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Part I

Setting up the Framework

0.1 Logging in

The initial account to login to the system is called "root" and the password is "calendar". Type them both in without the quotes. Make sure to change the password as soon as you log in for the first time by going to preferences.

0.2 Entering Organization Details

Setting up your organization requires much forethought in order to ensure that all the features work properly. With the default root user, you can modify anything you wish, however, after creating initial users, it is wise to add additional data through these accounts for reasons explained in the User Groups and Users sections below. By following these instructions, you will create a school organization with the basic framework in which to enter events. For more detailed help concerning entering data, please consult the in-calendar help.

0.2.1 Entering Campus Information

Enter your Campus information first as it is essential to creating almost anything else in the system. Under Organization... Campuses section, enter the Add Campus section, fill in as much information about your campus(es) as possible. Color and Abbreviation are related to the transportation report so be sure to pick unique colors and abbreviations for your campuses.

0.2.2 Entering Users and User Groups

Users and User Groups are the next step in setting up your framework. Users can be selected as related to other items in the sytem, so it is important to add them early on to avoid having to come back and edit lots of other sections.

Entering User Groups

User Groups is one of the sections that requires the most planning. Without correct planning with regard to user groups, users will be able to modify sections and events that should not be accessible. If each campus has relatively separate events and facilities and separate event administrators, it is

not wise for campuses to edit the other campuses events. With this in mind, two kinds of groups can be created.

The first type of group is an organizational group. This type of group has no permissions granted but is used as a User's Primary Group to mark each event so that the event is not editable or deletable by other groups.

The second type of group is a permission granting group in which one or more permissions are granted. Four standard groups have already been created for you: Administrators, Administrator Permissions, Default Users and Default User Permissions. The Administrators group is an organizational group which is the primary group of the root user. The Administrator Permissions group provides read, write, and modify access to all sections. The default root user is in the Administrator Permissions group as well. Create groups such as Calendar Operators which allow Read, Write, and Modify access to the calendar section. You might want to create a separate group for each section of permissions or create a few groups that entail many responsibilities. Perhaps creating a default read-only group would be wise as well.

Entering Users

Users play an integral role in managing your system, so it is important to set them up correctly and relatively early in the data entry process. By using the root user to create Users and User Groups, the Administrators Primary Group becomes the group that has access to manage Campuses, User Groups, and Users, which are the items that you have created with the root user. Create additional users and add them to the appropriate primary group and other groups. The Administrator checkbox allows an override to the group checking feature as described in the User Groups section. It is important to create users even if they are not modifiers of the system because users can be picked as department heads, contacts, etc. This section is different from contacts, however, because contacts cannot log onto the system. Organizationally, only school employees should be Users, and only non-employees should be Contacts. Note that the password field is optional. It is possible to authenticate users through an NT or NIS domain, however, if this feature is not yet setup, you must enter a password for the users.

Once these users are setup, it is imperative that those accounts are used to enter more data unless you plan on making everyone an administrator which is probably a bad idea. If the root account is used to enter all the data, the users in the Calendar Operator primary groups that you created in the above section will not be able to modify events because they are not in the same primary group. The primary group of the user adding a piece of data is used to determine who has access to modify that data in the future. Only users with the same primary group will be able to modify that data.

0.2.3 Entering Contacts

Contacts are related to users, but are not employees of your organization. Contacts could be coaches for other schools, equipment suppliers, etc. It is important to enter contacts early in the data entry process because you can associate contacts with facilities, schools, etc.

0.2.4 Entering Department Information

Enter your Department information under the Organization... Departments section. Departments are very generic descriptors such as High School, Music, Athletics, Administration, etc. These are used to categorize events to allow for filtering.

0.2.5 Entering Activity Types

Enter your Activity Types under the Organization... Activities section. Activities are very broad types of activities such as Meeting, Soccer, Field Trip, Choir, etc. These are used to categorize events to allow for filtering.

0.2.6 Entering Groups and Group Types

Enter your Groups and Group Types under the Organization... Groups section. Groups and Group Types are tightly integrated, but you must define Group Types before Groups.

Entering Group Types

Group Types are essentially a way to categorize groups to enhance filtering capabilities. In order to not have users select from potentially hundreds of groups on the calendar page, users can filter by an Activity such as Soccer and then by Group Type such as Grade 11 or Boys Varsity. This allows the user to make very detailed view filters while selecting from two basic and understandable categories. Group types should be adequately generic such as Boys Varsity, Grade 12, Parents, Faculty/Staff, etc.

Entering Groups

Groups are essential to defining events because events nearly always involve activities. Groups are specific teams of people such as High School Boys Soccer Varsity, Concert Choir, or High School Students. This section grows quickly even for small organizations. Within this screen you can create new levels such as Varsity and Junior Varsity (or Boys A, Boys B, etc.) and also new seasons such as Fall, Winter, or Spring.

0.2.7 Entering Facilities

Facilities are fairly straightforward to enter, but keep in mind that there is a distinction between Remote and Local facilities. Local facilities would be for instance the rooms on a campus or the gym. Remote facilities would be external rented fields or other venues that other schools use. Keep in mind that a school is not a facility. In an event, a facility is not a required field, so if your school plays another school as an opponent, that other school would be listed as a school not a facility unless the venue is not on that school's campus, in which case it would be at some other remote facility. When adding remote facilities, be sure to enter full information in order to provide direct links to Mapquest and Mappoint directions.

0.2.8 Entering Schools

Entering schools is a straightforward process, however, the schools need to be schools for athletic opponents or some other event.

0.2.9 Entering Transportation Information

Entering transportation information is a rather simple process that requires little planning. It merely manages drivers and vehicles and shows assignments. See the Transportation help section in the Calendar or Chapter 3 for more information.

0.2.10 Entering Equipment

Entering equipment is a simple process than can take as little or as long as you wish depending on the detail. Equipment can be used for events, however, and cannot be assigned to facilities or otherwise.