Course Calendar
User Guide

for SharePoint 2016

MWR Monthly Events Schedule

September 2021

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
29 9:00 am Bingo 6:00 pm Bingo	30	31	1 7:00 pm FIFA 21 Tournam 7:00 pm Texas Hold 'Em	2 7:00 pm - 11:00 pm Cornhole Tournament	3 6:00 pm Open Mic 7:00 pm Karaoke	4 7:00 pm - 11:00 pm Casino Night
5 9:00 am Bingo 6:00 pm Bingo	6 2:00 pm Super Smash Bro 7:00 pm Mortal Kombat 1	7 7:00 pm - 9:00 pm Ping Pong Tournament	8 7:00 pm - 10:00 pm Texas Hold 'Em	9 7:00 pm - 9:00 pm Spades Tournament	10 6:00 pm Open Mic 7:00 pm Karaoke	11 7:00 pm Spades Tourna 8:00 pm Country Music
12 9:00 am Bingo 6:00 pm Bingo 7:00 pm Season Opener K	13 7:00 pm - 9:00 pm Movie Night	14 7:00 pm - 9:00 pm 8-Ball Tournament	15 7:00 pm - 10:00 pm Texas Hold 'Em	16 7:00 pm - 11:00 pm Cornhole Tournament	17 6:00 pm Open Mic 7:00 pm Karaoke	18 7:00 pm Chess Champi 8:00 pm Reggae in The
19 9:00 am Bingo 6:00 pm Bingo 8:00 pm NFL Sunday Gam	20 7:00 pm Movie Night 7:00 pm Madden Tournan	21 7:00 pm - 9:00 pm Ping Pong Tournament	22 7:00 pm - 10:00 pm Texas Hold 'Em	23 7:00 pm - 9:00 pm Spades Tournament	24 6:00 pm Open Mic 7:00 pm Karaoke	25 7:00 pm Spades Tourna 7:00 pm Water Wars 8:00 pm Latin Music Ni
26 9:00 am Bingo 6:00 pm Bingo 8:00 pm NFL Sunday Gam	27 7:00 pm Super Smash Bro 7:00 pm Movie Night	28 7:00 pm - 9:00 pm 8-Ball Tournament	29 7:00 pm - 10:00 pm Texas Hold 'Em	30 7:00 pm - 11:00 pm Cornhole Tournament	1 7:00 pm - 9:00 pm Karaoke	2

Table of Contents

Welcome to the *Course Calendar User Guide for SharePoint 2016*. This guide describes the steps for setting up the **CourseCalendar** and **CourseAttendees** apps and how to use it. The **CourseCalendar** and **CourseAttendees** app is compatible with *SharePoint 2016* and can be used for any event that requires pre-registration or event sign up.

Introduction

The **CourseCalendar** app displays a *SharePoint* calendar of events. The **CourseAttendees** app contains the registered users list associated to a *Nintex* registration form. The form opens in New mode when a user selects an event on the calendar. The user completes the fields to register or sign up for the selected event.

Setup planning

This chapter details the requirements and deliverables necessary to set up the **CourseCalendar** and **CourseAttendees** app**.**

System Requirements

- ***SharePoint 2016***
- ***Nintex Forms 2016***

Deliverables

Deliverables include the *SharePoint* list templates and directions for setting up and using the apps:

- *CourseAtendees.stp*
- *CourseCalendar.stp*
- *Course Calendar User Guide for SharePoint 2016*

Requirements for setup

- ***SharePoint*** Site Manager permissions (**Full Control**) or above
- Familiarity with ***Nintex Forms***

Before you begin

Although this guide takes you through a step-by-step process, basic ***SharePoint*** design knowledge and ***SharePoint*** Site Manager permissions are required to set up this app. Basic knowledge modifying ***Nintex Forms*** is also required.

> 📝 **Note** – Users need **Contribute** permissions to sign up or register for an event. For more information on permissions, see Setting Permissions on page 26.
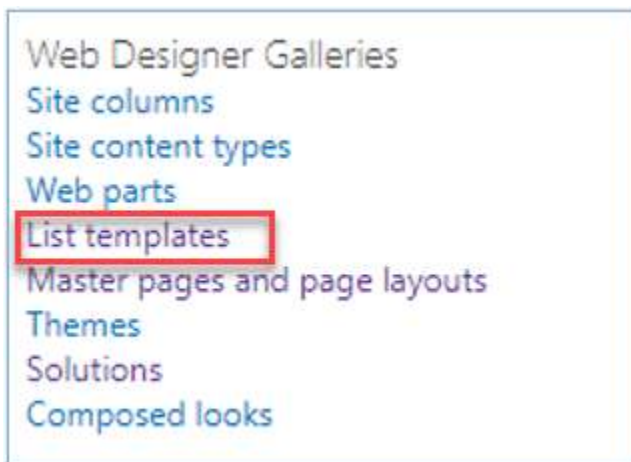
Uploading the templates

This section details the steps to upload the **SharePoint** apps to your site's Template Gallery.

Before you begin

Download the **SharePoint** lists *CourseAttendees.stp* and *CourseClaendar.stp* from the [KMCool](#) **SharePoint** site.

Uploading the SharePoint lists

1. Navigate to your **SharePoint** site's root.
2. Click **Settings** (⚙) **Site settings.** The Site Settings page appears.
3. Under the **Web Designer Galleries** section, click the **List templates** hyperlink.

4. The List Template Gallery page appears. Click the **FILES** tab and then click **Upload Document** on the ribbon.
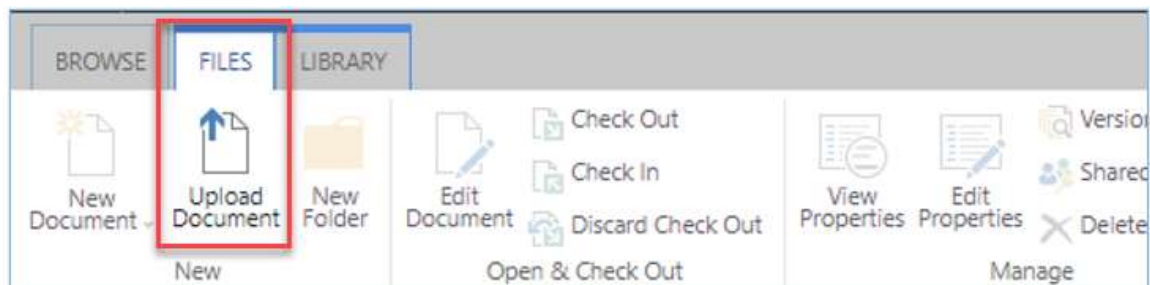
5. The Add a template dialog appears. Click **Choose File** and browse for the *CourseAttendees.stp* and *CourseClaendar.stp* lists downloaded from KMCool.
6. Click **OK** to upload the lists and close the dialog.
7. The **SharePoint** lists appear in the template gallery.

Creating the lists

This section details the steps to add the ***SharePoint*** apps to your site.

