Creating new calendars and events

Calendars allow you to visualize organizational level events in your reports down to team level events and meetings. Below, find instructions on how to set up a calendar and create events within that calendar.

Who can use this?

Core	Plus
✓	✓

You can create as many calendars as you would like but here are a few best practices to keep in mind.

- Teams should only subscribe to one calendar that is visible on the Date Picker.

- Try and keep only one Organizational level calendar visible in the Date Picker.

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Where will my events appear?

Create a calendar

1. Click **Settings** in the top navigation of Flow. Using the left navigation under **Report Settings**, click **Calendars**.

   > **Tip:** Calendars is a permission based feature. You need to have the **Manage calendars** permission in order to view and create calendars. Learn more about Administrative permissions (https://help.pluralsight.com/help/administrative-permissions).

2. Click **Add calendar.**

3. In this modal you will need to fill out the following fields:

   1. Calendar Name

   2. Calendar Description

   3. Calendar Type

      1. Organization - Select this option if your events are applicable to all teams and Users.

      2. Group - Select this option if your events are applicable to only a select group of teams. You will need to subscribe teams (https://pluralsight.knowledgeowl.com/help/calendar-subscriptions) to group calendars.

   4. Show On - Select where you would like your events to appear.

      1. Reports - events will appear directly in your reports

      2. Date Picker - This option should be used for creating custom date ranges or sprint cycles. Events

will appear in the Date Range filter in your report so you can easily navigate to a specific time frame.

4. Once you have filled out your calendar details click **Save.**

5. You have successfully created a calendar and it will be visible in your calendar list.

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Bulk importing calendars

Prepare a .csv file with the following columns:

- Calendar Name

- Event Name

- Start Date/Time

- End Date/Time

- Timezone

- All Day

- Category

- Hide

Your file should look something like this:

The CSV file should include the following columns:

Calendar Name	Event Name	Start Date/Time	End Date/Time	Timezone	All Day	Category	Hide

Example:

```
Calendar_name,Event_name,Start_time,End_time,Timezone,All_day,Category,Hide
Jen Default,June Vacation,06-15-2019,06-15-2019,US/Mountain,true,Time Off,false
GitPrime Corporate Events,Spirit Week,06-01-2019,06-06-2019,US/Mountain,true,Informational,true
GitPrime Corporate Events,Quarterly All Hands Meeting,07-01-2019 01:00PM,07-02-2019 4:00PM,US/Mountain,false,Meeting,false
```

Once you have your file, navigate to the Settings menu. Under **Report Settings** click **Calendars.**

Tip: Calendars is a permission based feature. You need to have the **Manage calendars** permission in order to view, create and import calendars.

Click **Bulk Upload (.csv).** A modal will appear that will prompt you to choose a file to import.

Make sure to make changes to these settings if needed before proceeding.

- Overwrite items if found - This will overwrite existing events/calendars if they overlap with events/calendars in the .csv file.

- Add calendars if not found - This will add any new calendars that do not already exist in your account.

Click **Next** to import your file. Confirm your import by clicking **Yes, Import**

If no errors were found with your file you will see the following success message:

If errors were found you will see a message with a link to view the results of your upload. Click **See detailed results** to view the fields/rows that need edits.

Tips & Next Steps

If you created new calendars, you may want to:

- Check the group type and show on properties.

  - Group Type: Determines whether the events are relevant for the whole organization (Org) or just for certain teams (Group).

  - Show On: Determines where the events for that calendar will be visible. Either in the Date Picker, on the Reports, Both or None.

- Subscribe teams to those calendars to be sure that the events are visible to relevant teams.

  - See Calendar subscriptions (https://help.pluralsight.com/help/calendar-subscriptions) for more information
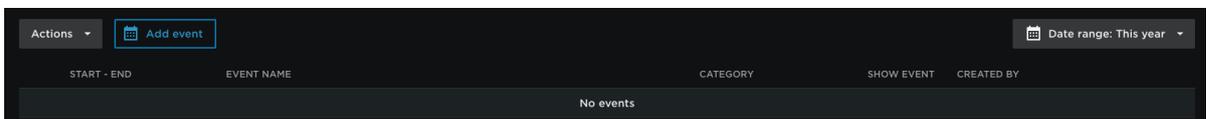
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Add events

Now that we have created a calendar, let's add some events.

