

# **PlanIt Purple: Getting Started**

A step-by-step guide to creating calendars and posting events

*Version: 112008a*

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Please note: This “Getting Started” guide draws substantially from the “PlanIt Purple Help” section, which is available by clicking the Help link in the upper right of PlanIt Purple pages. We have reformatted the content for easy printing, added screenshots to aid orientation to the various PlanIt Purple functions, and provided additional details and recommendations specifically relevant to Weinberg’s departments and programs. The online “PlanIt Purple Help” pages should be considered the authoritative source for instructions and guidelines on PlanIt Purple functionality and features.



**NORTHWESTERN**  
UNIVERSITY



**Judd A. and Marjorie Weinberg**  
**College of Arts and Sciences**

## A. Administration Overview

planit purple

[Calendar Administration](#) [Create a Calendar](#) [Help](#)

**ACADEMIC CALENDAR**

SEARCH EVENTS

ON OR AFTER

< November 2008 >

S	M	T	W	T	F	S
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

**ANNOUNCEMENTS**

[Announcement](#) [Watch Intro Video](#) [Leave Feedback](#)

**UPCOMING EVENTS**

**Wednesday, November 12, 2008**

All day [Africa in Focus: Celebrating 60 Years at Northwestern](#) *Fine Arts - No Location*

All day [Lunch Lecture: Kairn Kileman](#) *Lectures & Meetings - Evanston*

All day [Internship Initiative](#) *Other - Evanston*

All day [The Multifarious Mr. Darwin--Part II](#) *Fine Arts - Evanston*

### The Dashboard

To access the Dashboard, visit the PlanIt Purple home page – [planitpurple.northwestern.edu](http://planitpurple.northwestern.edu) – and click the "Calendar Administration" link at the top right. Log in with your NetID and password.

planit purple

[PlanIt Purple Home](#) [Create a Calendar](#) [Help](#)

**Dashboard**

**MY CALENDARS**

Click on a calendar below to edit its information and events.

[test cv](#)  
Weinberg College of Arts and Sciences

[create new calendar](#)

**PERSONAL PROFILE**

Name: Christopher Verkaik  
Phone: +1 847 491 5660  
Email: c-verkaik@northwestern.edu

This information is derived from the [University Directory](#). Please see [Edit Your Online Directory Information](#) to change your directory entry.

**XML FEED BUILDER**

[Create a new XML feed](#)

### My Calendars

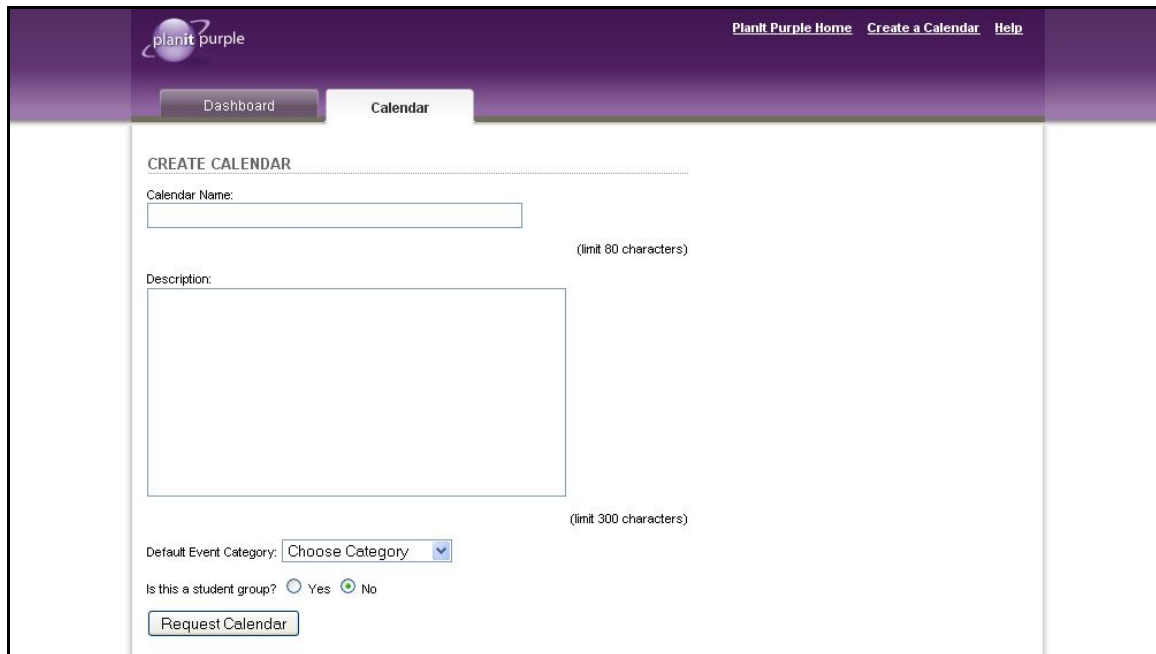
The calendars you administer are listed under the "My Calendars" heading. To modify any of these calendars, or to add, change or delete an event from one, click that calendar's name.