Adding the apps

1. Navigate to the site in which you want to add the Course Calendar app.
2. Open Site Contents and click **+ add an app.**
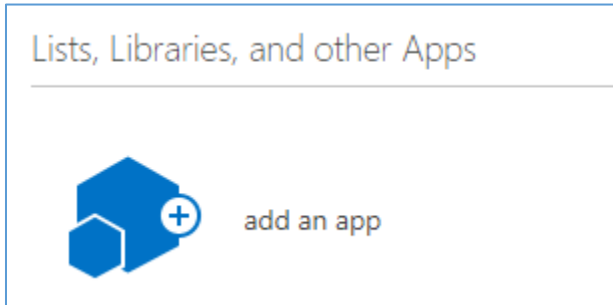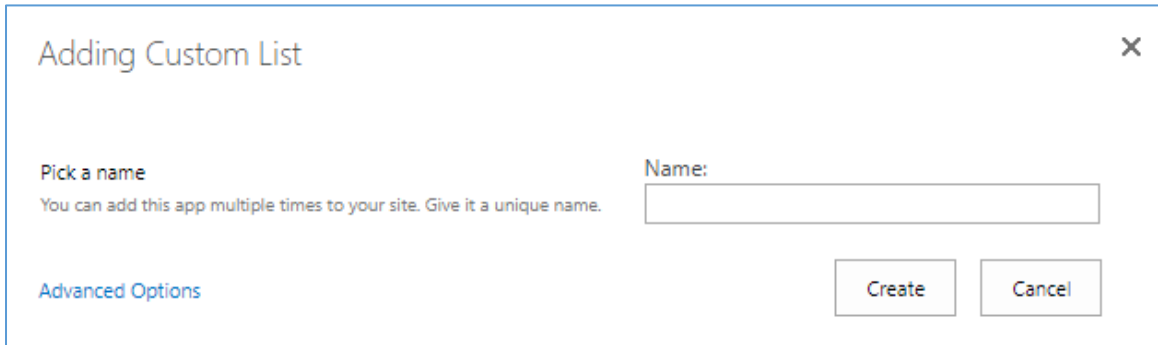
3. The Your Apps page appears. In the **find an app** search field, enter **CourseAttendees** and click the **Search** (magnifying glass) icon.
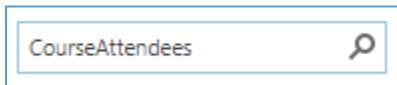
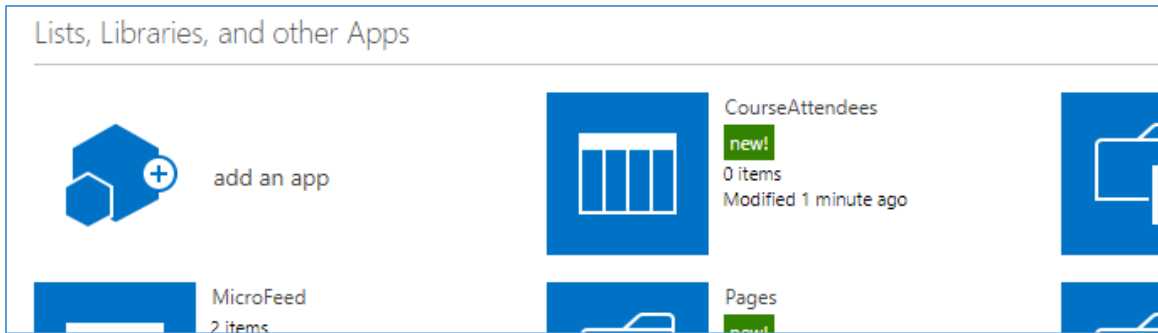4. ***SharePoint*** returns all results that match your search criteria. Click **CouseAttendees**.
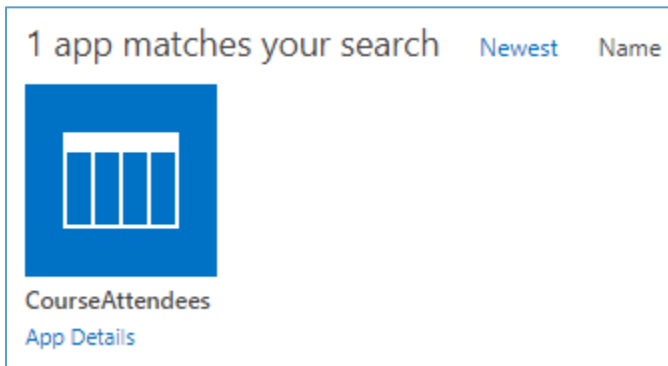
5. The Adding Custom List dialog appears. In the **Name** field, enter a name for the app.

> 📝 **Note —** You can rename the app as desired. Make a note of the app names since you will make configuration changes on the *Nintex* form.

6. The app appears in your Site Contents with a new! icon.

7. Repeat steps 2-5 to add the **CourseCalendar** app.

> 📝 **Note** — After upload to your Site Contents, **CourseCalendar** and **CourseAttendees** are referenced as "lists" instead of "apps"

Deleting and recreating lookup columns for each list

This section details the steps to create the lookup files associated to your site. For the purposes of these instructions, the list names have been changed to "Course Attendees" and "Course Calendar". If you rename the calendar and attendee list, it should be obvious that the two apps are related. For example, "MWR Calendar" and "MWR Signup".

When you update the **_SharePoint_** list column names, be sure you use the exact same names as the original column name to include upper/lower case. Otherwise, the calendar and attendee list will not reference each other.

Recreating the lookup columns for the CourseAttendees list

1. Click the **CourseAttendees** list to open.
2. A message appears indicating the list does not exist.

> List does not exist. The page you selected contains a list that does not exist. It may have been deleted by another user.
>
> Correlation ID:24bcef9f-b714-b07d-f894-d6f520ef9c9c

> 📝 **Note** — Ignore the message.

3. Click the **LIST** tab, then click **List Settings** on the ribbon.
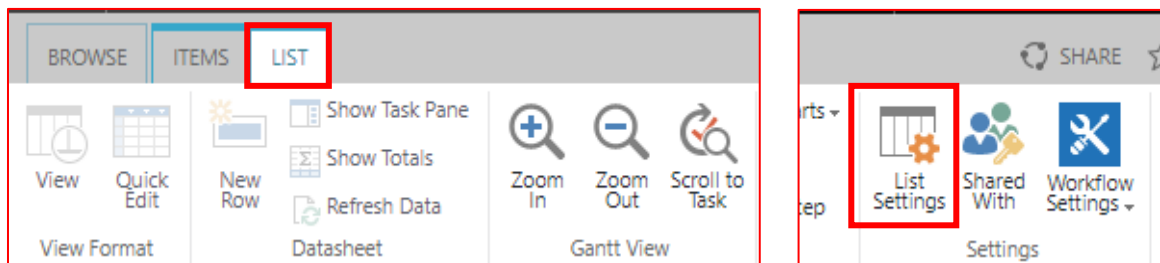
4. The Settings page appears. Under the **Columns** section, select the **CourseId** lookup column.

