



Virto Office365 Calendar Add-In for SharePoint Online

User and Installation Guide

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Virto Office365 Calendar Add-In for SharePoint Online

Overview

Virto Office365 Calendar is a calendar add-in for Microsoft SharePoint Online. It's built for displaying events collected from any SharePoint List on a single calendar view.

Office365 Calendar add-in can be used instead of built-in SharePoint Online Calendar. It provides you with powerful capabilities for more convenient events calendaring, e.g.:

- Combine all events from different SharePoint Sites into one calendar
- Overlay Exchange Online Calendar
- Add an event with one mouse click
- Use any SharePoint lists as a Data Source
- Event coloring according to List Type
- Event duration editing with a simple resizing action
- Move event to new date/time by simple drag and drop
- Single aggregated view of all your events from different SharePoint Lists from the whole
 SharePoint Site Collection

System/Developer Requirements

Operating System

SharePoint Online / Office 365

Browser

Microsoft Internet Explorer 11 or higher, Google Chrome, Mozilla Firefox.

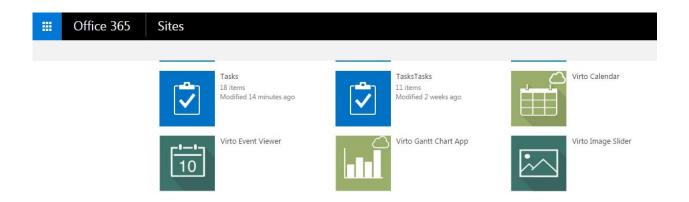
Installation

This section describes how to install, upgrade, uninstall, or contact Support for Virto Office 365 Calendar Add-In.

Installing Virto Office 365 Calendar Add-In

Before you begin, you need to make sure you have access to the server and your account must have the appropriate administrative privileges to install applications.

When Office365 Calendar Add-In is installed, it is automatically added to your site on page Site Contents.



To adjust Calendar view for SharePoint list, you need to define data source settings first of all. Click on Office365 Calendar Add-In icon and open default calendar, and then go to a configuration page for data sources.

Administration and Usage

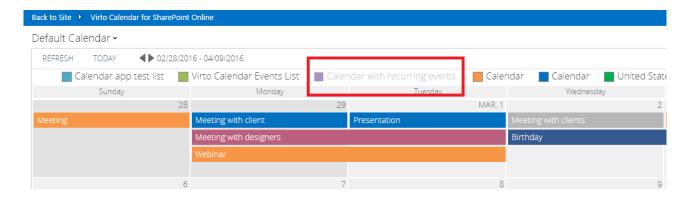
Calendar Overview

Actions with Calendar Items

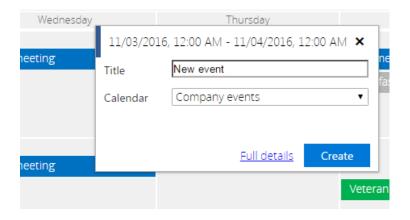
Virto Office 365 Calendar add-in provides different views of events: *Day, Week, Month, Year, Work Week, Task (Days), Task (Hours) and Multi Source View.* These tabs enable to view events for the required period of time.



You can show or hide any of your data sources in calendar just by clicking on its name in data source legend. Disabled data source is highlighted in gray and all its events are not displayed on calendar.

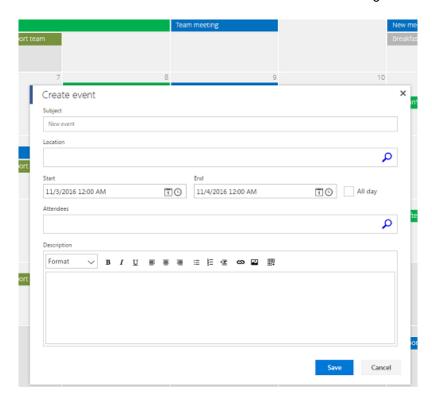


To create an event, open the required view tab, for example, Month view. Use mouse to select the required period of time for the event (select with drag & drop few days or few hours in Week view) or just click on the required day to create a new event.



Type the title, select the required calendar for this event and click "Create".

You can also display the full create form of the event with all fields by clicking on "Full details".

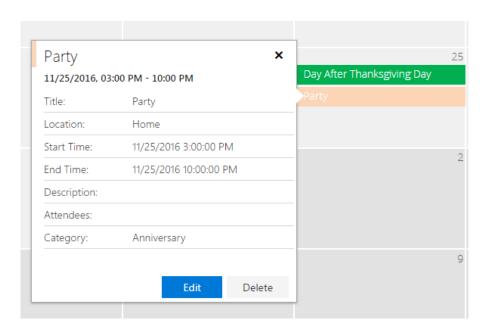


Note: drag & drop mode is not available in the "Year" view.

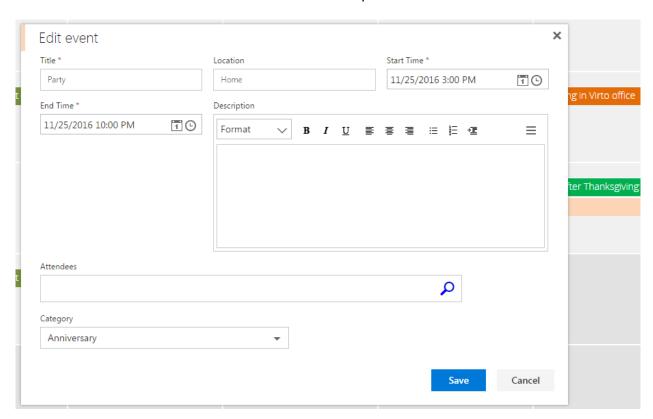
You can edit duration of events (resize them) in drag & drop mode as well.

