UF Health SharePoint 2010

Calendars
1.0 Calendar Features

1.1 The Calendar Ribbon

- In the Quick Launch Menu, click the Calendar Link
- Click the Calendar Tab to open the Calendar Ribbon

![Calendar Tools](image)

- Notice the following Options
  
  **Scope:**
  
  Gives us the ability to display the calendar in a Month, Week, or Day View.
  
  **Expand:**
  
  If you have multiple appointments/events on a specific day, use the ExpandAll or CollapseAll options.
  
  **Calendars Overlay:**
  
  Allows you to display items from one or more calendars in the same Calendar View.
  
  **Manage Views:**
  
  You can Create or Modify Views, and even Create New Columns, for the selected calendar.
  
  **Share & Track:**
  
  You can email the URL of the calendar to those who have access to view/modify the events and/or users can get notifications of events added. They can setup an RSS feed as well.
  
  **Connect & Export:**
  
  You can Connect your Calendar to Outlook, Export your Calendar into Excel, or Link your Calendar to an MSAccess database table.
  
  **Customize List:**
  
  You can customize your Calendar List or List Forms Page using SharePoint Designer or InfoPath.
  
  **Settings:**
  
  You have the ability to Modify your List Settings, Grant/Deny Permissions to the List and Create/Modify Workflows for the selected List.

**NOTE:** A Calendar is considered a List. In the Site Actions Bar, the tabs will display either Events/Calendar or Items/List. This is dependent upon the ‘type’ of view selected.
1.2 The Default Calendar View
2.0 Calendar List - Add a Calendar Web Part

2.1 Add a Calendar Web Part

In order to display this calendar on your home page, you need to add a Web Part. On the Site Actions Bar, click the Navigate Up icon to return to your home page.

- On the Site Actions Bar, click the Page Tab to open the Page Ribbon
- Click the Edit icon
- Click on the area of your page where you want to insert your web part
- Click the Insert Tab to display its options
- Click the Web Part icon
- Select the Calendar option
- Click Add

**On the Site Actions bar, click the Save and Close icon to save your changes.

2.2 Edit Your Calendar View

- Click the down-arrow of the Calendar Web Part
- Select Edit Web Part
- Select Summary View
- Click OK

2.3 Add an Event to Your Calendar

- Click the Add new event link (you may need to scroll to the left in your browser window – or refresh the page)
- Fill in the form with information about your new event
2.4 Display This Week’s Events

Create Your Custom View

- In the Quick Launch Menu, click the Calendar Link
- Click the Calendar Tab to open the Calendar Ribbon
- Click the Create View icon, select Standard View
- Enter a Name for your new view (Next7Days)
- Include or Exclude desired columns (Check or Uncheck Column Name... include Category)
- Scroll down to the Filter area
- Click the radio button: Show items only when the following is true:
- Enter your filter criteria: Show the items when column
  1. Start Time is greater than or equal to [Today]
  2. and Start Time is less than [Today]+7
- Click OK

On the Site Actions Bar, click the Navigate Up icon to return to your home page.

Edit the Web Part to Display Your Custom View

- Click the down-arrow of the Calendar Web Part
- Select Edit Web Part
- Select Next7Days
- Click OK

*You may now Add New Events for specific dates within or beyond the 7 day filter
*The Calendar Web Part with the Next7Days View will display the events of today and 7 days beyond today
*Your Calendar’s Default View has not changed and will continue to display all events
3.0 Connect and Export Features

3.1 Connect a Calendar to Outlook
1. In the Quick Launch Menu, click the Calendar Link
2. Click the Calendar Tab to open the Calendar Ribbon
3. Click the Connect to Outlook icon
4. At both prompts, click Allow

*You may now use Outlook to view/modify your SharePoint Calendar
To return to your Calendar page, close the Outlook Calendar window

