

# Getting started

## User guide

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# Getting started

**This document is a quick guide that shows how to install StaffCal server data store, the data store manager and StaffCal clients.**

StaffCal follows a client/server model, where data is held on a central server or servers and StaffCal clients connect to the servers to access data.

## Terminology

**Realm** - A company, with one or more sites

**Site** - A server with one or more groups

**Group** - A set of objects (sales people, all staff, visitors, meeting rooms etc)

**Object** - Anything that requires a calendar eg people (staff, visitors), room bookings, asset bookings (vehicles, machinery, whiteboards, projectors etc)

## Software

**StaffCal Client** is loaded on individual computers for users to view and change appointments etc

**StaffCal Manager** is loaded on only a few machines from which the system will be managed.

Users can set up and change sites, groups and objects within groups.

There are three manuals for the StaffCal system.

**Getting started** - (this manual) This covers the planning and installation of the Staffcal data store, and an overview of managing the StaffCal data stores.

**StaffCal site manager** - This shows how to configure and manage StaffCal sites.

**StaffCal client** - Shows how to use the StaffCal client effectively.

**STEP 1 - Plan the layout of the StaffCal system.** The division of people or objects into groups and the location of servers needs to be considered.

If you have a **smaller business** with only one location, you probably only need to install one site (server).

For a functional diagram of this configuration see [LAN Configuration](#)

For a diagram of the data store structure see [Site Structure](#)

If you have a **larger business** with multiple locations using a WAN (Wide Area Network) or possibly even locations connected via the Internet, you will need to configure multiple StaffCal sites.

For a functional diagram of this configuration see [WAN Configuration](#)

For a diagram of the data store structure see [Site Structure](#)

Generally speaking you should have one server for each physical site and a maximum of about 300 people or objects per server. This however is only a guideline and if for instance you had many small sites linked by a high-speed data service to a central 'head office', you may need only one StaffCal server with all Staffcal clients connecting to head office.

Any computer connected to the network (running TCP/IP) with any Windows98 or above operating system is suitable for use as a StaffCal server. However the higher the specifications of the server the better the data transfer rate. Other enhancements such as a good backup system, high speed network cards and RAID drives are also a plus.

**STEP 2 - Install the StaffCal data store.**

Run the setup file StaffCalendarDataStoreSetupx-x.exe from the setup package on the machine you wish to be the StaffCal server.

By default the data service will use port 2339 for communication. Make sure that if your server has a firewall, that this port is open. If you wish to change the default port, you can do so from within the StaffCal service manager.

**NOTE:** It is important to take a note of the DNS connection strings displayed in the setup, or IP connection strings if you wish to reference the StaffCal server by IP address (they are case sensitive).

These connection strings will be used in the StaffCal manager and also the StaffCal client(s).

If you lose the connection strings, then you can run the file IPCFG in the StaffCal data store program group to retrieve the connection strings.

**STEP 3 - Install StaffCal Site Manager.**

StaffCal Manager allows you to configure sites and add, move and delete groups and objects. It is normally installed on the same server as the StaffCal data store (StaffCal server). However it can be installed on any machine that it is convenient to work from.

Run the setup file StaffCalendarManagerSetupx-x.exe.

Start StaffCal Site Manager, and log in.

see [Login](#)

Use StaffCal Manager to set up your realm, sites, groups and objects.

See [StaffCal Manager Tutorial](#)

**STEP 4 - Install StaffCal Client on each client machine.**

Run the setup package StaffCalClientSetupx-x.exe on each client machine.

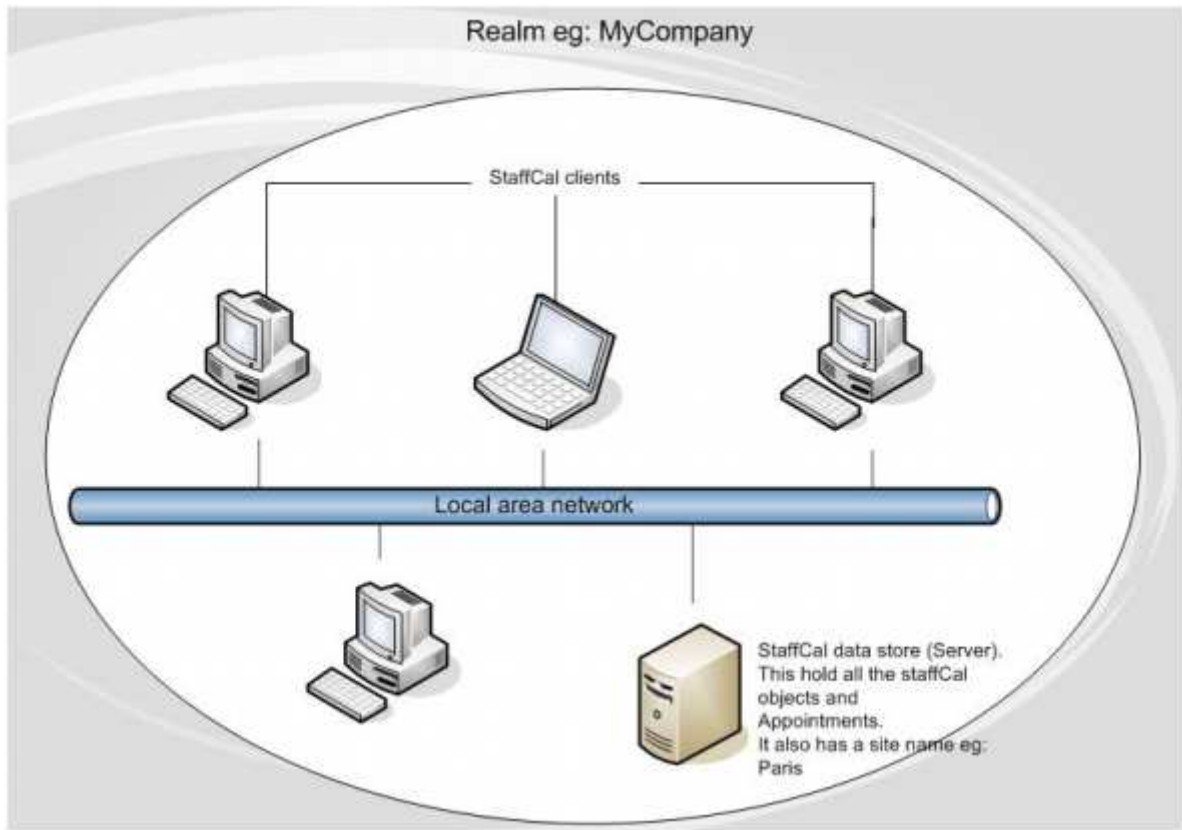
**NOTE:** To make distribution easier, you can specify the connection string as a parameter for the setup package. eg: Run the command line 'StaffCalClientSetupx-x.exe Myserver:2339:User:User'. This will automatically use the specified connection string when the user starts the StaffCal Client

