

# StaffCal site manager

## User guide

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# StaffCal site manager

Welcome to the StaffCal site manager.

The StaffCal site manager allows you to configure sites and add, move and delete groups and objects. The site 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.

This document gives an overview of how to use the site manager along with the calendar database administration utilities.

There are three manuals for the StaffCal system.

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

**StaffCal site manager** - (this manual) This shows how to configure and manage StaffCal sites.

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

[Notes on planning the layout of the StaffCal system.](#)

The division of people or objects into groups and the location of servers needs to be carefully 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.

## Client distribution:

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

NOTE: To make distribution easier, you can specify the home server 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

## Logging in to the StaffCal site manager

The screenshot shows a window titled "Connect to a calendar server". It contains two main sections: "Account" and "Calendar server".

- Account section:**
  - User name:** A text box containing "Administrator".
  - Password:** A text box containing "\*\*\*\*\*".
- Calendar server section:**
  - Calendar server:** A dropdown menu showing "192.168.0.38:2341".
  - Server name:** A text box containing "Paris server".
  - More servers:** A button with three dots "...".

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

Numbered callouts (1-5) point to the following elements:

- 1: User name
- 2: Password
- 3: Calendar server
- 4: More servers
- 5: Connect

This is the main logging window for the StaffCal site administration utility.

If you do not have an administrator account user name or password or server address, you can run the file IPCFG in the StaffCal data store program group to retrieve the administrator connection string and retrieve the relevant information.

**1** **User name**

User name:

This is the StaffCal administrator user name and supplied by the calendar administrator.

**2** **Password**

Password:

This is the administrator password as supplied by the calendar administrator.

**3** **Calendar server**

Calendar server

This is the path to the calendar server in the form Hostname: Port.

The host name can be in the form of a DNS name, or as an IP address.  
Some examples are:

TokyoCalendarServer:2339

192.168.0.55:2339



**More servers**



Opens a browse list of all StaffCal servers that have been connected to before.

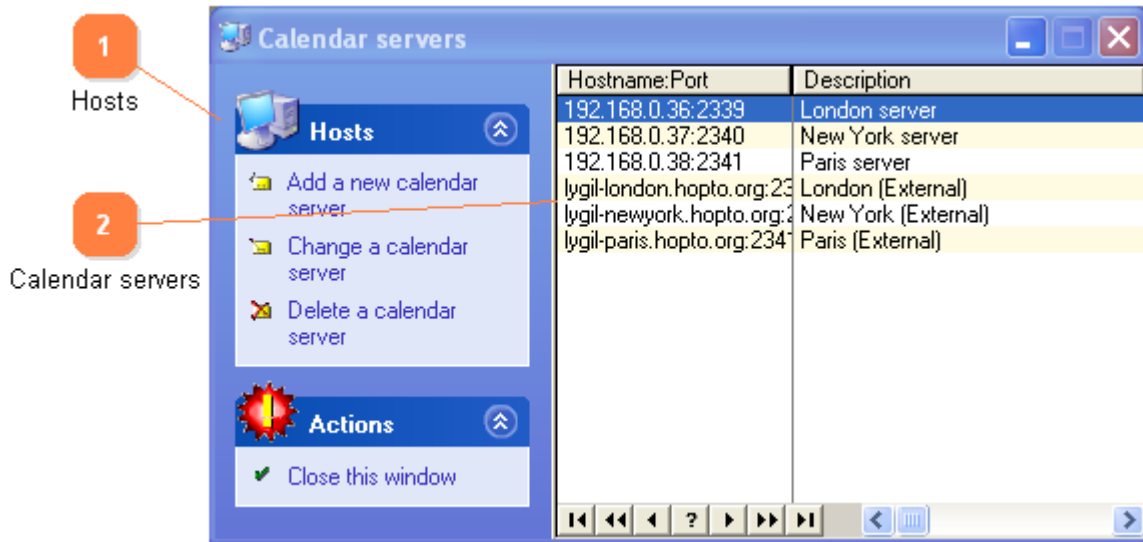


**Connect**

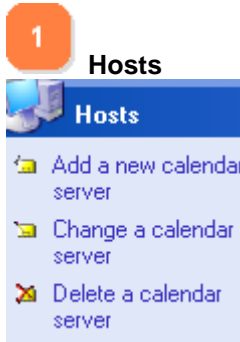


Connects to a [StaffCal](#) server using the current username and password.

## StaffCal servers



This window shows a list of all StaffCal servers previously connected to. You can add, change or delete StaffCal server connections from here.

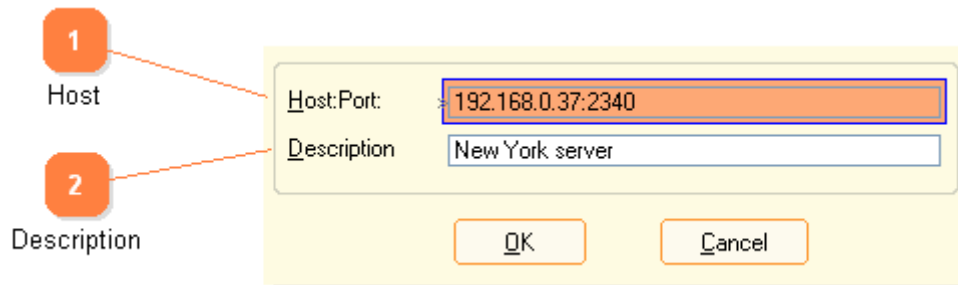


**Add, change or delete** calendar server connections.

		Calendar	servers
192.168.0.36:2339	London server		
192.168.0.37:2340	New York server		
192.168.0.38:2341	Paris server		
lygil-london.hopto.org:2339	London (External)		
lygil-newyork.hopto.org:2340	New York (External)		
lygil-paris.hopto.org:2341	Paris (External)		

The list of StaffCal server connections showing the connection details and a description of the calendar server site.

## Change a StaffCal server



This window allows you to add, change or delete calendar server definitions.

