University Calendar Reference Guide

Description:

This document is intended to be a quick reference for common tasks within the Active Data Calendar admin interface. For more detailed documentation of any feature, reference the full Active Data user guide by clicking the “? HELP” button on the top right of any screen.
Table of Contents

Accessing the system ........................................................................................................................................... 3
  Mobile .......................................................................................................................................................... 3

Main Menu ....................................................................................................................................................... 4

My Profile ........................................................................................................................................................... 5

Facilities ........................................................................................................................................................... 6

Categories .......................................................................................................................................................... 8

Creating Events ............................................................................................................................................... 9
  Main Information ....................................................................................................................................... 9
  Scheduling & Facilities ............................................................................................................................... 10
  Images & Attachments ............................................................................................................................... 14
  Details & Registration ............................................................................................................................... 16
  Event Registration .................................................................................................................................... 17
  Event Preview ............................................................................................................................................ 19
  Change Log ............................................................................................................................................... 20

Editing Existing Events ................................................................................................................................. 22
  Modifying Events ....................................................................................................................................... 22
  Deleting Events ......................................................................................................................................... 23
  Canceling and Rescheduling Events .......................................................................................................... 24
  Copying Events .......................................................................................................................................... 26

Approving Events .......................................................................................................................................... 27
  Approving Open Entry Events .................................................................................................................... 28
  Approving Events from Other Calendar Admins ......................................................................................... 31
  Denying Events ......................................................................................................................................... 32

Event Import & Export .................................................................................................................................. 32

Marketing & Syndication ............................................................................................................................... 33
  Email ......................................................................................................................................................... 33
  Syndication ............................................................................................................................................... 37
  List .............................................................................................................................................................. 38
  Grid .............................................................................................................................................................. 39
  RSS ............................................................................................................................................................. 40
  Search ....................................................................................................................................................... 42
  Quick Link .................................................................................................................................................. 45

GW Drupal Integration ................................................................................................................................... 46
Accessing the system

**Active Data admin system:**
http://browse.calendar.gwu.edu/Login.aspx

**Public calendar:**
http://browse.calendar.gwu.edu

**Open Entry Form (General):**
http://www.gwu.edu/~calendar/open_entry.html

**Open Entry Form (Student Organizations):**
http://www.gwu.edu/~calendar/open_entry_studentorgs.html

**Mobile**
Active Data provides an out of the box mobile view of the calendar. Visit the public calendar link on your mobile device to experience the calendar on mobile.
Main Menu

You will be presented with the main menu page upon login. This page highlights:

- **Events Pending Approval**: A list of events pending your action, with options to review, modify, approve, deny or delete the event with one click.
- **Your Upcoming Events**: A list of upcoming events in your category(s) that have been saved but not yet published.
My Profile

Click on the **Workflow** tab to access the My Profile page. Use this page to set up the default category(s) and department(s) that you would like to have assigned to your events. You can also use this page to reset your password.
Facilities

**Important Note About Calendar Facilities:** As a calendar administrator, you are expected to know and follow the processes for reserving space around campus. **DO NOT** select a building/room for your event that you have not reserved through the proper channels. Information about room reservation resources may be found at:

- [http://calendar.gwu.edu/event-planning-resources](http://calendar.gwu.edu/event-planning-resources)

Click on the **Facilities** tab to see a list of all locations, buildings and rooms listed in the calendar. If you would like to add an on-campus location to this list, please complete the Location Request Form:

- [http://calendar.gwu.edu/calendar-location-request-form](http://calendar.gwu.edu/calendar-location-request-form)

All off campus events should be marked as “Off Campus” and additional details should be provided in the description of the event.
View Locations

Search for Specific Location  View All

Select Location/Building: [Select]
Enter Keyword: [ ]

# of Locations = 5  # of Buildings = 20  # of Rooms = 133

Location Name          Building Name

- Foggy Bottom
- Foggy Bottom 1267 E Street NW (show rooms)
- Foggy Bottom Alumni House (show rooms)
- Foggy Bottom Anniversary Park
- Foggy Bottom Duques Hall (show rooms)
- Foggy Bottom Hall of Government (show rooms)
- Foggy Bottom Kogan Plaza
Categories

Click on the **Categorization** tab to see a list of the categories that have been established for the calendar. Click on a category name to view the subcategories and category owners.
Creating Events

To create an event, click on the **Events** tab. This will bring you to the first page of a multi-step process to create an event. Alternatively, you can click **EVENTS: Add** to reach the same screen. You can move through each step in the process by clicking the tabs at the bottom of the screen. Clicking between tabs will save your information.

