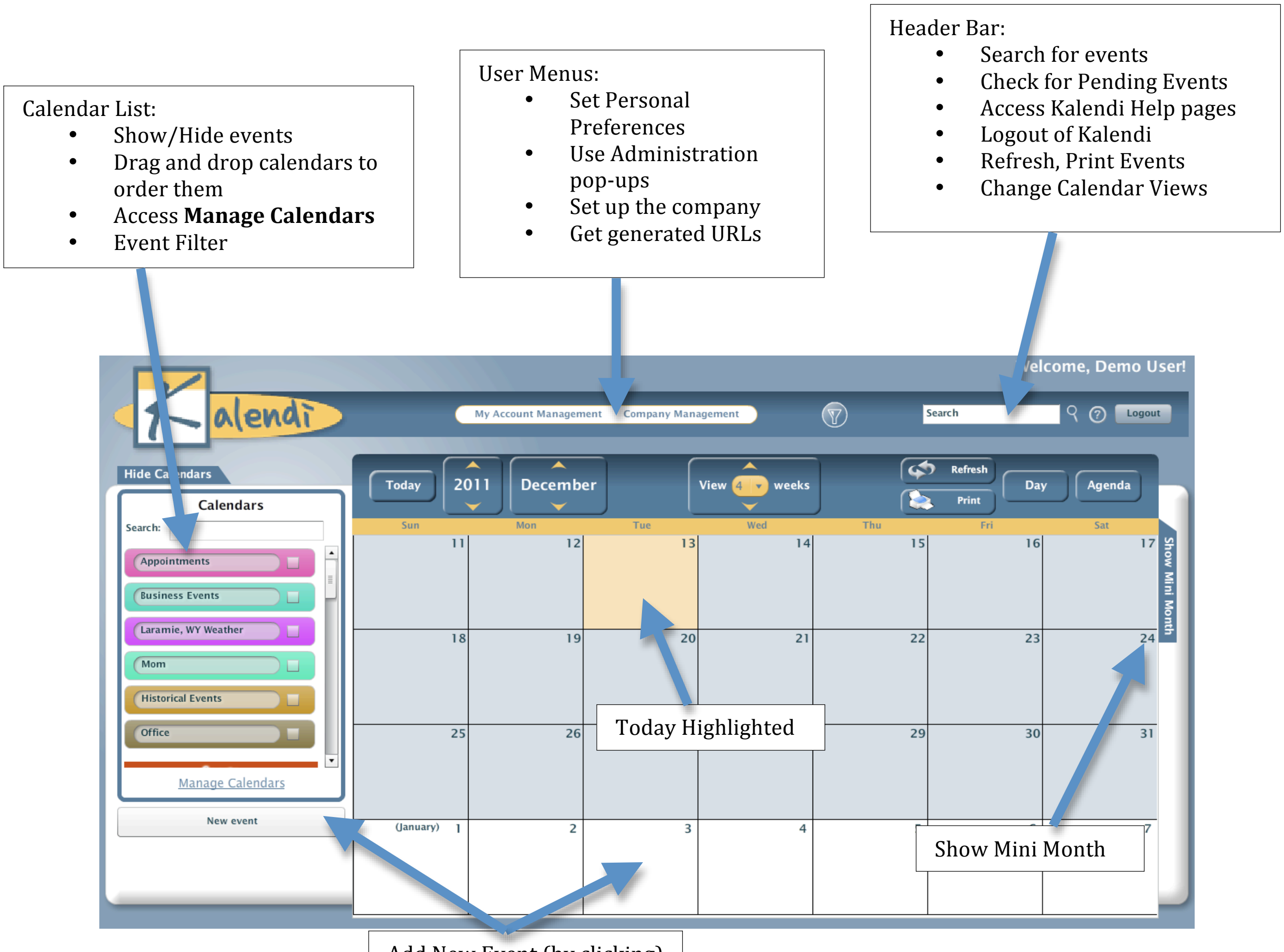
Kalendi Quick Start Guide

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!



(Figure 1)

Company Setup

For users who are administrators use the *Company Management* menu to set up your employees and company.