1

### Host

Host:Port: 192.168.0.37:2340

This is the path to the StaffCal server in the form Hostname: Port.  
The host name can be in the form of a DNS name, or as an IP address.  
Some examples are:

TokyoCalendarServer:2339 (DNS)

192.168.0.55:2339 (IP)

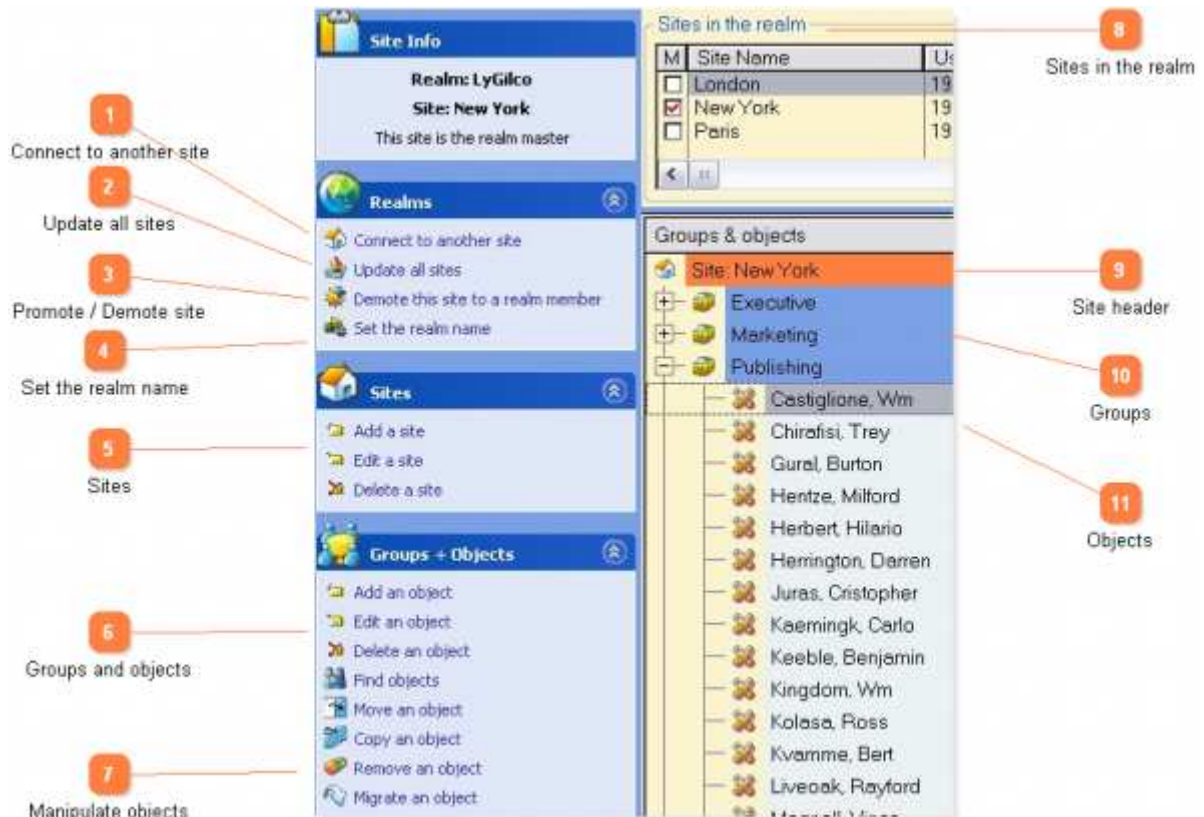
2

Description New York server

A user-friendly description for the StaffCal server.

### Description

## Sidebar menu



### 1 Connect to another site

 Connect to another site

Closes the session and opens the [Login](#) window to connect to another site.

### 2 Update all sites

 Update all sites

This is only visible if the site is a [realm master](#). This **updates all the sites** in the realm with the [realm master's](#) site configuration data.


This is necessary if you make any changes to the master sites list to ensure that all sites have up to date information about each other.

### 3 Promote / Demote site

 Demote this site to a r

This either **promotes** the site to a [realm master](#) or **demotes** a site to a realm member.

4

**Set the realm name**
 Set the realm name

This is only visible if the site is a [realm master](#) and sets the **name for your realm**.

5


**Sites**
 Add a site


 Edit a site

 Delete a site

This is only visible if the site is a [realm master](#). It allows you to **add / edit or delete sites** on the master [sites](#) list. (see [working with sites](#))

6

**Groups and objects**
 Add an object

 Edit an object

 Delete an object

Allows you to **add / edit or delete groups and objects** on this site.

To **add a group** you must have the top *site* entry on the list highlighted.


To **edit or delete** groups you must select the *relevant group*.


To **add an object** you must have the *group* that you wish to add the object to highlighted.

To **edit or delete** objects you must select the *relevant objects*.

7

**Manipulate objects**
 Find objects

 Move an object

 Copy an object

 Remove an object

 Migrate an object

Allows you to :

1 : [Find objects or groups](#) in this site or on other sites.

2: [Move or copy objects](#) to other groups within this site.

3: **Remove** an object from a group. This only removes the instance of an object from a group. It does not delete the object itself. If this is the last instance of the object in any group, you will not be able to remove it, you must use the **delete** function instead. (This will permanently delete the object)

4: [Migrate an object](#). This moves an object and all its associated appointments to another site.

8

**Sites in the realm**



This is the list of sites in the realm as provided by the [realm master](#).

9

#### Site header



This is this site name.

10

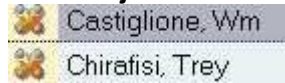
#### Groups



Shows the [groups](#) that belong to this site.

11

#### Objects



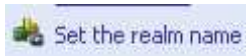
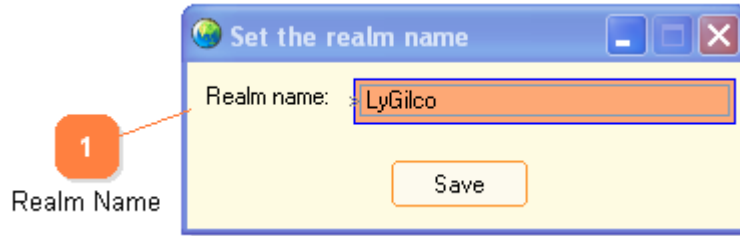
Shows the [objects](#) that belong to this [group](#).

