

# The Calendar



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## About the Calendar

In an effort to provide organization, record-keeping, and event planning online, the Taskstream calendar tool (accessed from the **Go to the Calendar** link on the Communications homepage) offers full-control of scheduling to suit your needs.

From the *View Calendar* page, you can [add, edit and delete events](#) as needed.

*You are ONLY allowed to edit or delete events that you have posted.*

The top of the *View Calendar* page includes several options for customizing the current view:

- *Show All* events, or **Change View** to filter for a specific type of events

### To filter for specific type of events

1. Select the type of events from the **Change View** pull-down list

*Curriculum events include Lessons and Units. To learn more about how to add curriculum events to the calendar, please refer to the Lesson & Unit Builders section of the online Help.*

2. Click the **Go** button.
- Use the buttons provided to toggle between [a Month View and a Day View](#) of scheduled events.
  - If you have created or imported *multiple calendars*, select the calendar(s) for which you currently want to show events.

The **Show Calendars** section at the top of the page shows the various [personal calendars you have added](#) as well as calendars you have [imported for viewing](#) (for example, you may have selected to view the calendars shared by others in your learning community). Each calendar is displayed in a [different shaded](#) box.

Use the checkbox(es) to indicate which calendar(s) you want to view at this time.

- When your calendar might include Units, you can set related Display Options.
  1. Click the **Display Options** button. You are navigated to a *Calendar Options* page.
  2. Use the radio buttons to indicate whether you want your view to *Show associated lessons and unit* (default), *Show just unit, not associated lessons*, or *Show just associated lessons, not unit*.
  3. Click the **Apply Changes** button to return to the calendar with this display option applied.
- Generate a printer-friendly version of the calendar.
  1. Click the **Print View** button immediately above the calendar.
  2. A pop-up window opens to display the calendar in a printer-friendly version.
  3. Click the **Send to Printer Now** link to send this to your local printer.

## Calendar Views

Whether you are viewing one or multiple calendars, and regardless of the type of events you have chosen to view, you can toggle to display the scheduled events in your choice of two popular layouts:

By default, the View Calendar page opens in the **Month view**. As the name implies, this view is a month-at-a-glance grid. Scheduled events might potentially display over a span of days or even weeks.


As well as viewing the names of scheduled events for the selected month, you can click the **Add Event** button for any date to [create a new scheduled event](#) for that date.

By default, the Calendar opens to display the current month. Today's date is shaded in blue.

You can navigate from month to month via the **<<Previous Month** and **Next Month>>** links at the top of the grid.

### To jump to a specific month

1. Use pull-down lists to select the Month and Year.
2. Click the **Go** button.

 Each date number in the Month grid is a link. Click that link to drill down to the related Day view.

The **Day** view lists the selected schedule for a single calendar date. In this view, you are able to see more detailed information for each event.

If you immediately switch to the Day view upon accessing the *View Calendar* page, you are presented with today's schedule of events. "All Day" events are listed first, with other events listed in ascending order by time.

This view displays detailed information for each event, including date range (for an event that spans multiple dates), creator, type, subjects (for lessons and units) and details.

 Lesson and Unit listings may include a **View Lesson** or **View Unit** link, enabling you to view a read-only copy of this information in a pop-up window.

As well as viewing information about scheduled events for this date, you can add a new event via the **Post Event** button, or **Edit** or **Delete** events that you created.

*You are ONLY allowed to edit or delete events that you have posted.*


The date appears in a box at the top of the schedule.

You can navigate from day to day via the **<<Previous Day** and **Next Day>>** links at the top of the grid.

### To jump to a specific day

1. Use the calendar widget to select a date *OR* enter a date free-form in the mm/dd/yyyy format.
2. Click the **Go** button.

A set of mini-calendar views of the previous, current, and next month display in the right panel of this page.

 Each date number in a mini-calendar is a link. Click that link to jump to the related **Day view**.

Use the buttons at the top of the grid to toggle between these two calendar layouts.

In either display, based on the category of events you have chosen to view plus the calendar(s) you have selected to show, you may see:

- Events you have scheduled
- Other Program or organization events posted by a TS Coordinator
- Your scheduled lessons and units

If you are viewing multiple calendars, you can set each calendar to [display events in a shaded box](#) of a different color.

## Add, Edit, or Delete Events


Events of various types can be added, edited or deleted from either [the monthly or daily view of the calendar](#).