Note: resizing is available in Day, Week, Work Week views only.

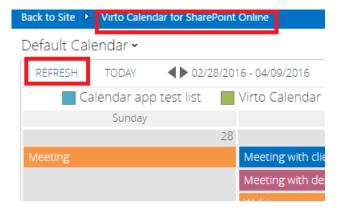
If you want to edit event information, click the event and then click "Edit" in the tooltip. The fields set displayed in tooltip can be defined in calendars data source settings.



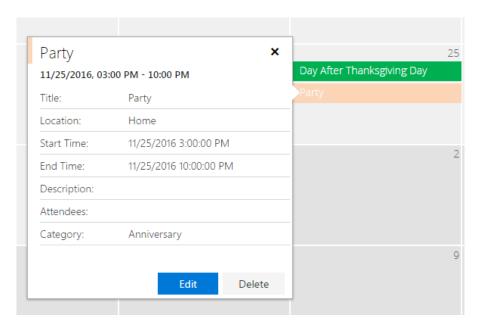
In opened form you can edit information, for example, specify the location and then click "Save".



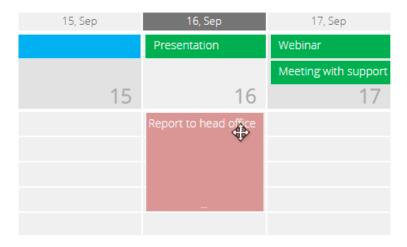
You can reload calendar by clicking "Virto Calendar for SharePoint online" or reload selected calendar by clicking "Refresh" button.



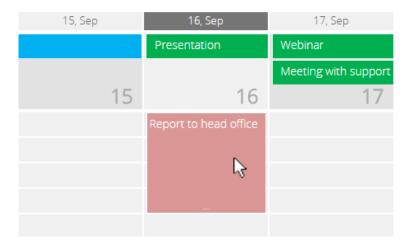
To delete an event, click the required one and then click "Delete" in tooltip.



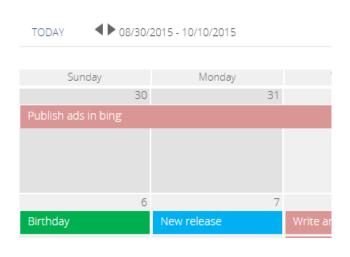
In the week and work week views you can hover the cursor over event name to move this event with drag and drop.



Click on empty space on the event body to edit or delete it.

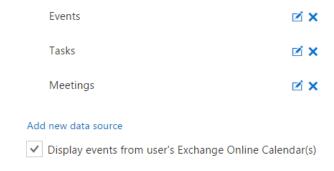


Use "Today" to be redirected to the time view that contains the current day. Use arrow buttons to go to previous/next page of the period.



Exchange Online Calendar overlay

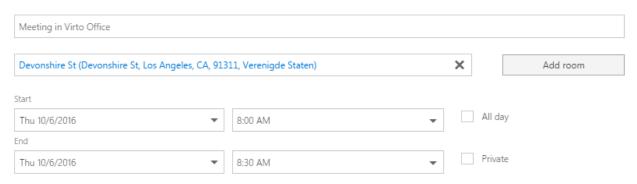
You can add your Exchange Online Calendar to Virto Office365 Calendar with a single click. Just check the box under selected data sourced on Calendar settings page and all Exchange Online Calendar events will be added as another data source.



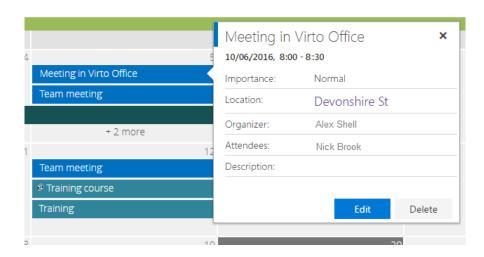
Another smart feature is the ability to view the event location from Outlook events with Google maps right from a link in Virto Office 365 calendar event details.

For example, you can create an event in Outlook with certain location.

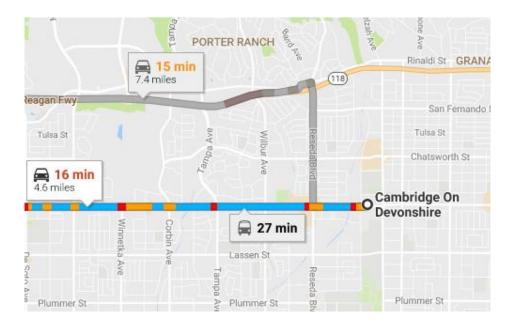
Details



And then display it in Virto Office 365 calendar by checking the box in data sources as described before.

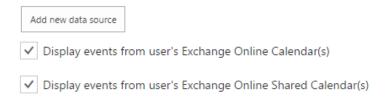


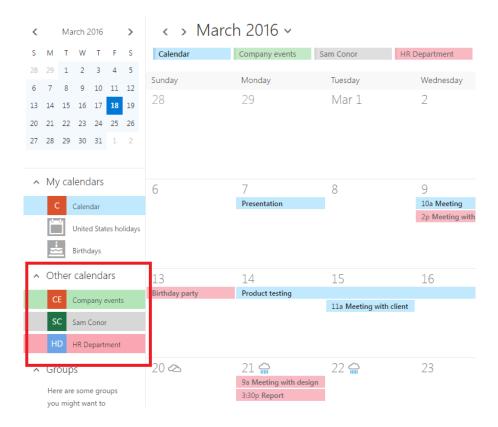
By clicking on link of event location from Virto Office 365 Calendar you will be redirected automatically to Google maps.