3.2 Export a Calendar to an MSAccess Table
1. In the Quick Launch Menu, click the Calendar Link
2. Click the Calendar Tab to open the Calendar Ribbon
3. Click the Open with Access icon
4. Specify location for the database
5. Select either Link on SharePoint Site or Export a copy of the data
6. Click OK

*My Documents is the default location
*You may now use MSAccess to view/modify your SharePoint Calendar

3.3 Export a Calendar to Excel
1. In the Quick Launch Menu, click the Calendar Link
2. Click the Calendar Tab to open the Calendar Ribbon
3. Click the Export to Excel icon
4. Save and Name the query file (.iqy)
5. Using Windows Explorer, double-click on the name of the query file to open with Excel

*My Documents is the default location
4.0 Form Web Parts

4.1 Edit Form Web Parts

- In the Quick Launch Menu, click the Calendar Link
- Click the Calendar Tab to open the Calendar Ribbon
- Click the down-arrow of the Form Web Parts
- Select Default New Form
- Click the Insert Tab to open the Web Part Ribbon
- Select Text

- In the Content Editor web part... click the Click here to add new content link
- Enter your text message (*Events to be displayed on our public website MUST have a category of 'Public')
- *Click the Page Tab
- *Click the down-arrow of the Stop Editing icon
- *Select Stop Editing

4.2 Add a New Event to View the Text Message

- Click the Events Tab to open the Events Ribbon
- Click the down-arrow of the New Event icon
- Select Event
5.0 Calendar Overlays

5.1 Create SharePoint Calendar Overlays

*For purposes of this training... Ensure you have Added an Event to Your Default Calendar*

- In the Quick Launch Menu, click the Calendar Link
- Click the Event Tab to open the Events Ribbon
- Click the New Event icon
- Enter the details of your event and click Save

**Part One: Calendar Overlays Option**

- In the Quick Launch Menu, click the Calendar Link
- Click the Calendar Tab to open the Calendar Ribbon
- Click the Calendars Overlay icon
- Click the New Calendar link

**Part Two: Overlay Two Different SharePoint Calendars**

*Overlay Another Site’s Default Calendar*

- Input the Calendar Name (TeamA)
- Input the Web URL... replace your training site’s name (ITCTR-xxx) at the end of the URL with (Workflow)
- Click the Resolve button
- Select Calendar from the List dropdown box
- **Check the Always show checkbox**
- Click OK

*Overlay Another Site’s Labs Calendar*

- Click the New Calendar link
- Input the Calendar Name (TeamA Labs)
- Input the Web URL... replace your training site’s name (ITCTR-xxx) at the end of the URL with (Workflow)
- Click the Resolve button
- Select Labs from the List dropdown box
- **Check the Always show checkbox**
- Click OK
5.2 Create an Outlook Calendar Overlay

**Since your training accounts ‘may’ not have appropriate access... the instructor will guide you through this example.

**Instructor: Sign in as a Different User to Demonstrate

Display Your Outlook Calendar(s)

- Click the New Calendar link
- Input the Calendar Name (Outlook)
- Select the Exchange radio button for the type of calendar
- Select a different Color if desired (Gray – 50%)
- Input the Outlook Web Access URL... ([https://mail.ufl.edu/owa](https://mail.ufl.edu/owa))
  or ([https://mail.shands.ufl.edu/owa](https://mail.shands.ufl.edu/owa))
- Input the Exchange Web Service URL... ([https://mail.ufl.edu/ews/Exchange.asmx](https://mail.ufl.edu/ews/Exchange.asmx))
  or ([https://mail.shands.ufl.edu/ews/Exchange.asmx](https://mail.shands.ufl.edu/ews/Exchange.asmx))
- Click the Find button
- **Check the Always show checkbox
- Click OK

View Your Calendar Overlays

- In the Quick Launch Menu, click the Calendar Link

*Access all overlays by clicking the Calendar button or the individual Calendar Name...

