

Calendar Tool Documentation:

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Event Info:

When you first create a new calendar event, the Event Info tab helps designate the introductory information for your event, such as Event Title, Time, and Contacts. It also lets you determine frequency of your event, and privacy of the event posting, as detailed below:

Single vs. Recurring Events:

You can designate your event either a “Single” or “Recurring” event. A “Single” event is an event that only occurs one time – for example, a special event or reception. A “Recurring” event is an event that will occur on a regular schedule, such as a weekly staff meeting, or monthly office-hosted social event or speaking engagement.

- To designate an event as a “Single” event, indicate “Single Event” using the left adjacent radio button, and proceed to the next section to determine the beginning and end times for your event.
- To designate an event as “Recurring,” indicate “Recurring Event” using the left adjacent radio button, and proceed to establish the Start Date (the first event in the series), and the End Date (determined by either the date of the final event in the recurrence, or the number of recurrences after the first event). In the “Recurrence Pattern” section, designate on what schedule you would like your event to recur (for example: weekly, monthly), and on which day(s) your event will occur.

Event Security: Public Vs. Private Events:

The Event Security option allows whether or not you would like to post your event, or work on it as a draft. The Privacy selection of “Public” means it will display on any calendar you add it to, and can be searched for and added to the calendars of other users. The selection of “Private” means that no users other than yourself will be able to view it, and can only be added to your own calendar. The “Private” setting can also be used for events in Draft Status.

Designating an Event Contact:

Our calendar system allows you to either designate an external contact or pull an internal contact from the Yale School of Medicine News and People Profile System, which will automatically populate email addresses and available contact information into the necessary fields.

- To add an **Internal Event contact**, click the “Add New” button and type their name into the “Find Yale Person” search field. When their name appears below the search bar, click on their name and their information will populate accordingly.
- To Add an **External Event Contact**, manually input their name, email contact, and phone number in the appropriate fields.

For either option, once you’ve designated your contact, click the “Add” button to add them as a contact for your event.

Event Content:

The Event Content tab allows you to add more specificity to your event listing.

Adding an Event Type:

“Event Types” function like keywords and allow users to filter events based on what type of event they are. Choose one or more of the most appropriate “Event Types” from the dropdown list that describes the nature of your event.

Event Status:

Setting the “Event Status” will help participants or attendees know the status of your event.

The following are the status options:

- Confirmed
- Tentative
- Cancelled

Establishing Event Audience

You can define the audience for your event using the “Event Audience” feature.

- For a public event, choose the “Everyone (Public)” option
- For an event that is restricted to the host organization, choose the “Organization Only” option
- For an event that is restricted to the School, choose “School Only” option
- For an Event that is restricted to any Yale User, choose the “Yale User” option
- For an event that is for a Restricted audience, choose the "Restricted" option.

Security Vs. Audience

The “Event Audience” and “Event Security” feature on the Information tab seem similar, but they control different things. The “Event Security” setting controls whether or not your event is visibly displayed on the calendar feed, while the “Event Audience” feature will display on your event as an indicator regarding to whom the event is open.

Designating an RSVP contact and URL

If your event requires an RSVP, you can designate both an RSVP URL for participants, and/or an RSVP Contact – someone who should be notified when attendees RSVP.

- If you would like to select the RSVP contact from the “Event Contacts” you set up on the “Event Info” tab, and select the checkbox to “Pull from Event Contacts”
- Otherwise, you can choose either an internal or external contact, in the same way you designated contacts in the “Event Info” tab.

Event Food

This section allows you to specify to attendees what type of refreshments you will have. You can also provide additional information – for example: you could specify you were serving “Refreshments” and then add as Additional Information “Non-Alcoholic Options Provided.”

Assigning an Event Location

Event locations can be categorized in the following way:

- None
- Yale Location
- Non-Yale Location
- Virtual Location

Once you have selected the type of location from the dropdown list of the above options:

- For both **Yale and Non-Yale locations**: begin type the street address of the desired location, and fill out any necessary additional information in the areas provided.
- For a **Virtual Location**: Use the “Description” field to input any information about how participants should access the meeting.

Related Materials

The related materials section allows you to add supplementary materials to your event for the benefit of your attendees. These items are optional, but providing them can give you an extra opportunity to both advertise your event and prepare attendees for your event.

Thumbnail

You can upload a thumbnail for your specific event. This can be in the form of .png, .jpg, or .jpeg files, and has a maximum file size of 10MB.

The minimum dimension for thumbnails is 720 pixels by 494 pixels.

Flyer

You can also add an event flyer in the form of a .pdf, .doc, .docx, .ppt, .pptx, .png, .jpg, or .jpeg files, and has a maximum file size of 10MB.

Images uploaded to this section (.png, .jpg, or .jpeg) must be at least 720 pixels by 494 pixels.

Related Links

You can add related links to your event for the benefit of your attendees. To add a link, you will need to add the full URL, and the display title that will display to users.

Related Documents

Likewise, you can add related documents for attendees in the form of .pdf, .doc, .docx, .xls, .xlsx, .rtf, or .txt. files, and has a maximum file size of 3MB.

Related News

The Related News option allows you to pull news articles pertaining to your event from the News and People Profile System. To add news, click the “Add New...” button, and use the available filters to add the desired news article to your event.

Please note that, at the moment, this functionality does NOT affect how events or news appear on the public websites. This functionality will be introduced soon.

People and Calendars

The People and Calendars tab allows you to designate hosts, speakers, affiliated organizations, and the calendars on which your event will display.

Speakers, Host Users, and Host Organizations

Like the Event and RSVP Contacts, you can either designate an External Speaker or Host, or pull an Internal Speaker or Host from their Yale School of Medicine profile, which will automatically populate their email address and available contact information into the necessary fields.

- To add an **Internal Speaker or Host**, click the “Add New” button and type their name into the “Find Yale Person” search field. When their name appears below the search bar, click on their name and their information will populate accordingly.
- To Add an **External Speaker or Host**, manually input their name, email contact, and phone number in the appropriate fields.

For either option, once you’ve designated your Speaker or Host, click the “Add” button to confirm them as Speaker or Host for your event.

To add a Host Organization, either use the search bar to select a Yale Organization, or type in the necessary information to identify an External Host Organization.

Internal Vs. External

As a rule, in the calendar, anything “Internal” means “Yale Affiliated.” For example, if your department is cohosting a large event with another Yale Department, both of those Host Organizations would be considered “Internal.” Additionally, if you had a Speaker from Yale, you would also select “Internal” as the option.

If, however, your event were being sponsored or hosted alongside YNHH or the FDA, both of these organizations would be considered “External” as they are not part of the Yale School of Medicine.

Display Calendars

The Display Calendars section allows you to designate onto which of your calendars the event will appear. From this area, you can also suggest your event on a calendar outside of those for which you are the administrator.

Recommended Vs. Explicitly Suggested Calendars

The display calendars are split into three groups:

- **Your Calendars** – this is a listing of all the calendars for which you are an administrator. You can add your event to a calendar you manage by clicking on the plus sign icon
- **Recommended Calendars** – this list of calendars is populated based on the Yale people and organizations you have tagged in an event.
- **Explicitly Suggested Calendars** – This section allows you to use the search bar to suggest your event to a calendar for which you are not the administrator. You can see the status of this suggestion (Suggested, Accepted, Rejected), or remove the suggestion by using the trash can icon to the right of the listed calendar.