Refer to the above menu when following the steps for setting up your company:

Step 1: Set the Company Information

Open the Company Info tree, and select *Edit Company Info*. 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. We suggest you use a logo around the size of 400x115 pixels.

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

Step 2: Set Company Roles

From the *Company Management* menu select *Manage 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 Kalendi Groups is defined as an Employee. The person or people who administer Kalendi (add employees, set up groups, etc.) are Administrators. There may be multiple administrators to Kalendi, but we do not encourage this situation.

Since calendar permissions (see next section) may be based on group 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: Set Company Groups

From the *Company Management* menu select *Manage 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 group people. If you want several different people across the company to share a calendar then create a group for them.

Calendar 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: Set Company Event Types

From the *Company Management* menu select *Manage Event Types*.
In this section, you will be able to add company event types. These event types are useful for quickly viewing events that fall under a common theme.

You can use the *Event Filter* drop down located on the *Calendar List* to view only events belonging to the chosen type.

When you have finished adding event types, move on to Step 5.

Step 5: Create Company Employees

From the *Company Management* menu select *Manage 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.

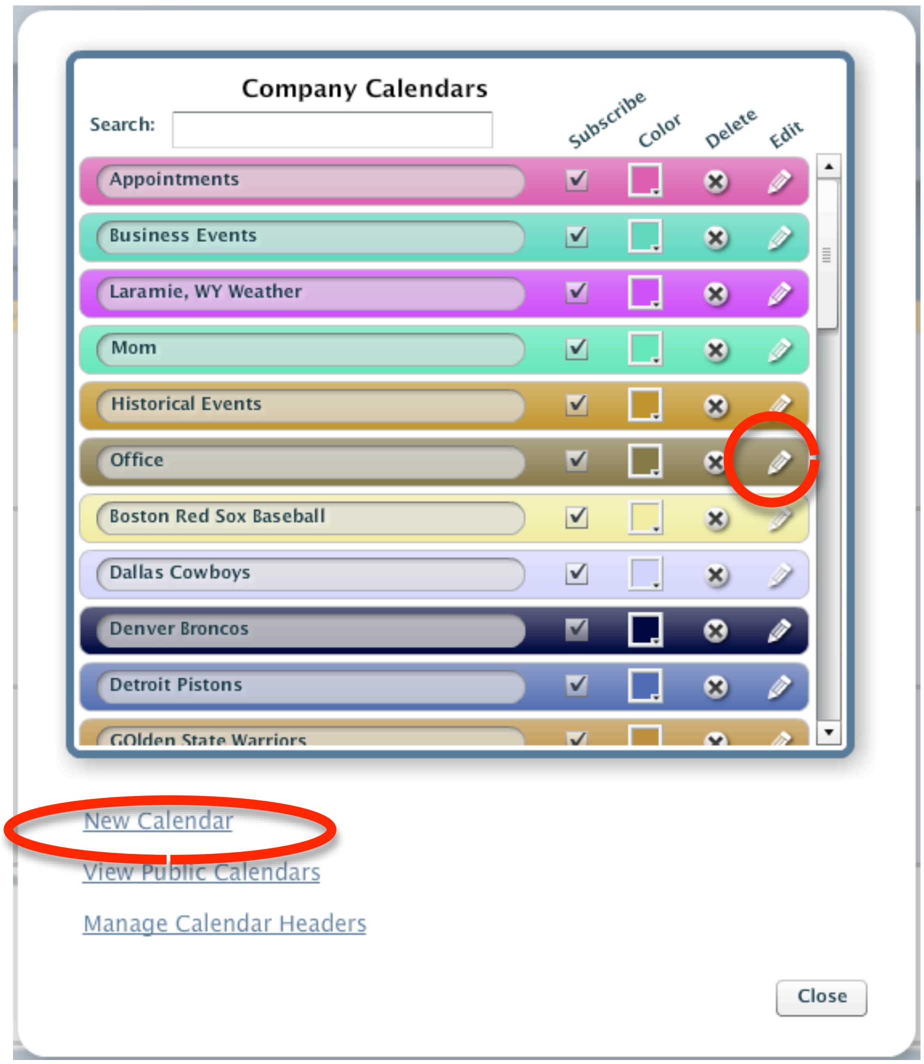
Add the first name, last name, and email/username. Please use a valid existing email address, because the user will have to verify their account at this address. When they log into Kalendi they have the ability to change their email/username and password.