Run StaffCal Start/ All programs/ StaffCal/ Staffcal.

If you did not specify the connection string on setup, you will need to log into the site where the users object is present (Home server) using the user connection string for that site. (eg: Myserver:2339:User:User). Note the connection string is case sensitive.

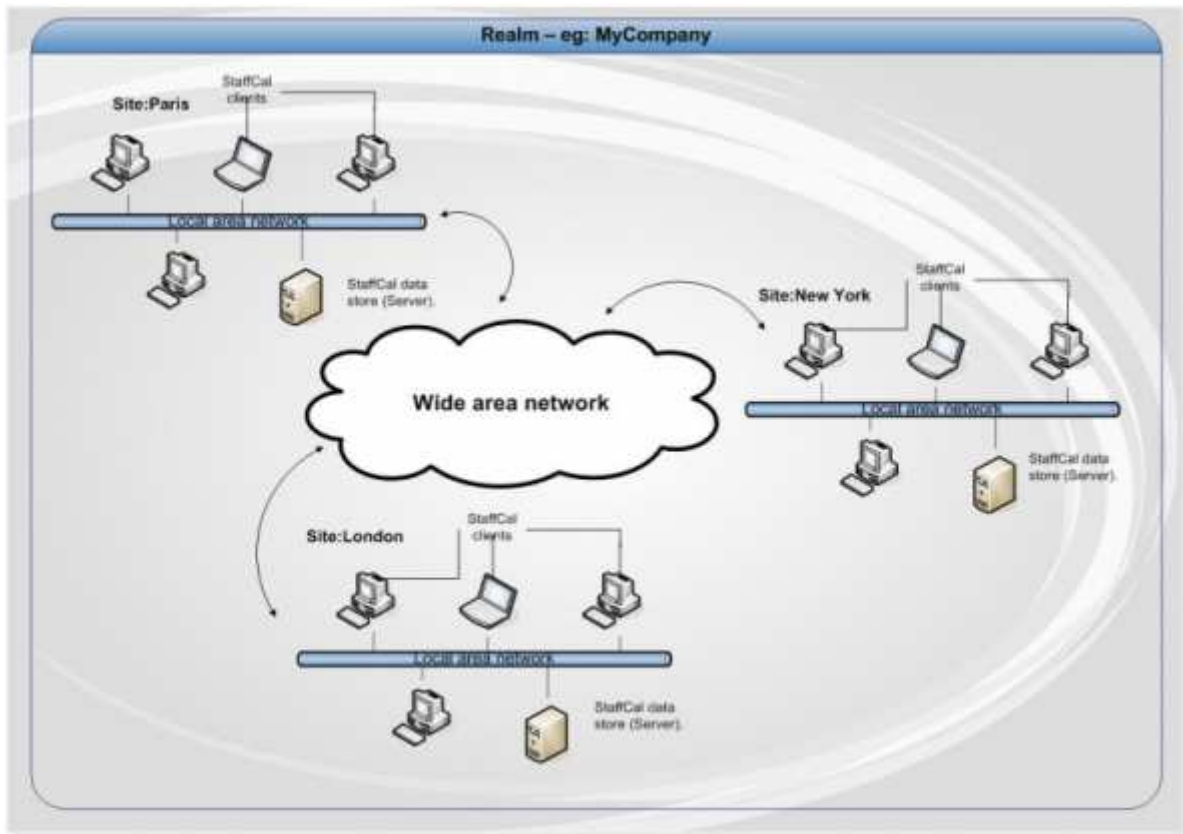
Please also read this section on how to use [Templates](#)

## LAN configuration



The realm layout for a realm with only one site.

# WAN Configuration



The realm layout for a realm with multiple sites.