*If you are a TS Coordinator, you can post events to specific Programs and/or areas of your learning community.*

The steps for adding curriculum events (e.g. Lessons and Units) differ slightly from the steps for adding other kinds of events:

### Add a non-curriculum event to a calendar

1. Click an **Add Event** button from any date cell of the Month view or the **Post Event** button at the top of either view. Either way, the *Add Calendar Event* page opens in a pop-up window.
2. Use the radio buttons to choose the type of event you want to schedule, and click **Continue**. The *Add Calendar Event* page refreshes to display the fields used to define an event.
3. Enter an **Event title**.
4. (Optional) Use the pull-down list to select a different **Event type** than you originally chose.
5. *If you have more than one calendar*, use the pull-down list to select the **calendar** to which you want to post the new event.
6. Use the calendar widgets to select **Event dates** (*Start Date* and *End Date*) OR enter dates free-form in the mm/dd/yyyy format.
7. By default, the **Event time** is marked as "All Day" event. Uncheck the *All Day* box to enable a set of *Start time* and *End time* selectors. Times are slotted at 5-minute intervals.


 If the date range for this event spans multiple dates, the event is considered "All Day" for each of those dates.

8. (Optional) Enter a **Description** of this event in the text box provided.
  - Click the **Submit** button to post this new event to the selected calendar.

### Add a Lesson to a calendar

1. Click an **Add Event** button from any date cell of the Month view or the **Post Event** button at the top of either view. Either way, the *Add Calendar Event* page opens in a pop-up window.
2. Use the radio buttons to choose Lesson as the type of event you want to schedule, and click **Continue**. The *Add Calendar Event* page refreshes to display the fields used to define a scheduled lesson.
3. Use the pull-down list to select a lesson from those already created in Taskstream.
 

To learn more about lessons in Taskstream, see the "Lesson and Unit Builders" section of the online Help.
4. *If you have more than one calendar*, use the pull-down list to select the **calendar** to which you want to post the new lesson event.
5. Use the calendar widgets to select **Lesson dates** (*Start Date* and *End Date*) OR enter dates free-form in the mm/dd/yyyy format.
6. By default, the **Lesson time** is marked as "All Day" event. Uncheck the All Day box to enable a set of Start time and End time selectors. Times are slotted at 5-minute intervals.

 If the date range for an event spans multiple dates, the event is considered "All Day" for each of those dates.

7. (Optional) Enter **Comments** related to this scheduled lesson in the text box provided.
8. Click the **Submit** button to post this new event to the selected calendar.

### Add a Unit to a calendar

1. Click an **Add Event** button from any date cell of the Month view or the **Post Event** button at the top of either view. Either way, the *Add Calendar Event* page opens in a pop-up window.
2. Use the radio buttons to choose Unit as the type of event you want to schedule, and click **Continue**. The *Add Calendar Event* page refreshes to display the fields used to define a scheduled unit.
3. Use the pull-down list to select a unit from those already created in Taskstream. The (scrolling) *Add Calendar Event* page refreshes to display all of the individual lessons ("Activities") associated with this unit, each with its own date, time and comment fields.
 


To learn more about units in Taskstream, see the "Lesson and Unit Builders" section of the online Help.
4. *If you have more than one calendar*, use the pull-down list to select the **calendar** to which you want to post the new Unit event and all related Lesson events.

*This screen includes fields that will create events for the unit AND for each related lesson that you select.*


5. Use the calendar widgets to select **Unit date(s)** (*Start Date* and *End Date*) OR enter dates free-form in the mm/dd/yyyy format.
  - a. (Optional) Check the box provided if you want the Unit date(s) to *Apply to all activities listed below*. When used, this feature simply populates the **Lesson Dates** for all related Activities with the Unit date(s).

*You can subsequently change the dates for individual lessons.*

6. (Optional) Enter **Comments** related to this scheduled unit in the text box provided.
7. For each lesson you want to include in this scheduled unit, in the Activity section provided:
  - a. (Optional) Enter (or modify) the **Lesson Dates**.
  - b. By default, the **Lesson time** is marked as "All Day" event. Uncheck the *All Day* box to enable a set of *Start time* and *End time* selectors. Times are slotted at 5-minute intervals.

 If the date range for an event spans multiple dates, the event is considered "All Day" for each of those dates.

- c. (Optional) Enter **Comments** related to this specific scheduled lesson in the text box provided.
8. Click the **Submit** button to post this new unit event and all related lesson events to the selected calendar.