### Personal Profile

At the top right, you'll see a heading marked "Personal Profile." This contains your name and contact information, which PlanIt Purple automatically assigns to any new calendars you create.

PlanIt Purple draws your contact information from Northwestern's university directory and does not keep your information on file. If you want to change your contact information for any reason, follow the link that reads "Edit Your Online Directory Information" to do so.

## B. Creating and Managing Calendars



The screenshot shows the 'CREATE CALENDAR' form on the Plant Purple website. The form is titled 'CREATE CALENDAR' and has two tabs: 'Dashboard' and 'Calendar'. The 'Calendar' tab is active. The form contains the following fields and options:

- Calendar Name:** A text input field with a character limit of 80 characters.
- Description:** A larger text input field with a character limit of 300 characters.
- Default Event Category:** A dropdown menu with the option 'Choose Category'.
- Is this a student group?:** Radio buttons for 'Yes' and 'No'.
- Request Calendar:** A button to submit the form.

1. In the Dashboard, click “create new calendar” beneath the heading "My Calendars.”
2. Name your group’s calendar by typing its name in the “Calendar Name” field. Suggestions:

### ***Calendars for Departments, Programs, Centers, and Institutes***

Consider beginning your group name with the subject matter of your program, not the words "Department of," "Center for," etc. Examples:

- Art History Department
- Plant Biology and Conservation Master's Program

### ***Calendars for Speaker Series within a Department or Program***

Colloquia or speaker series within departments and programs should use the name of the series, provided that the subject matter is clear. Examples:

- Anthropology Colloquium Series
- "Patterson Lecture Series" could be "Transportation Center Patterson Lecture Series" to clarify subject matter

Once you’ve named your calendar and moved your cursor to the “Description” field, a list of **calendars with similar names that already exist** may appear below the “Calendar Name” field. If this occurs, be sure to see if any of the listed calendars duplicate the one you were planning to create.

3. Enter a brief description of your calendar and/or group in the “Description” field.
4. Choose a Default Event Category from the drop-down menu below the “Description” field. Events are divided into seven category types:
  - Academic:** Typically, student-oriented events related to specific courses.
  - Fine Arts:** Events specific to the Fine Arts (such as gallery exhibits or music recitals).

**Athletics:** Sports events.

**Social:** These events are more leisurely than scholarly.

**Lectures & Meetings:** Events by established clubs, groups, or committees, whether student- or faculty/staff-based; also academic talks and discussions. (The MOST TYPICAL category for Weinberg department/program event postings open to the public.)