## Site structure

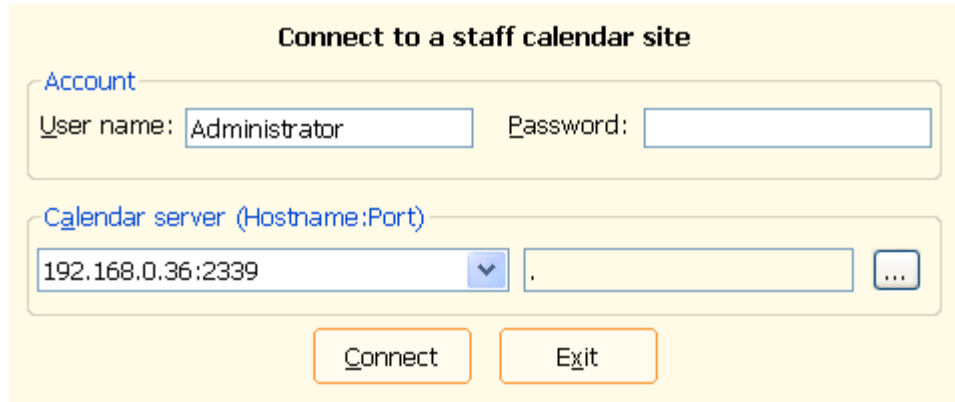


The structure of groups and objects within a site.

A site is made up of one or more groups, which contain objects (people, assets, bookings).

An object can belong to one or more groups within a site.

# Login



The screenshot shows a login window titled "Connect to a staff calendar site". It contains two main sections: "Account" and "Calendar server (Hostname:Port)".

- Account section:** Includes a "User name:" field with the text "Administrator" and a "Password:" field.
- Calendar server section:** Includes a field with the text "192.168.0.36:2339", a dropdown arrow, a field with a period ".", and a button with three dots "...".

At the bottom of the window are two buttons: "Connect" and "Exit".

This is the main login window for the StaffCal Manager utility.  
If this is the first time you are logging in, use

User name :Administrator

Password: password (case sensitive)

Calendar server: This is the path to the StaffCal server in the form Hostname: Port (no User:User)

The host name can be in the form of a DNS name

eg: TokyoCalendarServer:2339

or as an IP address

eg:192.168.0.36:2339

Press **Connect** to connect to the StaffCal server data store. Each new connection will prompt for a description of the site. Enter something meaningful (eg London). Then press **Connect** again.

Go Back to [Getting Started Step 3](#)

# StaffCal Manager Tutorial



## This is the StaffCal Manager Tutorial

Above is an example of what can be achieved with StaffCal. When starting the StaffCal manager setup, there will be a blank screen with few details. It is important to follow the steps in order.

1

### Promote/Demote

 Demote this site to a realm member

**Promote this site to a realm master site.** (This only applies if there is no other realm master on your network, and must be done if this is the only site on your network ie your first site). There should only ever be one realm master in your calendar realm.

A message will be displayed 'This site is now the realm master'

Once a realm master site has been added, it can be demoted to a realm member if necessary. This button will then indicate **Demote this site to a realm member**.

2

### Master Sites list

M	O	Site Name	User connect string	Admir
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	London	192.168.0.36:2339;User:U 192.1	

You should now have your site listed in the **Master sites list**. If it is a new site, the **Site** name will be <<**Unknown**>>.

(The realm master site list will only be enabled on the realm master site.)

3

### Set the realm name

Set the realm name

See [set the realm name](#).

4

### Edit your new site

Add a site  
Edit a site  
Delete a site

configure your new site (server data store). This will in fact be the site you have just installed - ie **this site**. Highlight the new *site entry* in the master sites list, then click on **Edit a site**. You will need to give your new site a name, and enter licensing details. See [Configure Site](#).

5

### Add/Edit Groups

Groups & objects
Site: London
Engineering

The next step is to add a group(s).

A group is simply a repository for similar objects eg: all the people in sales, all meeting rooms in a building, or all vehicles

If your site is small you might have only one group called 'Staff'.

Highlight the *site* you have just named in the groups and objects list, and click **Add a group** (side toolbar) or **Insert** (top toolbar)

For more details see [Add/Edit Groups](#)

6

### Add/Edit Objects

Production
Reception
Antilla Frederic

After you have added a group you can add objects to that group.

An object is simply something that needs a calendar, eg; people, assets that people need to use, rooms or meeting rooms and vehicle bookings.

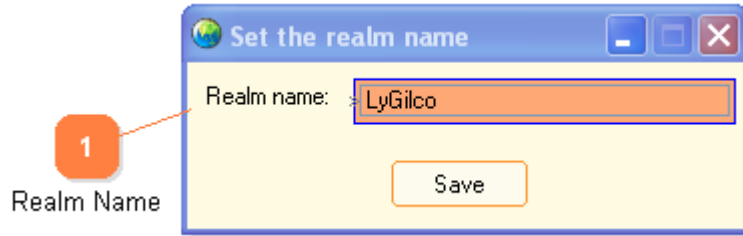
Highlight the *group* you have just created in the groups and objects list, and click **Add an object** or **Insert**

For more details see [Add/Edit Objects](#)