 Selecting ANY **Submit** button on this page will SIMULTANEOUSLY POST ALL related events (the Unit and each related Lesson) to the calendar.

*If you post lessons and/or units to the calendar, the dates automatically propagate the Implementation Record dates of the Schedule page of the Lesson or Unit Builder. Similarly, entering Implementation Record dates in the Lesson/Unit Builders automatically posts these events to your calendar.*

## Edit or Delete Events


*You are ONLY allowed to edit or delete events that YOU have posted.*

The Day view of a schedule displays a pair of **Edit** and **Delete** buttons to the right of each listed event that YOU have posted.

 *If you are working in the Monthly view and want to Edit or Delete an event, click the event title to navigate to the Daily view.*

### Delete an event

1. Click the related **Delete** button.
2. A pop-up confirmation message displays. Click **OK** to continue with deleting.

 If you remove a unit event from the calendar, you will simultaneously remove all the scheduled lesson events associated with that unit.

### Edit an event

1. Click the related **Edit** button.
2. An *Edit Calendar Event* pop-up displays, enabling you to edit scheduling information for the event.

*When editing scheduled units or lesson events that are attached to these units, this screen enables you to edit scheduling information for all related events.*

- Click the **Submit** button to apply your changes.

## Manage Calendars

Your [monthly and daily views](#) can display multiple calendars. In addition to "My Events Calendar" (your *default* calendar in Taskstream), you can create other calendars in which to manage your own schedule. You can also choose to import calendars that others in your learning community have created and shared with you.

For example: you might want to separate class-related events from other events on your schedule; you might import a calendar of public events for your organization, or a shared class schedule.

When you select the *Create, Edit & Import Calendars* tab of the calendar tool, you are navigated to a *Manage Calendars* page.

This page lists the calendars to which you currently have access, divided into two sections (your own calendars, and calendars shared by others). Each calendar is described by:

- **Name** of the calendar. In the case of a calendar shared by another subscriber, the **Owner** appears below the calendar name.
- The number of **Entries** that have been made to the calendar, by you or others with access.
- The date on which this calendar was **Last Updated** the calendar was updated. Updates include adding, editing and deleting events.
- Your **Permissions** for the calendar.
  - For your own calendars, this will display as either *View/Edit* or *Deleted*.
  - For calendars owned by others, your permissions will be *View/Edit*, *View Only*, *Not Shared*, or *Deleted*.

*A calendar that was initially shared but is no longer will display with the permission Not Shared. Not Shared might also indicate that the owner of this calendar is a TS Coordinator.*

- **Display Color** used to highlight events from this calendar in both of the different calendar views. When multiple calendars are displayed in a single view, this color option makes it easy for you to distinguish between the sources of the various events.
- A button that can be used to change the visibility status of this calendar.
  - For your own calendars, you may choose to **Hide** a calendar from view. When you hide a calendar, it is not available from either the monthly or daily view.
  - If one of your calendars is currently "hidden," you can choose to **Show** it again.
  - For calendars owned by others, the only option is to **Remove** that calendar from your area.

*Your default "My Calendar" has no button as it CANNOT be hidden or removed.*

From this *Manage Calendars* page, you can opt to:

Change the **Display Color** of any calendar to which you have access.

- Locate the calendar whose color you want to change.
- Click the **Change** link in the related Display Color sample box. A pop-up window opens, showing samples of available calendar display colors.
- (Optional) Click the **X** in this pop-up to close that window without changing color.
- Click the name of the new color. The pop-up closes. You are returned to the *Manage Calendars* page, which now reflects the new color.

*The same color can be assigned to multiple calendars.*

**Add, Edit and Delete My Calendars.** This button navigates you to a page where you can [manage your personal calendars](#).

**Locate Others.** This button navigates you to a page where you can locate and [import calendars that have been shared](#) by others in your learning community.

## Add and Manage Your Personal Calendars

The *Add, Edit and Delete My Calendars* page displays your default "My Events Calendar" as well as any personal calendars you have subsequently created.

You can create up to five (5) personal calendars in Taskstream, using them to categorize events (for example, a birthday calendar, a calendar of curriculum events, etc.). Each calendar can have its own [display color](#) and can be individually included or excluded from [the monthly and daily views](#), creating a flexible viewing experience.