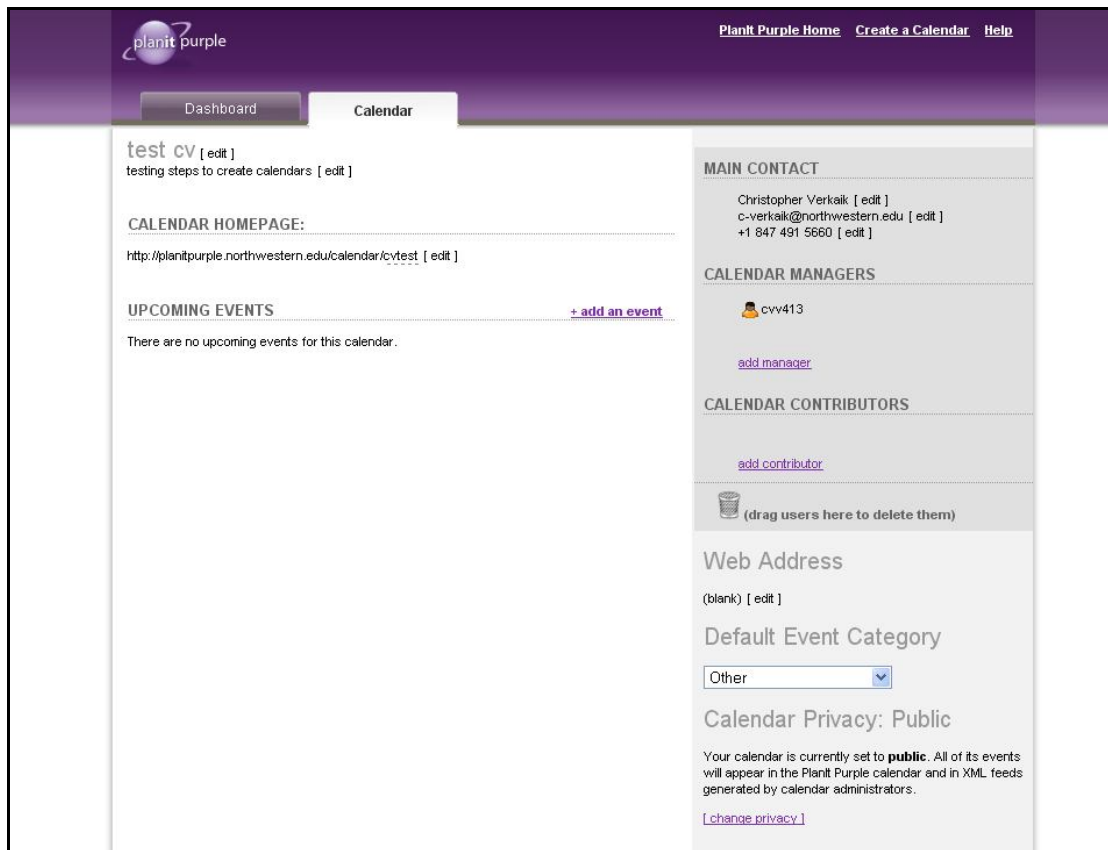
**Religious:** Events involving spirituality or worship.

**Other:** Events not related to any of the above categories.

5. Specify whether or not your group is a student group by clicking either the “Yes” or “No” radio button.

6. Click “Request Calendar.” You will see a message thanking you for submitting your calendar.

### Editing Your Calendar's Profile and Description



1. In the Dashboard, click the name of the calendar you want to modify.

2. To change the calendar name, click the [edit] next to the name of your calendar. An editable text field will open; type the new name of the calendar in this field and click "Save."

3. To change the calendar description, click [edit] next to the existing calendar description. An editable text field will open; type the new description of the calendar into it and click "Save."

4. To customize your group's Calendar Homepage URL, click the [edit] next to the current URL. To customize the URL, type the desired URL of your group's Calendar Homepage into the field and click "Save." It is recommended that you use only lowercase letters and avoid underscores.

If you've never given your calendar a custom URL, your current URL will be a series of numbers. Changing your URL from a series of numbers to meaningful text will NOT affect web sites that link to your calendar, as PlanIt Purple will continue to recognize the old, numeric URL.

If your current URL is *not* a series of numbers, your URL has already been customized. If this is the case, you should not change it unless you have informed everyone who links to your calendar that its URL will be changing.

5. You can enter the URL for a Web page associated with your group under the Web Address heading. Click the [edit] under the Web Address and an editable text field will open.