CourseId	Lookup
CourseId:Title	Lookup
CourseId:Start Time	Lookup
CourseId:End Time	Lookup
CourseId:Seats	Lookup

5. The Edit Column page appears. Scroll to the bottom of the page and click **Delete**.

> 📝 **Note** — You will recreate this column in step 7.
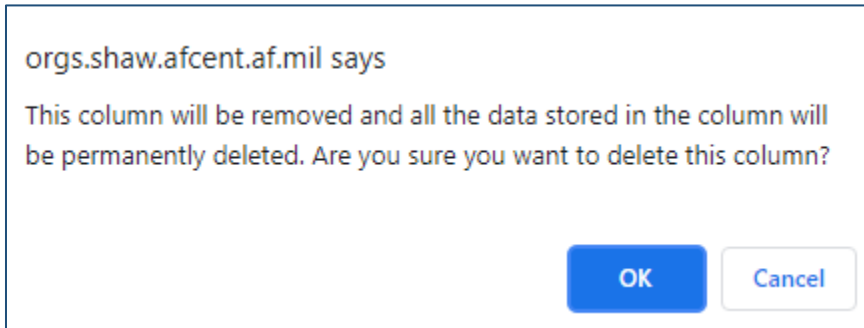
6. A web alert appears. Click **OK** to confirm the message and close the alert.

orgs.shaw.afcent.af.mil says

This column will be removed and all the data stored in the column will be permanently deleted. Are you sure you want to delete this column?

OK   Cancel

7. You are returned to the Settings page. Click **Create Column**.

▫ Create column

▫ Add from existing site columns

▫ Column ordering

▫ Indexed columns
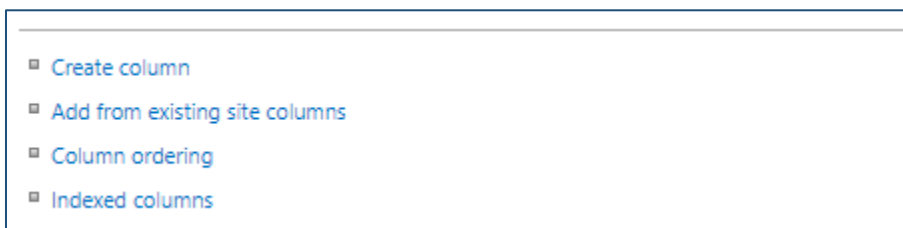
8. The Create Column page appears. In the **Name** field, enter **CourseId**.
9. In the **The type of information in this column is** field, mark the **Lookup (information already on this site)** option.

Column name:

CourseId

The type of information in this column is:

○ Single line of text
○ Multiple lines of text
○ Choice (menu to choose from)
○ Number (1, 1.0, 100)
○ Currency ($, ¥, €)
○ Date and Time
● Lookup (information already on this site)
○ Yes/No (check box)
○ Person or Group
○ Hyperlink or Picture
○ Calculated (calculation based on other columns)
○ External Data
○ Task Outcome
○ Managed Metadata

10. In the **Get information from** dropdown, select **CourseCalendar**.

11. In the **In this column** dropdown, select **ID**.
12. Mark the following checkboxes:
    - **Title**
    - **Location**
    - **Start Time**
    - **End Time**
    - **StaticStartDate**
13. Unmark the **Add to default view** checkbox.
14. Click **OK** to save your changes and return to the Settings page.

Recreating the lookup columns for CourseCalendar list

1. Navigate to Site Contents and click **CourseCalendar** to open the list.
2. Click the **CALENDAR** tab and then click **List Settings** on the ribbon.
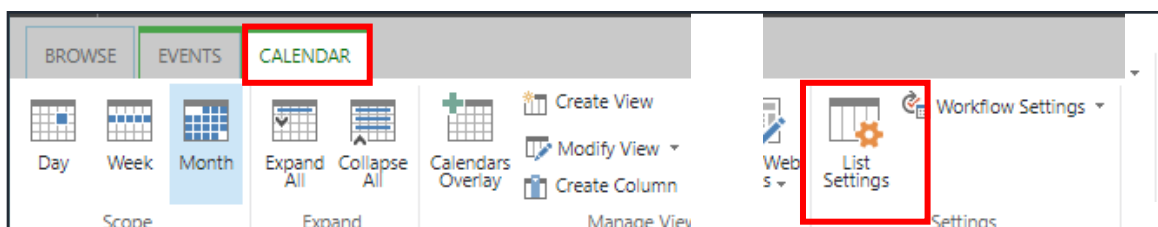
15. The Settings page appears. Under the **Columns** section click the **Count_Attendees** lookup column.

Check Double Booking	Check Double Booking
Count_Attendees	Lookup
Created	Date and Time

3. The Edit Column page appears. Click **Delete**.

📝 **Note** —You will recreate this column in step 5.

4. A web alert appears. Click **OK** to confirm the message and close the alert.

orgs.shaw.afcent.af.mil says

This column will be removed and all the data stored in the column will be permanently deleted. If this column is currently being used by any content types, it will be removed from those types. Are you sure you want to delete this column?

OK   Cancel

5. You are returned to the Settings page. Click **Create Column**.

▫ Create column

▫ Add from existing site columns

▫ Column ordering

▫ Indexed columns
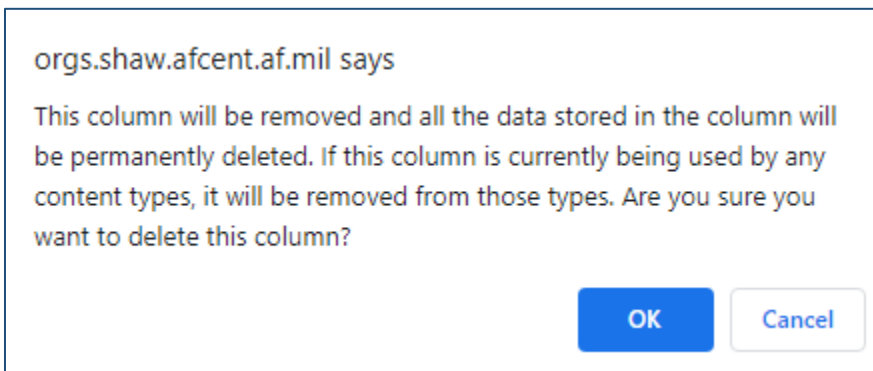
6. The Create Column page appears. In the **Name** field, enter **Count_Attendees**.
7. In the **The type of information in this column is** field, mark the **Lookup (information already on this site)** option.

8. In the **Get information from** dropdown, select **CourseAttendees**.

9. In the **In this column** dropdown, select **CourseID (Count Related)**.
10. Unmark the **Add to default view** checkbox.
11. Click **OK** to save your changes and return to the Settings page.

Modifying Nintex forms

This section details the steps to modify the *Nintex* form associated to each list.