Exchange Online Shared Calendars overlay

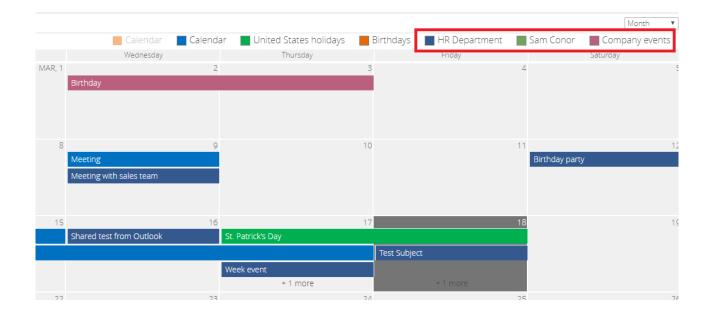
You can check the box "Display events from user's Exchange Online Shared Calendar(s)" and all your shared Exchange Online calendars will be automatically added to Virto Office365 Calendar.





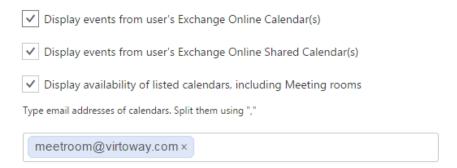
The colors of all shared calendars are assigned automatically, if you do not have specified the background color for a shared calendar in Exchange Online.

Note: All access and permission conditions of shared calendars from Exchange Online are delegated to corresponding calendars in Virto Office 365 Calendar, excepting shared calendars with limited access. Shared calendars with predefined in Exchange Online "Availability only" and "Limited details" permissions are not displayed in Virto Office 365 Calendar.



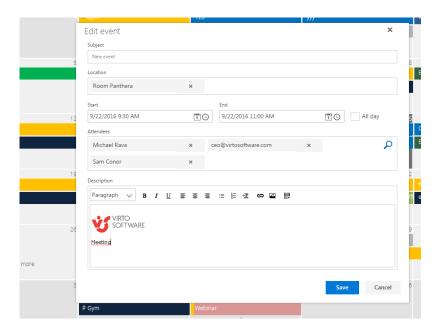
Exchange Online meeting rooms overlay

You can overlay meeting rooms from Outlook Exchange Online and your SharePoint calendar events. Check the box and define the list of Outlook meeting rooms.

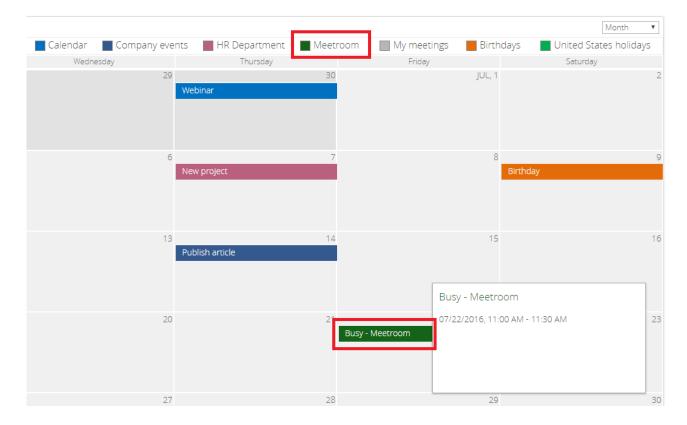


You can create and change events for Exchange Online with meeting room location, assign attendees and edit Exchange rooms right from the Virto calendar add-in.

You can also add external email addresses to the attendees list.



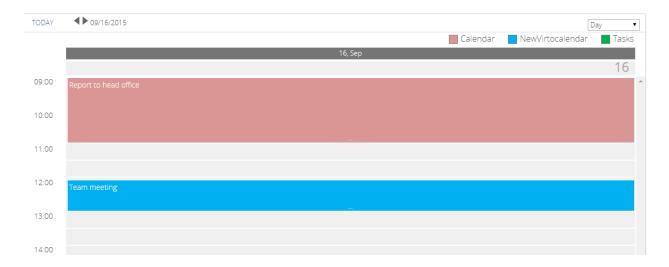
Note: If you have full access to an Exchange Online meeting room, you can view and edit event in this room. If your permission is restricted, you can see the room booking schedule only.

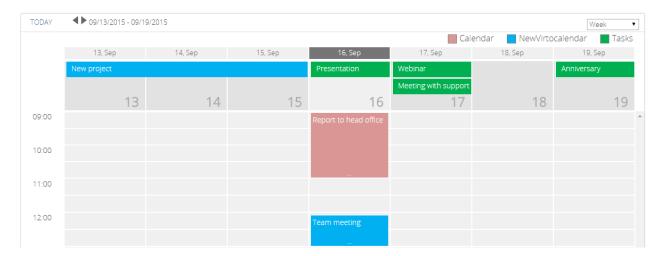


Calendar Views

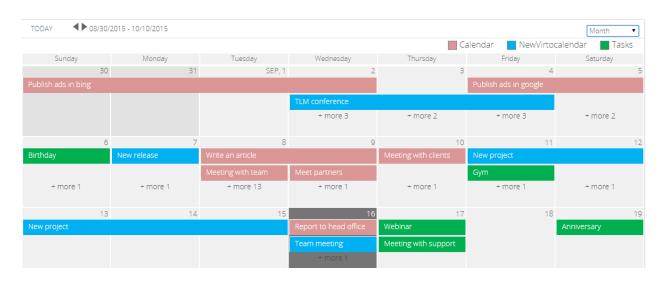
Simple Views

Views *Day, Week* and *Work Week* allow users to create and delete events, move them in drag & drop mode to required position (time).