6. To change the default event category for your group's calendar, simply select a category from the drop-down menu under the "Default Event Category" header near the bottom of the right-hand column. When creating events, you can always change the category from your calendar's default category if necessary.

7. When you're finished editing one or all of these fields, scroll back to the top of the page and click the Dashboard tab. Your changes will have already been saved.

### **Assign a New User to a Calendar**

Add someone as a Calendar Manager if you share administrative duties with that person. Calendar Managers can add calendar events, modify existing events, and edit calendar data.

Add someone as a Calendar Contributor if you want them to be able to add and edit calendar events, but not to delete any calendar events or change any calendar information:

1. If you want to add a Manager to your calendar, click "add manager" under the "Calendar Managers" heading in the right-hand column of the page. If you want to add a Contributor, click "add contributor" in the "Calendar Contributors" section.

2. A pop-up window will ask for the NetID of the Manager or Contributor you're adding. Type the new user's NetID in the field and click "OK." The window will close, and your new user's NetID will appear next to a small icon under either "Calendar Managers" or "Calendar Contributors," depending on which type of user you've added.

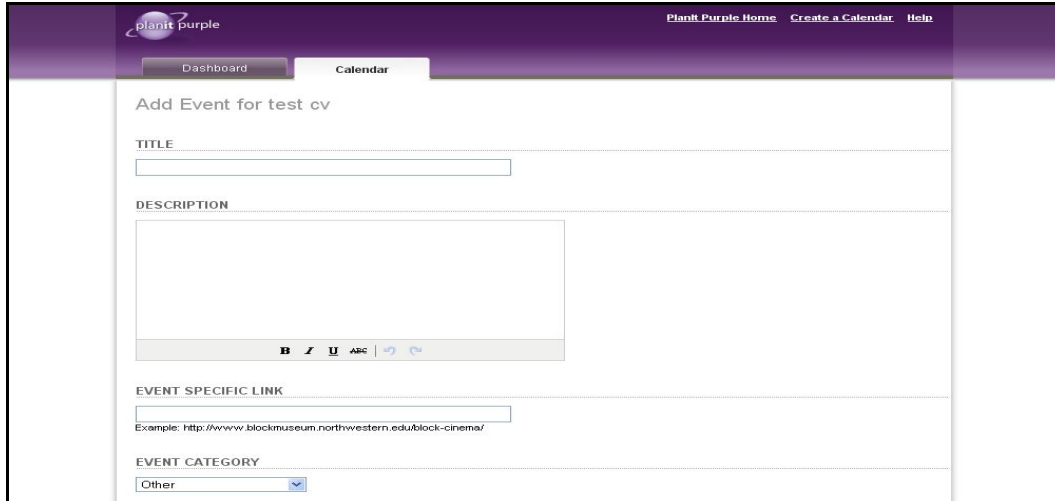
### **Change a User's role**

To change a user's role, click the icon next to the user's NetID and drag it to the Calendar Managers or the Calendar Contributors field, above the "add manager" or "add contributor" text.

To remove a user's ability to manage or contribute to your calendar, click the icon next to the user's NetID and drag it into the area that says "(drag users here to delete)" next to the trash can icon. The user will be removed from the list of calendar managers and contributors.

## C. Adding and Editing Events

1. In the Dashboard, click the name of the calendar on which you want your event to appear. To the right of the subheading “Upcoming Events,” click “+ add an event.”



