Silverline

Calendar Anything

Advanced Admin
Configuration Guide

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Overview

CalendarAnything LWC is a Salesforce.com application that allows Users to create calendar views from any Standard or Custom objects that are a date or date/time field. CalendarAnything LWC can be downloaded from the AppExchange at:

HTTP://APPEXCHANGE.SALESFORCE.COM/

This advanced admin guide is recommended for system administrators who already have at least a basic understanding of CalendarAnything LWC functionality.

⚡ Implementation of the features described in this admin guide will require system administrator access to the organization.

Technical Specifications

Salesforce.com supported editions:
Enterprise Edition, Unlimited Edition, Force.com Platform Edition, Developer Edition

⚡ Salesforce.com users without the above versions are unable to use the app, even if CalendarAnything LWC licenses are assigned to the User.

User Permissions Needed

All CalendarAnything LWC clients are required to make the permission changes below. These changes will need to be made for all profiles or permissions sets that apply to Users using CalendarAnything LWC.

1. 1. Navigate to **Setup >> Security >> Sharing Settings**.

2. 2. Make sure that Organization Wide Default access in Internal and External columns is set to **Private** for all objects with "**CA__**" prefix.

3. 3. From **Setup**, click **Users | Profiles**.

4. 4. Select a profile.

Enhanced Profile User Interface	Standard Profile User Interface
In **Apps**, click on Object Settings. Select any of the CalendarAnything LWC custom objects, these objects have the **CA_** prefix. Check the Read column to see if all fields are checked. If all fields are checked select the next **CA_ custom object**. If some fields are unchecked, click the **Edit** button and check all fields under the **Read** column. **Save** changes. Make sure the profile has **Create** permission on **CA_UserSettings**. Repeat for the next CA_ custom object. Repeat until all fields on all CA_ custom objects are visible for that profile.	In **Custom Object Permissions** block, make sure the profile has **Create** permission on **CA_ UserSettings**. Scroll to the Field Level Security section. Locate the CalendarAnything custom objects, these objects will have the **CA_** prefix. Click **View** next to each **CA_ custom object** to show the field security settings. Check the **Read Access** column to see if all fields are checked. If all fields are checked, click **Back to Profile** button. If some fields are unchecked, click the **Edit** button and check all fields under the **Read Access** column. **Save** changes. Return to profile details and repeat for the next CA_ custom object. Repeat until all fields on all CA_ custom objects are visible for that profile.

Next, enable **Apex Class Access** for all CalendarAnything LWC components (those with the **SLCALWC.CA_** prefix). Also enable Visualforce Page Access for all CalendarAnything LWC components (also beginning with the **SLCALWC.CA_** prefix).

Enabled Apex Class Access	Edit	Enabled Apex Class Access Help ⑦
Apex Class Name		**AppExchange Package Name**
SLCALWC.CA_AjaxResponceController		CalendarAnything LWC
SLCALWC.CA_CalendarWrapper		CalendarAnything LWC
SLCALWC.CA_DataLayer		CalendarAnything LWC
SLCALWC.CA_DataUtils		CalendarAnything LWC
SLCALWC.CA_EventHandlerController		CalendarAnything LWC
SLCALWC.CA_EventWrapper		CalendarAnything LWC
SLCALWC.CA_FieldWrapper		CalendarAnything LWC
SLCALWC.CA_Fields		CalendarAnything LWC
SLCALWC.CA_Filters		CalendarAnything LWC
SLCALWC.CA_GroupWrapper		CalendarAnything LWC
SLCALWC.CA_JsonCompiler		CalendarAnything LWC
SLCALWC.CA_Options		CalendarAnything LWC
SLCALWC.CA_ParentController		CalendarAnything LWC
SLCALWC.CA_PostInstall		CalendarAnything LWC
SLCALWC.CA_Remote		CalendarAnything LWC
SLCALWC.CA_Security		CalendarAnything LWC
SLCALWC.CA_Shares		CalendarAnything LWC
SLCALWC.CA_UserSettings		CalendarAnything LWC
SLCALWC.CalendarAnything_pageController		CalendarAnything LWC
SLCALWC.DateUtils		CalendarAnything LWC
SLCALWC.DescribedCore		CalendarAnything LWC
SLCALWC.FilterSet		CalendarAnything LWC
SLCALWC.FilterSoqlCompiler		CalendarAnything LWC
SLCALWC.StringUtils		CalendarAnything LWC
SLCALWC.Test_CreateTestData		CalendarAnything LWC