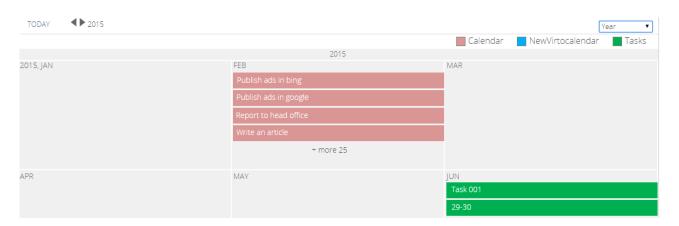




Month view allows users to create, move, and delete events.

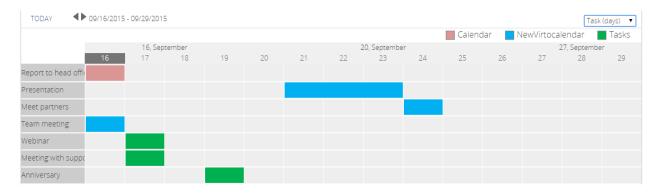


Year view enables to view, edit, and delete events.



Gantt View

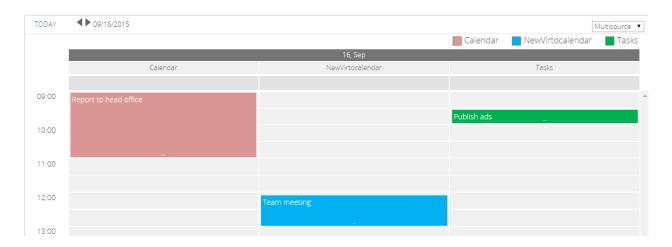
Gantt View in the Virto calendar is provided in two views: *Task (Days)* and *Task (Hours)*. These views allow to display items grouped by events and see which time exactly planned for them. Users can create, delete and move events.



Note: since any field on Integer type can be set as field for completion show, the percentage will not be displayed in case the value of the field is higher than 100%.

Multi Source View

Multi Source View allows users to view events planned for a day but all the events will be grouped by source. Here you can resize or edit events. But you cannot move events from one source to another.



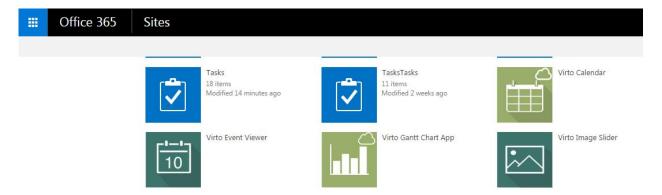
Access to Calendar Items (Security Settings)

The items displayed in Office 365 Calendar Add-In are visible for calendar users according to SharePoint security settings. If there are special access settings for every SharePoint list's items, they will be applied to these items in the Calendar.

For example, users with no access rights to items of List 1 will not see these items in the calendar. If they have rights of List 2 item management they can move, edit, resize and etc. these items in Office 365 Calendar Add-In. And if they have just read-only rights applied for List 3, they can view items of this list in the Calendar but have no ability to change any information of them (edit, resize, move, delete).

Calendar Configuration

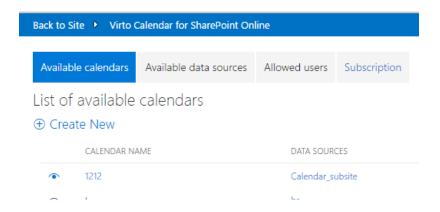
To adjust Calendar view for a SharePoint list, you have to define data source settings first of all. Click on Office 365 Calendar Add-In icon and open configuration page for data sources.



All the configuration settings are made in the special menu "Settings".

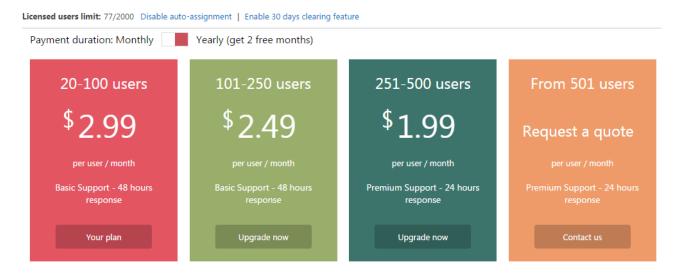


There you can define the list of allowed users, set available data sources, select available calendars and check your license details.



Subscription

On the subscription tab you can see your current subscription status.

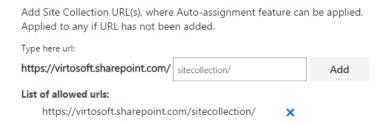


You can apply there the auto-assignment feature that allows handling user subscriptions.

When auto-assignment feature is enabled, any user who opens SharePoint Calendar add-in or opens the page with installed SharePoint Calendar add-in, will be added to licensed users list automatically. This feature can be a great help if your company has hundreds or thousands of users. SharePoint administrator does not need to add manually all licensed users to list.

Also, you can apply cleaning feature to automatically delete from licensed users list all users who have not opened SharePoint Calendar more than 30 days.

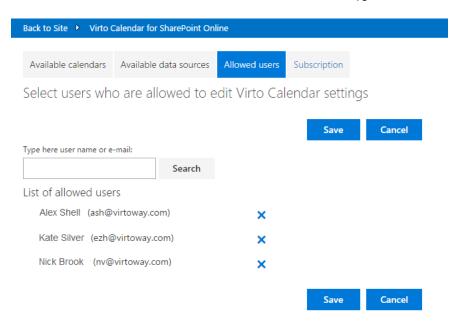
Another option is site collection url(s) assignment for adding licensed users. You can define the list of SharePoint sites where the users auto-assignment feature can be applied.



