

## Guide for Enterprise Event Calendar Editors

OHSU has chosen Trumba Connect as its Enterprise calendar solution. As an Enterprise Calendar Editor, you are responsible for the following:

- Monitor events to make sure inappropriate or personal information (e.g. no information that would be regulated by HIPAA policy) doesn't appear on your calendar
- Approve events that are submitted to your calendar (if applicable)
- Add/edit events on your calendar
- Set up and manage registration for events on your calendar (if applicable)

### Logging In

Editor email

Editor password

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1. Navigate to <http://www.trumba.com> in any web browser
2. Click "Sign In" in the upper right portion of the screen.
3. Enter the email address and password from above. This information was given to you by Web Strategies when you set up your calendar. If you have forgotten your login information, contact [webadmin@ohsu.edu](mailto:webadmin@ohsu.edu).

### Monitor Calendar Event Listings

It is important to know and understand the guidelines for event listings at OHSU. You can find this information online at [http://www.ohsu.edu/xd/about/news\\_events/events/submission-guidelines.cfm](http://www.ohsu.edu/xd/about/news_events/events/submission-guidelines.cfm), as well as printed at the end of this document.

As an editor, you should spend at least some time each day glancing at the events on your calendar, looking for the following red flags:

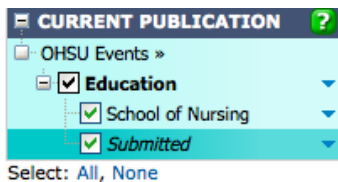
- If this is a public calendar, is the event appropriate for a public forum? Is the event open to the public? If not, it should not be listed. (Non-public listings are okay on the Ozone)
- Are there any spelling or grammatical mistakes?
- Is all the information included in the listing, such as location, time and cost? Incomplete event listings should be removed.
- If there are images in the listing, are they appropriate? Are they huge or overwhelming? Unprofessional or overly large/garish images should be removed.
- Is there inappropriate or private information? Is the tone professional?
- Is there an inappropriate endorsement of an outside business or group, such as a pharmaceutical or a vendor?

## Orienting yourself to the Trumba interface

1. **Views** – customize how you look at events in your calendar

View: Day | 3 Day | Week | 5 Week | **Month** | Year | List

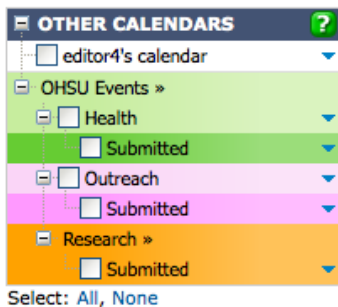
2. **Current Publication vs. Other Calendars**



The **bolded calendar** is the one you are currently viewing.

If you click a calendar and find you are not allowed to view a calendar, a tool tip appears to indicate the reason.

To go to a different calendar, click on that calendar name.



If you have publishing rights for a shared published calendar, you will see all of the shared calendar's mixed-in calendars whether or not they are shared with you.

More help online here: <http://www.trumba.com/help/viewedit.aspx>

3. **Color-coding** – Each calendar has it's own color, so if you are looking at a calendar with events from multiple calendars, you can easily distinguish them.

## Add/edit events on your calendar

When you create a new event for a calendar, you define the event by naming it, specifying the start time, and more. If things change after you create the event, you can update it or delete, remove, or cancel it at any time.

*To add an event:*

1. Log in to Trumba at [www.trumba.com](http://www.trumba.com) with your credentials (see above)
2. Click on "Add Event" at the top of the page

**Add Event**

3. In the Event Information form, choose the type of event you want to add.
4. Type a description and location (and add a map link if you want). Select the start date and time. **Tip: To create an event with no end time, for Duration, click Specify End. Set the end time to match the start time.**
5. Fill in the rest of the information according to the information you have.
6. Under Also Shows On, select additional calendars, if any, that you want to add the event to.
7. Click OK to save your changes and return to your calendar.

To update an event:

1. Log in to Trumba at [www.trumba.com](http://www.trumba.com) with your credentials (see above)
2. Click on the event that you would like to edit. Depending on your view, this will display in different ways, but the title will always be clickable.
3. Edit the form fields of the event listing and click OK to save your changes.
4. If the details of the event are not editable, that means you do not have edit rights for the calendar you are viewing. Contact [webadmin@ohsu.edu](mailto:webadmin@ohsu.edu).