Customizing the CourseCalendar

1. Navigate to Site Contents and click to open the list.
2. Click the **CALENDAR** tab and then click the down arrowhead (▾) on the **Nintex Forms** button. Select **Customize the Event Form** on the menu.
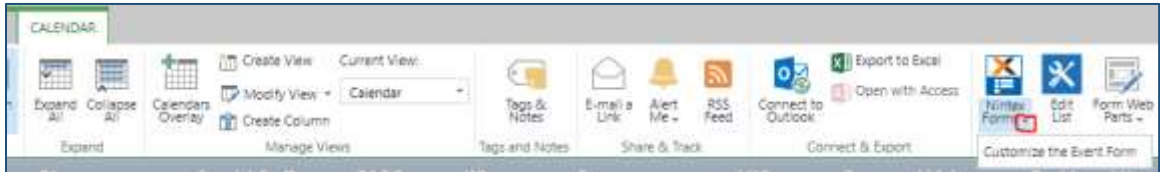
3. ***Nintex Forms 2016*** opens and shows the Course Details form associated to the CourseCalendar list.
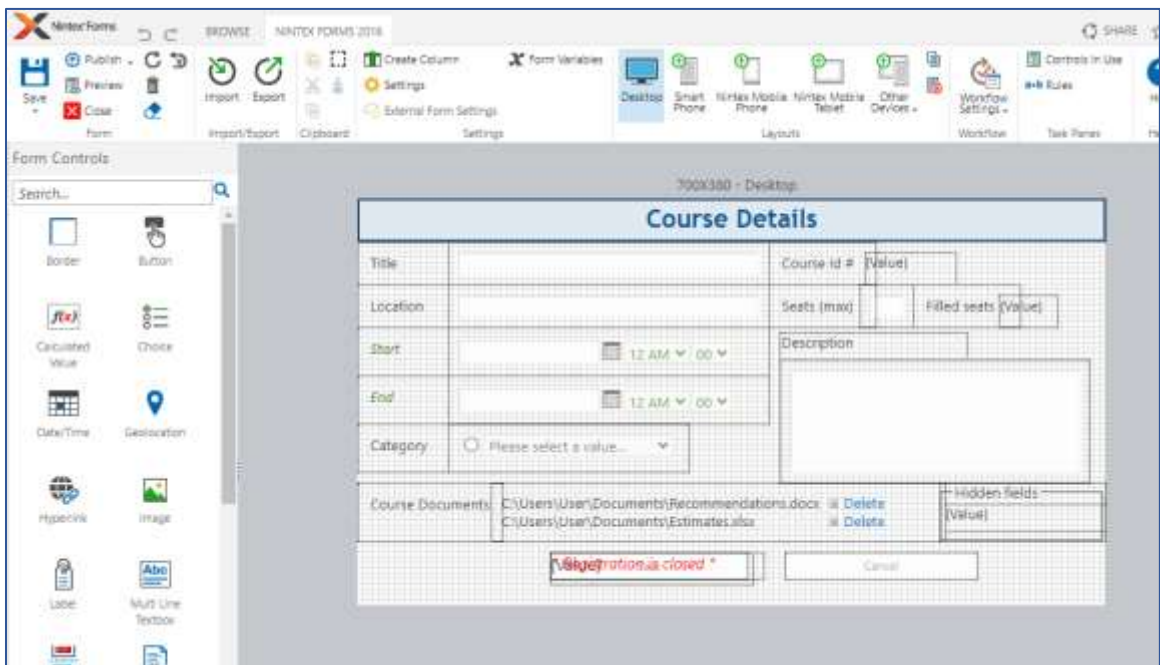
4. Click the **NINTEX FORMS 2016** tab if necessary and then click **Form Variables** on the ribbon.
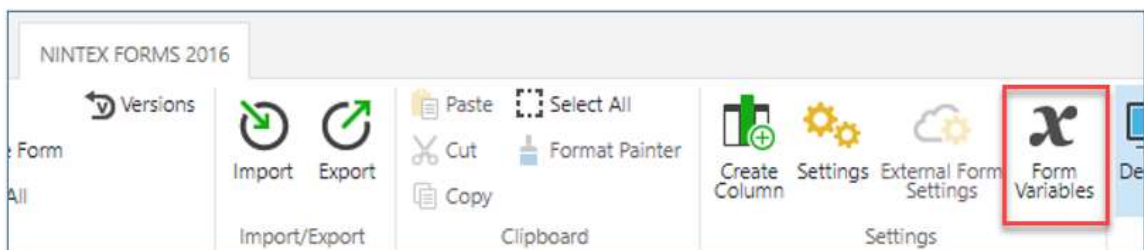
5. The Form Variables dialog opens. In the left pane, select var_AttendeesList. The right pane shows the configuration associated to var_AttendeesList.
6. In the **Formula** field, replace 'CourseAttendees' with the renamed list. For example, 'Course Attendees'.
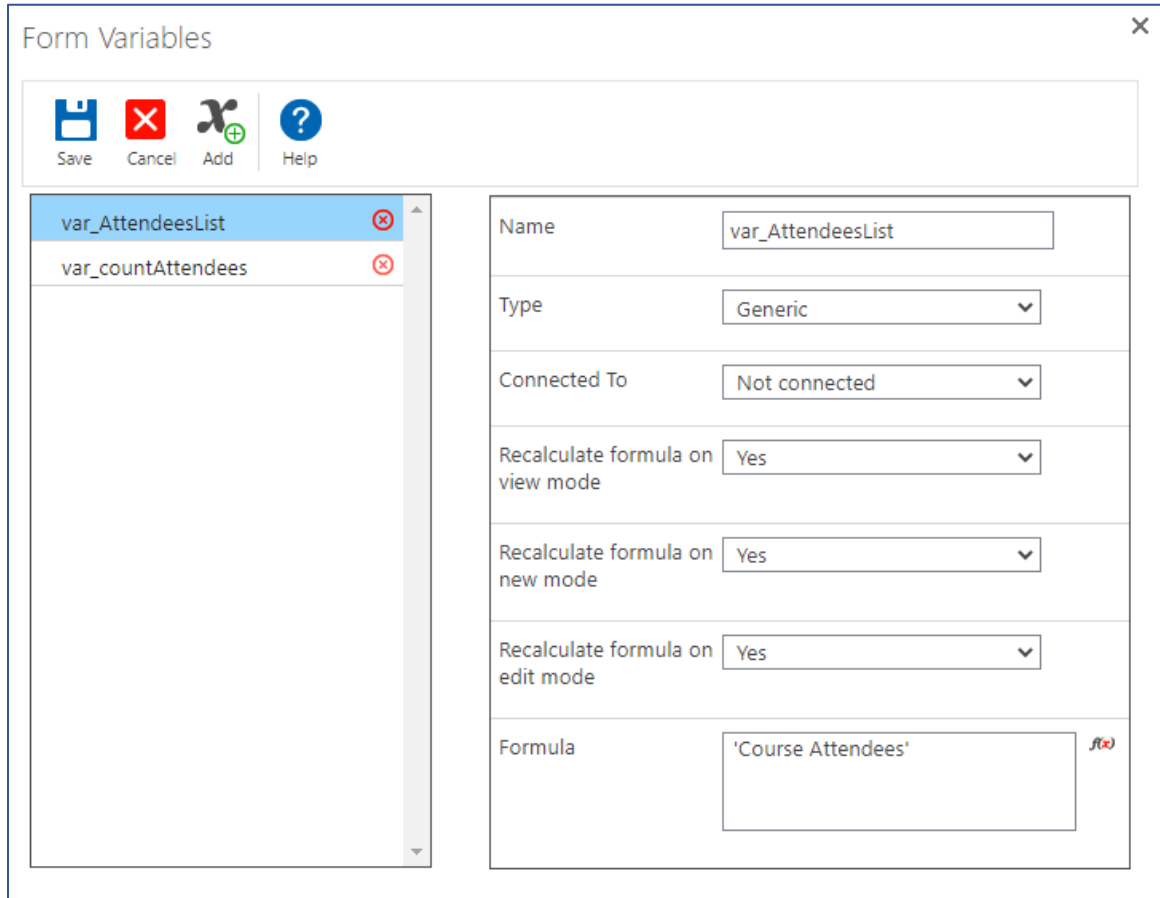
> 📝 **Note** — Ensure the name of the attendees list is surrounded by single (') quotation marks.