Enable profile access to CalendarAnything LWC custom Apex classes and Visualforce pages

| Enabled Visualforce Page Access	Edit	Enabled Visualforce Page Access Help ⑦
Visualforce Page Name		**AppExchange Package Name**
SLCALWC.CAL_RESTSession		CalendarAnything LWC

Please see the explanations of **CA_** custom object functions to determine what other permissions User profiles might require.

**CA_** object functions to help in determining sharing settings.

Object Name	Function	User Profile Permissions Needed
CA_Calendar	Main object used for storing Standard Calendars.	Read, Create (if creating calendars), Edit, Delete (if deleting calendars), View All.
CA_HoverFields	Stores fields that display on the "hover dialog"	Read, Create, Edit, Delete, View All.
CA_CreatingField	Stores fields used on the "Quick Create" popup when creating events from the CalendarAnything page	Read, Create, Edit, Delete, View All.
CA_CalendarToken	Stores calendar token	Read, Create, Edit, Delete, View All.
CA_Filters	Stores information about calendar filters	Read, Create, Edit, Delete, View All.
CA_Groups	Stores information about calendar groups	Read, Create (if creating Calendar Groups), Edit, Delete, View All.
CA_UserSettings	Stores user settings such as a list of visible calendars	Read, Create, Edit, Delete, View All.
CA_WebCalendar	Stores list of Web Calendars. Will not be used by clients	Read, Create, Edit, Delete, View All.

Another way to ensure the necessary access to CalendarAnything LWC is given, is to use a **Permission Set** (now included in CalendarAnything LWC).