> **Tip:** You can also bulk import events.

1. Click on any calendar in your calendar list to view the **Calendar details** page.

2. On the **Calendar details** page click **Add event.**

Actions ▾	📅 Add event					📅 Date range: This year ▾
START - END	EVENT NAME			CATEGORY	SHOW EVENT	CREATED BY
			No events			

3. In this modal you will need to input the following information:

   - Event Name

   - Date of Event and Timezone

   - Repeating - With any repeating event you can select an end date if applicable or have it set to repeat indefinitely.

     - Does not repeat

     - Daily

     - Weekly

- Monthly

    ○ Event Type - There are three types:

        ■ Informational

        ■ Meeting

        ■ Time Off

4. Once you have filled out all your event details click **Create.**

5. Success! At this point you can continue to create additional events or you can click **Done.**

6. You will now see all the events you created in your event list. You can make edits to your event at any time. Learn more about your Calendar details (https://pluralsight.knowledgeowl.com/help/calendar-details) page.

> **Note:** If you create a recurring event it will create an event for each day that it repeats.

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Adding Events in the Project Timeline Report

Once you have a calendar created, you can also add events straight from the **Project timeline** report.

> **Tip:** This **Add event** button will only be visible in the report for users that have the **Manage calendar** permission.

1. Click the **Add event** button to open the **Add event** modal.

2. Select the calendar name from the drop down menu that you wish to add the event to, then click **Next.**

3. Fill out the details (name, date, time, meeting type) of the event then click **Create.**

4. On the next screen you can review and edit your event or add another event. If you are finished click **Done.**

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Where will my events appear?

You can see your calendar events in two different places depending on the Calendar **Show On** setting.

Show On: Reports

For any events within a calendar that is set to show on reports, you will see your events in the report itself. You will need to verify the following:

1. Events filter is set to include the type of calendar events you are wanting to view:
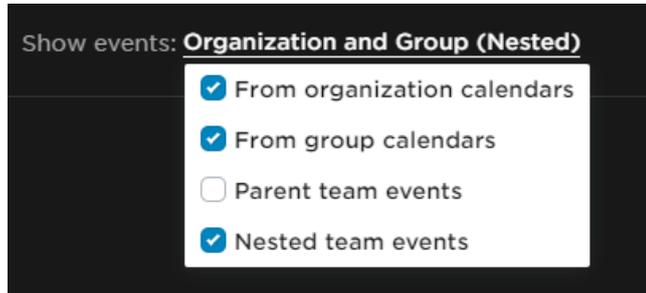
2. If your calendar events are under a group calendar, you will need to filter to the subscribed team (https://pluralsight.knowledgeowl.com/help/calendar-subscriptions)

    Once you have those two filters set appropriately you will see your events appear as shown below:

> **Tip:** If you are filtering to both organizational and group calendars you will see both types of events. As seen above, the org level event is in pink and the group level event is in purple.

Show On: Date Picker

The Date Picker is designed to create custom date ranges (https://pluralsight.knowledgeowl.com/help/setting-up-custom-date-ranges), specifically sprints. These generally are associated with a group calendar with specific teams subscribed. Events associated with a calendar that appear in the Date Picker will appear regardless of what is or is not selected in the Events filter. For any event that is set to show on the Date Picker, you will need to ensure you are properly filtered to the correct team, if the events are only assigned to a specific team.

To turn on custom date ranges, make sure you have the **Manage configurations** permission, then go to **Settings** then **Configurations**. Scroll to the bottom of the **General** tab to the **Custom Date Ranges** section. Toggle on **Enable custom date ranges** and customize your label.

If you choose a group calendar for custom date ranges, make sure to subscribe teams to the calenda (https://help.pluralsight.com/help/calendar-subscriptions)r.

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If you need help, please email support@pluralsight.com () for 24/7 assistance.