*Upon clicking the Outlook link, your personal e-mail will display. Click on the Calendar icon to view your Outlook Calendar(s) from within SharePoint.
6.0 A Real-Time Example

6.1 Web Services Contacts
- SharePoint Services... iweb@ahc.ufl.edu
- WordPress WebServices... webservices@ahc.ufl.edu
- To setup this type of calendar... http://webservices.ahc.ufl.edu/help-support/how-to/sharepoint-calendar/

6.2 SharePoint Calendar and Public Events via EPIC

** Since your training accounts do not have appropriate access... the instructor will guide you through this example.

- **Instructor: Sign in as a Different User to Demonstrate**
- In the Breadcrumbs Trail, click the Training breadcrumb
- In the Quick Launch Menu, click the Team – Epic Calendar link

1) Connect Who We Are Administration Information Technology IT Departments Educational
   Technologies Training SharePoint Training Workflow

2) Team - Epic Calendar

3) Add a TEST Event with Category = Public Event  (double-click on the date, click +add, category=public)

4) View the Event within EPIC’s public calendar... http://epictrain.health.ufl.edu

** Mention: Some users input via the SharePoint Calendar... Some users do not have access to SharePoint, but input via Outlook then Sara uses a Datasheet View to quickly flag events as Public from within SharePoint.

- Return to the Team – Epic Calendar and Delete the Test Event  (Training Site... Team – Epic Calendar)
- Return to the SharePoint Training (Socrates) Site and Login with Socrates credentials
7.0 Another Useful Example

7.1 Leave Approval - Workflow Calendar

**Since your training accounts do not have appropriate access... the instructor will guide you through this example.

- **Instructor: Sign in as a Different User to Demonstrate
- In the Breadcrumbs Trail, click IT Departments
- In the Quick Launch Menu, click Systems Development > iWeb > Internal Area
- Click on All Site Content... then on the subsite Test Leave Approval
- Notice the Web Parts... Absences, Absences Pending Approval, Rejected Absence Requests

1) [Image]

2) **Go to All Site Content Then subsite Test Leave Approval

3) **Mention: Workflow currently routes all approvals through SharePoint Services (for testing purposes).

**Brief Description: Add an event to the Absences Pending Approval calendar and it goes into a Pending Approval status. When an item is approved or rejected, the status will change accordingly and will show up in the appropriate view (either the calendar if approved or the rejected view if rejected). The approval is currently a two step approval using a director approval and a chair approval.

- **Return to the SharePoint Training (Socrates) Site and Login with Socrates credentials

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8.0 Time to Explore

8.1 Navigate to a Shared Team Site

**To ensure we are all working within the shared Workflow Site...

- In the **Site Actions Bar**, click the **Navigate Up** button
- Select **SharePoint Training**
- The last item in the breadcrumbs trail should now be.... **SharePoint Training**
- In the **Quick Launch Menu**, click the **All Site Contents** link
- Scroll down to the **Sites and Workspaces** area
- Click the **Workflow** link
- The last item in the breadcrumbs trail should now be.... **Workflow**

![Workflow Site Breadcrumbs](image1)

8.2 Create a Calendar and Explore its Options

** Begin by creating your own calendar, and explore the options that interest you.

- In the **Workflow Site**, click the **All Site Content** link
- Click the **Create** icon
- Filter By: **List**
- Click the **Calendar** template
- Enter the **Name** of your calendar (use the name of your Greek God or Goddess)
- Click the **Create** icon

![Create Calendar](image2)

*The link to your calendar should now display within the Quick Launch Menu under the Lists section*
The Ribbon

SharePoint 2010 uses a **Ribbon** feature, which groups editing tools into contextual tabs depending on the item that you have selected to edit or insert.
Contact Us

- UF Health IT Training:
  http://training.health.ufl.edu/public_contactus.aspx

- Training Registration, Schedules and Handouts Website:
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Want to learn more about SharePoint? Visit lynda.com.