As each calendar can be set up with its own specific sharing permissions, maintaining several personal calendars is also a powerful organizational tool. Separate private events from events that can be shared. Divide your shared events into several different public events and restrict permissions to specific (different) groups of subscribers.

### To access and manage your personal calendars

1. From the either view of the Calendar, click the *Create, Edit & Import Calendars* tab. You are navigated to [the Manage Calendars page](#).
2. Click the **Add, Edit, and Delete My Calendars** button. You are navigated to the *Add, Edit and Delete My Calendars* page.

To exit from this page, either use the breadcrumb link to navigate back to **Manage Calendars** OR return to the **View Calendar** tab.

### To create a new personal calendar from this page

1. In the box provided, *Name new calendar* (maximum of 35 characters) and click the **Create Calendar** button.
2. Your new calendar is added to the page. You can now adjust **Viewing permissions** and/or **Editing permissions** for this Calendar.
3. When you have finished customizing the calendar, click **Apply Changes**.

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## Managing your existing calendars

The *Add, Edit and Delete My Calendars* page includes several options for managing your personal calendars:

### Rename

The **Rename** button below each calendar on the page opens a pop-up.

Enter a new name for that calendar, then click **OK** to apply it.

### Delete

Use the **Delete** button below a specific calendar to delete it when it is no longer needed.

A pop-up message displays the number of events associated with this calendar (ALL of which will also be deleted) and asks you to click **OK** to confirm your decision to delete.

*You CANNOT delete your (default) My Events Calendar.*

## Sharing Permissions:

**Viewing permissions** indicate who is allowed to view events on this calendar.

1. Use radio buttons to choose between two viewing options:
  - **Private** = NOT SHARED. The calendar is restricted so that only you can view it.
  - **Public** = SHARED. Others in your Taskstream learning community can view this calendar.
2. Click **Apply Changes**.

*The option to allow others to add events to the calendar is set separately, as an **Editing permission**.*

**Editing permissions** indicate who is allowed to add events to this calendar.

*By default*, you are the only person who can create events on any of your personal calendars. You can, however, extend this permission to other users.

### To grant editing permissions to other Taskstream subscribers

1. Click the **Add Users** button.
2. The *Member Locator* opens in a pop-up window. Use the Locator to find and select the Taskstream subscriber(s) to whom you want to grant the ability to add events to this calendar. The names of selected users are added to the *Editing permissions* area.
3. (*Optional*) To remove editing access for a specific individual, click the red X to the left of that person's name in the *Editing permissions* area.
4. Click **Apply Changes**

*Access to shared calendars is not automatic. Others will not see the events on a Public calendar until they import it.*

## Locate Additional Calendars

When you select the *Create, Edit & Import Calendars* tab of the calendar tool, you are navigated to a *Manage Calendars* page. From this page, you can locate calendars created and shared by other Taskstream subscribers in your learning community. When you import a calendar, it becomes available to [include in the monthly and daily views](#).

*You can import calendars that have been marked for "Public" view by the owner, or those for which the owners have specifically granted you edit permissions. For more about permissions, See "Sharing Permissions:" on page 8*

*TS Coordinators are allowed to select calendars that have not been shared with them. Subscribers with TS Coordinator privileges are able to view the lessons and units (curriculum entries) placed on ANY calendar within their learning community.*

### To locate and import a calendar

1. From the either view of the Calendar, click the *Create, Edit & Import Calendars* tab. You are navigated to [the Manage Calendars page](#).
2. Click the **Locate Others** button. You are navigated to the *Locate Others' Calendars* page.
3. **EITHER Browse via the Member Locator** to find other Taskstream subscriber(s) whose calendar(s) you might want to import,  
OR  
Enter at least two (2) characters of a person's name in the *Search by Subscriber Name* field and click **Search**.
4. All calendars owned by the members you selected (via Locator) or whose names include the characters you entered (Search) are displayed as *Search Results*.
  - Each calendar is identified by the Name of the owner, Calendar title, Status (*View/Edit, View Only* or *Not Shared*) and the date on which it was Last Updated.
  - A green checkmark (✓) indicates that this calendar was already imported and appears on your *Manage Calendars* page.
5. Check the calendar(s) you want to import and click **Add Selected Calendars**.
6. You are navigated back to the *Manage Calendars* page, with the selected calendar(s) added.
7. (Optional) [Change the display color](#) of the newly-added calendar.

*If the calendar's owner has granted you Edit permissions, you can [add events](#) to that calendar after it has been imported.*