### Main Information

1. **Event name**: The name of the event as it should appear on the public calendar.
2. **Department:** Select the appropriate department from this list. Calendar admins with permission to approve Open Entry events will have access to the “Open Entry” department as well as their own department(s).

3. **Publish on selected calendar(s):** Select “Public”. *(Note: Private calendar functionality will be introduced in a future phase of the University Calendar.)*

4. **Category(s)/Subcategory(s):** Select one or more categories for your event. Based on the categories selected, the event may be posted live immediately once released, or routed to another calendar admin for approval.

5. **Event description:** Use the “What You See is What You Get” (WYSIWYG) editor to enter your event description. Strip any extra formatting by using the “Strip Formatting” button, which is the first in the top row of buttons. Make sure your description is comprehensive and engaging for site visitors. Visit [http://calendar.gwu.edu/submission-best-practices](http://calendar.gwu.edu/submission-best-practices) for suggestions on writing effective descriptions.

6. **Date & time:** Select the date and time for the event. If this is a recurring event, you will set the recur pattern on the next tab, Scheduling & Facilities.

**Scheduling & Facilities**

This screen allows you to set the recur pattern for the event (if desired) and select the location for the event. If your event does not have a recur pattern and you do not want to select a location, you can skip this step and click to another tab.
1. **Setting a recur pattern:** Click the **RECUR PATTERN** button and use the fields that appear to set the recurrences. Then click **Generate Schedule** to generate a list of all event occurrences.
2. **Adding Occurrences**: If you want a non-standard repeating pattern of events, click the **ADD OCCURRENCES** button to add additional occurrences in an ad-hoc fashion. Once your event day(s) and time(s) have been entered, click **GENERATE SCHEDULE** to generate a list of event occurrences.
3. **Selecting a Location:** Clicking **GENERATE SCHEDULE** will cause a list of Locations to appear. Expand the list options by clicking the plus (+) icon. Select the deepest level (usually the room) where your event will be held.
a. If your event is off campus, select “Off Campus” from the location list and make sure that the full details of the location are included in your event description.

b. If your event is on campus and your desired location does not appear, leave the field blank or select the appropriate parent location. Requests for new locations may be submitted via the Location Request Form: [http://calendar.gwu.edu/calendar-location-request-form](http://calendar.gwu.edu/calendar-location-request-form)

Images & Attachments

1. If desired, an image can be associated with the event. Select an image from your computer, enter the Image Alt Text and click the “Add” button.
   a. **Image size:** To ensure consistency across the calendar, please make your images **220x220 pixels**. Calendar admins reserve the right to remove or resize images that do not meet these dimensions.

2. If desired, attachments may be associated with the event. Select the attachment from your computer, add the Attachment text and click the “Add” button. If you would like this attachment to display publicly, click “Display on Front End”.

Details & Registration

This tab contains additional information and attributes about the event as well as the option to enable event registration. Some of the fields will display on the front end as search filters or on the event detail page as described in the following chart. Note that despite the text “Not viewable on user display”, GW is pulling out some of the Internal Information fields for display on the event detail page.

<table>
<thead>
<tr>
<th>Field</th>
<th>Search Filter</th>
<th>Detail Page</th>
<th>Required</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td></td>
<td>✔</td>
<td></td>
<td>The specific contact person/organization for the event.</td>
</tr>
<tr>
<td>Phone</td>
<td>✔</td>
<td>✔</td>
<td></td>
<td>Contact phone number</td>
</tr>
<tr>
<td>Email</td>
<td></td>
<td>✔</td>
<td></td>
<td>Contact email</td>
</tr>
<tr>
<td>Audience</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>The intended audience for the event</td>
</tr>
<tr>
<td>Event Format &amp; Features</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>Additional attributes describing the event</td>
</tr>
<tr>
<td>Series</td>
<td></td>
<td>✔</td>
<td></td>
<td>Used to tie multiple events together</td>
</tr>
<tr>
<td>Tags</td>
<td></td>
<td>✔</td>
<td></td>
<td>Additional keyword tags that can be used to aid search or for pulling dynamic feeds</td>
</tr>
</tbody>
</table>

Please list the name and contact information for the executive sponsor of this event.

This field is intended to capture additional information about the event owner/sponsor and will be required on the Open Entry form. Individual department admins will not need to complete this field.

If this event takes place in reservable space on campus, list your room booking confirmation number.

This field is intended to prevent Open Entry users from selecting a campus location without following the proper process for reserving campus space.