## The realm master

A realm master is simply a machine that holds configuration data for all the sites in the realm, so that all sites have up to date information about each other. When the realm master sites list is changed the site configuration data is updated (pushed) to all the sites in the realm.

There should only ever be one realm master in your realm.

## Set the Realm Name



When you accept this form you will be prompted to update all sites, click **Yes**.  
(This is required to keep all sites updated with the realm master site data)

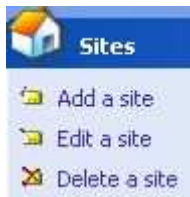
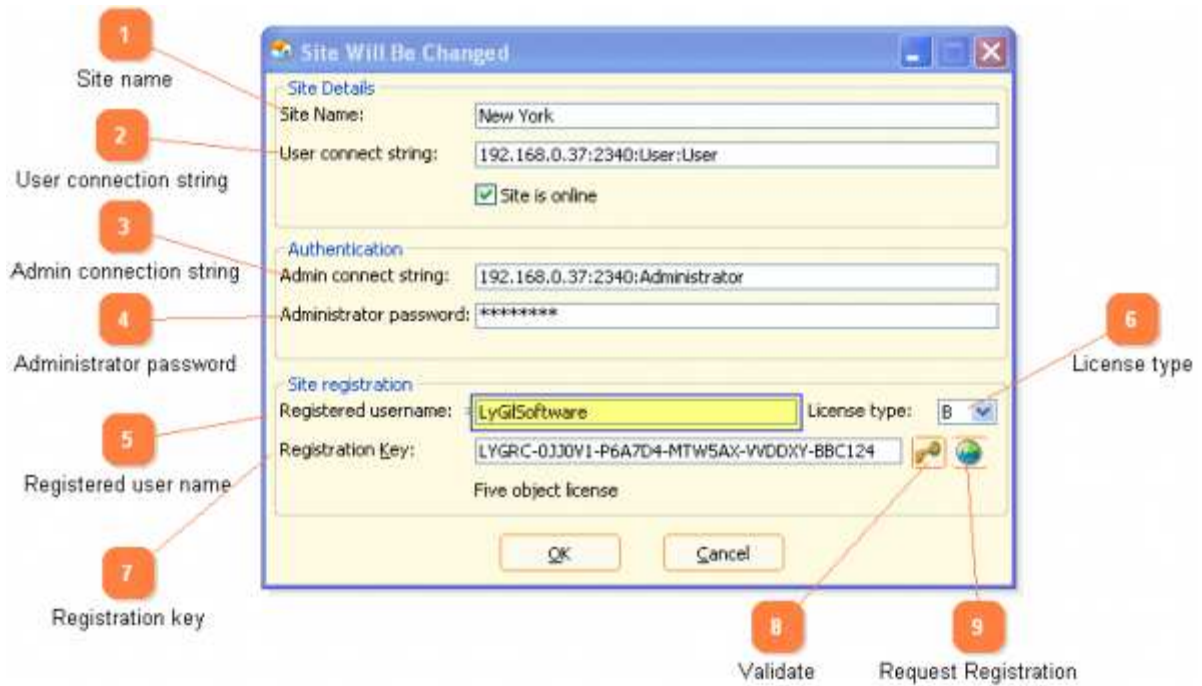


### Realm Name

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.

## Working with sites



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**.

When you accept this form you will be prompted to update all sites, click **Yes**. (This is required to keep all sites updated with the realm master site data)

**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.

**Note:** If you have lost the connection string details, then you can run the file IPCFG in the StaffCal data store program group on the site you wish to configure to retrieve the connection

strings.

[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.

**Note:** If you have lost the connection string details, then you can run the file IPCFG in the StaffCal data store program group on the site you wish to configure to retrieve the connection strings.

[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

### 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.

6

### 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 beta license (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

7

### Registration key

Registration Key:

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

8

### 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.

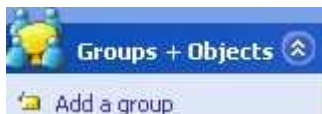
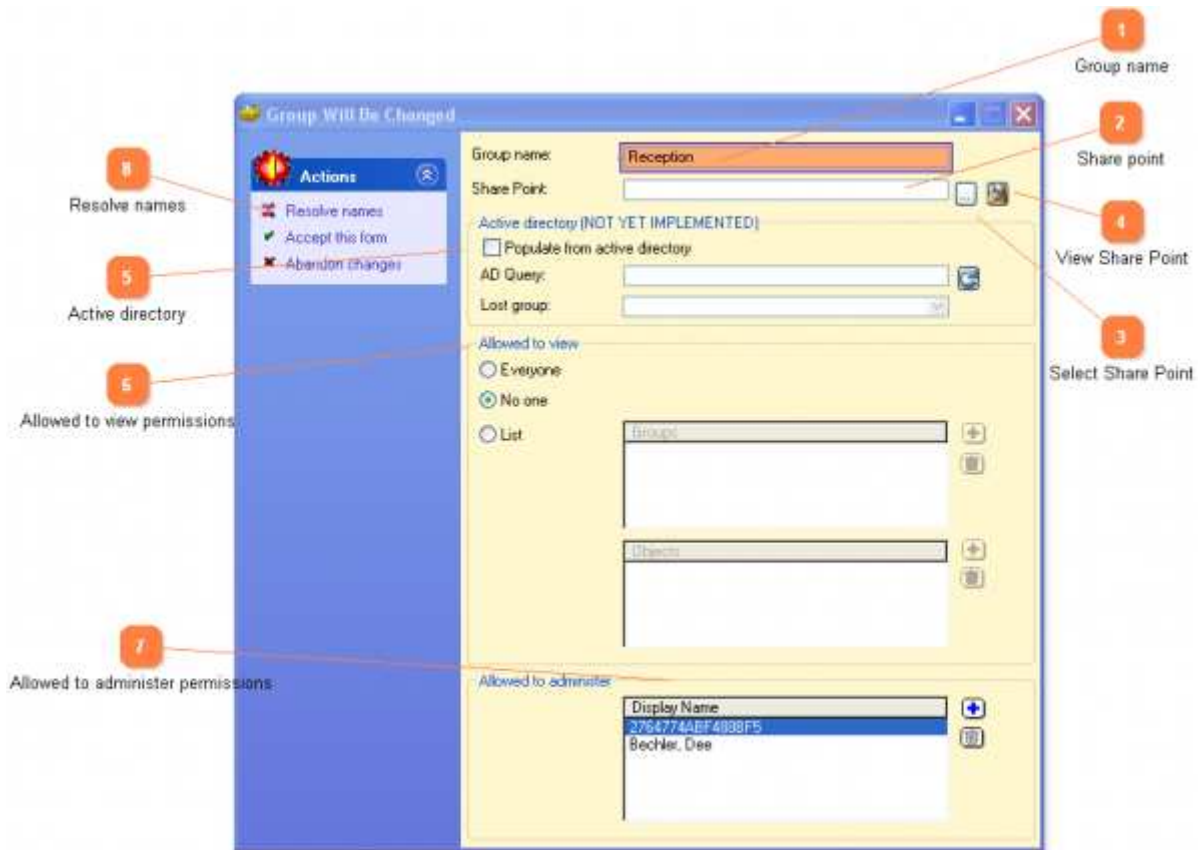


