

6.

CALENDAR SYNC

6.1 Introduction

Resource Tracker now has a new, optional Calendar Sync tool that is designed to help users who experience lots of last-minute changes to the diary. For these users, receiving diary updates by email is not always convenient. The new Calendar Sync tool automatically synchronises the Resource Tracker diary with other diaries (starting with Google Calendars) without the need to use emails to transmit the diary changes.

The Calendar Sync module keeps calendars updated for all your staff so that they can see their work diaries at any time from their laptops, home PCs or smartphones. Google calendars are free and can be set up in a matter of minutes and are the world's most popular online calendars being easy to use, flexible and fully integrated with Google Mail.

The Google calendars are read-only for the staff (so that they cannot amend or delete work scheduled for them). If staff already have Google calendars for personal use, the additional "work calendar" will simply appear automatically on their laptop or phone—but without the option to remove work you have scheduled for them.

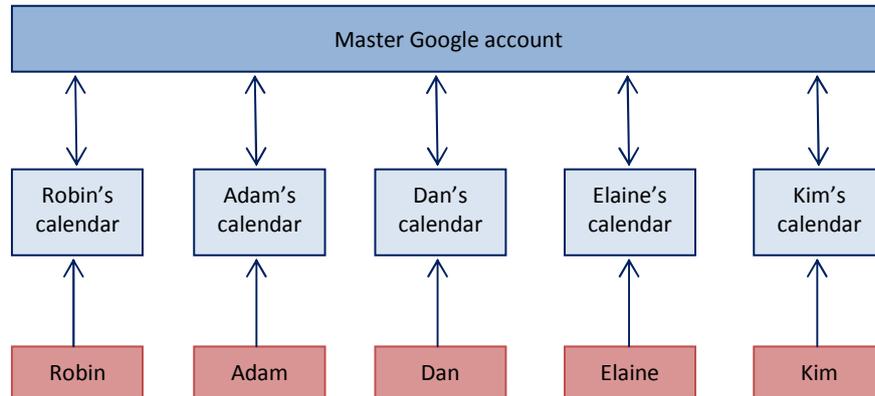
Use of this module means that you no longer have to send appointments via email to staff—their own diaries will automatically sync no matter how many appointments you schedule for them, how many you move, or even how many you delete.



Please note that you need Resource Tracker v1.5.500 or higher to use the Calendar Sync tool.

6.2 Setting the structure of your calendars

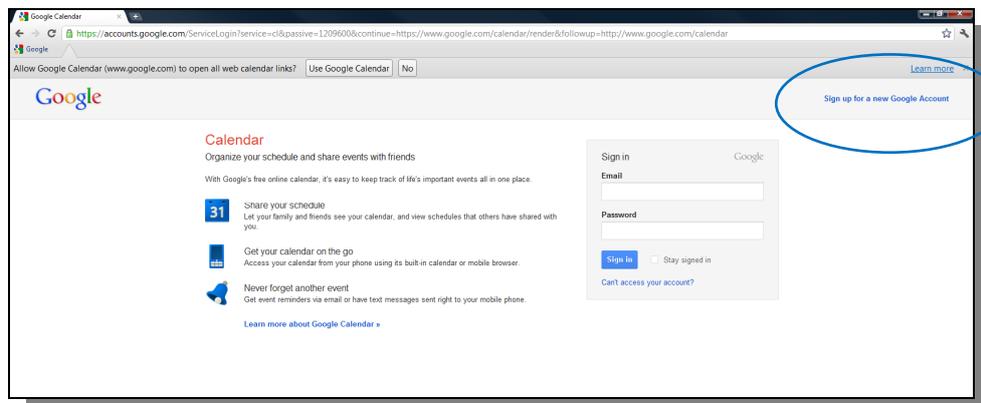
The Calendar Synchronisation service uses a master Google account to manage all calendars for your employees. The individual employee calendars are created inside the master account and each employee is then given access to one of them as their personal work calendar (in read-only mode).