7. Click **Save** to save your changes and close the dialog.
8. On the ribbon, click **Publish**.
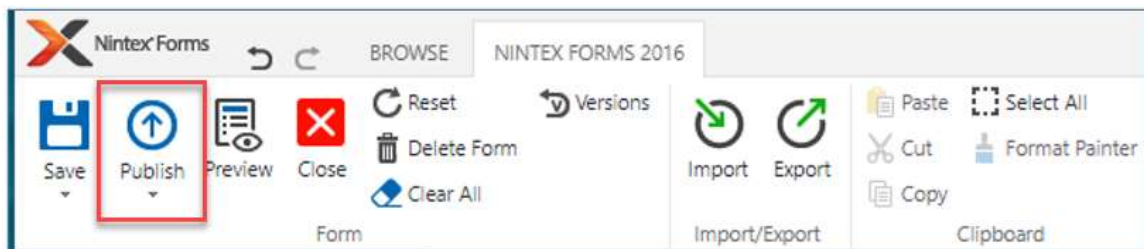
9. A Confirm publishing dialog appears. Click **Publish** to confirm the message and publish the form.
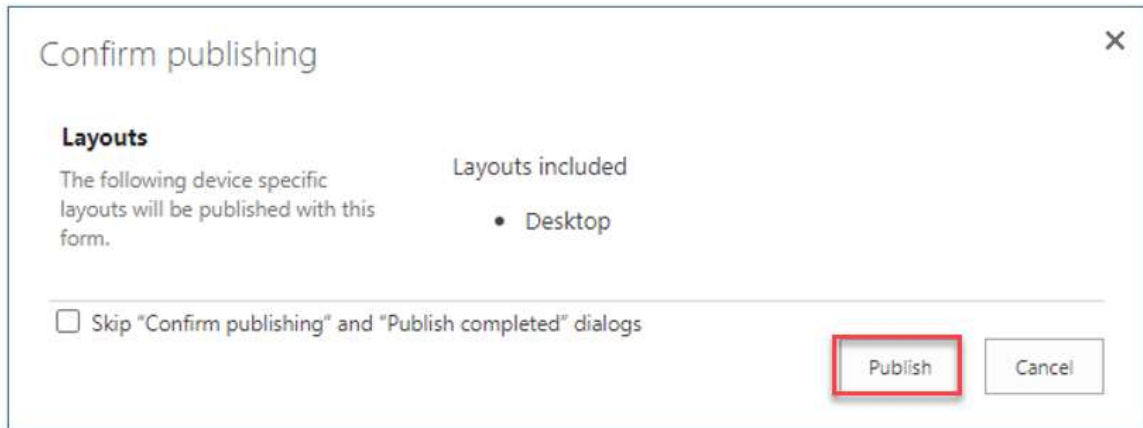
10. A Publish completed confirmation appears. Click **OK** to confirm and close the message.
11. On the ribbon, click **Close** to exit *Nintex Workflow 2016*.
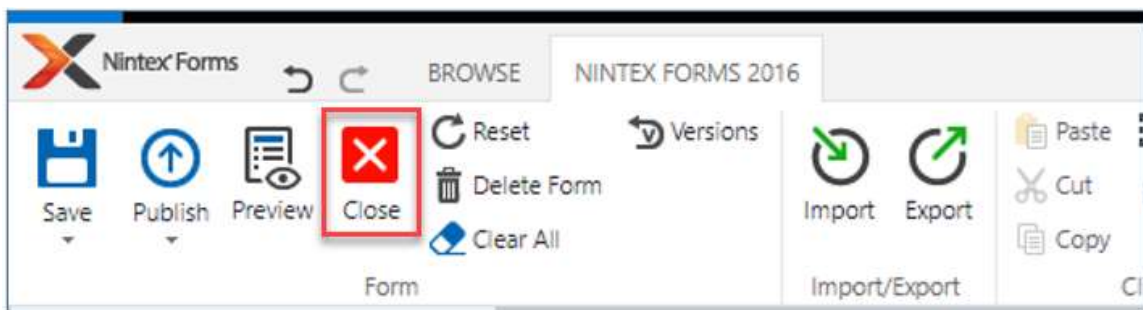
Customizing CourseAttendees