### Request Registration



This will redirect you to our website to obtain a **Registered 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)

## Working with groups



A group is a set of similar objects (sales people, all staff, visitors, meeting rooms etc)  
 A group can only contain objects from the site that it exists on. (off site object inclusion will be implemented in future versions)

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

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)

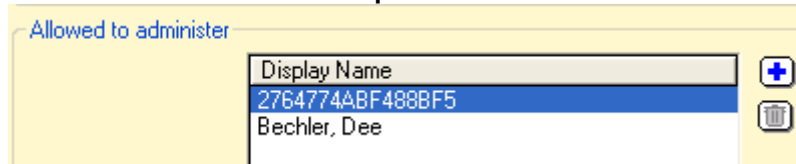
**List** - *defines* the groups and objects that can view this group.

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



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 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



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.

## Working with 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.

**Note:** The StaffCal administrator should ensure all staff (objects) at one location are members of a special single group (eg: "All Staff") so that in an emergency to the receptionist can quickly print the "Emergency" print out displaying the movements of all staff at the current date and time. A staff member (object) can be a member of multiple groups.

## 1. General

Object Will Be Changed

Accept this form | Resolve Names | Abandon Changes

General	General (cont.)	Files	Notes	Permissions
<b>Name</b>				
Title:	Mr			
First Name:	Trent			
Initials:	R			
Surname:	Bormet			
Employee ID:	138744			
<b>Account</b>				
User Name:	TRBormet			
Display Name:	Bormet, Trent			
Password:	[redacted]	<input checked="" type="checkbox"/> Enable login		
<b>Contact details</b>				
Business:	[526]27530931			
Business other:				
Business fax:				
Mobile:				
Mobile other:				
Pager:				
Phone IP:				
Home:				
Home other:				

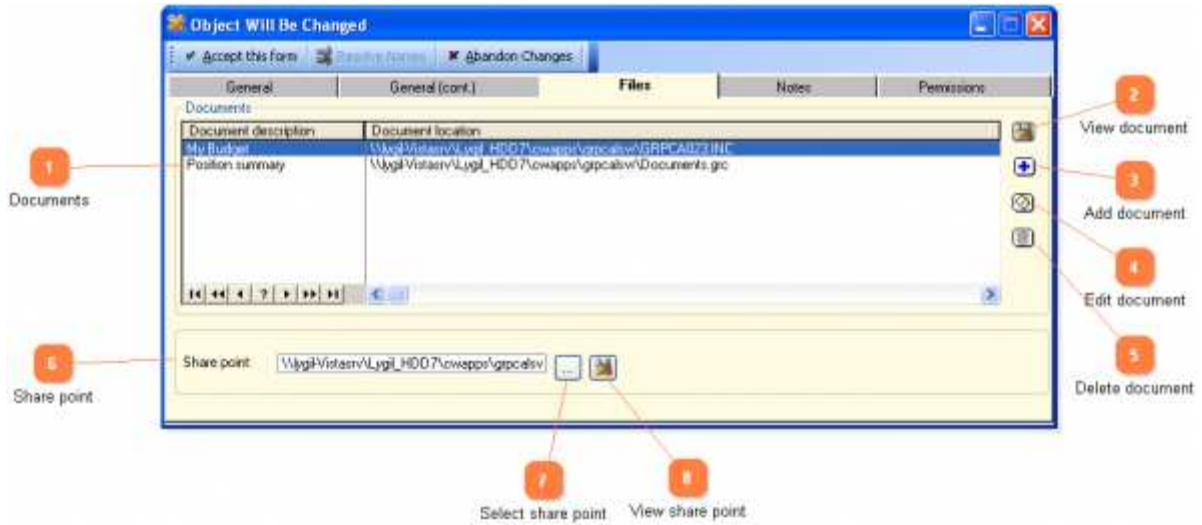


Most of the details here are self-explanatory.

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.

## 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, an 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\grpca\sv`

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

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

This allows you to select the folder to use as a share point.