Social Media Links

Enter your social media links separated by a comma. For example: [https://www.facebook.com/georgewashingtonuniversity](https://www.facebook.com/georgewashingtonuniversity), [https://twitter.com/GWtweets](https://twitter.com/GWtweets)
### Event Registration

If you would like to enable registration for the event, check the **Enable Registration** button. Select a form template from the list and complete the fields associated with registration.

Additional training on event registration will be provided at a later date.

| Hosted by | ✅ | A freeform text field to allow for a custom description of the event host. For example: *The Global Women’s Institute, School of Public Health & Health Services and the National Institutes of Health* |
| Internal Notes | | Used for internal notes only. These notes will be visible by other calendar admins with access to view or approve the event. |

**NOTE:** This field is not currently displayed on the calendar and will be incorporated at a later date.
Event Preview

Once all fields have been completed, click “Preview” to preview your event. From the Preview screen you can do the following:

1. Click any tab at the bottom to make modifications.
2. Select “Save Event” (recommended) to save the details but not yet publish to the calendar.
3. Select “Release Event” to publish the event to the calendar once you are finished.
4. Click the small “Facilities”, “Resources”, “Marketing” and “Internal” tabs in the middle of the page to access additional event details for each section.

Once you are satisfied with your event, click the FINISH button in the bottom right.
Change Log
Once saved, events contain a change log that captures a history of modifications made to an event.
Note about system timeout: Active Data Calendar will log out a user after 15 minutes of inactivity. To save your event as you go, click the PREVIEW button, select the “Save Event” option, and click FINISH.
Editing Existing Events

Navigate to the Events tab, then select EVENTS: Modify/Cancel/Delete to see a list of all events you have access to modify or delete. Click on the event name and click the SUBMIT button to edit the event.

Modifying Events

When modifying an event, follow the same steps as you would when creating an event. Click the PREVIEW button to view your changes and save or release the event.
Deleting Events

Deleting an event will remove an event from the calendar entirely. Click the **DELETE EVENT** button and complete the following screen to delete it from the system.
Canceling and Rescheduling Events

Canceling an event will keep the event on the calendar but append “(Cancelled)” to the Event Name field. It will also allow you the option to reschedule the event, which will append “(Rescheduled)” to the Event Name field. Click the CANCEL EVENT button and proceed through the following screens to cancel and optionally reschedule your event.
Copying Events

To copy an existing event, click the **COPY** button and proceed through the standard event creation screens, making any desired modifications.
Approving Events

Events will appear in your queue for approval:

- When the event is submitted from the Open Entry form to your category
- When another calendar admin selects your category for their event

Click on the **Main Menu** link at the top of the page to see your list of events for approval. To view the event details, click on the event name.

**NOTE:** Selecting an option from the “Action” pulldown menu will immediately implement the change without first providing the opportunity to review the event. Use this pulldown menu only if you are confident with your selection.
Approving Open Entry Events

If the event was submitted through the Open Entry form to a category you own, you will have the ability to modify the event. Click the MODIFY button to make changes. Use the subsequent screens to review, modify, and release the event.
**IMPORTANT:** For Open Entry events, be sure to update the following fields so that the event displays on the correct calendar(s) and your department owns the event:

- **Department:** Change this from “Open Entry Form” to your department.
- **Publish on Selected Calendar(s):** Change this from “Private” to “Public”. *(Note: Private calendar functionality will be introduced in a future phase of the University Calendar.)*
Approving Events from Other Calendar Admins

If your category was assigned to an event by another calendar admin, they are the primary event owner and you will NOT have the ability to modify the event. If you click the event name, you can view the details of the event but not make changes. If you would like changes to be made to the event, click the SEND NOTIFICATION button to send a message to the event owner.
To approve the event, click the APPROVE button or select Approve from the pulldown on the Main Menu page.
Denying Events

If you deny an event for your category, be aware that it may still appear on the calendar under other categories.
To deny an event without providing any details, select Deny from the Main Menu page pulldown menu.
To deny an event and include a note about why you are denying the event, click the event title to view the event, then click the DENY button. You will be prompted to enter a note. The event owner will receive an email notifying them that the event has been denied for your category.

Note About Event Approval: If an event owner makes modifications to an event that you previously approved for your category, it will be resubmitted to you for approval.

Event Import & Export

Events may be imported and exported on a one-time or ongoing basis. If you are interested in importing events, please contact the External Relations Online Strategy team.
More details about event import and export will be provided in a future training.
Marketing & Syndication

Click on the Marketing tab to access various ways to share your events. The default screen of this section brings up the Email option.