1. Navigate to Site Contents and click to open the list.
2. Click the **LIST** tab and then click the down arrowhead on the **Nintex Forms** button. Select **Customize the Event Form** on the menu.
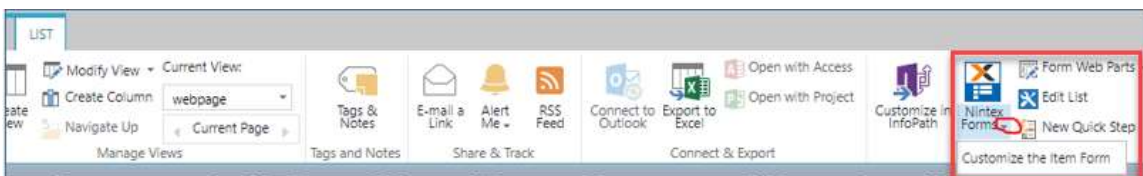
3. **Nintex Forms 2016** opens and shows the registration form associated to the CourseAttendees list.
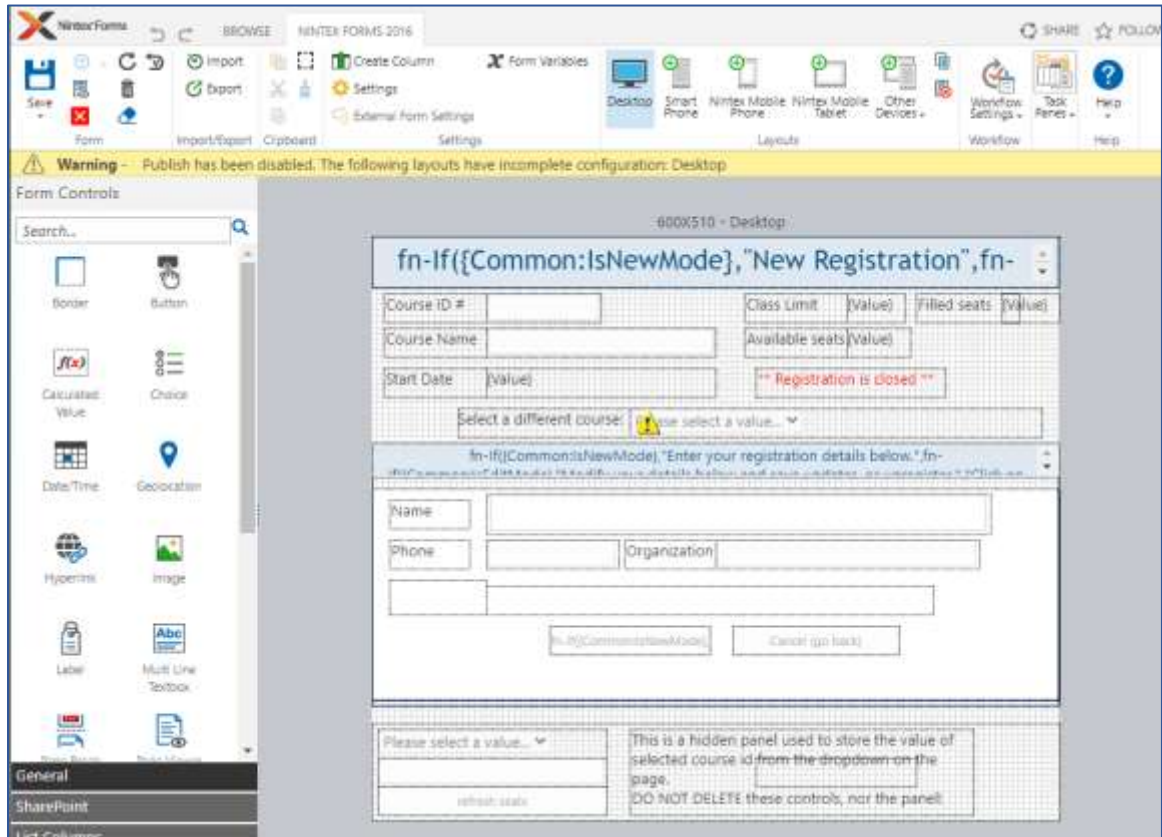
> 📝 **Note** — A warning banner appears above the form. We'll fix that in step 8.

4. On the ribbon, click the **Form Variables** button.
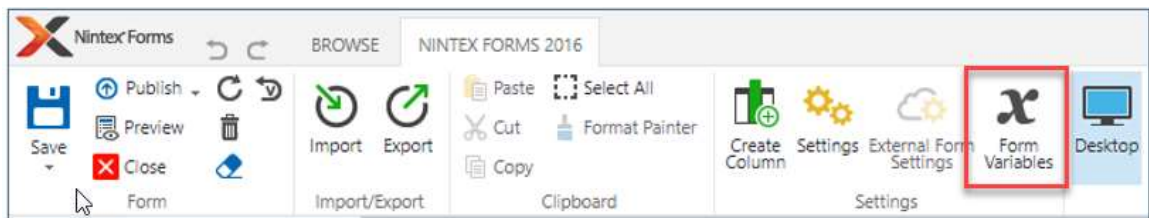
5. The Form Variables dialog appears. On the left pane, click **var_CourseCalendar**. The details for var_CourseCalendar appear on the right pane.

6. In the **Formula** field, replace 'CourseCalendar' with the new name in single (') quotation marks. For example, 'Course Calendar'.
7. Click **Save** to save your changes and close the dialog.

8. On the form, double-click the control that allows selection of another course.

9. The Control Settings – List Lookup dialog appears. In the **Source SharePoint site** field, set the URL of the *SharePoint* site that contains the source list by clicking the green arrow to the right of the field.

10. The site hierarchy screen appears. Select the name of the site in which the calendar list resides.
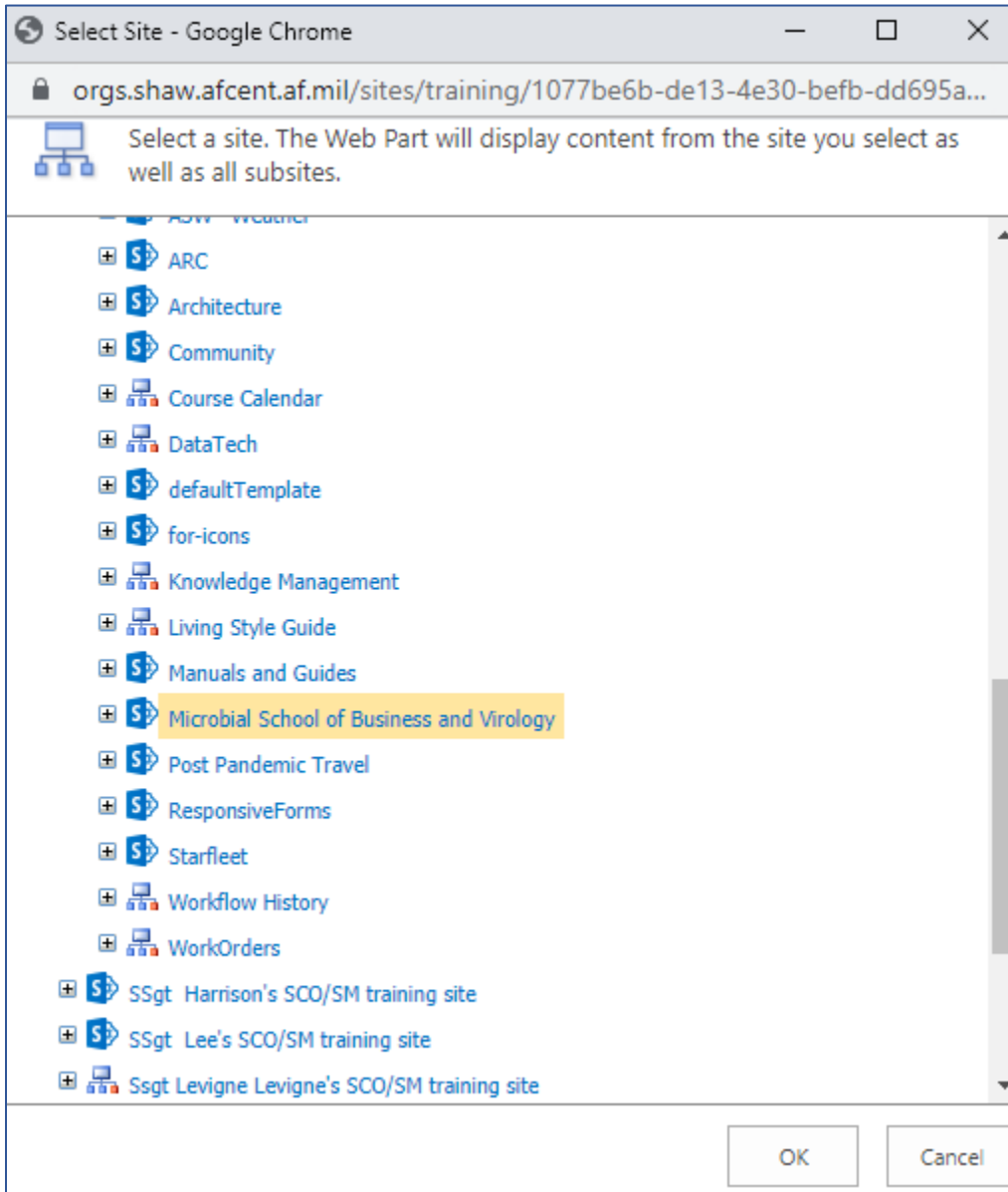
11. Click **OK** to save your changes and close the screen. The URL of the selected site appears in the field.
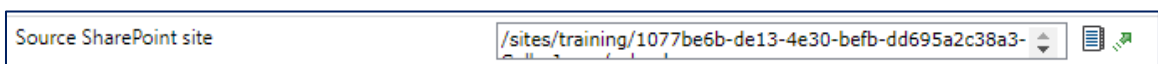
12. In the **Source List** dropdown, select the name of your calendar list.