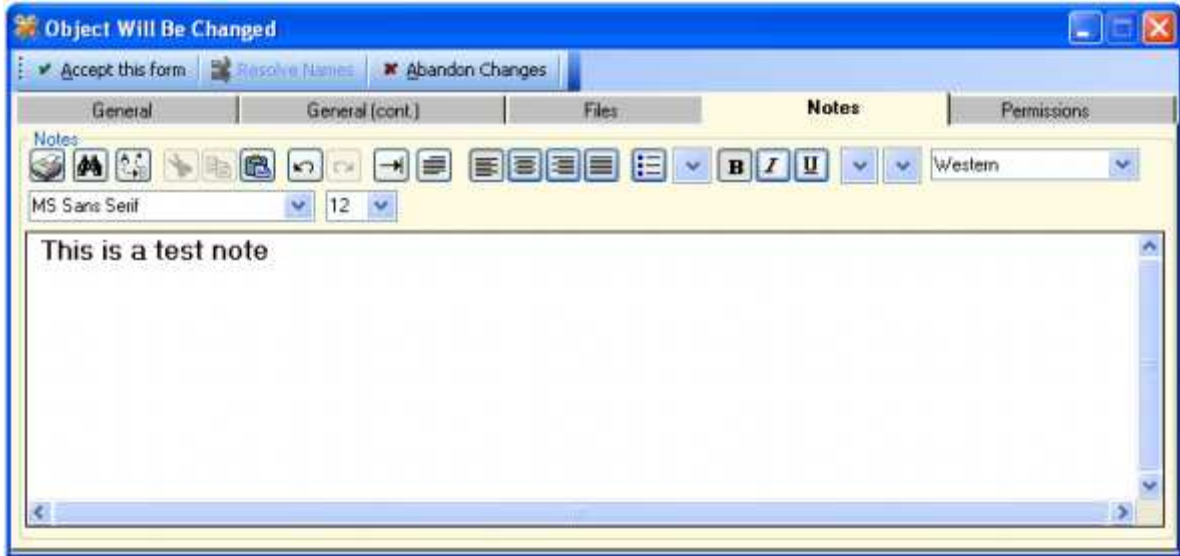
(An object in the group must have network access permissions to the share to be able to view them)

8

**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).

### 3. Notes

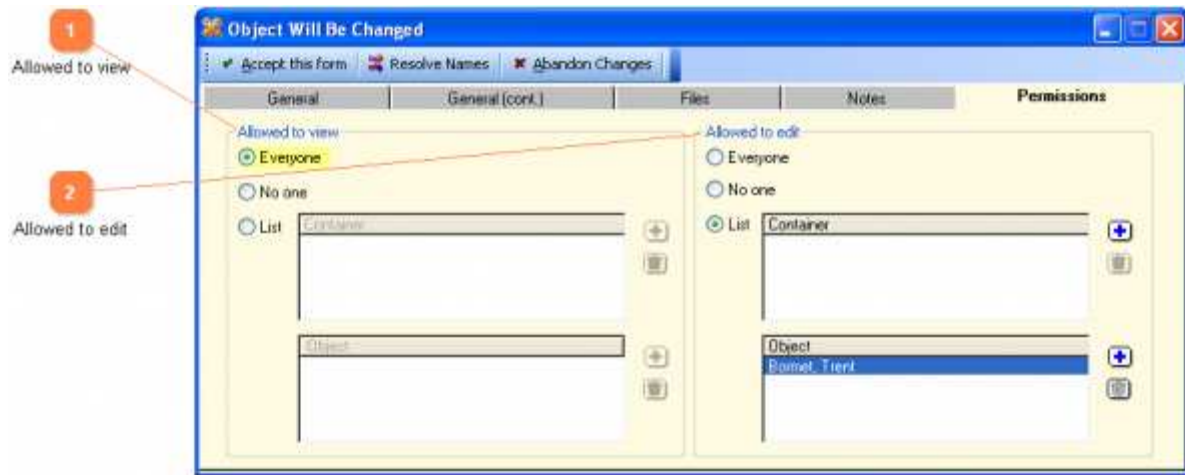


This field contains any general notes about the object.

Some examples:

I work monday, tuesday and friday.  
I am based in our city office.  
This vehicle is a 4WD manual shift.

## 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.

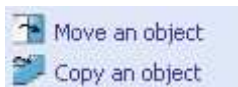
**List** - defines groups and/or objects that can edit this object.

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 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.

## Moving and copying objects



This window allows you to move or copy an object from one group to another within the same site.

**Note:** If you need to move an object to another site use migrate instead.

**Copy** creates a pointer to the object in the new group, rather than a new object. This means that all appointment, documents and other information is preserved.

Conversely this means that if you **remove** an object from a group and that object also exists in another group, only the pointer to that object is deleted, the object and all its associated data remains intact.

If you **delete** an object that does not have any pointers to other group, then the object is truly deleted. If an object is deleted you cannot recover any data associated with it.

**1** **Object**

Object:

The object to move or copy.

**2**

From group:

The group to move or copy from.

**From**

**3** **To**

To group:

The group to move or copy the object to.

# 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 group 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: Executive

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.

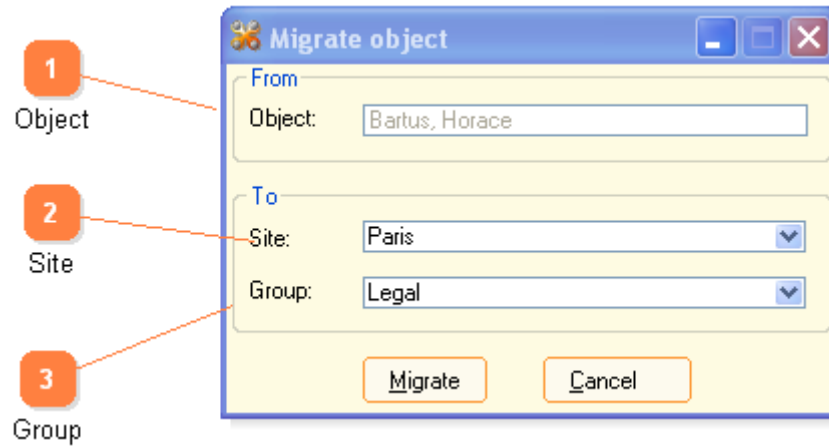
6

**Import the data**

Import data

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

## Migrating objects



 Migrate an object

Migration moves an object and all its associated appointments to another site.

