

This is the Calendar Module. When the Calendar Link is Clicked, the Calendar in Month View is Shown. Depending on the User Role, different options would be present.

Search: ☒ Light

Today

JANUARY 2022

<>

GSV PDF Print

Month Show

DECEMBER 2021< >

SMTWTFS
 1 2 3 4
5 6 7 8 9 10 11
12 13 14 15 16 17 18
19 20 21 22 23 24 25
26 27 28 29 30 31

Calendars:

Appointments

Dinner Shift

Events

Lunch Shift

Maintenance

Meetings

Room Reservations

System Maintenance

Time Off Approved

Time Off Requested

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1
	2	3	4	5	6	7
	<div>● 6PM Dinner Shift</div>	<div>Time Off Requested</div>		<div>● 6PM Dinner Shift</div>		8
	9	10	11	12	13	14
		<div>Planned Website Maintenance - Site Will Be Down</div>		<div>● 8PM Team Meeting</div>		<div>Pool Maintenance</div>
	16	17	18	19	20	21
	<div>Pool Maintenance</div>		<div>● 6PM Dinner Shift</div> <div>● 9PM Staff Party +2 More</div>	<div>● 6PM Dinner Shift</div>		22
	23	24	25	26	27	28
				<div>Time Off Approved</div>	<div>● 5PM Living Room</div>	29
	30	31				

The Calendar would largely be based on the look/design of Google Calendar (Please refer to Google Calendar for the other “Views”).

NOT SHOWN: I do like how Google Calendar has event/dates of previous and following month faded out on the Calendar grid (where the grey squares are above). I would like this Calendar to have that too. Also the square of the current day should be highlighted/or something to indicate it is the current day. Even though this sample shows the dates on the Right in the boxes, I would like them on the Left.

Features:

- Far left would have:
 - Calendar Settings– This will allow the OWNER/PROPERTY MANAGER to open the Calendar Settings. This button does not appear for other users.
 - “Calendar Sync” button that will give them the options to sync with their Google Calendar or to download an iCal feed of the Calendar that they can use to import into other Calendar Programs.
 - The “Today” button would jump the calendar back to the current month/day.
 - The “mini” calendar would allow them to see past and future months in a mini-view.
 - “Calendars” would show the different “Calendars” the user has access to in alphabetical order. They can click on/off those calendars to show/hide them in the main calendar.
- Above the Main Calendar would be the following things:
 - Scheduler Button: This would allow OWNER/PROPERTY MANAGER/OTHER DESIGNATED STAFF create events using the calendar designations -OR- to Schedule Staff (opens the Scheduler) . This button does not appear for those who don’t have this access.
 - Time Off: This button Allows Staff to Request Time Off. In the OWNER Settings they can choose to “Require Approval” in order for a Time Off Request to be okay.
 - Reserve a Space: This allows the User to Put in a Request to Reserve a Space. In OWNER Settings they should be able to choose to Activate this Feature and choose to “Require Approval” in order for a Space Request to be ok. For the OWNER/PROPERTY MANAGER this button will also allow them to Manage Space Requests. IMPORTANT. These spaces come from the “PROPERTY LOCATIONS” in the OWNER Settings. When Adding a “PROPERTY LOCATION” the OWNER should also be able to specify “Cost to Rent” and “Reservation Deposit”, which would be used in the Room Reservations.
 - Displayed Month—This shows the current month displayed on the Main Calendar
 - Back/Forward Arrows: This advances the Main Calendar Forward or Back.
 - Download CSV: This downloads the Main Calendar Month in a CSV File (showing the Month, Day, and Events on each day) for the “Calendars” shown (changes with selected “Calendar View”).
 - Download PDF: This Downloads the Main Calendar Page in a PDF File (showing the Month Calendar and the “calendars” that are shown (changes with selected “Calendar View”).
 - Print: This Prints the Main Calendar Page in a PDF File (showing the Month Calendar and events) for the “calendars” that are shown (changes with selected “Calendar View”).
 - “View” Drop Down: Allows them to select the Calendar View: Month (Default), Week, Day, Year, Schedule, 7 Days.
 - Show: This option would be just for Staff. It allows them to Show Just their Calendar or they can see their calendar and all other staff shifts/calendars that they may not be scheduled for.


When an event is clicked, the event details are shown in a Pop Up. The “system calendars” (these are ones that are in the system and automatically appear in the accounts (only their “color” can be changed by the Owner) all will show an icon (loaded by Super Admin). Created “Shift Types” automatically become a calendar. I would like the Super Admin to be able to create other System Calendars.