> 📝 **Note** — The values in the **Source List** dropdown repopulate with the list names associated to the selected URL in step 10.

13. Click **Save** to save your changes and close the List Lookup dialog.

> 📝 **Note** — If the yellow warning banner still appears, go back to Control Settings – List Lookup and check the **Source SharePoint site** and **Source List** field values.

14. Click the **NINTEX FORMS 2016** tab if necessary and then click the **Publish** button on the ribbon.
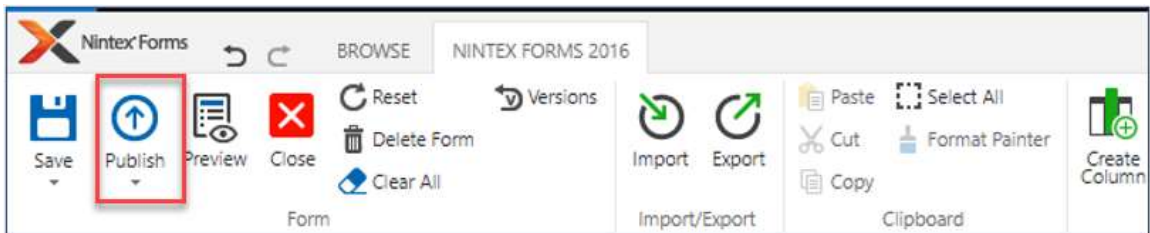
15. Publish the form.
16. Click **Close** to exit *Nintex Forms 2016*.

Adding attendees to the event details page
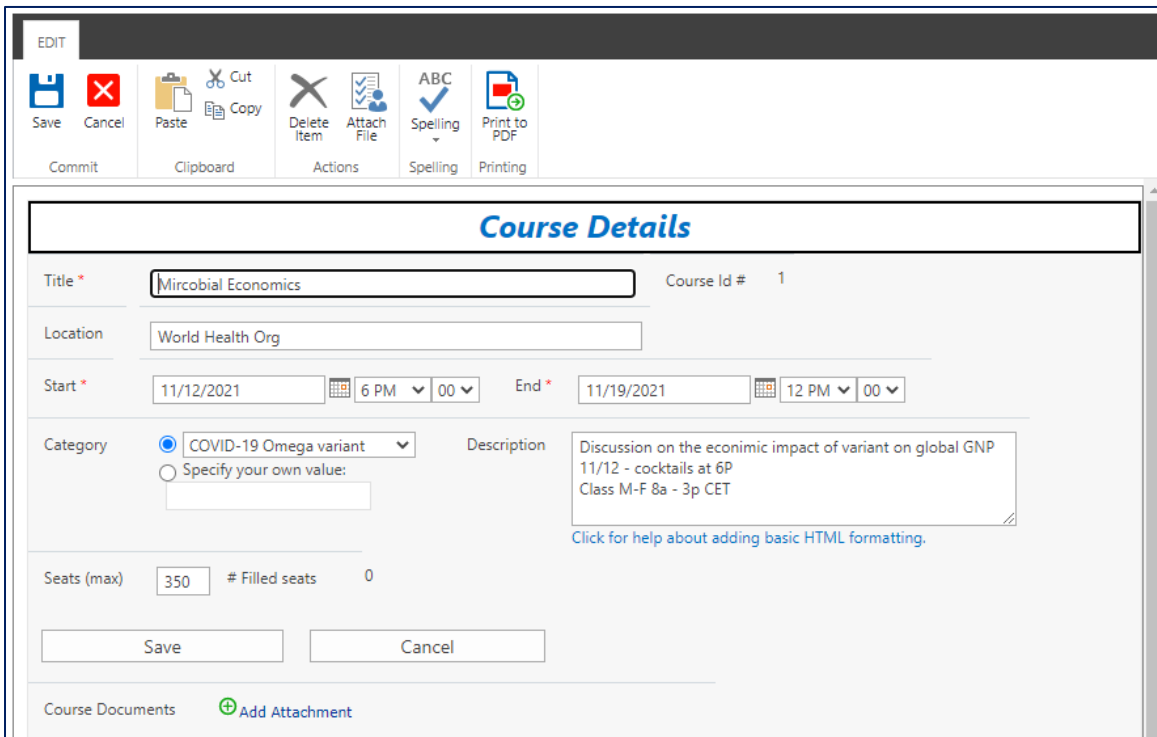
This section is optional and describes the steps to add a filtered view of the attendees list to the calendar event form. You can scroll down and see the registered individuals while viewing the details of the course. You can also remove individuals from the course or event.

Adding an event

1. Open the calendar and click the **EVENTS** tab.
2. Click **New Event**.
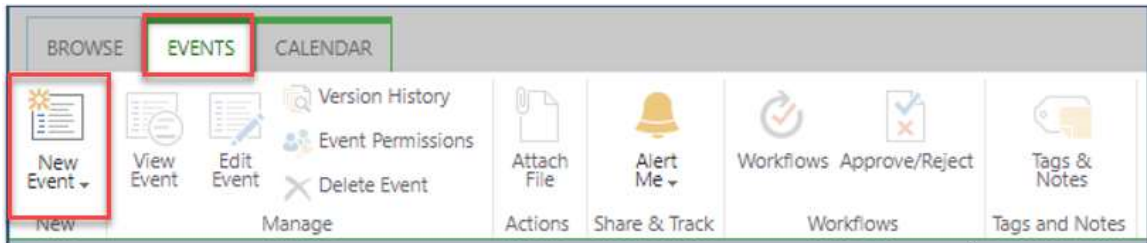
3. The CourseCalendar – New Item screen appears in New mode. Complete the fields to add a course.