Add a Permission Set
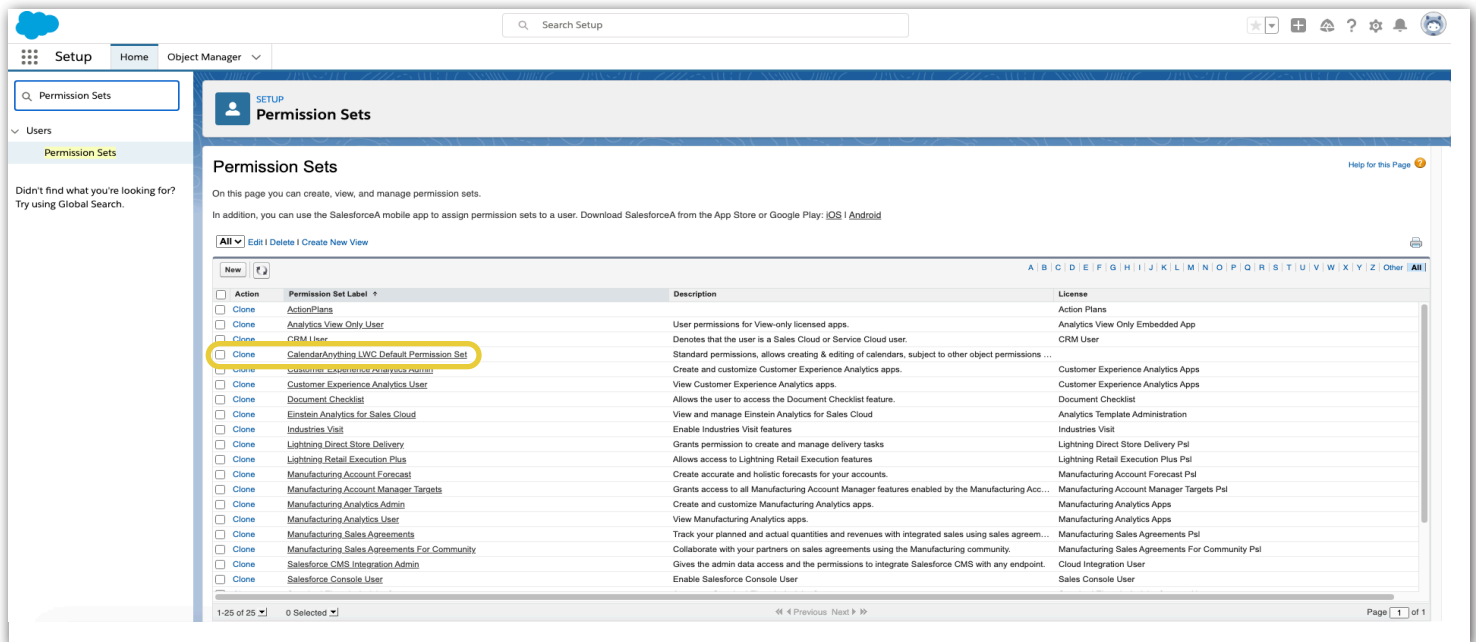
When added to the user record, this **Permission Set** allows **creating and editing of calendars**, subject to other object permissions and sharing rules.
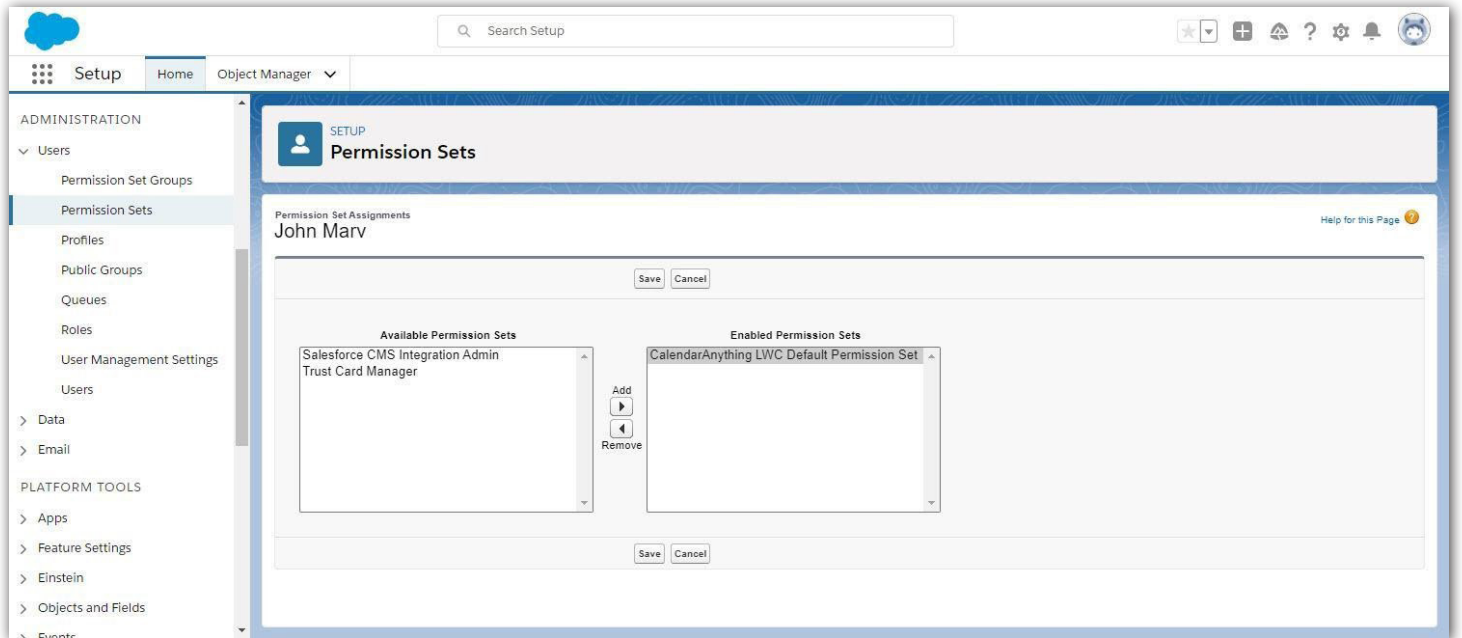
CalendarAnything LWC Default Permission Set