Email

The Email functionality will allow you to email calendar administrators or external email addresses about a specific event. **When to use it:** We recommend that you use this functionality for internal calendar administrator communications only, and leverage other email marketing tools for external-facing communications. Select the event you wish to email, utilizing the search feature on the right if desired, and click Submit.
University Calendar

Send Event Email Notice

Select Event for Email Notification

Test 2 - Knapp Fellowship for Entrepreneurial Service-Learning, 11/29/2012 - (0)
Knapp Fellowship for Entrepreneurial Service-Learning, 11/21/2012 - (0)
Open entry test 3 - routing, 11/29/2012 10:30 AM - (0)
Open entry test 2 - student orgs, 11/30/2012 9:30 AM - (0)
Open entry test 1, 12/8/2012 2:00 PM - (0)
Sample Staff Volunteer Event, 1/4/2013 6:00 PM - (0)
MLK Day of Service, 1/26/2013 - (0)

Search for Events

Select Saved Search: Select

# of Events Displayed: 25

Event Type: All

Department Name: Select

Search By Category(s)/Subcategory(s):

- Academic Calendar
- Academic Events (Locked)
- Admissions (Locked)
  - Graduate
  - Undergraduate
- Arts, Culture, & Entertainment (Locked)
- Performance
- Athletics, Sports, & Recreation (Locked)
- Club Sports

Location: Select

Keyword Search:

Select Events for a Specific Date Range

Range of Dates: Select

CANCEL  SUBMIT
On the following screen, configure the event recipients, subject, and message. Click **Submit** to preview and send your email.
Syndication

Click the **Marketing** tab at the top of the screen to access the syndication options described in the chart below.

<table>
<thead>
<tr>
<th></th>
<th>List</th>
<th>Grid</th>
<th>RSS</th>
<th>Search</th>
<th>Quick Link</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Generates:</strong></td>
<td>A dynamic list formatted to your choice of predefined layouts</td>
<td>Mini calendar grids, up to 12 months in advance</td>
<td>An RSS feed of upcoming events</td>
<td>Search box</td>
<td>Link to a filtered list of events</td>
</tr>
<tr>
<td><strong>Options:</strong></td>
<td>Mix/match any of the following:</td>
<td>Mix/match any of the following:</td>
<td>Mix/match any of the following:</td>
<td>Show/hide the following search fields:</td>
<td>Mix/match any of the following:</td>
</tr>
<tr>
<td></td>
<td>• Category</td>
<td>• Category</td>
<td>• Category</td>
<td>• Start Date</td>
<td>• Category</td>
</tr>
<tr>
<td></td>
<td>• Location</td>
<td>• Location</td>
<td>• Location</td>
<td>• End Date</td>
<td>• Location</td>
</tr>
<tr>
<td></td>
<td>• Department</td>
<td>• Department</td>
<td>• Department</td>
<td>• Start Time</td>
<td>• Audience</td>
</tr>
<tr>
<td></td>
<td>• Audience</td>
<td>• Audience</td>
<td>• Audience</td>
<td>• End Time</td>
<td>• Event Format &amp; Features</td>
</tr>
<tr>
<td></td>
<td>• Event Format &amp; Features</td>
<td>• Event Format &amp; Features</td>
<td>• Event Format &amp; Features</td>
<td>• Category</td>
<td>• Series</td>
</tr>
<tr>
<td></td>
<td>• Series</td>
<td>• Series</td>
<td>• Series</td>
<td>• Location</td>
<td>• Date range</td>
</tr>
<tr>
<td></td>
<td>• Date range</td>
<td>• Date range</td>
<td>• Date range</td>
<td>• Department</td>
<td>• Keywords</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Pre-filter results based on:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Category</td>
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<td>• Location</td>
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<td></td>
<td>• Department</td>
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<td></td>
<td>• Audience</td>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td>• Event Format &amp; Features</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Series</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Date range</td>
</tr>
<tr>
<td><strong>When to use:</strong></td>
<td>If you wish to integrate a custom list of events in your website.</td>
<td>If you wish to integrate a custom calendar grid in your website.</td>
<td>May be used on GW Drupal sites or any other site that consumes RSS feeds.</td>
<td>If you wish to integrate a custom calendar search in your website.</td>
<td>If you wish to link to a filtered set of results on the calendar.</td>
</tr>
</tbody>
</table>

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*Online Strategy*

Division of External Relations
The George Washington University
onlinestrategy.gwu.edu

*Last updated February 4, 2014*
List

Click the **List** link to configure the list of events you wish to pull from the system. Select a prebuilt Syndication Template and configure your list based on the available options. Once you have made your selections, click the **SUBMIT** button (not pictured) and a box will appear on the right-hand side of the screen containing the embed code for the list.