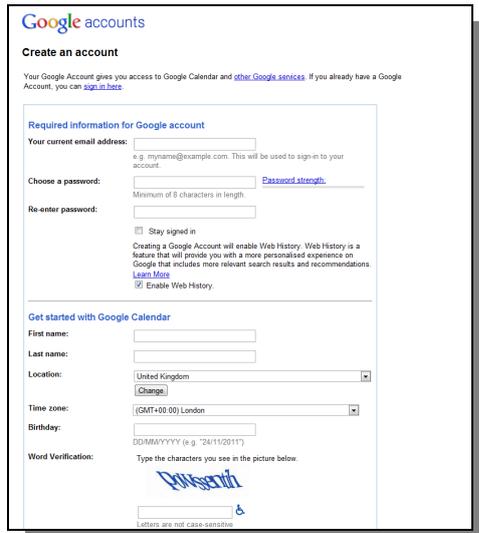
To set up the calendars:

1. Go to <http://calendar.google.com>.
2. Select *Sign up for a new Google Account* which is located in the top right of the header.

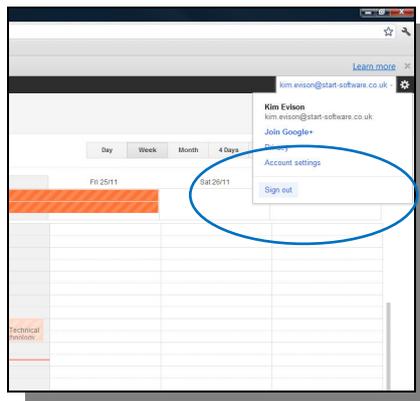
You must sign up for a new Google account so that you can create the master account for the calendars.



3. Enter the details to create a new master account.

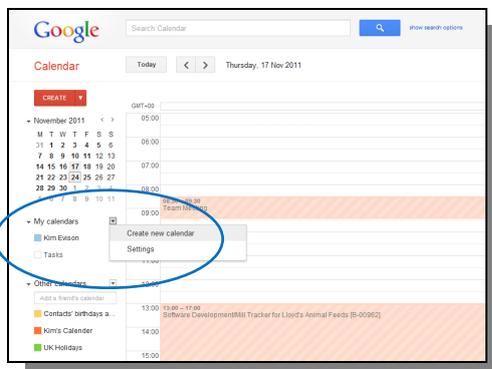


If you already have an account, Google may automatically log you in. If so, you will need to sign out and revisit the above link to see the sign up link.



Once inside the calendar system you will see a small column along the left called 'My Calendars' and showing a small down arrow. This is the option you use to create the individual calendars within the master account.

4. Click the small down arrow next to 'My Calendars' and select *Create New Calendar*.



A screen is displayed in which you can give the calendar a name (eg Ricky's Work Calendar) and enter any other information you require.

The screenshot shows the Google 'Create New Calendar' interface. At the top, there's a search bar and a 'show search options' link. Below that, the 'Create New Calendar' title is followed by 'Calendar Details' and navigation buttons: 'Back to calendar', 'Create Calendar', and 'Cancel'. The form fields include:

- Calendar Name:** A text input field.
- Description:** A larger text area.
- Location:** A text input field with a note: 'e.g. "San Francisco" or "London" or "UK". Specifying a general location will help people find events on your calendar (if it's public)'.
- Calendar Time Zone:** A section with a note: 'Please first select a country to select the right set of time zones. To see all time zones, tick the box instead.' It includes a 'Country' dropdown menu set to 'United Kingdom' and a 'Now select a time zone' dropdown menu set to '(GMT+00:00) London'. There is also a 'Display all time zones' checkbox.
- Make this calendar public:** A checkbox with a 'Learn more' link. A note says: 'This calendar will appear in public Google search results. Share only my freebusy information (Hide details)'.
- Share with specific people:** A section with a 'Person' field containing the email 'kim.evison@start-software.co.uk'. To the right, there are 'Permission Settings' (set to 'See all event details') and an 'Add Person' button. Below this, it says 'kim.evison@start-software.co.uk' and 'Make changes AND manage sharing'.