This is the end of StaffCal Manager Tutorial

[Go back to Getting Started](#) Step 4

## Set the Realm Name

**1**

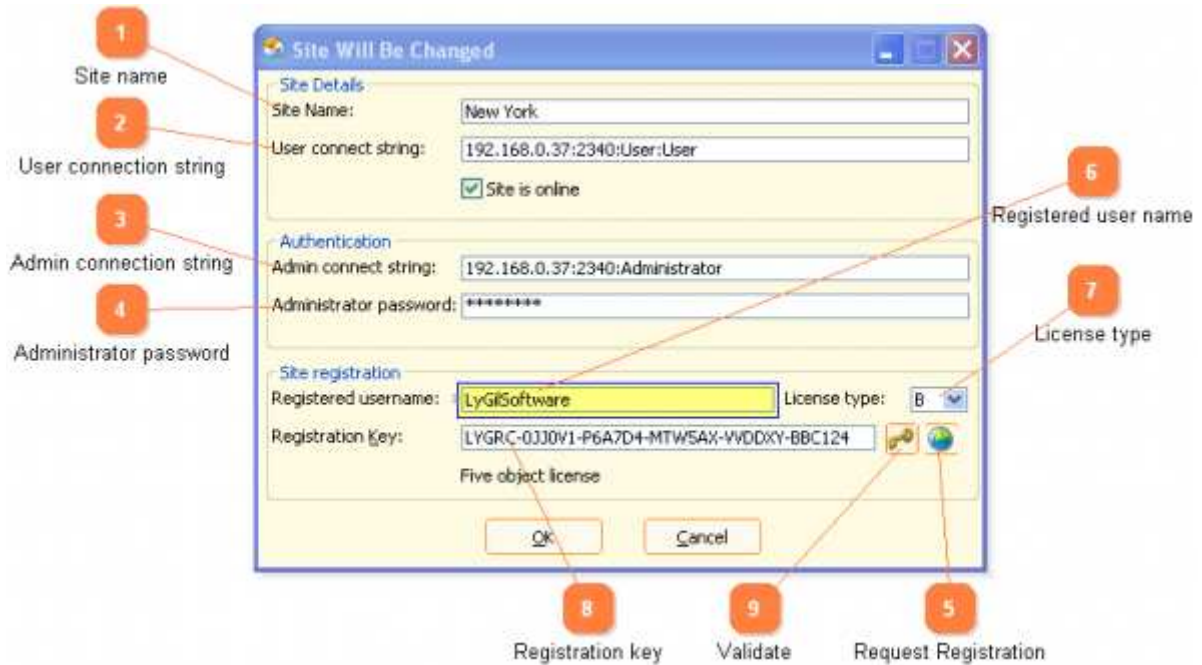
### Realm Name

Realm name:

Enter a name for your realm here. This will probably be the name of your company or organisation. When prompted to update all sites, select Yes.

Go back to [StaffCal Manager Tutorial](#) point 4

## Configure Site



This window allows you to add or edit site details. If this is a new site you will get a message 'Invalid User/License Key' - click **OK**

1

### Site name

Site Name:

Enter a meaningful name of this site eg a town, city or company division name.

2

### User connection string

User connect string:

Check the user connect string which is automatically displayed is the same as the user connect string supplied whilst installing the data store for the site that you are configuring.

If you do not have a record of the string, see [Getting Started](#) Step 2

[Do not use LocalHost or 127.0.0.1 as the computer name. This refers to the local machine and when StaffCal clients use this, they will be trying to get data from a non-existent local data store.]

3

### Admin connection string

Admin connect string:

Check the administration connect string which is automatically displayed is the same as the administrator connect string supplied whilst installing the data store for the site that you are configuring.

If you do not have a record of the string, see [Getting Started](#) Step 2

[Do not use LocalHost or 127.0.0.1 as the computer name. This refers to the local machine and when you try to update sites it may be pointing to a non-existent local data store.]

4

#### Administrator password

Administrator password:

This is the password for the administrator account. By default the administrator password is 'password' (lowercase & case sensitive)

5

#### Request Registration



This will redirect you to our website to obtain a User Name, Registration Key, and License Type. You can obtain a license from [www.lygil.com/staffcal/register.htm](http://www.lygil.com/staffcal/register.htm)

6

#### Registered user name

Registered username:

This is the user name supplied when you registered the software.  
If no registration details are entered the site will default to a maximum of five objects in the site.

7

#### License type

License type:

This is the license type for the software and indicates the number of objects that can be entered.

B: Unlimited objects (freeware)

U: Unlimited objects

C: 100 objects

L: 50 objects

T: 20 objects

X: 10 objects

If unlicensed, then there is a maximum of only 5 objects

8

#### Registration key

Registration Key:

This is the registration key supplied when you registered the software.