Default System Calendars:

- System Maintenance: [calendar-system-maintenance](#) This Calendar is Controlled by the “Super Admin” and shows on all Users’ Calendars
- Bill Due: [calendar-bill-due](#) This is automated for invoice due dates. In the calendar, I would like it to list “DUE”, PAST DUE”, “PAID”, or “PAID LATE” based on the bill’s status. It should also have a link to the invoice in the description, I would *NOT* like the amount due to be shown in the calendar though.
- Construction: [calendar-construction](#) This is to designate Construction events. Owner/Property Manager/Head of Operations can create events to this calendar.
- Maintenance Event: [calendar-maintenance](#) This is to designate Maintenance Events. Owner/Property Manager/Head of Operations can create events to this calendar.
- Meetings: [calendar-meetings](#) This is to designate Meeting Times. Owner/Staff can create events to this calendar.
- Property Event: [calendar-property-event](#) This is to designate events for the Property. Owner/Property Manager can create events to this calendar.
- Reservation: [calendar-reservation](#) This is to designate a Room/Location Reservation.
- Moving: [calendar-moving](#) This is to designate Move out/Move in dates. These would be automated from the Lease Module. Owner/Property Manager can also create events to this calendar.
- Inspections: [calendar-inspections](#) This is to designate Scheduled Inspections. This would be automated from the Inspections Module as well as the Moving Module (for move in/out walkthroughs).
- Birthday: [calendar-birthday](#) These events are automated from the User Profiles, but shows birthdays on the calendar for the Owner/Staff. It does not show the age/year the person was born. It does show the birthdays for both the Staff and the Tenants (preferably two different calendars for them).
- Lease Anniversary: [calendar-lease](#) This is automated from the Lease Module but lists Yearly anniversaries of current/active Tenants.
- Hire Date Anniversary: [calendar-hire](#) This is automated from the Staff Module, but lists the yearly anniversaries of Staff Members’ hire dates.
- Shift: [calendar-shift](#) These are created with each “Shift Type” as a separate calendar.
- Holidays: [calendar-holiday](#) is there a way to automatically add in holidays based on their country –OR– can we add a few different calendars of collections of holidays that they can then select that they want to see (US National Holidays, Christian Holidays, Jewish Holidays, Islamic Holidays, Canadian Holidays, Mexican Holidays, etc. Perhaps these could be a separate list of “calendars” under the listed “calendars”?

Event Details:

Shown when an event is clicked. If they have edit access, then the “edit” and “delete” icons appear on it.



{TITLE}

{Location}



{DATE}

{TIME}

{Calendar}

{Description}



{Other USERS/Groups Included (Seen only by Admin/Property Manager)}





This is the form that opens up for the “Add/Edit” Event.


Add/Edit Event:


Title*:

Date*:  to Date*: 

If “All Day” is checked, then the second “Date” field appears to list an ending date. Please use Google as the model.


☐ All Day Start*:  to End*: 

Does Not Repeat 


 Location:  Other:

Would want same repeating options that Google Has

Locations are from the “Property Locations”, they should be able to select more than one. They can also enter a different location in the “Other” field.

Calendar: 

This would list all of the Calendar types they have access to posting events for.

Add Groups/People: 

This would list all the Users in the system they have access to. It would also list groups (Tenants, Staff, etc.). And Units/All Property. They can select more than one. Since it is a long list they can type and it will auto-suggest. The event will appear on the calendar of those listed. If a unit is selected, then the event would be active for a new tenant who is assigned that unit vs. an event assigned to a tenant, which would not apply to a new tenant moving into the same unit.

Description:

LIMITED HTML EDITOR



Files:

Upload Files



Event Files



Save

This is the form that opens up for the “Reserve a Space” Button



Space Reservation Request:

Name of Event*:

Date*:



to

Date*:



If “All Day” is checked, then the second “Date” field appears to list an ending date. Please use Google as the model.

☐

All Day

Start*:



to

End*:



Location:



{LOCATION_DESCRIPTION}

Locations are from the “Property Locations”, that are listed to be included in Room Reservations. If a Deposit/Rental Fee is preset in the system, it would show next to it. If the Property Location is already reserved in the Calendar for something, it would show as faded/not available. The Location Description would appear next to the Location selected. Only one location can be selected per reservation.

Event
Description:

HTML EDITOR

Submit

Once Submitted, if there is a Deposit/Fee the invoice would automatically be generated and sent upon approval (if needed). If Approval is needed, then they will get a message saying that it is submitted for approval.