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 Kalendi 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. You can keep adding employees in this fashion until you have finished.

Building Calendars

In this section we will discuss how to build or modify a calendar. When creating new calendars, or editing existing ones, you will use the *Manage Calendars* pop-up shown here.

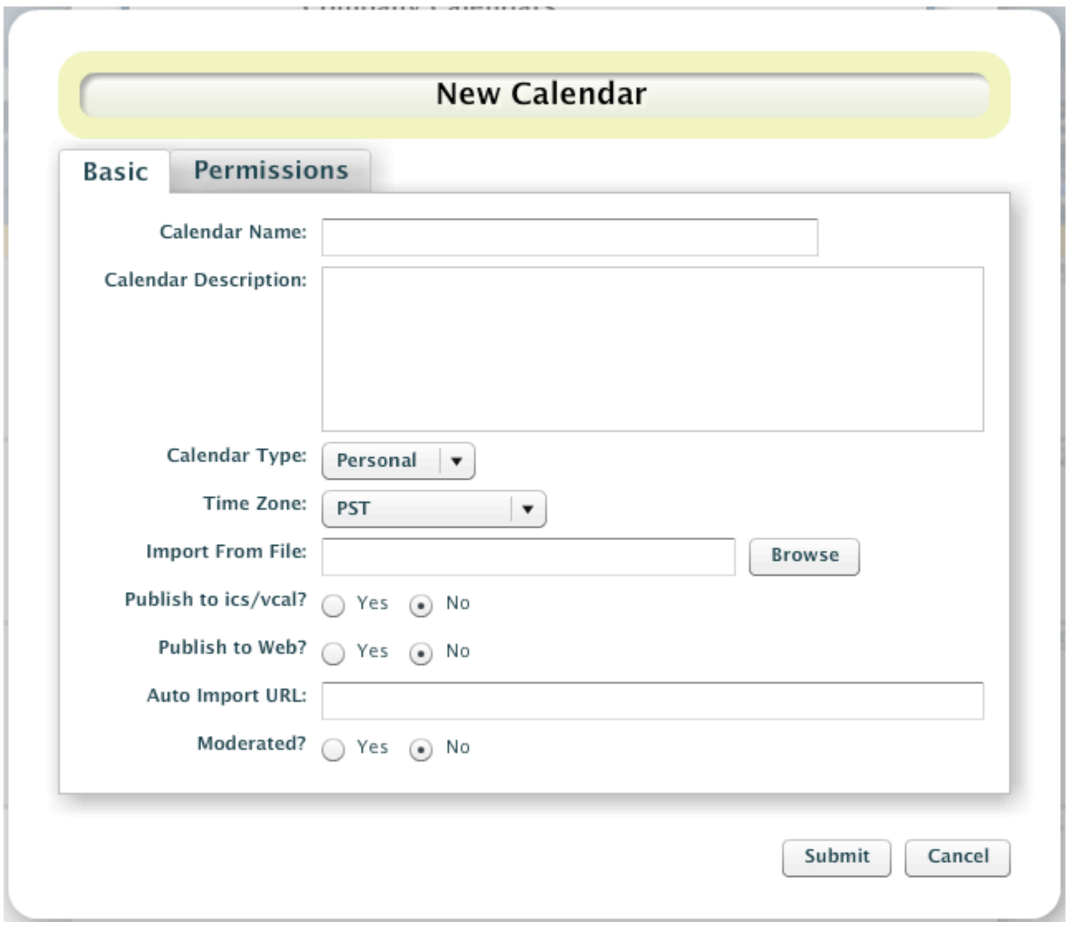


There are four calendar types within the Kalendi system. They are: Company, Group, Personal, and Public. The Company Calendar cannot be deleted. It is automatically built for the company when the company is created and its name is the name of the Company. The purpose of the company calendar can be to 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 the company 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.