9

#### Validate



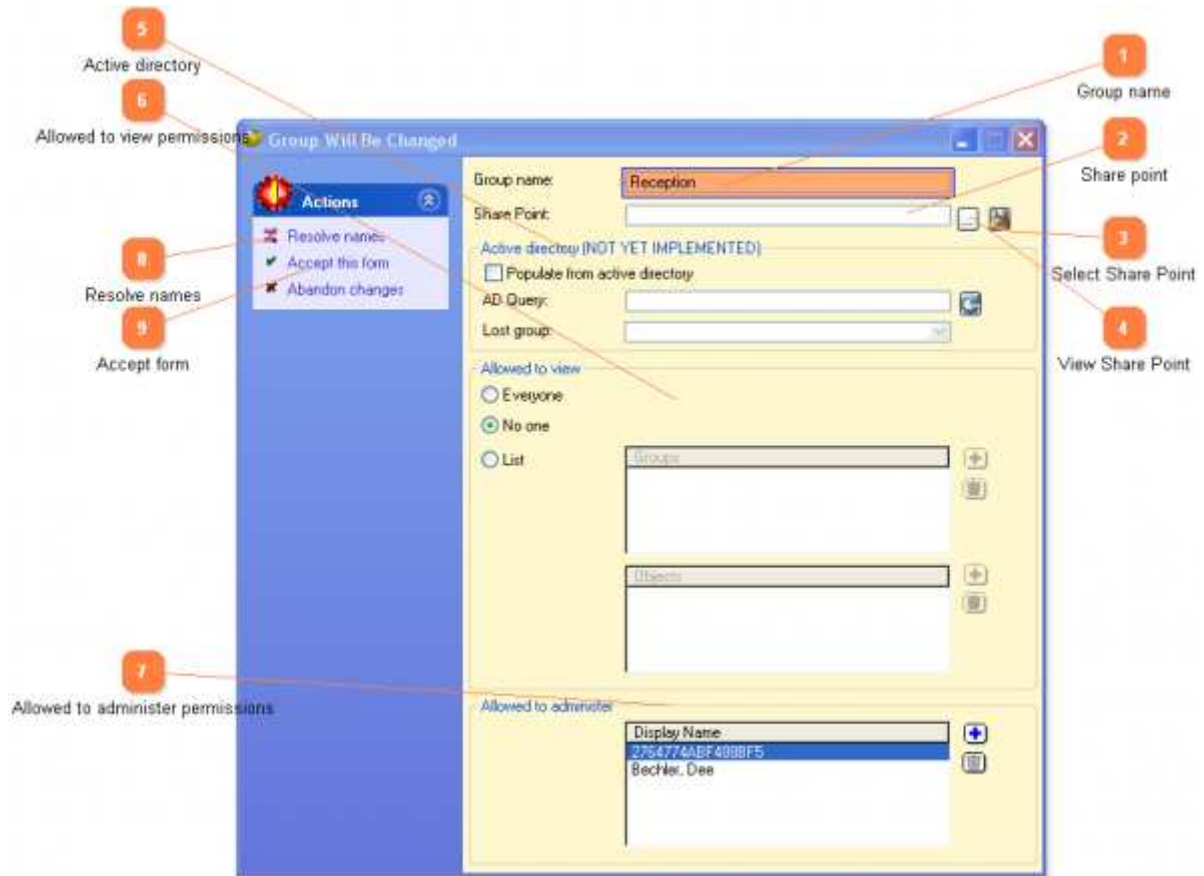
This verifies that the registration key is correct and displays the number of objects below the registration key that the site is licensed for.

Press **OK** to continue

When prompted to update all sites, click **Yes**.

Go back to [StaffCal Manager Tutorial](#) point 5

## Add/Edit Groups



This window allows you to add or edit a group description. You can define a group name and set access permissions for the group.

1

### Group name

Group name:

This field sets the descriptive name for the group. You should make this name representative of the set of people/assets who will be using this group.

2

### Share point

Share Point:

This is the UNC (Network) name of a shared folder that all the objects in the group can use as a file repository. It is a handy method for quickly transferring files between people in the group.

3

### Select Share Point



This allows you to select the folder to use as a share point.  
(An object in the group must have network access permissions to the share to be able to view the files).

4

#### View Share Point



This will open up Windows Explorer to view the contents of the share point that you have selected. (An object in the group must have network access permissions to the share to be able to view the files).

5

#### Active directory

Active directory (NOT YET IMPLEMENTED)

Populate from active directory

Active Directory dynamic connections are not yet implemented.

It is envisaged that Active Directory dynamic connections will allow creation, maintenance and descriptions of objects to be maintained and synchronised with the Active Directory structure.

6

#### Allowed to view permissions

Allowed to view

Everyone

No one

List

Groups

This determines which object or groups are allowed to view the group.

**Everyone** - all objects from all sites can view this group. This is initially set to 'everyone' as no objects have been created to set permissions at present.

**No one** - no objects from any sites can view this group (hidden). Hidden groups can be useful as a holding place for objects that are no longer used but you are not prepared to delete at this stage (eg casual staff not working at present)

**List** - *defines* the groups and objects that can view this group.

Only **groups** that are *local to the site* can have view permissions, however **objects** from *any site* can have view permissions.

If the object is from another site, a number appears in the list rather than a name. This is the object identifier. To convert this to a name click on **Resolve Names** from the menu bar.

7

#### Allowed to administer permissions

Allowed to administer

Display Name	
2764774ABF488BF5	<input type="button" value="+"/>
Bechler, Dee	<input type="button" value="X"/>

This is a list of objects that are allowed to add, change, or delete objects within this group from the StaffCal client.

An example of this might be a receptionist who is trusted to look after the maintenance of objects within a group (for example: the executives group) rather than another staff member.

If the object allowed to administer is from a another site, a number appears in the list rather than a name. This is the object identifier. To convert this to a name, click on **Resolve Names** from the menu bar.

**8****Resolve names**A light blue rectangular button with a small icon of a puzzle piece and the text "Resolve names" in a sans-serif font.

If an object in a permissions list is from another site, you will only see the objects identifier, which is a 16 digit hexadecimal number.

Use this menu item to resolve that number into a name. If the remote site has a slow link, the resolve process may take some time.

**9****Accept form**A light blue rectangular button with a small green checkmark icon and the text "Accept this form" in a sans-serif font.

Once details have been completed **Accept this form** (or **Abandon changes**)

Go back to [StaffCal Manager Tutorial](#) point 6

## Add/Edit objects

An object is simply something that needs a schedule. Examples of objects are people, assets that people need to use, rooms or meeting rooms, and vehicle bookings.

