

CalendarPath Users Guide

Welcome to CalendarPath

Creating documents or events

From your user portal, in the middle of the view, click the “Create a new...” and choose the document or event type that you would like to create.

This will open an event in the editor. The editor uses word-processor style controls that may be familiar to you. Follow the instructions below for the editor.

Editing documents or events

To get to the editor, click on the editor link on the left hand column of the User home page, or click to edit any document.

This version adopts a “word processor” metaphor for the editor. Many more controls are located in the editor tool bar, which greatly expand the functionality of the editor.

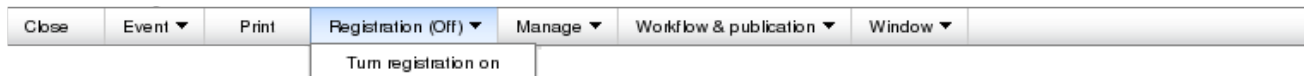
Summary of changes

- The updated **editor** provides access to all of your documents with the New, Open, Close, Copy and Delete controls all located behind the {document} button. Note, that the name of this tab depends on the type of document you have loaded. This example reads “Event.” You might have a “Participant” or an “Article.”
- If the document type allows registration, **registration controls** are now available from the tool bar. Click on the registration link to view registration settings.
- The **Registration manager** has been updated with an easier to use layout and clearer controls.
- **Registration** now provides an “auto confirm” option. Previous versions had the option of turning confirmation on, which proved to be confusing in practice. Turn on autoconfirm if registrants should be automatically confirmed. Turn it off if they should be manually confirmed.

Editor tool bar for new documents



Editor tool bar after initial save



Click on the registration link to view the “Turn registration on” command. Click this to configure registration settings.

disabled until the document is saved.

Editor tools for document editors

- **Close:** close the editor
- **{document type}**
 - New: create a new instance of this document type
 - Open: find and load an existing instance of this document type
 - Close: close the editor
 - Save and publish functions: depending on the configuration of this document type, one or more save functions may be available
 - Copy: make a copy of this document
 - Delete: delete this document. Note that some document states will not allow deletion of a document. For example, if the document is currently published, it must be canceled before it may be deleted.
- **Print:** open a print view of the document
- **Registration**
 - Manage registration & attendance
 - Print sign in sheet
 - Number of participants registered: this provides information on the current number of registrants. If it is clicked, you will be directed to the manage registration function.
 - Turn registration off / on: view the registration properties and turn registration on or off
 - Change registration properties: view the registration properties and make changes
- **Manage**
 - Contact owner: editors and managers (but not general users) may view the document owner's email address
 - Assign editors: assign editors to this document
 - Archive: send this document to the document archive. Use this for long term storage of documents, or to remove from site documents that may not be deleted (for example, an event

with confirmed registrations, which are part of the permanent record).

- **Workflow and publication**
 - Currently published at: shows where the document is currently published
 - Pending at: shows where the document is currently waiting in workflow
- **Window** let's you view the last few documents that you have worked on and switch between them.
 - Close all: clears the editor of all documents

Publishing events to the calendar

When you click “publish,” your event will be routed to the appropriate manager based on regional or other criteria that you have selected.

The calendar manager will have the option to accept or decline your request for publication. You will receive an email notification when this happens.