Now if a user opens Virto SharePoint Online Calendar on any site that is NOT contained in this list, he will not be added to licensed users list.

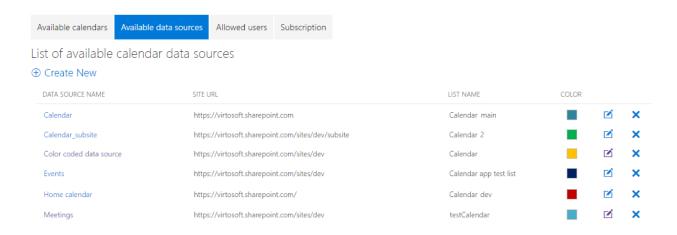
Allowed users

Select users, which are allowed to edit Calendar Settings



Available data sources

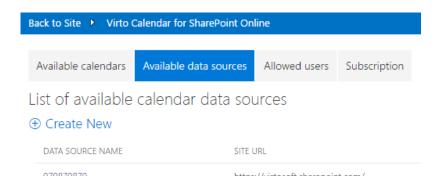
There you can manage your Office 365 Calendar Add-In data sources. In order to delete a data source, use corresponding "X" button opposite the required source. Use "edit" button to modify required data source or click on data source name to edit it.



You can choose the color of data source events displayed in calendar by clicking on data source edit button or right in this table by clicking on the data source color.



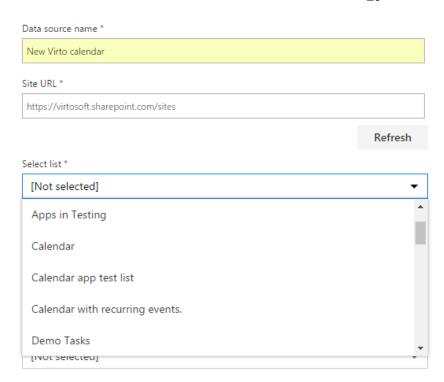
To add a new data source to the calendar, use "Create New" button.



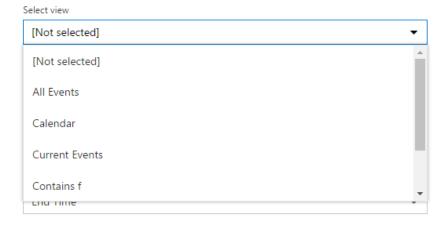
Now type the name of the new data source. Select the required site and select required list with data in the dropdown.

Note: you can add lists from any amount of sites from SharePoint site collection.

Note: All fields marked with an asterisk (*) are required.



Select view of the list (not required):



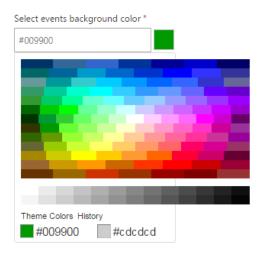
When you chose a calendar list, the Title fields and Time fields are filled automatically from corresponding columns. Otherwise you should select field values manually.



Select the color which will be used to color-code events of new data source.



Click "Web colors" to select a custom data source color.



Click "History" to display previously chosen colors.



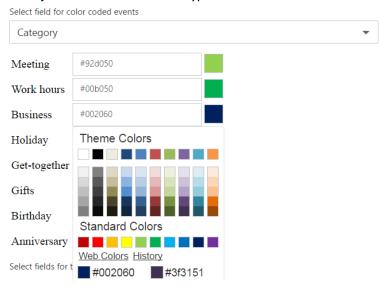
You can adjust colors for color coded events. This feature is optional, and you can use it to display the event categories in your calendar (meetings, work hours, holidays, etc). The event category has its own color, while the calendar data source color will be displayed as color marker on the left side if the event (see the example below).

Select a choice field, which will be used for color coded events.

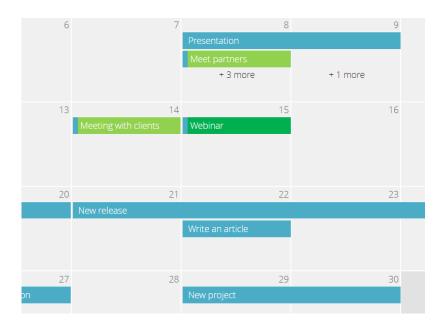
Select field for color coded events



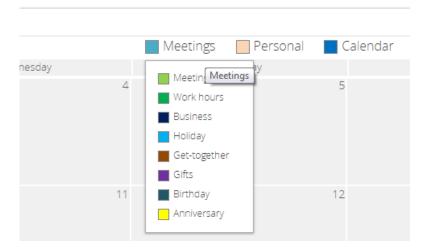
Then adjust colors for each event type.



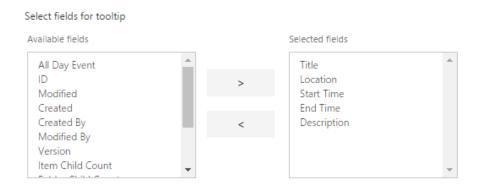
Now the color coded event will be displayed with a chosen color. The color marker on the left side of color coded events is corresponded to the data source color.



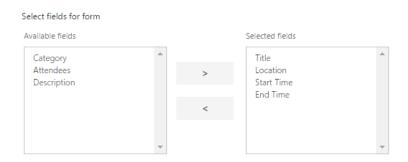
You can see the color coded events legend by hovering the mouse tip over data source name.



Next step is the tooltip adjustment (the pop-up that appears when you click the event in the calendar). You can display more than one of event fields in tooltips. To select multiple values press "Ctrl" and select required fields.



You can also adjust fields for event form in the same way as in previous example.