Objects can belong to one or more groups at one site.

There are four sections to an objects description-

[General \(click for more detail\)](#)

[Files \(click for more detail\)](#)

[Notes \(click for more detail\)](#)

[Permissions \(click for more detail\)](#)

Follow the steps above, and once complete click **Accept this form** (or **Abandon Changes**). Add further objects as required.

Objects can be imported in bulk from external sources, see [Importing objects](#) for more details.

# 1. General

The screenshot shows a Windows-style dialog box titled "Object Will Be Changed". It has a menu bar with "Accept this form", "Resolve Names", and "Abandon Changes". Below the menu bar are five tabs: "General", "General (cont.)", "Files", "Notes", and "Permissions". The "General" tab is selected and contains the following fields:

- Name:** Title (Mr), First Name (Trent), Initials (R), Surname (Bormet), Employee ID (138744).
- Account:** User Name (TRBormet), Display Name (Bormet, Trent), Password (redacted), and a checked "Enable login" checkbox.
- Contact details:** Business ([526]27530931), Business other, Business fax, Mobile, Mobile other, Pager, Phone IP, Home, Home other.

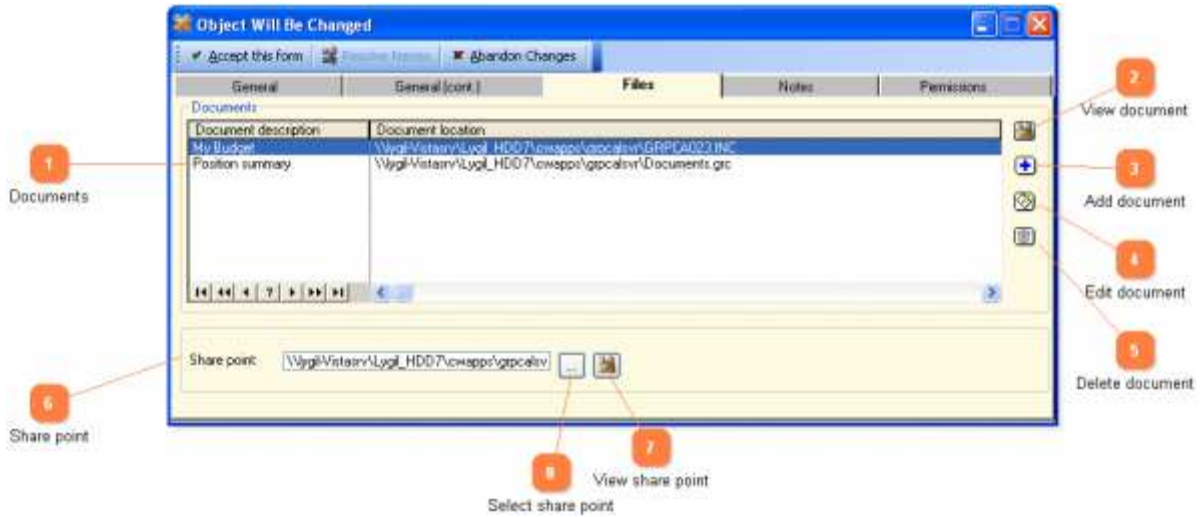
Most of the details here are self-explanatory.

However, please note that both the **User Name** and **Display Name** are constructed automatically from the first name and surname of the object. If you do not wish this to occur simply fill in the User Name or Display Name before entering the first name or surname details.

Whilst a password is not necessary it is advisable for security reasons to create one. If the password is left blank, then anyone can log into StaffCal Client using that object name, and will be able to change that object's details.

Go to [2. Files](#)

## 2. Files



### 1 Documents

Document description	Document location
My Budget	\\Lygil-Vistasrv\Lygil_HDD7\cwapps\grpcalsvr\GRPCA023.INC
Position summary	\\Lygil-Vistasrv\Lygil_HDD7\cwapps\grpcalsvr\Documents.grc

A list of documents belonging to, or referenced by this object eg; your photo, your CV, your training records, its operation manual. NB These documents will be available for public access, and will be accessible to anyone who can view the object.

### 2 View document

This will allow you to view the currently selected document.

### 3 Add document

Adds a new document to the document list box.

### 4 Edit document

Edits an existing document in the list box.

5

**Delete****document**

Deletes a document from the list box.

6

**Share point**Share point: `\\Lygil-Vistasrv\Lygil_HDD7\cwapps\grpcalsv`

This is a pointer to an object's shared directory that clients can transfer files to and from. It is a handy method for quickly transferring files between people.

7

**View share point**

This will open up Windows Explorer to view the contents of the share point that you have selected. (An object in the group must have network access permissions to the share to be able to view the files).