To delete an event:

1. Log in to Trumba at [www.trumba.com](http://www.trumba.com) with your credentials (see above)
2. Make sure you are in "List" view
3. Check the event or events that you would like to delete.
4. Choose "delete events" from the drop down select box and then click "Go"

Select: All   None	Delete events	Go
SAT 1/10/09	<input checked="" type="checkbox"/> 10 - 11:30am	Casey Vision Correction Seminar (Ca
MON 1/12/09	<input checked="" type="checkbox"/> 12 - 1pm	Linguistic analysis as a tool for und

### Approve events that are submitted to your calendar (if applicable)

These steps will only apply to those editors who have chosen to approve all submitted events. If events are published to your calendar automatically, then you will not need to go through these steps.

1. Log in to Trumba at [www.trumba.com](http://www.trumba.com) with your credentials (see above)
2. Make sure you are in "List" view
3. Click on the "Submitted" subcalendar
4. Check the event or events that you would like to approve.
5. Choose "Approve submitted events" from the drop down select box and then click "Go"

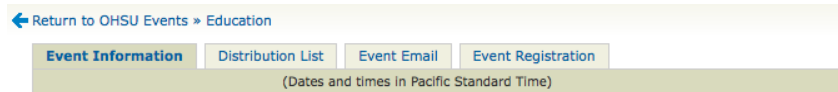
Select: All   None	Approve submitted events	Go
SAT 1/10/09	<input checked="" type="checkbox"/> 10 - 11:30am	Casey Vision Correction Seminar (Casey Ey
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### Set up and manage registration for events on your calendar (if applicable)

If you wish to manage event registration, it is recommended you read the overview of how event registration works in Trumba: <http://www.trumba.com/help/events/eventinvite.aspx>

1. Log in to Trumba at [www.trumba.com](http://www.trumba.com) with your credentials (see above)
2. Click on the event you would like to set up event registration for, or create a new event and fill in the details on the add event form.

3. Click on the “Event Registration” tab at the top



4. Fill out the registration details according to how you want to structure the registration.

A screenshot of the "Event Registration" form. The form is titled "Event Registration" in a blue box at the top. It contains several settings and checkboxes. On the left side, there are four checkboxes, each with a letter label: A, B, C, and D. On the right side, there are several dropdown menus and a checkbox, each with a letter label: E, F, G, H, I, and J. The settings are: "Send invitations to register for this event" (checked, A), "Open sign up for this event" (checked, B), "Allow attendee to bring guests" (checked, C), "Show registration list when responding" (checked, D), "Registration form:" (Standard Invitation, E), "Registration limit:" (15, F), "Max Guests / Registrant:" (2, G), "Create wait list when fully booked" (checked, H), "Response deadline:" (3 weeks, I), and "Response notification:" (Tai Chi students, J).

- A. **Send invitations to register for this event:**  
Select when you want to receive an email message each time someone accepts an invitation or signs up to attend the event.
- B. **Open sign up for this event**  
Select when you want the invitation to be open to anyone who can visit your published calendar. A Sign Up button appears next to open-invitation events on your published calendar. Anyone can sign up to attend the event.
- C. **Allow attendee to bring guests**  
Select when you want to let the people you invite or who sign up from your calendar know that they can bring others along to the event.
- D. **Show registration list when responding**  
Select when you want people who respond to see the response list. The response list contains the names of the people who plan to attend and the comments each person made. NOTE: If you select this option for an open invitation, your entire response list becomes available to anyone who can view your calendar.
- E. **Registration Form**  
Use the Standard Invitation. If you think you need a custom form for your event, contact [webadmin@ohsu.edu](mailto:webadmin@ohsu.edu) to configure one for you.
- F. **Registration limit**  
Choose the maximum number of people who can sign up for the event. If you choose any value other than None, another setting appears to give you the option to start a waiting list when the registration limit is reached.
- G. **Max guests / registrant**  
Allows attendees to specify how many guests they intend to bring to the event. The maximum number of guests that an attendee is allowed to bring is based on an organizer-specified value.
- H. **Create waiting list when fully booked**  
Appears only when Registration limit is set to something besides None. If you enable

a waiting list, people can only accept or decline an invitation. They can't sign up as tentative.

