select the description to be used. Alternate descriptions are available for a variety of system fields (item descriptions, function descriptions, etc.) and are only available to organizations using alternate descriptions.

- Logon – Determines the Logon Configuration that will be used. The available options are configured on the Logon Configuration screen.

Add Descriptions

- If you wish to use non-standard description fields, that are not a group-by or order-by value, add them using the Add Descriptions field. You may multi-select fields by using the multi-select button. [...]

- When using the "Column" format in COE, the last column displayed is "Location." The Location column can be overridden to display the value selected in the Add Description drop-down. In addition to selecting a value from the drop-down, you must also edit the coe_p1_all.aspx file. Please contact Client Care for more detailed information.

Calendar of Events - Service Order Processing
Welcome to our calendar of events. Click on an event name for more details.

No Group Value | *Internal Meeting* | *International* | *Local* | *National* | *Regional* | *United Kingdom* | *USA*

No Group Value

Date	Event	Location
Sat 02/21/09 to Wed 02/25/09	D. R. Burbank	
Mon 01/05/09 to Fri 01/09/09	Ungerboeck Systems International	
Sun 01/11/09 to Sat 01/17/09	Ungerboeck Systems International	
Thu 07/02/09	Sales Meeting	
Sat 03/28/09	Conference Planning	Room 03
Sat 04/11/09	Sales Recap Meeting	
Tue 04/07/09	Web Sponsored Events	
Wed 05/06/09	Bob the Magician	
Mon 09/01/08 to Wed 09/03/08	Monthly Seminar Series	
Mon 10/06/08 to Wed 10/08/08	Monthly Seminar Series	
Fri 04/10/09	Executive Summit	
Sat 04/11/09	Saturday Night Live Meeting	
Thu 03/26/09	Weekly Meeting	
Wed 04/08/09	2009 April Marketing Seminar	
Wed 03/25/09	Friendly Paintball Meeting	

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Grouping Options

- <u>Group By</u> – From the Group by Values link users will select from which values they want to sort the data by. Automatically defaults to Start Date.

- <u>Group By Values</u> – These are the Values users may choose to sort the data by.

- <u>Ascending</u> – Select this checkbox to sort the data in ascending order. If the checkbox is not selected the data will be sorted in descending order.

- Use the A-Z button, or the up and down arrows to sort the group alphabetically, or to move values up or down the list.
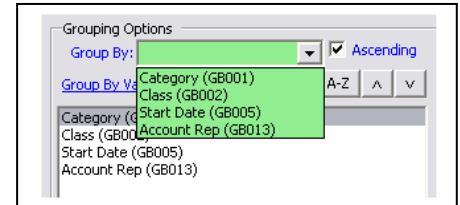
Example:

- Clicking the Group by Values link, we have chosen the values of Category, Class, Start Date, and Account Rep. These are reflected in the Group By drop-down menu. What option is selected in the Group By field is reflected on the Service Order Processing web link.

Grouped by Category   Grouped by Start Date

<u>Allow Saving to Outlook Calendar</u> – If checked, allows the event to be saved on the users Outlook Calendar.
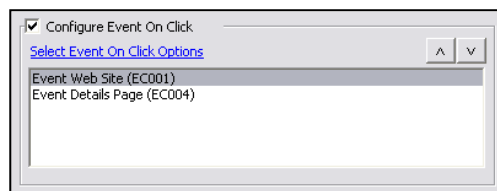

<u>Allow Caching</u> – Caching refers to of keeping a copy of a page or image you have already seen. Web browsers typically cache files that they display and ask the server to only download what has actually changed, rather than always downloading the entire page, thus speeding up your next visit to that page. You may choose to have the page cached, and how often, or may choose to not allow caching and updates to a page are only seen upon refreshing the page.

- Example of Allowing Caching:
    - The user is a hotel, with a calendar of events on a monitor in the lobby for public view. As the calendar is updated throughout the day, at the intervals indicated in the configuration, so is the screen on view in the lobby without having to be physically refreshed upon each change.

<u>Configure Event on Click</u> – This option allows the user to select what page will open when the hyperlink to the Event is clicked. Use the "Select Event On Click Options" link to choose the page that will first appear. If that page is not available, the page will default to the next page, in the order you arrange them.
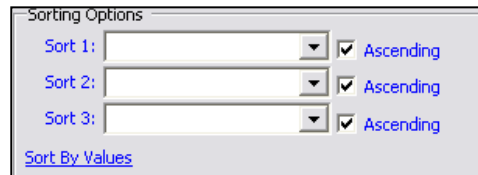- Example:
    - The Event Web Site is the first page listed, therefore the default.
    - If the Event Web Site is down for maintenance or otherwise unavailable, the next page listed will become the default, in this example, the Event Details Page.

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Sorting Options

There are three fields under Sorting Options, which allow you to select the criteria that the Groups are sorted by, and in what order you wish to have them sorted.

- By using the Sort By Values link you can select which values you wish to sort by, and then filter down further by arranging those values in sorting order 1, 2, and 3. You may also use the checkbox to have them sort in ascending or descending order.
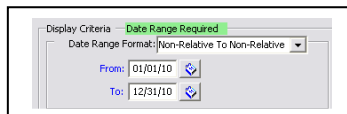
Display Criteria/Search Page

Date Range Format - Choose from four formats: Non-Relative to Non-Relative, Non-Relative to Relative, Relative to Non-Relative, and Relative to Relative.
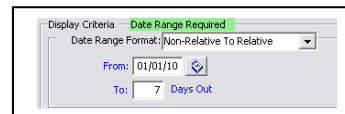- Relative dates are established by a specific time frame, for example, seven days out. They use the current date to determine the date range.
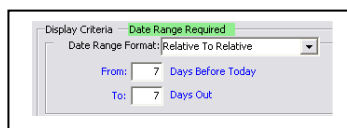- Non-Relative dates will show a specific time frame without constraints.
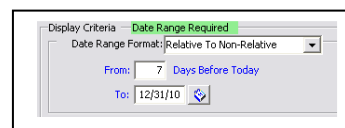
Example:

Non-Relative to Non-Relative

Non-Relative to Relative

Relative to Relative

Relative to Non-Relative

- Date to Use – Choose the date the user wants to display for the events on your calendar, Start Date or Move-In date.

- Status – From the Bookings tab on the Edit Event window, select the Status range the user wishes the information to be sorted and what will be displayed.

- Event Sensitivity – On the Supplement tab of the Edit Event window elect the sensitivity range the user wants to view, from Public to Confidential information.

- Relative Space – Select the Anchor Venue you wish to use from the Bookings tab of the Edit Event window. This is used to filter events which have a designated Anchor Space.

- Show Events to the End of the Month – Shows events that cross over the end of a month.

Search Page Fields

- <u>Field to Show</u> – This is where you can configure what fields will be searchable, and in what order they will appear on the Search Page. Select the items you wish by checking the checkbox, then enter a number 1-10 to designate what order in which they will appear. You can also designate the maximum day span you wish to view.

- <u>Values</u> – Multiselect boxes that are used as display criteria and define what selections are available on the Search Page.
  - Choose items from Categories, Classes, Types, Ranks, Accounts, Anchor Venues and Anchor Venue Types by selecting the link for each. Use the [A-Z | ∧ | ∨] box to designate the order and if you want them listed alphabetically.

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