 At the bottom, there are navigation buttons: 'Back to calendar', 'Create Calendar', and 'Cancel'. A footer contains '©2011 Google - Terms - Privacy Policy'.

5. In the **Calendar Name** field, type the name by which to identify the calendar.
6. Check that the country and time zone displayed in the **Calendar Time Zone** fields are correct.
7. In the **Share with specific people** section, specify who can see the calendar:
 - Enter the email address of the employee whose calendar you are creating in the **Person** field.
 - Select the 'See all event details' **Permission Setting** option.
This setting gives the employee read-only access to the current calendar.



The email address specified must also be set as the Google account of the employee.

- Click the **Add Person** button to add the employee with whom you are sharing the calendar to the list in the **Share with specific people** section.



*Do NOT tick the **Make this calendar public** tickbox as this would make it available to the general public.*

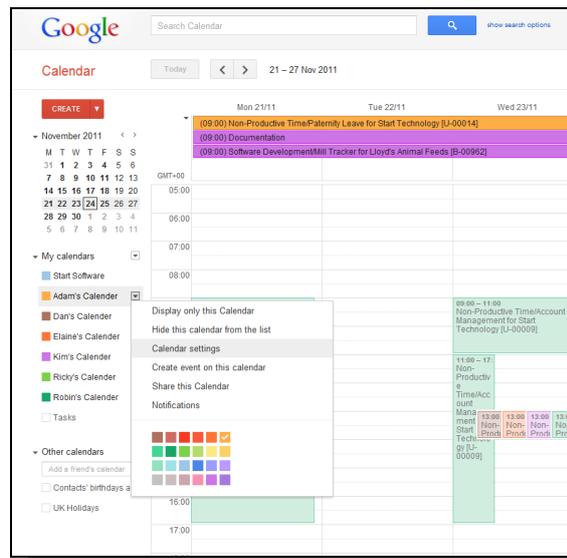
8. Click the **Create Calendar** button at the bottom of the screen.
9. Repeat from step 4 for each employee for whom you want to set up a calendar.

6.3 Linking the Calendars to Tracker

Once you have created all the calendars you must inform Tracker of each calendar's ID so that calendar information can be updated for each employee. To obtain the calendar IDs:

1. From the master account, move your mouse over the name of the calendar whose ID you wish to identify.
2. Click the down arrow which is now displayed next to the calendar name.

A menu is displayed.

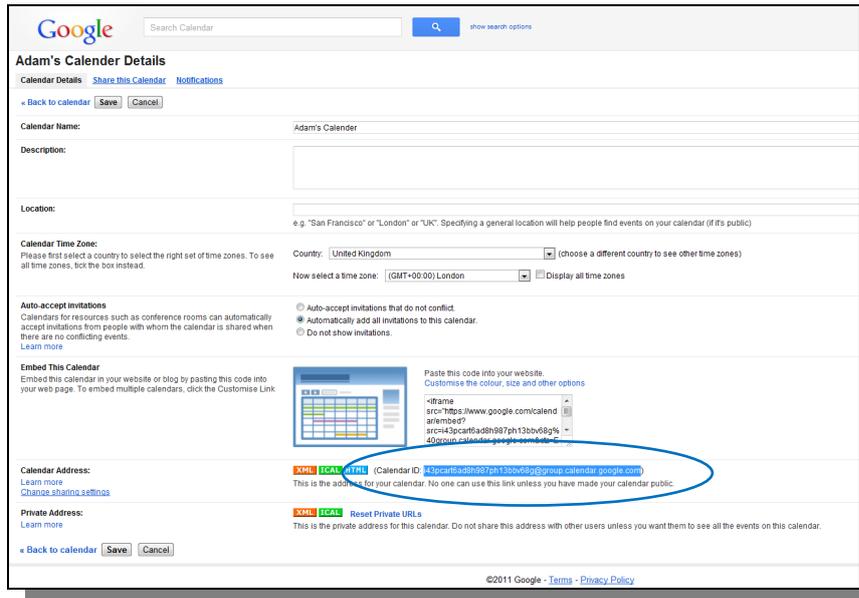


3. Select *Calendar Settings* to display the calendar's ID.

You can see the ID on the second row up from the very bottom. It is labelled 'Calendar Address'. The ID itself is made up of a long sequence of letters and numbers, for example:

amp5hn678k93e655f2be9uoqng@group.calendar.google.com

The following screen shows an example with the ID highlighted:



You must now enter this ID into Tracker.