Sample output:
Grid

Click the Grid link to configure the events you wish to pull into a mini calendar grid. The View Type field determines how events will appear once clicked. Do NOT select Grid or Gantt as these options are not intended for use on the University Calendar. Configure your grid settings based on the available options. Once you have made your selections, click the SUBMIT button and a box will appear on the right-hand side of the screen containing the embed code for the list. Below is an example of a single month mini grid.
Sample output:

RSS

Click the RSS link to configure the list of events you wish to pull from the system in RSS
format. Configure your list based on the available options. Once you have made your selections, click the **SUBMIT** button (not pictured) and a box will appear on the right-hand side of the screen containing the embed code for an RSS feed button icon and the URL of the feed.

![Generate RSS Code](image)

The RSS URL is included in the embed code as highlighted below:

```html
<A href="http://browse.calendar.gwu.edu/RSSSyndicator.aspx?type=N&number=5&category=6-0&sortorder=ASC"><img src="http://browse.calendar.gwu.edu/images/rss_1.gif" border="0" /></A>
```

Although not listed as an option in Active Data, keywords may be added to an RSS URL by adding **&keywords=your+keywords** to the URL. For example: http://browse.calendar.gwu.edu/RSSSyndicator.aspx?type=N&number=5&category=6-0&sortorder=ASC&keywords=Alumni
Search

Click the **Search** link to configure a custom search box. Configure your list based on the available options. The first screen will display a list of currently available search options. Click the **ADD** button to add a new one.

On the following screen, configure the fields that should appear on the form and the types of events to be searched. Click the **Search Results Setup** and **Security Setup** tabs to further configure your search box. When complete, click the **SAVE** button (not pictured).
Once you click SAVE, an additional tab labeled **Syndication Code** will appear. Click this tab to access the embed code for the search.
Note about search syndication: The search code must be uploaded to a web server in order to function properly. It may not appear if you are viewing HTML files local to your computer.
Quick Link

Click the **Quick Link** link to configure a link to a predefined set of events. The **View Type** field determines how events will appear when a user visits the link. Do NOT select Grid or Gantt as these options are not intended for use on the University Calendar. Configure your quick link settings based on the available options. Once you have made your selections, click the **Submit** button (not pictured) and a box will appear on the right-hand side of the screen containing the link.
GW Drupal Integration

Active Data events may be pulled into GW Drupal sites and will appear in the standard Event Sidebar format.

To add an Active Data event feed to your site, follow these steps:

   1. Create an Active Data RSS feed with your desired events (see page 32).

   2. Log into your GW Drupal site (Site Administrator privileges required).
3. From the black menu bar, navigate to Configuration > Web Services > Feed Aggregator > List.

4. Click the “+ Add Category” link to add a feed category. A category may contain one or more feeds.

![Feed Aggregator Image]

Enter a title that describes your feed(s). The description field is optional. Neither field will display publicly.
5. Click the **List** tab to return to the main screen for this section. Then click “+ Add Feed” to add a feed. Enter a descriptive title and the RSS URL from Active Data. Adjust the update interval if your event list will be changing frequently. Finally, select the category for your feed.
Feed aggregator

Title *
Active Data Alumni Feed
The name of the feed (or the name of the website providing the feed).

URL *
http://browse.calendar.gwu.edu/RSSSyndicator.aspx?type=N&
The fully-qualified URL of the feed.

Update interval
1 hour
The length of time between feed updates. Requires a correctly configured cron maintenance task.

News items in block
5
Drupal can make a block with the most recent news items of this feed. You can configure blocks to be displayed in the sidebar. The number of news items to show in this feed's block. If you choose '0' this feed's block will be disabled.

Categorize news items

- Active Data Alumni Feed
- GW Blogs

New feed items are automatically filed in the checked categories.

Save
6. Run the cron task to pull a fresh download of your feed. From the black menu bar, navigate to **Configuration > System > Cron** and click the “Run Cron” button.

7. Go to the page on which you’d like to add the Event Sidebar RSS Feed. Click “Customize this page”. In the desired column, click the “+” button to add a new pane. On the window that pops up, click on **GW Display Views – Site Placement**, then select **GW RSS Events Display**.
8. Configure a title, if desired, and select your RSS category from the list.

9. Click Finish and then Save to save your changes. **Refresh the page** and your Active Data Event Sidebar will appear.