CHANGES TO “PROPERTY LOCATIONS” OWNER SETTINGS: These would be the new fields needed to be added for the Property Locations in the Owner Settings (when they add in a new location).

Property Locations:

Name*:

Description:

LIMITED HTML EDITOR

This Location Can be Reserved:

☐

By:



Reservation
Requires
Approval:

☐

Deposit:

Fee:

Set Different Options
Based on User Role:







☐

If it can be reserved, then the other fields appear. “By” lists all User Roles (Tenants, Staff, Specialty Staff)
Then “Requires Approval”, the “Deposit”, and the “Fee” is listed. If “Set Different Options Based on User Role” is activated, then the “Approval”, “Deposit” and “Fee” can be entered for each User Role that was listed in the “By: field.

Save



Space Reservation Request:

Event Name:	Space:	Requestor:	Date:	Time:	Status:	Options:
Poker Tournament	Club House	McClean, Mateo Unit B	12/11/2022	5:00PM-10:00PM	PENDING	 
HOA Meeting	Board Room	Long, Donna Property Manager	11/30/2022	4:30PM-6:00PM	APPROVED	 
Job Fair Exhibit	Club House	Long, Donna	10/122022— 10/15/2022	All Day	CANCELLED	 

This is the “Edit” Form to Approve/Deny/Etc.”

{NAME}

{LOCATION}

{DATE} {TIME}

{DESCRIPTION}

Submitted on: {DATE/TIMESTAMP}

Deposit: {Deposit} Rental Fee: {FEE}

The Deposit and Fees are generated from the “Property Locations”, but can be edited before approval.

Public
Comments:

HTML EDITOR

Public Comments can be seen by the Requestor

Internal Notes:

HTML EDITOR

Internal Notes can only be seen by the Owner/Property Manager

Status:

▼

Pending, Approved, Cancelled, Denied—when status changes, requestor gets an updated notification with details and public comments.

Submit

Once approved, an invoice is autogenerated for any fees/deposits. Like Security Deposits, there would be a form for the “Deposit Return” that the OWNER/PROPERTY MANAGER/Etc. would then fill out once the event is done.

Calendars:

New

<div></div>	Appointments	Tenants, Staff	<div><div></div><div></div></div>
<div></div>	Construction	Property Managers, Head of Operations	<div><div></div><div></div></div>
<div></div>	Maintenance	Property Managers, Head of Operations	<div><div></div></div>

System calendars would appear but can’t be deleted. They can change their color by double clicking the color next to it and access for people/ groups to add events to it—but they can’t change the names of the system calendars. Created calendars can be edited/deleted. Those with Access to use the calendar (create events) would be listed next to it. Events can include people that don’t have access to create events on the calendar. When they do, the calendar will appear in their “calendars list” on the main calendar that they can show/hide.

Edit Features: Name, Icon, Access to Create Events

Shift Types:

New

<div></div>	Dinner	All Staff	<div><div></div><div></div></div>
<div></div>	Brunch	McClean, Mateo; Long, Donna,	<div><div></div><div></div></div>
<div></div>	Special Event	All Staff	<div><div></div><div></div></div>

Shift types automatically create a “calendar” for that type. These are the types of shifts that can be used for the scheduler. They can add as many shifts as they want. The options would be the Shift Name, Color, and who can be assigned the shift (can be individual staff, entire staff, or staff roles or user types). If a group or sub-group of staff is listed for the shift type, then when a new staff member is created, if they fall into that group, they are automatically able to be assigned that shift.



Time Off Requests:

Prevent Staff from deleting their approved requests:

☐ Always

Prior to the Approved Time Off Request Date

If “Always” is checked then the above options would be hidden. If it isn’t checked, the first drop down would be 1-30. The Second drop down would be: Days, Weeks, Months. This would tell the system how long before the approved requested time off shift can a staff member delete their request.

Icon Map:

The following icons are used in this template. They are available in the Google Cloud Folder on this Trello Card: <https://trello.com/c/z2j1yyVR>

While icons may look different in this template, the ones in the Google Drive folder are always the most up-to-date. Almost all icons have a complementing line version. The name is the same with the addition of an “-l” added to the end. If an icon is missing, please let me know—chances are it is in the process of being created!

Calendar Settings: *calendar-settings*

Scheduler: *staff-schedule* **Download CSV:** *system-download-csv*

View: *system-view* **Download PDF:** *system-download-pdf*

Calendar Sync: *calendar-sync* **Print:** *system-print*

Delete: *system-trashcan*

Edit: *system-edit*

Location Reservation: *calendar-reservation*

Time Off Request: *staff-request-time-off*