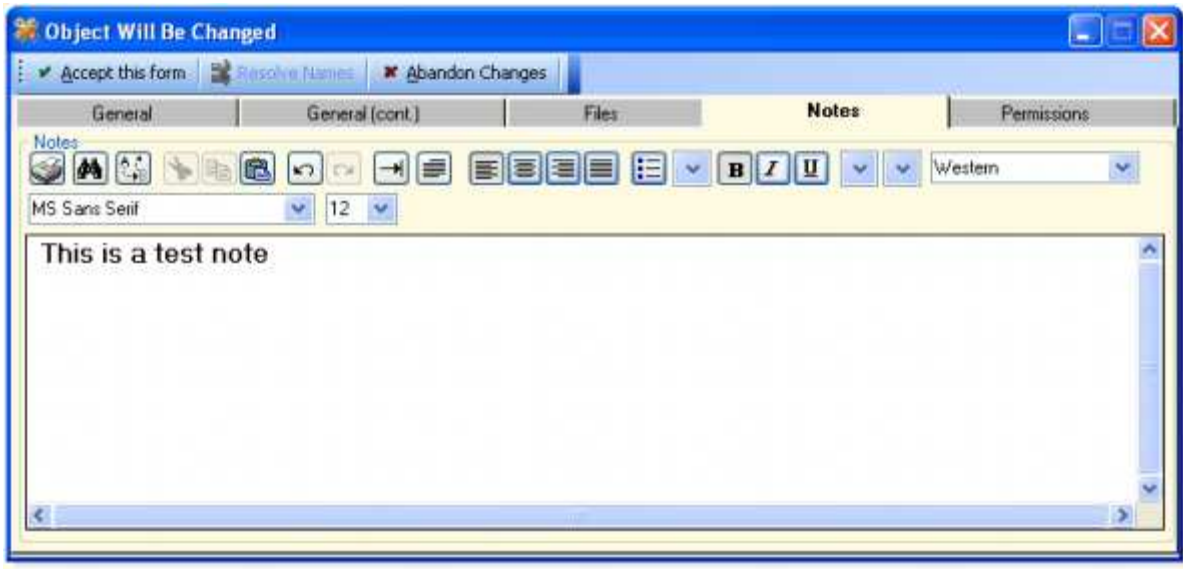
8

**Select****share****point**

This allows you to select the folder to use as a share point. (An object in the group must have network access permissions to the share to be able to view them)

Go to [3. Notes](#)

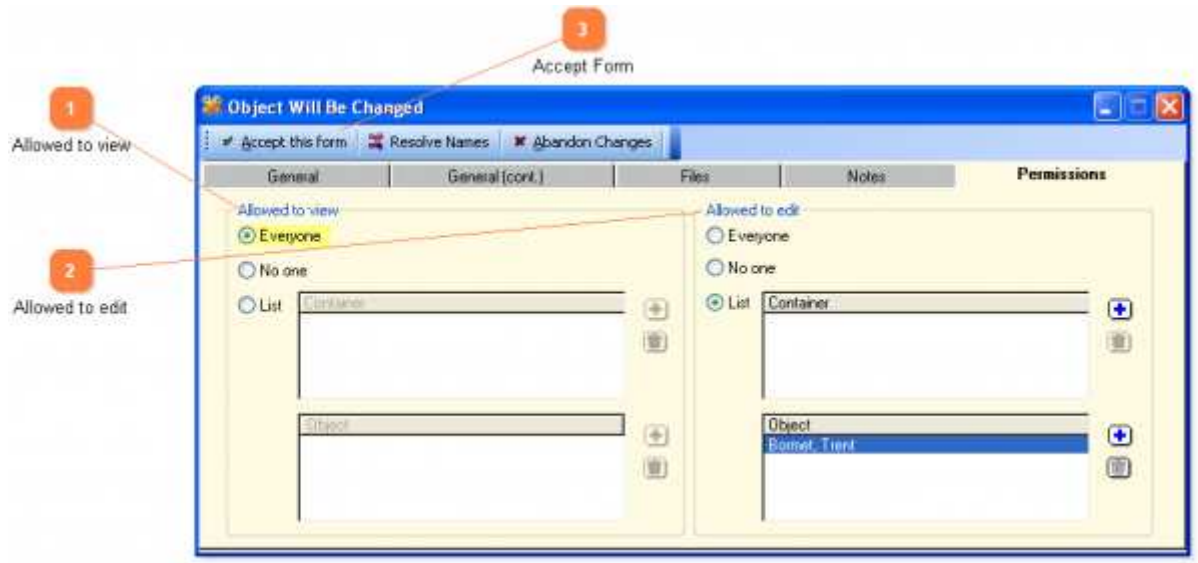
### 3. Notes



This field contains any general notes about the object.

Go to [4. Permissions](#)

## 4. Permissions



Sets **view** and **edit** permissions for an object.

1

### Allowed to view

[Allowed to view](#)

This sets who is allowed to view the object.

**Everyone** - all objects from all sites can view this object.

**No one** - no objects from any sites can view this object ie; they are hidden. You can hide objects that are no longer in use and that you are not prepared to delete yet (eg contract staff who often get new contracts).

**List** - defines groups and/or objects that can view this object.

Only **groups** that are *local to the site* can have view permissions, however **objects** from *any site* can have view permissions.

If the object in the 'allowed to view' list is from another site, a number appears in the list rather than a name. This is the object identifier. To convert this to a name click on **Resolve Names** from the menu bar.

2

### Allowed to edit

[Allowed to edit](#)

This sets who is allowed to edit the object. Edit permissions are automatically granted to the

object itself, however, if you are creating a new object you will not see the granted **edit permissions** until you save the object and then proceed to edit it.

**Everyone** - all objects from all sites can edit this object.

**No one** - no objects from any sites can edit this object.

**List** - defines groups and/or objects that can edit this object.

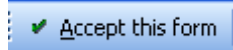
Only **groups** that are *local to the site* can have edit permissions, however **objects** from *any site* can have edit permissions.

If an object has administrator permissions to the group that this object is present in, then this overrides the edit permissions presented here and the object with administrator permissions automatically has the right to edit this object.