4. Click **Save** to save your changes and close the dialog.

Adding the attendee list to the calendar

1. On the calendar, navigate to the event, place the insertion point on the event, right-click, and select **Open link in new tab** on the menu.
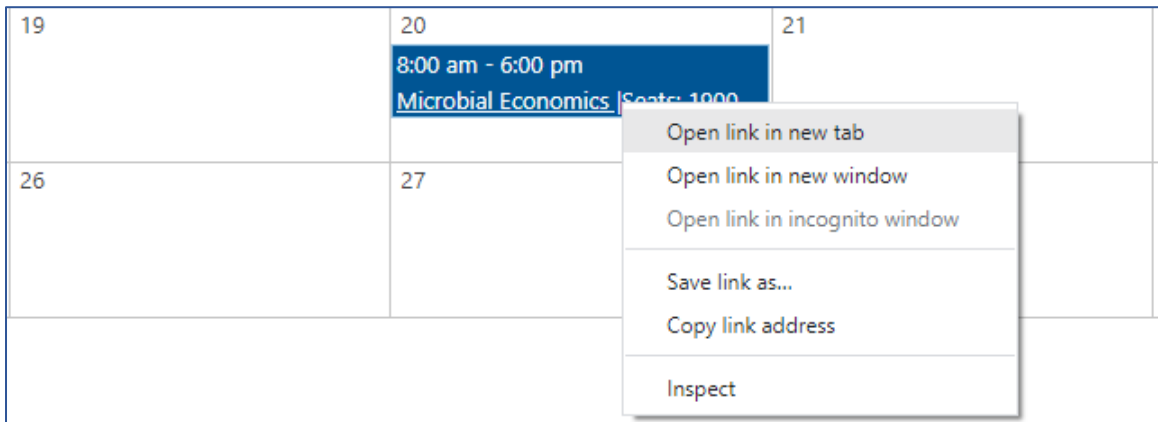
2. The Course Details appear in View mode. From **Settings**, click **Edit Page**.
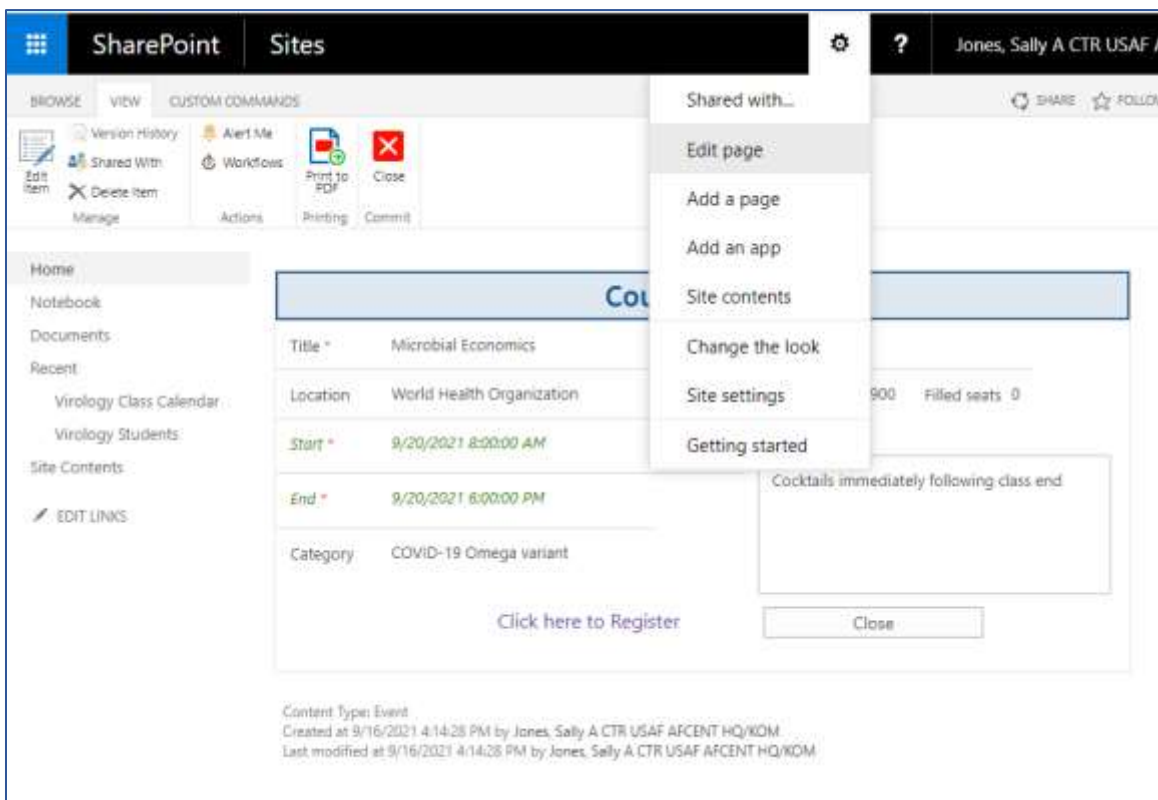
3. The page appears in View mode. Place the insertion point in the space below the form and in the web part (see text "Place insertion point here"). Click the **INSERT** tab. On the **Related List** button, click the down arrowhead (▾) and then select the name of your class attendee list.

4. The **Related Items in** <class attendee list name> web part appears below the form.

5. Click the **PAGE** tab and then click **Stop Editing** on the ribbon.

Setting Permissions

Give the calendar list administrators **Contribute** permissions so that they can add, remove, and edit events as necessary.

⚠ *Warning!* Do not grant **Edit** permissions. **Edit** permissions allow users to modify columns and the form. This could break the relationship code between the calendar and attendee list.

Give attendee users/registrants **Contribute** permissions so that they can sign up for events. Do not grant **Edit** permissions.

📝 **Note** — Anyone with Contribute permissions can modify or delete other user entries.

Notes about this app

Users can edit user details in the **CourseAttendee** list after registration, if desired. If a user wants to change the event they signed up for, they first need to delete the list entry for the current event and then complete a new sign up form for another course. The **Filled seats** field adjusts automatically the next time the event is viewed.

Users can register for an event one of two ways.

- They can click the calendar event to open the form. When the form appears, they can click the **Register** button and class details and the **Name** fields auto-populate. The user enters their phone number and organization, then clicks the **Register** button.
- They can click the **+new item** on the attendee list. The class detail fields populate when the user selects a course from the dropdown.

Event registration is closed if:

- The start date is prior to today's date.
- The **Filled seats** is equal to or greater than **Available seats.**

Enhancements

You can add an **Unregister** button to the **CourseAttendees** list item to make it more intuitive for users to remove themselves.

You can create the ability to email all attendees about a particular event.

You can incorporate a workflow to send email notifications to users about the event. For example, time/location change, guest speakers, or simply a confirmation that the user has signed up for the event.

Limitations

Recurring events are not allowed. Each event must be "stand-alone".

If you delete a course, if does not delete or change any registrations that exist for that course. This won't cause errors because of the unique IDs that are assigned to each event, however, you will have attendees that are no longer associated to that event.

Other tech notes

The app creator (Kristi Miller) used a "static start date" column that is set and saved while in the **CourseCalendar** event item form. This is due to some glitchy logic that could not be fixed with *Nintex*, *SharePoint* regional settings, or User settings. The **date/time** field reverts from UTC to local time depending on which form, and from which list the form was pulled. The creator saved the date as a static column based on the "edit/new" forms for the event itself.

There can be many rules associated to the form depending on whether it is in New, View, or Edit mode. This also causes a few other limitations in how the forms can react.