I. **Response deadline**

Select the amount of time before the start of the event after which people can no longer sign up to attend the event.

J. **Response notification**

Select who should receive notification email when someone responds or registers for an event.

5. *Optional:* If you want to send emails to a particular list for registration, you will need to [create a distribution list](#) using the “Distribution List” tab.
6. *Optional:* If you want to schedule event reminders to be sent by email at a specified amount of time before the start of the event, use the “Event Email” tab.
7. When you have finalized the details, click OK to save your changes and return to your calendar.

## Getting More Help

### Get Online Help

Trumba has help files on their web site. A good place to start is at the Manage Calendars and Events portion of their web site: [http://www.trumba.com/help/emailnurture/intro\\_nurture.aspx](http://www.trumba.com/help/emailnurture/intro_nurture.aspx).

Be aware that there might be tasks in the help that your license does not have permission for. If you have questions, contact Web Strategies at [webadmin@ohsu.edu](mailto:webadmin@ohsu.edu).

### Contact Trumba Support

Your editor license also enables you to contact Trumba for support. Their support email address is [support@corp.trumba.com](mailto:support@corp.trumba.com).

### End User FAQ

Trumba provides a simple help document for your calendar users to find out how to navigate a Trumba calendar: <http://www.trumba.com/help/caluser/caluserfaq.aspx>.

## Main Calendar Event Submission Guidelines

- Any member of the OHSU community (faculty, staff or students) may submit an event for listing on any of the OHSU event calendars. Events must be sponsored by an OHSU department or recognized entity.
- Events included on any public-facing calendar must be open to the public, even if by invitation only. Departmental events or other events to which no one outside the OHSU community is invited or would be allowed to attend, are not appropriate for inclusion on this calendar.
- All fields on the submission form are required. Incomplete submissions will not be accepted, with the exception of fields that do not apply to the event, such as Series Name.
- Submitting a calendar item does not guarantee publication. Submitters will be notified by e-mail if a submission is not accepted. Reasons for rejection may include but are not limited to:

- Event targets a small internal audience, for example, a potluck, team meeting or call schedule
- Event is a commercial advertisement or promotion for an outside group not sponsored or endorsed by OHSU
- Event contains private or other inappropriate information
- The Director of Protocol and Events, or their designee, reserves the right to refuse, edit or withdraw events at their discretion.
- For more information, please e-mail [events@ohsu.edu](mailto:events@ohsu.edu)

## Glossary of Trumba Language

**Calendar** – sometimes called “Categories” in the Trumba documentation, calendars are the basic framework of Trumba.

**Categories** – categories are synonymous with the term calendar

**Editor** – Editors have administrative access to control the event listings on the calendars that they manage. They can add, edit and delete any listings on their calendar, as well as manage event registration, distribution lists and event emails.

**Event** - Events are the basic units of calendars that you create in Trumba Connect. An event is a seminar, performance, meeting, class, or any other occurrence that you want to publicize. You can add one-time, multi-day, or repeating events to your calendars, and you can mark events as private.

**Mixed-in calendar** – Mixing in a calendar means that one calendar shares all it’s events with another calendar. Mixing in refers to the relationship between one calendar and another.

**Publication** – a published calendar. A calendar is considered to have been published when it has been embedded as a spud on a website. Calendars can only be published by a publisher – OHSU owns two publisher licenses.

**Publisher** – Publishers have the highest level of administrative access to Trumba. The publisher can create and configure new calendars, as well as control how calendars “mix-in” and are shared with other editors.

**Shared calendar** – Sharing a calendar means that you are giving another editor administrative rights to the events on your calendar. Sharing can be view only, or view and edit. Sharing refers to the relationship between a calendar and an editor.

**Spud** – the block of embedded code on a webpage that displays events or allows you to interact with events, such as a search or filter.

**Sub-calendar** – a child calendar. The child relationship does not imply that any events are mixed in to the parent or there are any additional sharing rights. The child relationship is largely a framework for sorting and organizing calendars hierarchically.