Most of your calendars will be personal, for example each employee of your company can have their own calendar of events.

To add a calendar select the **New Calendar** link circled above. The **New Calendar** pop-up will display.



Calendar Type: If you have built groups within your company and want to build a calendar for them, then set the **Calendar Type** to group. Another drop-down box will appear containing your company groups. If you have not built a group yet, the only types available are Personal and Public.

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 upload an ics or vcs file containing existing events.

Time zone: Select the time zone 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 Kalendi 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.

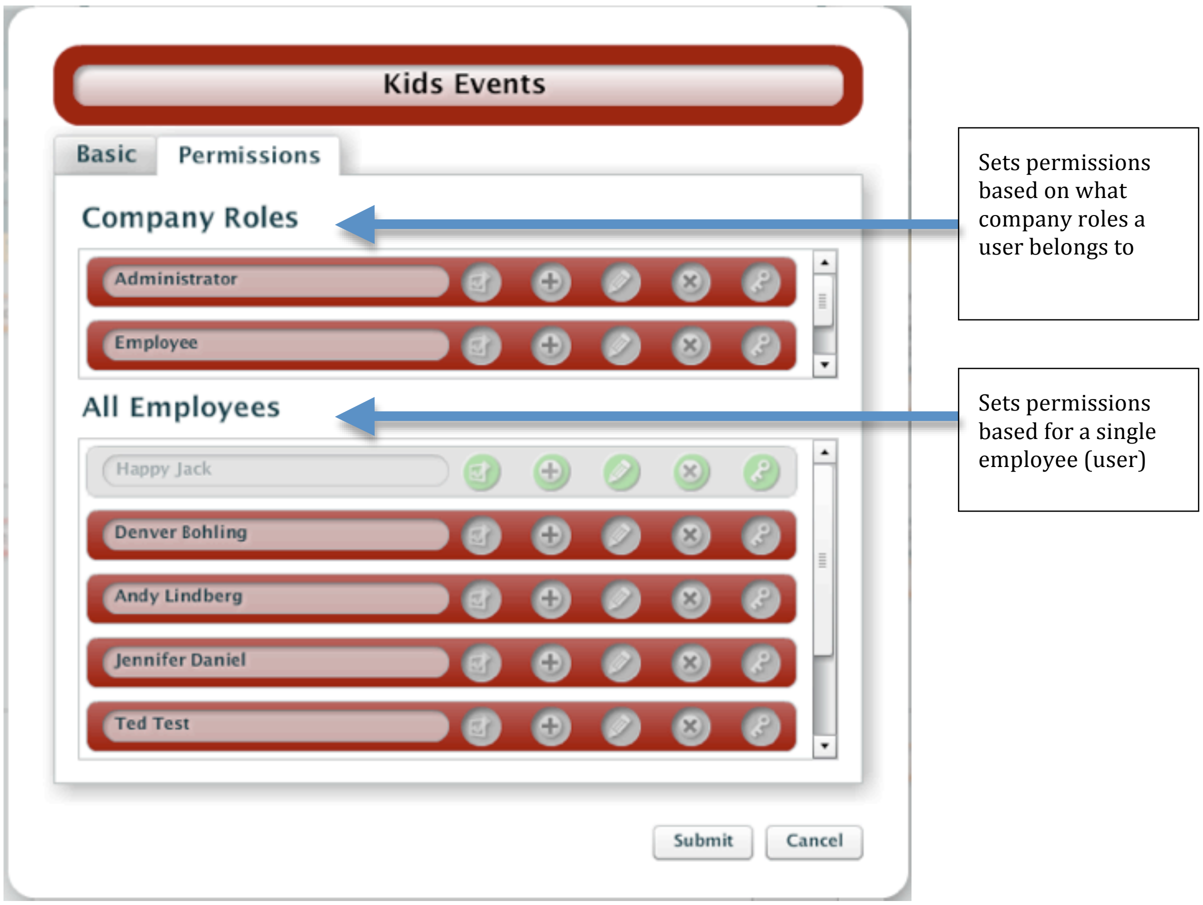
Auto import URL: This lets you auto import an ics file from some other web page. If the calendar is not new, all events are deleted off the calendar and then all the events from the imported ics file are placed on the calendar. This happens every night.