4. In Tracker, from the main menu, select *Maintain/View Basic Data*.
5. Select *Staff* from the Maintain/View Basic Data menu.

The Staff screen is displayed. This screen is very wide and you may need to drag the screen to the left so that you can see the **Google Calendar** field on the far right.

Email Address	Staff Member Can	Group	Skill	Home - Postcode - Office	Mobile Phone No.	Holiday Entitlement	Access Level	Drag & Drop	Google Calendar	
adam.dangerfield@start-cc	<input checked="" type="checkbox"/>	Project Manage	Team Lead	Asst	Lead	Sign Reports	Software	0		43pcarfaad8r987ph133bv68g@group.c
andy@accassociates.biz	<input checked="" type="checkbox"/>	Project Manage	Team Lead	Asst	Lead	Sign Reports	Phra	0		
abhinspections@syahoo.co	<input checked="" type="checkbox"/>	Project Manage	Team Lead	Asst	Lead	Sign Reports	Phra	0		
ben.dalton@start-softwa	<input checked="" type="checkbox"/>	Project Manage	Team Lead	Asst	Lead	Sign Reports	Software	0		curmouuh41mp47suhq25.74k@group.c
blane.potter@btmail.co.u	<input checked="" type="checkbox"/>	Project Manage	Team Lead	Asst	Lead	Sign Reports	Sales/Adm	0		ecdftr037q66gqodf02o651r@group.cale
inv.evisor@start-softwa	<input checked="" type="checkbox"/>	Project Manage	Team Lead	Asst	Lead	Sign Reports	Dually	0		574h1q115gvmgubthv344@group.cale
blowes@zen.co.uk	<input checked="" type="checkbox"/>	Project Manage	Team Lead	Asst	Lead	Sign Reports	Phra	0		gmh.321eav79poper/p1g3m3o@group.i
cbn.barnett@start-softw	<input checked="" type="checkbox"/>	Project Manage	Team Lead	Asst	Lead	Sign Reports	Director	0		oop7m5odtarrq83hemn7pou8k@group.c
thane.brennan@start-sof	<input checked="" type="checkbox"/>	Project Manage	Team Lead	Asst	Lead	Sign Reports	Software	0		
blew@start-technology.co	<input checked="" type="checkbox"/>	Project Manage	Team Lead	Asst	Lead	Sign Reports	Technology	0		
anne@start-technology.co	<input checked="" type="checkbox"/>	Project Manage	Team Lead	Asst	Lead	Sign Reports	Admin	0		
caro@start-technology.co	<input checked="" type="checkbox"/>	Project Manage	Team Lead	Asst	Lead	Sign Reports	Admin	0		
friz@start-technology.co	<input checked="" type="checkbox"/>	Project Manage	Team Lead	Asst	Lead	Sign Reports	Sales/Mat	0		
gannon@start-technology.c	<input checked="" type="checkbox"/>	Project Manage	Team Lead	Asst	Lead	Sign Reports	Accounts	0		
and@start-technology.co.u	<input checked="" type="checkbox"/>	Project Manage	Team Lead	Asst	Lead	Sign Reports	Technology	0		
ames@start-technology.c	<input checked="" type="checkbox"/>	Project Manage	Team Lead	Asst	Lead	Sign Reports	Technology	0		

6. Find the row of information for the required employee and then enter their Calendar ID in the last column under **Google Calendar**.

 *If you are copying and pasting the Calendar ID into Tracker, make sure that you do not inadvertently copy any spaces, particularly at the beginning or end of the Calendar ID.*

When you have entered the Calendar IDs for each employee for whom you have set up a calendar, Tracker and the calendars are linked. Each of the employees is then able to log in to their Google account, or sync their Google account with their smartphone, to view their up-to-date work diaries at any time and from any location.