If the object in the 'allowed to edit' list is from a group at another site, a number appears in the list rather than a name. This is the object identifier. To convert this to a name click on **Resolve Names** from the menu bar.



#### Accept Form



Once details have been completed **Accept this form** (or **Abandon changes**).

#### End of StaffCal Manager Tutorial

Go back to [Getting Started](#) Step 4  
or go back to [StaffCal Manager Tutorial](#)

## Importing objects



The StaffCal manager allows you to bulk import objects into groups from tab delimited (TSV) files. These can be from sources such as Active Directory lists or your own custom staff lists.

Dynamic Active Directory object synchronisation is still under development

To bulk import active directory objects:

- 1 Export from Active Directory**

1: In Active Directory users and computers, go to the container you wish to export objects from.  
 2: Make sure that the fields you wish to export are displayed in the viewing pane. (Right click / View / Add-Remove columns)  
 3: From the menu select Action / Export list.  
 4: Save as a Tab Delimited file
- 2 Open the import procedure**

In the StaffCal Manager menu, select File/Import Objects
- 3 Set the import group**

Container to import into:

Select the group to import the objects into.
- 4 Set import fields**

Field_1	Murray Gillespie	LOCALOBJ:GUID
Field_2	User	LOCALOBJ:ObjectType
Field_3	murray@anywhere	LOCALOBJ:UserName = Field_7

Drag and drop matching fields from the left hand pane to the right hand pane.
- 5 Strip header record**

Strip header record (field names)

Check 'Strip header record'. Active directory leaves field names as headers by default.

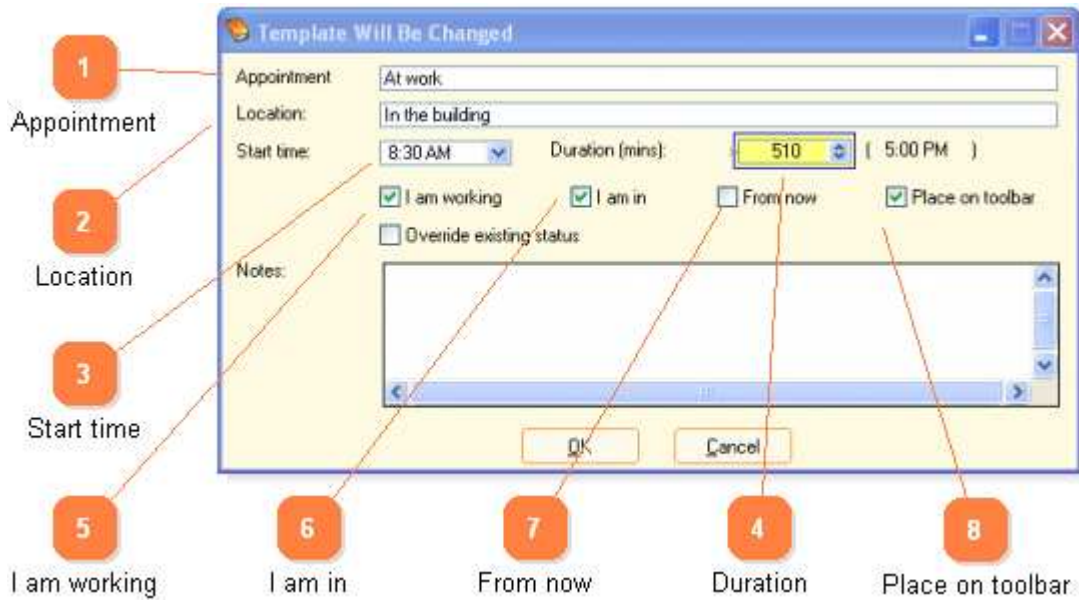
6

**Import the data**

Import data

Click on 'Import the data' to start the import process.

# Templates



Templates are pre-defined appointment/ bookings used to quickly enter information into StaffCal.

They are the key to getting the most out of StaffCal, they make entry of commonly used appointments / bookings quick and easy.

For example: If a user wishes to enter that they are in for the day (probably the most common appointment), all they need to do is click on the 'In' template on the toolbar, then click on the 'accept' button on the appointment form. No data needs to be entered.

There are two types of templates:

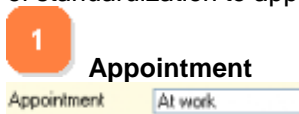
Server based:

These templates are pushed out to the StaffCal clients when they login to the server.

Client based:

These templates are created by the user on each individual StaffCal client and are visible only to that client.

It is advisable for the StaffCal administrator to create server based templates for common appointments, this removes the need for each user to create their own template, and gives a level of standardization to appointments.



The description of the appointment.

2

**Location**Location: 

In the location of the appointment.

3

**Start****time**

The time that the appointment starts.

This can be a fixed time, or if the 'From now' checkbox is checked, the appointment starts from when the template is invoked.

4

**Duration** | 

The duration of the appointment in minutes.

5

**I am working** I am working

This is commonly used to denote that the person is at work. However this can be used to show other information. For example: if the object is a meeting room rather than a person it might be used to denote whether the meeting room is in use.

6

**I am in** I am in

This is commonly used to denote that the person is In the office. However this can be used to show other information. For example: if the object is a asset rather than a person it might be used to denote whether the asset is in use.

7

**From now** From now

If the 'From now' checkbox is checked, the appointment starts from when the template is invoked.

8

**Place on toolbar** Place on toolbar

If this is checked the template will appear on the StaffCal clients toolbar.