Moderated: A moderated calendar is a calendar in which a single person is assigned to accept or reject events to the calendar. By selecting yes, you create the calendar as moderated. By default the Kalendi 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 accepts them.

Continue to the next page to see how you can manage your **calendar permissions**.

Setting Calendar Permissions

Granting permissions, while very easy, is very powerful. 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.



First we will describe what each permission *really* means.

Administrator -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 edit 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 calendar can be granted either by role (of the company) or by each person (Individuals of this company).

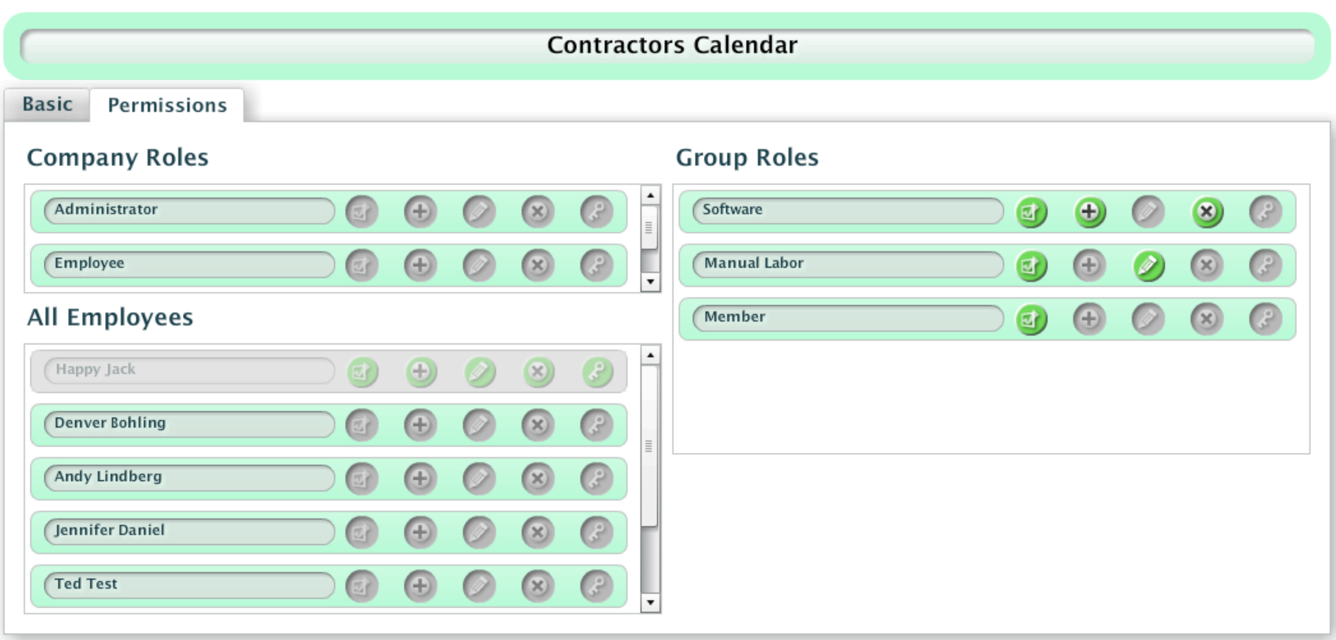
Remember the two built-in roles within the company? Employee and Administrator. Also, our sample company has two employees. We see all these in the interface above.

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 within the company to have permissions to this calendar, you could give the appropriate permission 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 company role called 'Management'; assign the appropriate individuals to this role and than just give permissions through the role. Either way would work.

You can use the tooltips to see which permission the icon represents. For more information on setting permissions and what the icons represent you can visit - http://www.kalendi.com/help/managepermissions.html

The permission interface for a Group Type calendar is similar and will now be described. Below is the permission tab for a company that has built a group named Contractors and has a calendar called *Contractor's Calendar* associated with this group.



Above is an example of setting permissions for a group calendar. As you can see this group has three roles. They are 'Software', 'Manual Labor', and Kalendi's default role 'Member' respectively.