Now click "Save" to create the data source. It will be displayed in the list of data sources.

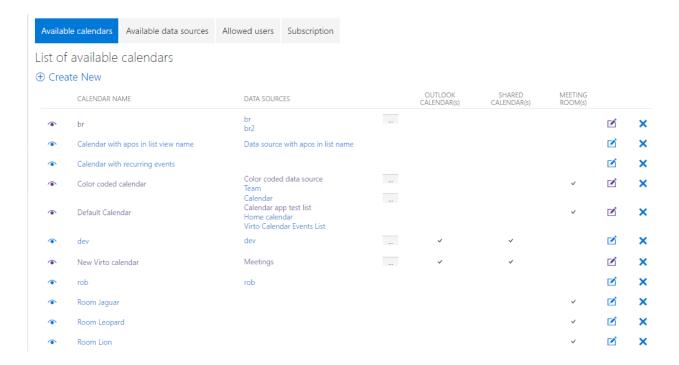
Available calendars

Click "Available calendars" on the Settings page. The list of available calendars will appear (or you need to create a new calendar if you do not have any existing calendars for now).

In order to delete any calendar, use corresponding "X" button opposite the required calendar. Use "edit" button to modify required calendar or click on calendar name to edit it.

Click on eye icon to view the required calendar.

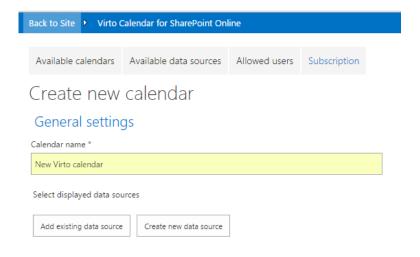
In the Data Sources column is displayed the data source corresponding to this calendar. By clicking on "..." icon you can see all data sources of this calendar.

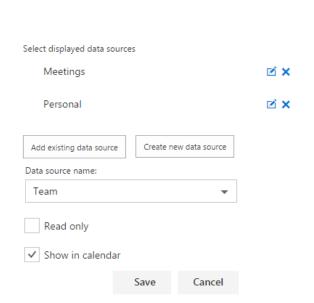


Click "Create new" to create a new calendar.

Type the name of a new calendar.

You can choose an existing data source or create a new one in popup window with the same settings as it is described in previous section "Available data sources".





You can check the "Read Only" box and make the calendar available only for viewing (users will be not able to create new events in Virto calendar, edit, move and delete items).

Check the boxes "Show in calendar" to show all events. Also, you can left it unchecked and save the settings without publishing this data source in calendar.

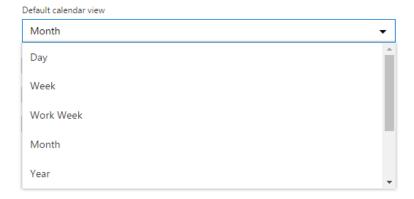
You can add more new data sources or edit/delete already existing data sources.



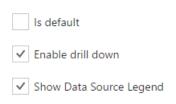
You are able to add your Exchange Online calendar or Exchange Online shared calendar with a single click. Just check the box under selected data sourced and all Exchange Online Calendar events will be added as another data source.



You can define which view (tab) will be displayed by default when you go to the calendar page. Select the required view in the dropdown (Day, Week, Work Week, Month, Year, Task (Days), Task (Hours), Multisource (Day view for all data sources)).

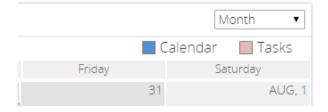


Check box "is default" to make selected calendar the default calendar for Virto Office 365 Calendar Add-In.

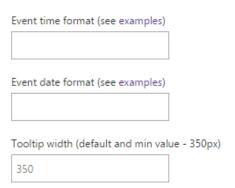


If you need to view a day from the month view, click on required day (the same way you can view any month from year view and etc.) But there is an ability to switch off the links, if you left "Enable drill down" box unchecked.

Also, you are able to show data source legend in the right upper corner



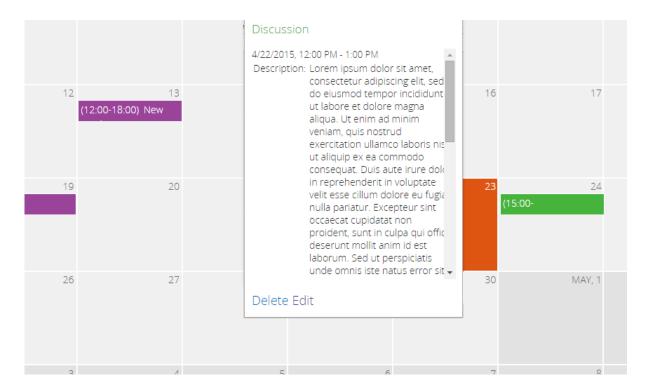
You can adjust time and date formats according to custom date and time format strings. Just enter required format (see this <u>link</u>), for example, use ddd format to display the abbreviated name of the day of the week.



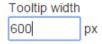
It is also possible to define tooltip width. This option is required when the text of item description is too large.

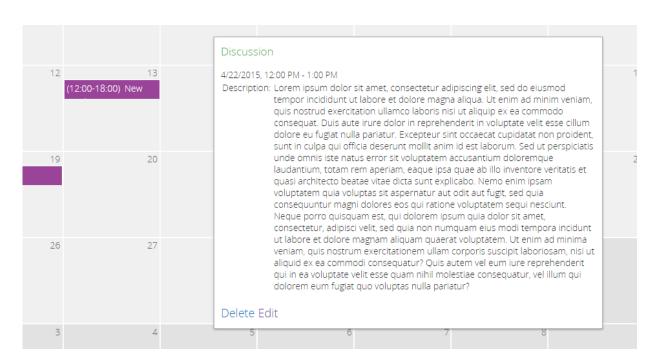
Default and minimum size of the tooltip is 350 pixels.