This can take some time if the data link is slow.

**1 Object**

From  
Object:

The object to migrate.

**2 Site**

Site:

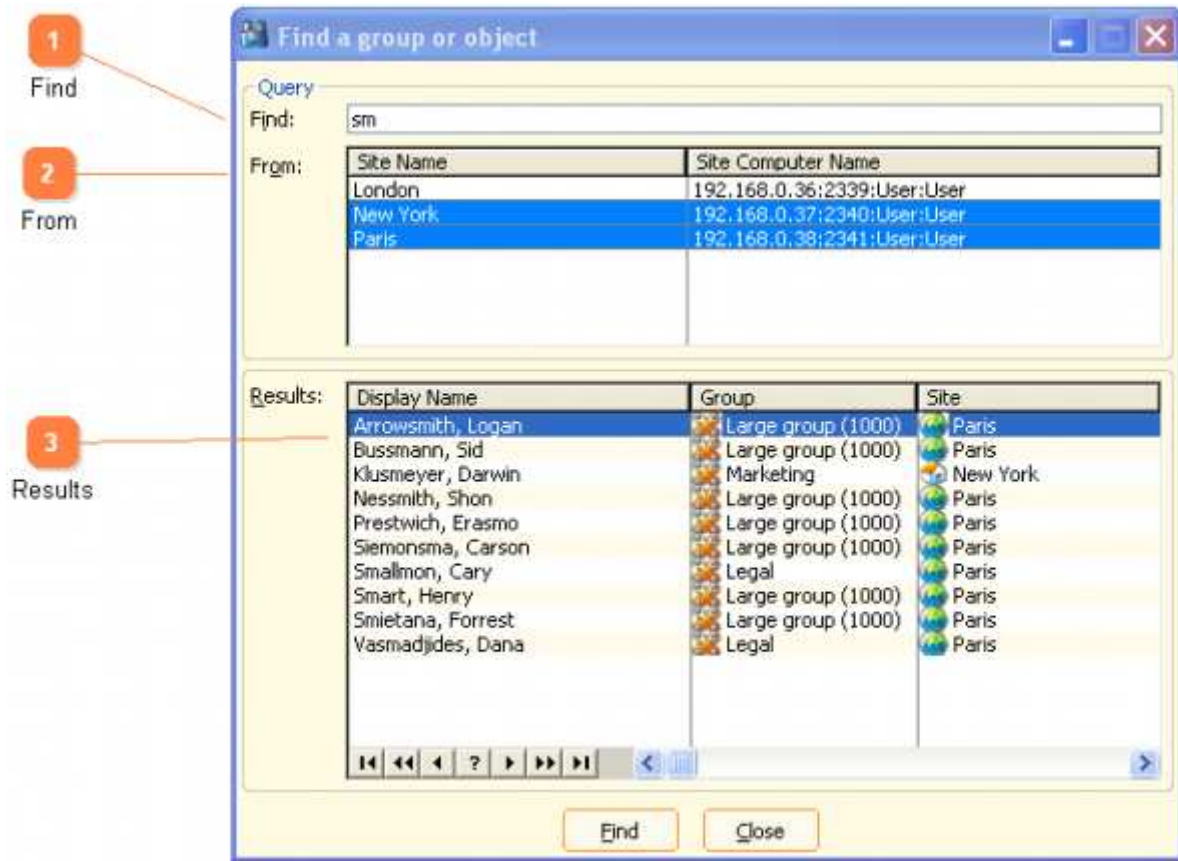
The site to migrate the object to.

**3 Group**

Group:

The group on the foreign site to migrate to.

# Find a group or object



## Find objects

Find objects or groups in this site or in other sites.

**1 Find**  
 Find:

The text to search for.

**2 From**  
 From: 

Site Name
London
New York
Paris

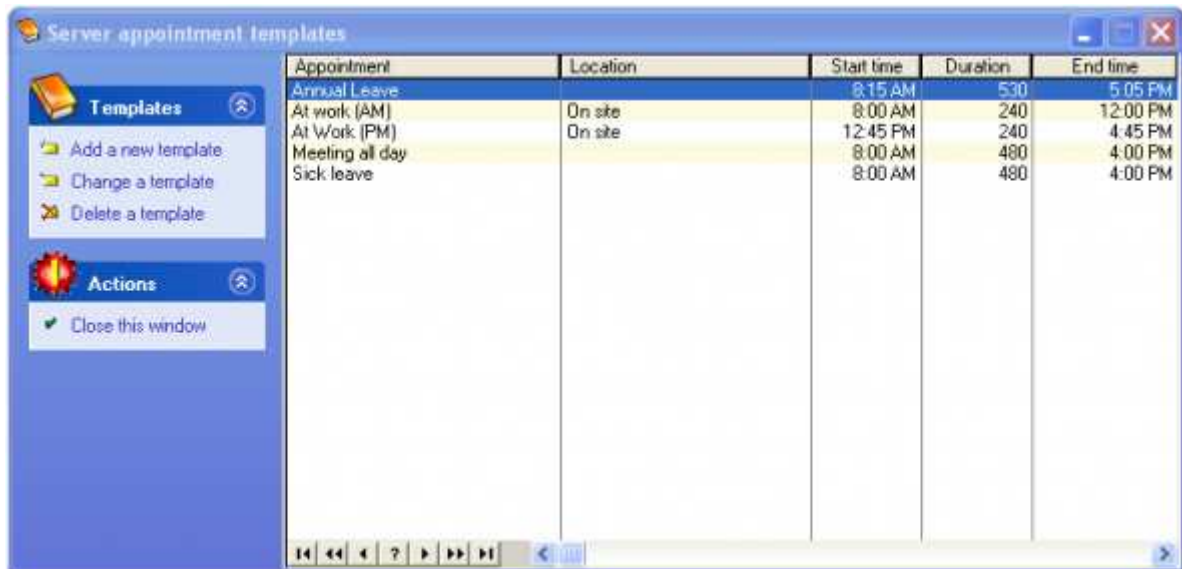
The site(s) to search for the group or object.