For an example using the permissions set above, the software contractors can make new events for the manual labor contractors. Once the manual labor contractors have completed the task, or the event has passed the manual labor contractors can edit the event saying it was completed so the software contractors know they can delete it if they wish. This grouping can be applied in any number of ways.

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.

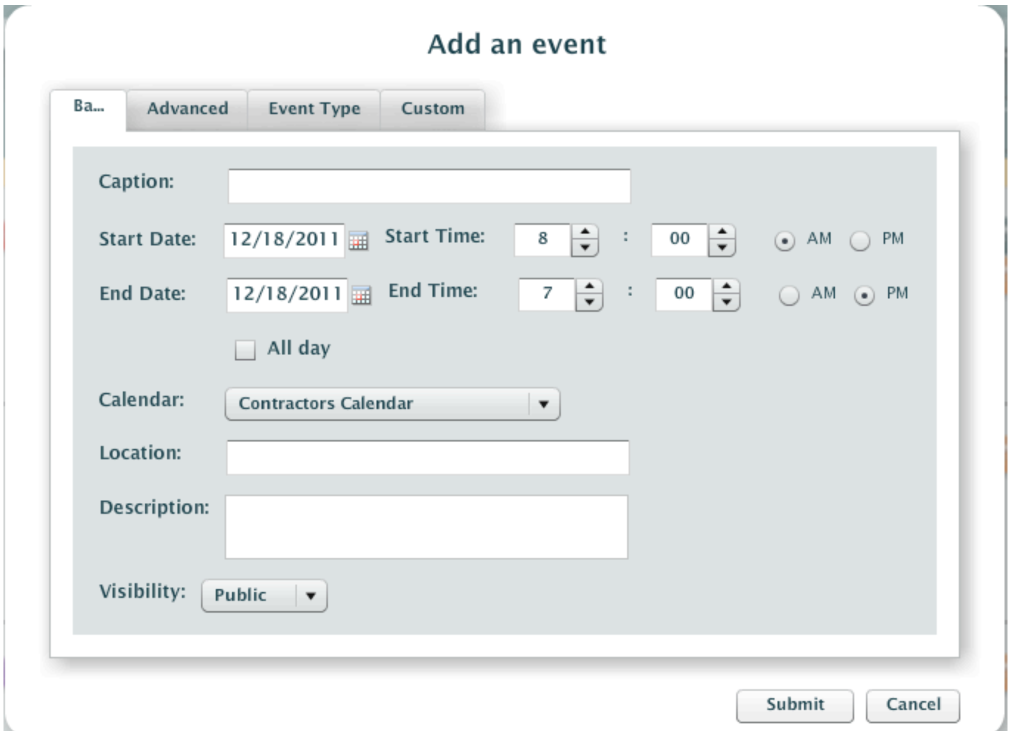
As you can see, granting permissions is both easy and powerful. The granularity in which one wants to apply permissions is up to the owner of a calendar. By default, building a calendar gives no permissions to anybody except the owner of the calendar. The owner must explicitly grant permissions before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

Continue to the next page for **Adding Events.**

Adding an Event

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, or click the 'New Event' button on the bottom of the 'Calendar List'. The **Add Event** pop-up will display:



Appropriately select and check items for your event through using the **Add Event** pop-up. Note that there are several tabs, *Basic, Advanced, Event Type,* and *Custom*. We will discuss what each one is for here:

basic – contains the pertinent information that every event will use such as the date range, times, caption, etc.

advanced – you can make the event recurring, add attachments, and set reminders here.

event type – this tab only appears when your company has created event types. This is where you can set which event types the event belongs to

custom – this tab only appears when your company has created custom properties. This tab is where you set values for custom event properties that may apply to the event.

Now that you have a feel for adding events we will explain to you event 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
busy – show my event caption as BUSY to others but me

Summary

Now you will be able to set up your company, add employees and events in no time! If you still have questions about permissions or anything else that may arise, please refer to the online FAQ at http://www.kalendi.com/help/helpportal.html or the complete Users Manual. We hope you enjoy your experience with Kalendi Business!