If description, for instance, is too large, tooltip will not look good enough.

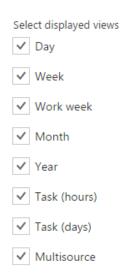


If we change tooltip width to 600 pixels, it looks much better.





You can hide some tabs (views) in the calendar. In order to do this, uncheck the boxes opposite required tabs.



Now you can define different view settings.

Multiday settings Month settings Year settings Task settings

Multiday settings

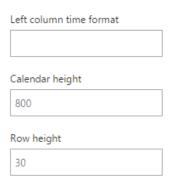
Expand "Multiday settings" block. The multiday view settings can be applied for the views **Day**, **Week**, **Work Week** and **Multisource View**.

Select the day from which calendar week will start (Monday or Sunday). Select start hour (from which every work day will start) and end hour.

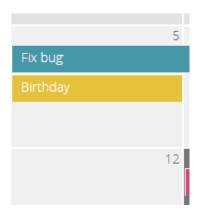
Multiday settings



Enter the row height (30 pxls recommended) and the whole calendar height.



It is possible to adjust the calendar grid height in the Multiday view / Month view / Year view settings. The default calendar height in Month view is 800 px.

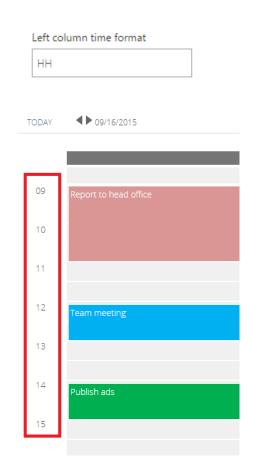


But if I assign in Virto Calendar settings the new 1800 px calendar height, the grid will looks like follows.

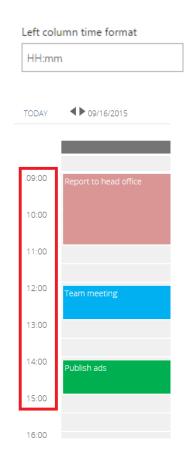


This way you can display more events in your calendar view. The same changes can be applied to other views.

You can adjust left column time format according to <u>custom date and time format strings</u>. Just enter required symbols and apply to the calendar.



Or change it as follows:



Select the amount of rows and time labels displayed per hour.



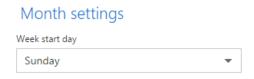
Select colors for background and header. Once you have made all the required modifications, click "Save".



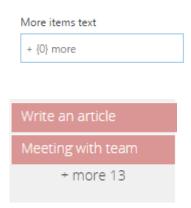
Month settings

Expand "Month settings" block. This view setting can be applied for the Month view.

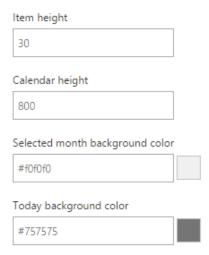
Select the day from which calendar week will start (Monday or Sunday).



You can edit text displayed if there are more items in the cell or amount of weeks in month.



Then enter the item height (30 pxls recommended), calendar height and select month and today background colors.



Year settings

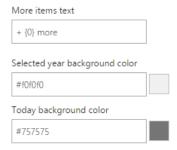
Expand "Year settings" block. This view setting can be applied for the Year view.

Enter the item height (30 pxls recommended) and the whole calendar height.

Year settings



You can edit text displayed if there are more items in the cell or amount of weeks in month. Also, you can change year and today background colors.

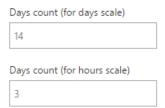


Task settings

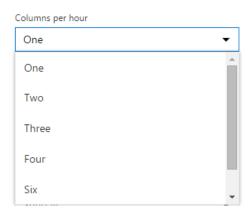
Expand "Task settings" block. This view setting can be applied for the task view.

In the Task View Settings block you can define days count for Task (Hours) and Task (Days) views. These views allow to display items grouped by events and see which time is exactly planned for them.

Task settings



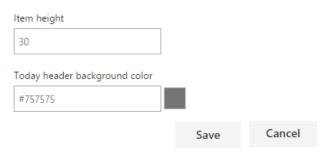
Then choose count of columns per hour.



Choose day start and end hours and select the day from which calendar week will start (Monday or Sunday).



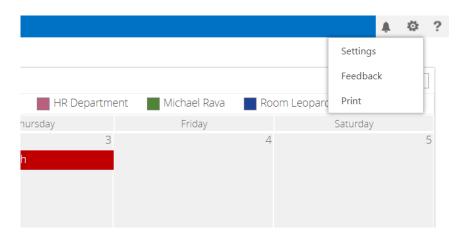
Enter the item height (30 pxls recommended) and choose header background color.



Press "Save" to save new data source settings.

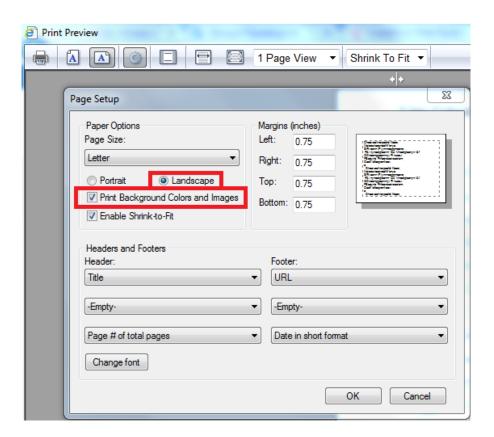
Calendar printing

Virto Office 365 Calendar is available for printing. Just click on settings button in the right upper corner of Calendar and select "Print".