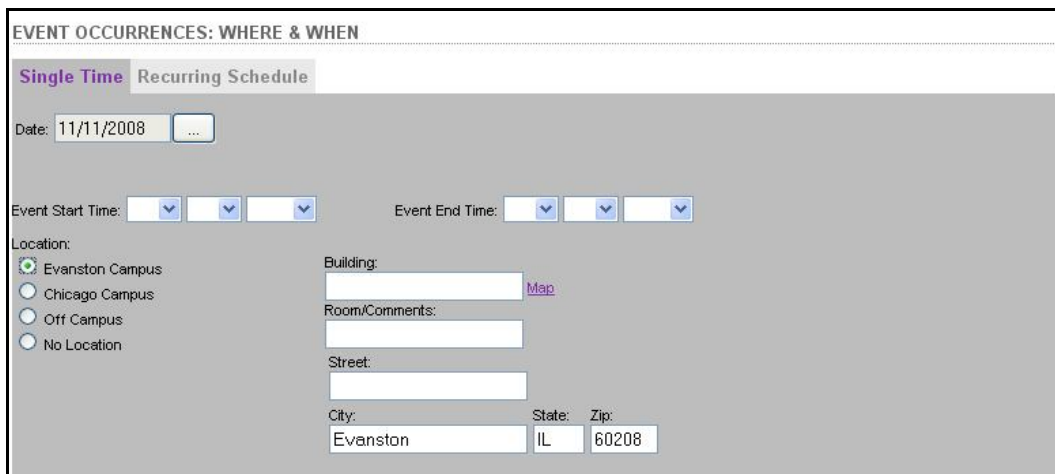
The screenshot shows the 'Add Event' form in the PlanIt Purple interface. The form is titled 'Add Event for test cv' and is located under the 'Calendar' tab. It contains several input fields: 'TITLE' (a text box), 'DESCRIPTION' (a larger text area with a rich text editor toolbar below it), 'EVENT SPECIFIC LINK' (a text box with an example URL: 'http://www.blockmuseum.northwestern.edu/block-cinema/'), and 'EVENT CATEGORY' (a pull-down menu currently set to 'Other'). The interface includes a purple header with the 'plant purple' logo and navigation links for 'Plant Purple Home', 'Create a Calendar', and 'Help'. Below the header are tabs for 'Dashboard' and 'Calendar'.

2. Enter the name of the event in the “Title” field and a brief description of the event in the “Description” field. Note that the description does not display in PlanIt Purple’s default “upcoming events” listing, so the title should be as descriptive as possible. Also note that the title is truncated after about 55 characters on the “upcoming events” display, so key words should be close to the beginning of the title if possible.

3. If you have a web site you’d like to link to with more information on your event, copy and paste the URL into the “Event-Specific Link” field.

4. Choose an Event Category from the pull-down menu marked “Event Category.”

5. Specify the date and time of your event using the “Event Occurrences” panel. Choose the event date by clicking the button next to “Date,” then clicking on the date of your event in the calendar that appears.



The screenshot shows the 'EVENT OCCURRENCES: WHERE & WHEN' panel. It has two tabs: 'Single Time' (selected) and 'Recurring Schedule'. The 'Date' field is set to '11/11/2008' with a calendar icon. Below are 'Event Start Time' and 'Event End Time' fields, each with three dropdown menus. The 'Location' section has radio buttons for 'Evanston Campus' (selected), 'Chicago Campus', 'Off Campus', and 'No Location'. To the right are input fields for 'Building:', 'Room/Comments:', and 'Street:'. At the bottom are 'City:' (Evanston), 'State:' (IL), and 'Zip:' (60208) fields. A 'Map' link is next to the 'Building:' field.

If your event occurs on more than one date, click the "Recurring Schedule" tab and choose the day or days on which the event takes place, as well as the start and end dates and times. A preview of the event dates will appear in the bottom of the "Event Occurrences" box. When you've finished entering event information, check the preview to make sure the correct event occurrences are listed there. If they are, click "Add to Schedule."

If your event occurs at different times or locations on different days, return to the top of the "Event Occurrences" box and enter information for the differing event times, dates, and/or locations. When the differing events are previewed correctly, click "Add to Schedule."

EVENT OCCURRENCES: WHERE & WHEN

Single Time **Recurring Schedule**

Occurs on days:  M  Tu  W  Th  F  Sa  Su

Starting on: 11/11/2008 ... Ending on: 11/18/2009 ...

Event Start Time: 8 : 30 a.m. Event End Time: 12 : 00 p.m.