**3 Results**

Display Name	Group	Site
Arrowsmith, Logan	 Large group (1000)	 Paris
Bussmann, Sid	 Large group (1000)	 Paris
Klusmeyer, Darwin	 Marketing	 New York

List of the groups and objects found.

## Server appointment templates



Appointment	Location	Start time	Duration	End time
Annual Leave		8:15 AM	5:30	5:05 PM
At work (AM)	On site	8:00 AM	2:40	12:00 PM
At Work (PM)	On site	12:45 PM	2:40	4:45 PM
Meeting all day		8:00 AM	4:00	4:00 PM
Sick leave		8:00 AM	4:00	4:00 PM

### Templates

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

Templates 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. All fields are filled automatically from the template and no extra information needs to be entered (Unless you wish to).

There are two types of templates:

**Server based:** These are the templates that you are creating here -These templates are pushed out to the StaffCal clients when they login to the server. If they are set to appear on the toolbar of the client, they can be distinguished by an asterisk (\*) in front of their title on the StaffCal client toolbar.

#### Client based:

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

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

StaffCal sites come pre-installed with a number of server templates.  
In the office .

Lunch.

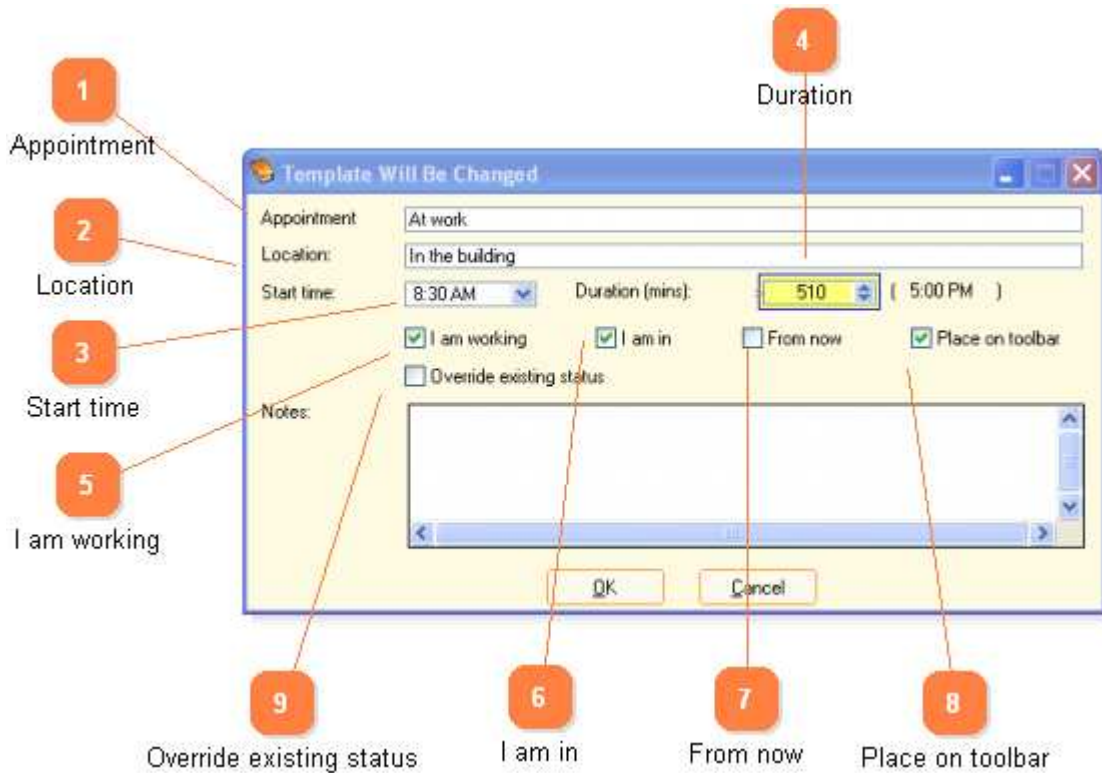
Annual leave

Sick leave

Out of the office

The StaffCal administrator can change these templates to suit your workplace.

## Editing server templates



### Templates

This form allows you to set template details.

**1** **Appointment**  
 Appointment

The description of the appointment / booking.

**2** **Location**  
 Location:

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

 | 5:00 PM |

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 working (but not necessarily in the office). 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 **From now** 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. A maximum of ten templates (server and client based) can appear on the toolbar.