If you use Internet Explorer, you need to perform a simple tuning before calendar printing.

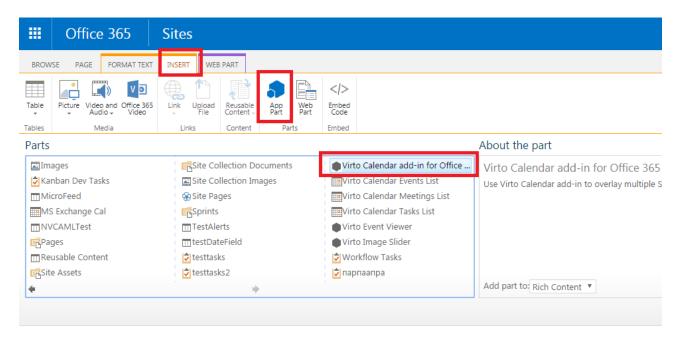
Just check the "Print Background Colors and Images" checkbox and choose Landscape paper orientation. Now your Virto Office 365 calendar is available for printing!



Using Virto Calendar as App Part

Adding Virto Calendar as App Part

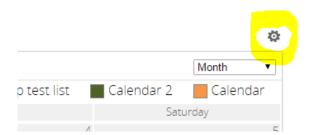
Go to a SharePoint site where you want to add the calendar and switch to edit mode. Then open "Insert" tab on ribbon and click "App Part".



Select "Virto Solutions" at the bottom of the list, choose "Virto Calendar add-in for Office 365" and click "Add".

Overlay with Exchange calendars and SharePoint farm calendars

First at all, you need to go to Virto Calendar Settings page.



Then click "Available calendars" and select your current calendar or create a new one. Click "Edit"

Virto Calendar add-in for Office 365

Eist of available calendars

⊕ Create New | Back to settings page

Calendar

1111

✓ ×

In the middle of the calendar settings page check the box to display events from Exchange Online Calendar or/and Exchange Online Calendars.

✓ Display events from user's Exchange Online Calendar(s)

Display events from user's Exchange Online Shared Calendar(s)

Save the changes.

Now you can see the new button on your calendar page.

Click it to display Exchange calendars and all SharePoint calendars from SharePoint farm.

VirtoCalendarAddIn

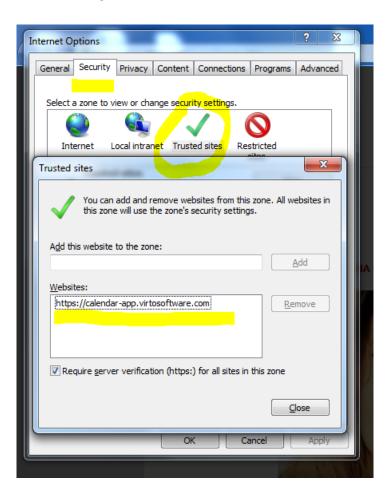
Virto Calendar add-in for Office 365

Virto Calendar for SharePoint Online

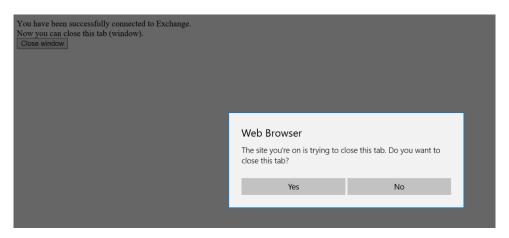
Authorize an app and display events

To display events in Virto Calendar press the button. If you are using Internet Explorer browser please add url https://calendar-app.virtosoftware.com to the list of trusted sites.

If you use Internet Explorer as a default browser, you need to add Calendar URL to the list of trusted sited in the browser settings.



Press "Connect to Exchange" and confirm the calendars overlaying in pop-up window, if your browser did not confirm it automatically.

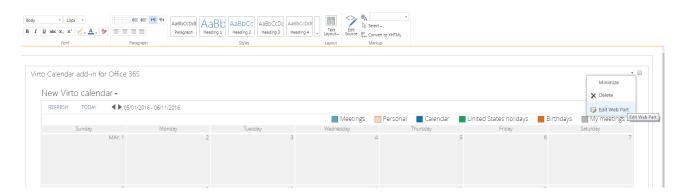


Reload SharePoint page to display Exchange Online Calendar on Virto Calendar.

Choose specific calendar for a site page

You can add a unique calendar to each site page, where Virto Calendar is added as app part.

Go to "Site Settings" and edit app part.



Below the default calendar name are displayed IDs of all available calendars on this SharePoint farm.



Copy ID of required calendar, which you will display as default calendar on current site page.

Virto Calendar add-in for Office 365

Color coded calendar •

Copy calendar id (guid without dashes) and paste it to app part properties.

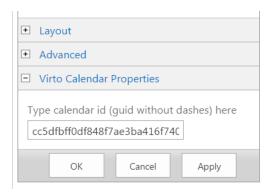
1212 - 70f70612115e485d8bd4f45445f7d377; br - d396052b210c4f43a701e3f84b5f9dd3;

Calendar with recurring events - 87757a198941477e8b2deb88285b94d4;

Default Calendar - 00797255312f454e875cd1b156d50768; New Virto calendar - c75dfbff0df848f7ae3ba416f740ab35

rob - ce64312fe470425ab99cd69a8d665d78; Simple SharePoint Calendar - 15733932c4694b01892ddb0780b05f75

Paste this ID to app part properties field.



Now this calendar will be shown as specific calendar for current page.