Publishing CalendarAnything LWC on Force.com

Create a Lightning App

The CalendarAnything LWC can be displayed on a force.com site.
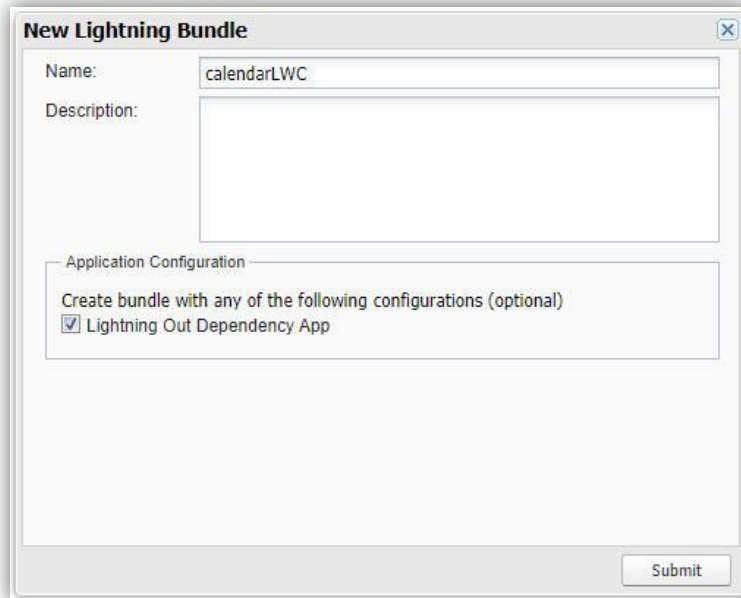
> ⚡ A System Administrator should help with the set up.

To create a lighting app, navigate to Salesforce and click on the **gear** icon in the top right corner. Then choose **Developer Console** from the dropdown.

In **Developer Console**, Click **File > New > Lightning Application**.

Name the application (Ex:calendarLWC) and make sure to check the 'Lighting Out Dependency App' checkbox.

That creates something that looks like:
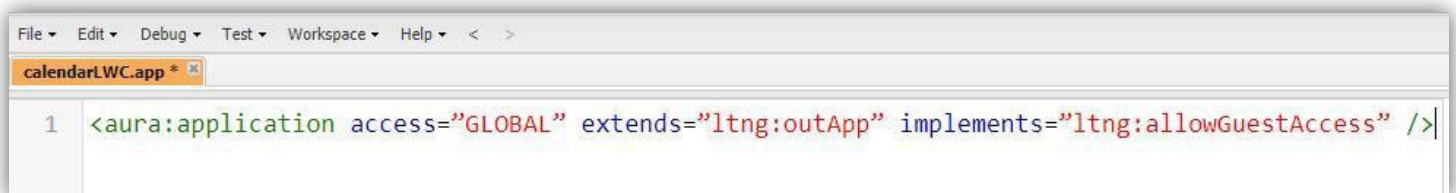

Remove everything and copy/paste the following:

```
<aura:application access="GLOBAL" extends="ltng:outApp" implements="ltng:allowGuestAccess" />
```

It should look like this:

Save by going to **File > Save**.

Create a VisualForce Page That Our Site Will Load

To create a VisualForce Page, navigate to **Setup > VisualForce Pages >** click **New**.
Fill in the fields in the Page Information section. Make sure to check the **Available for Lightning Experience, Lightning Communities, and the mobile app** checkbox.