Location:

Evanston Campus  
 Chicago Campus  
 Off Campus  
 No Location

From	To	Days	Start Time	End Time	Location	
11/11/2008	11/18/2009	M, W, Fr	8:30 a.m.	12:00 p.m.	No Location	<input type="button" value="Add to Schedule"/>

7. Click the appropriate button to specify the event's location, if any. If you click either the Evanston or Chicago Campus buttons, the "Building" and "Room/Comments" fields will appear. If you click on the "Off Campus" button, fields appear for the Street address, City, State, and ZIP code of the event location.

8. In the "Event Contact" section, click the button next to the appropriate contact person. Clicking "Me" or "Calendar Contact" will list the contact information of either you or the calendar's designated contact person. If you click the "Someone Else (Specify)" fields will appear for Name, Phone number, and Email address.

9. Specify the Event Audience by clicking the appropriate checkbox.

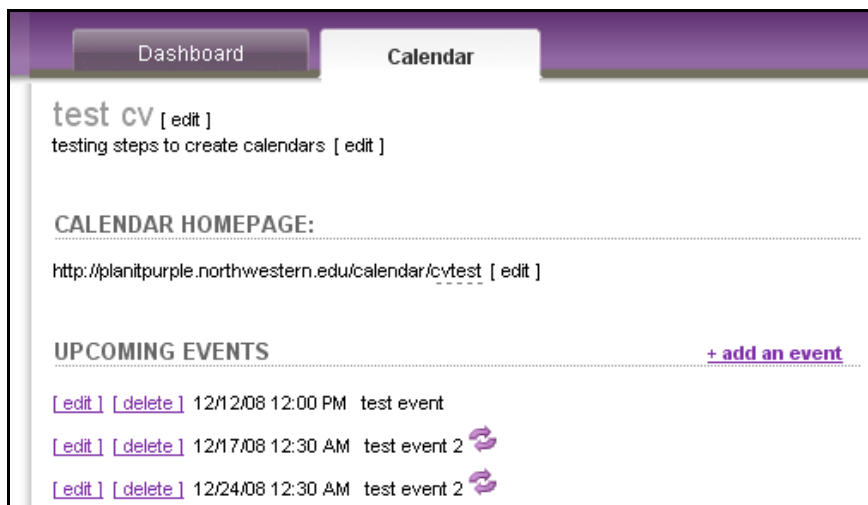
10. If there is an admission charge for the event you're entering, specify it in the "Event Costs" fields. Enter the price of admission in the "Price" field, and show to whom that admission cost applies in the "Audience" field. Note that you can enter text in the "Price" field if necessary. (EXAMPLE: Student admission is \$12, or \$10 with a can of soup.)

If your event will charge different admissions to different audiences (EXAMPLE: Student admission is \$12, Faculty/Staff admission is \$20), click "add alternate price."

11. When this information is filled in, click "Submit." Your event will be added to the appropriate group's calendar.

## Editing Events

1. In the Dashboard, click the name of the calendar containing the event you want to modify. This will take you to the calendar admin panel.

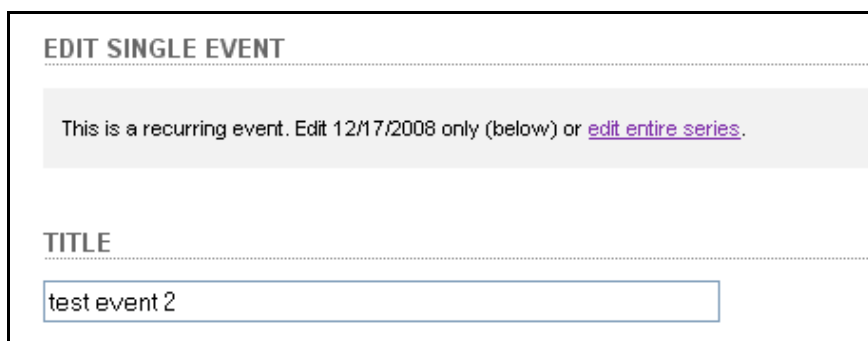


2. Find the event you want to modify; it should be listed under the "Upcoming Events" heading. Click "[edit]" next to the event's title. The event will open in the Event Edit screen and all fields will be editable.