9

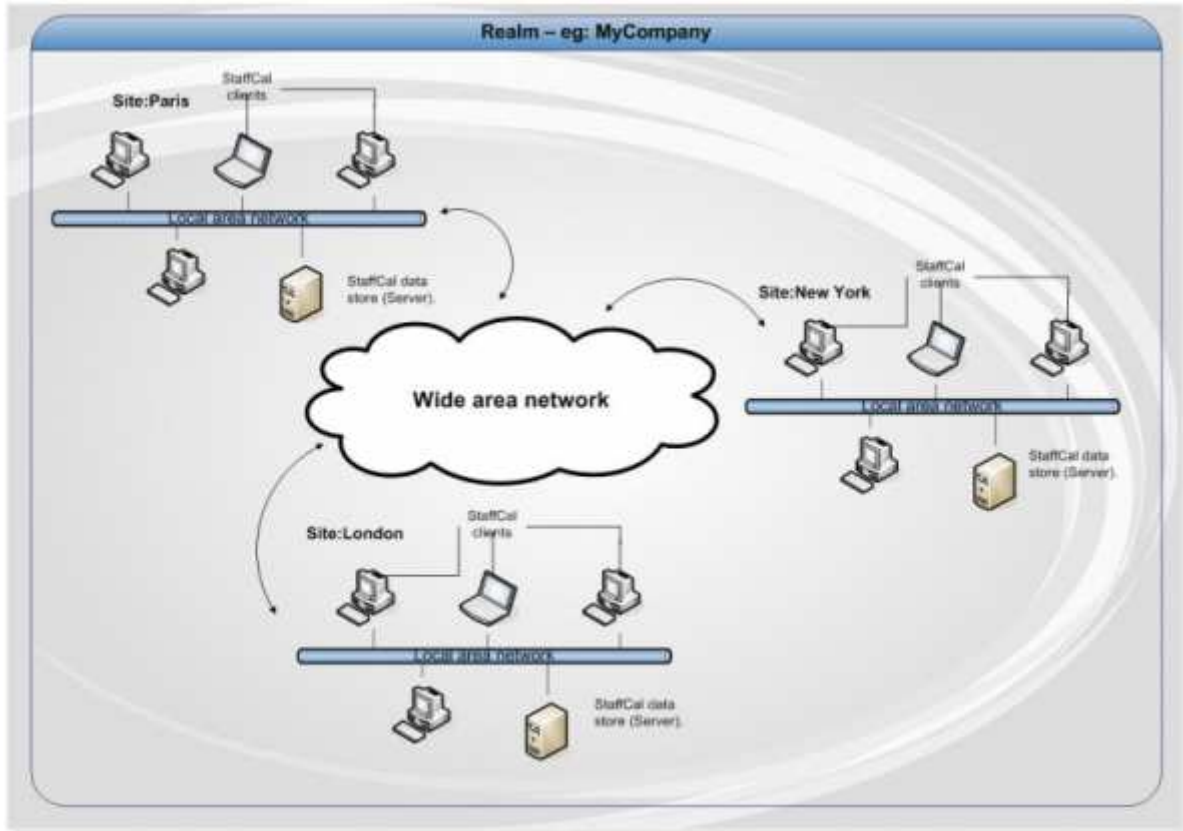
**Override existing status** Override existing status

This overrides the in/out and working status of any pre-existing appointment that overlaps the time of another appointment.

An example of this would be that you might make an appointment for 'In the office all day', 8am to 5pm with the status of 'working' and 'in' (ie 2 green dots on the group calendar). Then you might make an appointment for 'Lunch meeting' from 12 - 1pm which overrides the status of 'in' with the status of 'out'.

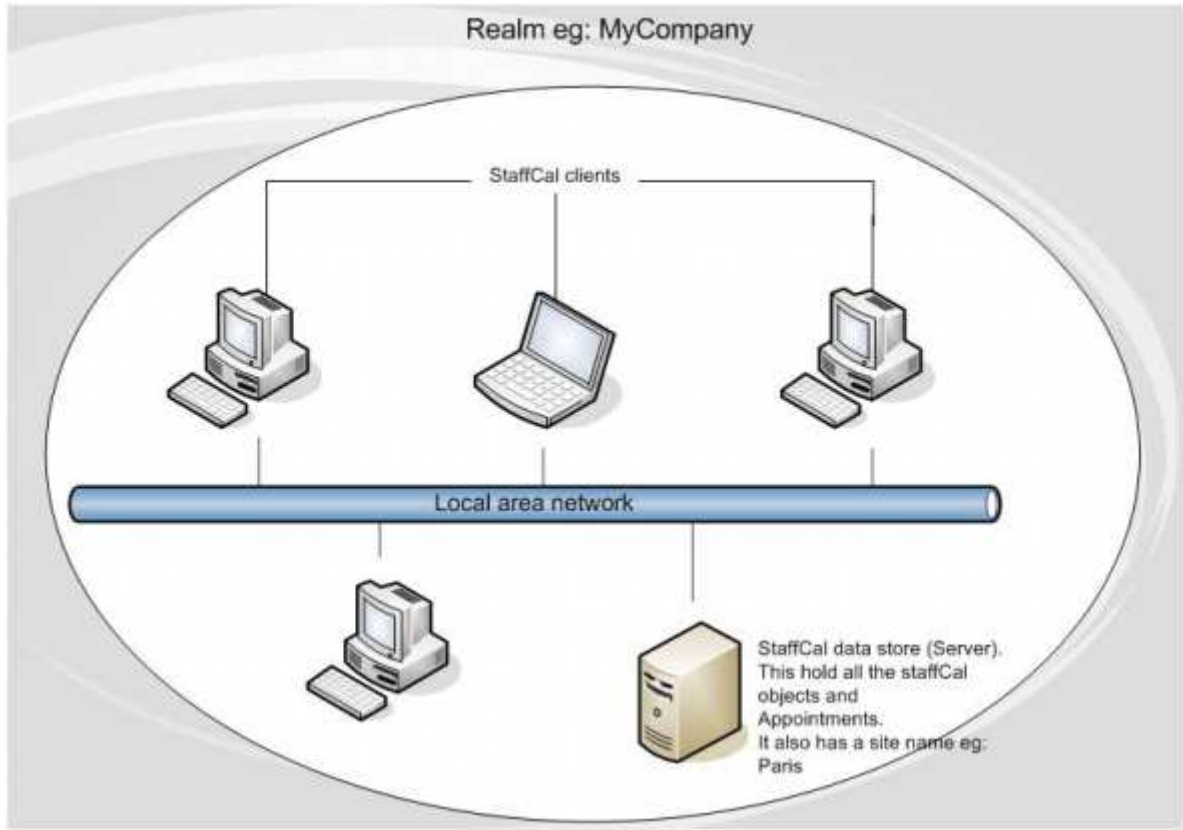
Between 12 - 1pm your status will show as 'out' (ie: a red 'out' dot on the group calendar) as the 'Lunch meeting' appointment has overridden the 'In the office all day' appointment. The rest of the day your status will show as 'In'.

# WAN Configuration



The realm layout for a realm with multiple sites.

# LAN configuration



The realm layout for a realm with only one site.

## 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.

## The data store manager

The IP Data Server Manager (IPSRVMGR.EXE) is a handy utility that you can use to perform a number of operations on the Data Store including:

- Setting the communication port number.
- Stopping and starting the data store.

# License agreement

The StaffCal license is based on a per server(site) seat model. This means that for every license you can have one server(site) with as many objects that the license allows, and as many StaffCal clients as you like. If you plan to use more than one server you need to purchase additional licenses.

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