### Editing a Recurring Event

If you need to edit a single instance of a recurring event, find the instance of the recurring event you need to change and click "edit" next to it. You'll enter the Edit Event screen; at the top of the page will be text stating that you're editing this event only.

If you need to edit all instances of a recurring event, find any instance of the recurring event and click the link that reads, "edit entire series."



3. Make the necessary changes to the event listing. When you've finished, click the "Save" button at the bottom of the screen, or, if you realize you're changing an event you don't want to change, click "Discard Changes."

## Canceling Single Events or a Single Instance of a Recurring Event

There is an important difference between marking an event as cancelled and deleting an event:

Marking an event as cancelled leaves the event in the PlanIt Purple database, but notes it as having been cancelled. Use this option if you want to inform people who were planning to attend your event of its cancellation.

Deleting an event altogether completely removes the event from the PlanIt Purple database. Use this option if you've entered an event by accident, or entered an event with blatantly incorrect information in it.

1. In the Dashboard, click the name of the calendar containing the event you want to modify. This will take you to the calendar admin panel.
2. Locate the event you want to mark as cancelled and click the "edit" button next to the event title.
3. Under the heading "Event Occurrences: Where & When," click the checkbox next to "Flag Event as Cancelled."

The screenshot shows a web form titled "EVENT OCCURRENCES: WHERE & WHEN". At the top, there is a "Date:" field with the value "12/12/2008" and a calendar icon. Below that are "Event Start Time:" and "Event End Time:" fields, both set to "12:00 p.m." and "2:30 p.m." respectively. The "Location:" section has four radio buttons: "Evanston Campus" (selected), "Chicago Campus", "Off Campus", and "No Location". To the right of the radio buttons are input fields for "Building:" (1922 Sheridan Rd), "Room/Comments:" (empty), "Street:" (1922 Sheridan Rd), "City:" (Evanston), "State:" (IL), and "Zip:" (60208). At the bottom left, there is a checkbox labeled "Flag Event as Cancelled" which is circled in red.

4. Click the "Save" button at the bottom of the page. The event you're editing will now show up in PlanIt Purple as cancelled.

## Canceling all Occurrences of a Recurring Event

1. Find any instance of the recurring event, click the "edit" button next to the event title and then click the link that reads, "edit entire series."
2. Under the heading "Event Occurrences: Where & When," you'll see the series (or multiple series) of events you've scheduled. To the right of the box are checkboxes marked "Cancel." Click as many of these boxes as appear.

3. Click the "Save" button at the bottom of the page. The event you're editing will now show up in PlanIt Purple as cancelled.

### **Deleting a Single Event**

1. In the Dashboard, click the name of the calendar containing the event you want to modify. This will take you to the calendar admin panel.

2. Locate the event you want to delete, and click the "delete" button next to the event title.

### **Deleting all Occurrences of a Recurring Event**

1. In the Dashboard, click the name of the calendar containing the event you want to modify. This will take you to the calendar admin panel.

2. Locate any instance of the recurring event you want to delete, and click the "delete" button next to the event title.

*It is currently impossible to delete a single instance of a recurring event. Deleting a single instance of a recurring event deletes the entire series.*

## **D. Getting More Help**

General PlanIt Purple troubleshooting and help documentation is available by clicking the "Help" link in the upper right corner of the PlanIt Purple site: <http://planitpurple.northwestern.edu/>

For questions about creating calendars, creating/editing/deleting events, or generating XML feeds in PlanIt Purple, please contact Chris Verkaik: [c-verkaik@northwestern.edu](mailto:c-verkaik@northwestern.edu).

To request that a PlanIt Purple XML feed be displayed on your department or program web site, please contact [web@wcas.northwestern.edu](mailto:web@wcas.northwestern.edu).

To request new PlanIt Purple features, comment about functionality, or report errors while viewing or managing calendars or events, please contact [planit@northwestern.edu](mailto:planit@northwestern.edu).