On the next page is a code sample for the site. In this example, we include Calendar IDs, but replace them with the IDs of the calendars you need to display and enable on your site when you copy and paste. Copy from `<apex:page>` to `</apex:page>`.

```
<apex:page >
<apex:slds />
<apex:includeLightning />
<div id="calLightning" class="wrapper"></div>
<script>
    var calendarApi = null;
    // Create custom app and expose it to VisualForce
    $Lightning.use('c:calendarMobileApp', function () {
        // add some settings
        let userAdditionalSettings = {
            displayTimeZone: true,
            dayModeArea: '0_1',
            readonly: {
                move: false
            }
        };
        $Lightning.createComponent(
            'SLCALE:CALWC',
            {
                calendar: "a024T00000257LDQAY, a024T00000257LFQAY",
//These are just example IDs and should be replaced with your CalendarIDs
                enabled: "a024T00000257LDQAY, a024T00000257LFQAY",
//These are just example IDs, you should be replaced with your CalendarIDs
            view: 'Agenda', // The default start view mode, in this example we are defaulting
to Agenda.
                showModeSelector: true,
                userAdditionalSettings: JSON.stringify(userAdditionalSettings),
                useCAForm: true,
                useCADetail: true,
                showIcoCreate: false,
                showIcoCalendars: false,
                height: '600px',
                readonly: {
                    move: false
                },
                // executes after calendar is fully loaded
                fReady: function (oApi) {
calendarApi = oApi; // for calendar API method (set dynamic filters, create custom buttons,
etc);
                }
            },
            'calLightning', // id of div you want to put new Lightning element
            (cmp) => {
                // callback for create element (NB calendar load event is not equal to this
event).
                // if you want to execute something after calendar is loaded use fReady
                console.info('created');
            }
        );
    });
</script>
</apex:page>
```
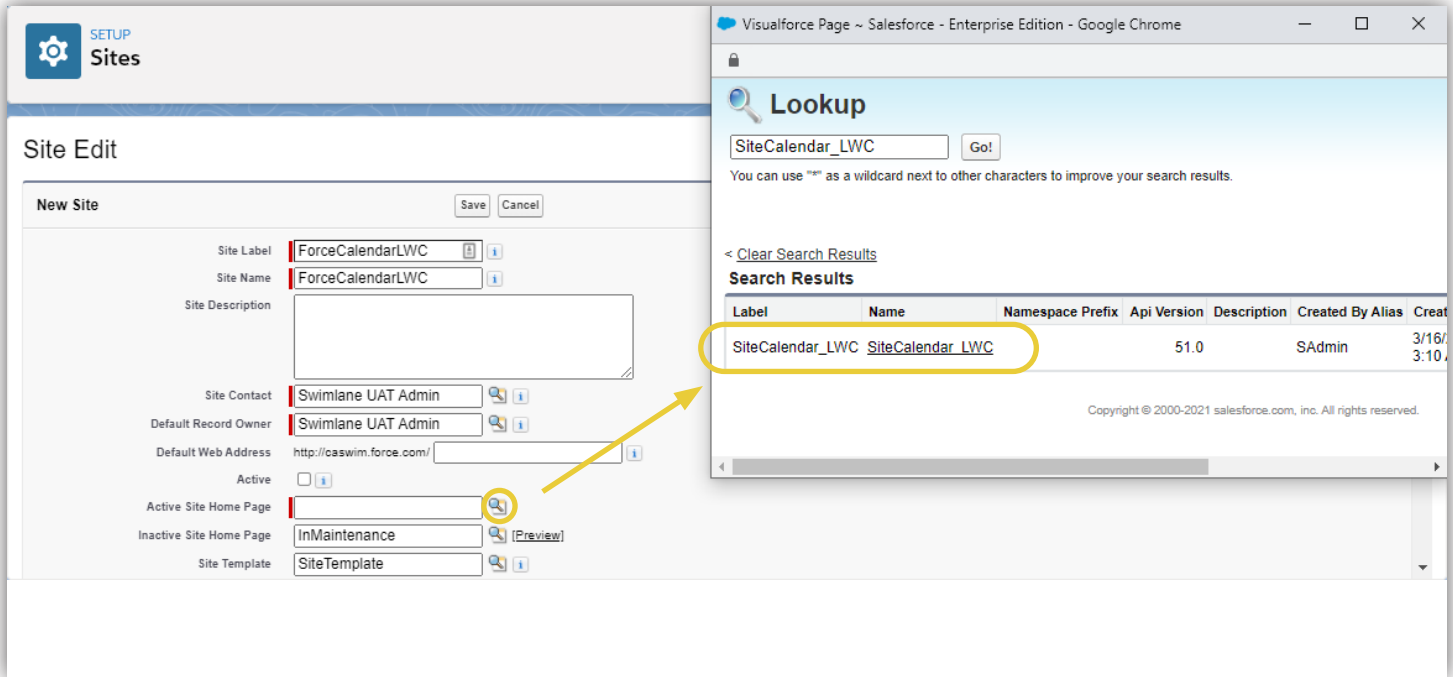
Create a Force.com Site Page

To make your CalendarAnything LWC public, you must create a force.com site page. This can be an existing page or a new one. To set up your Force.com site, refer to **SALESFORCE'S SETTING UP SALESFORCE SITES**.

Once on the site set up, replace the Active Site Home page with the VisualForce page we just created.
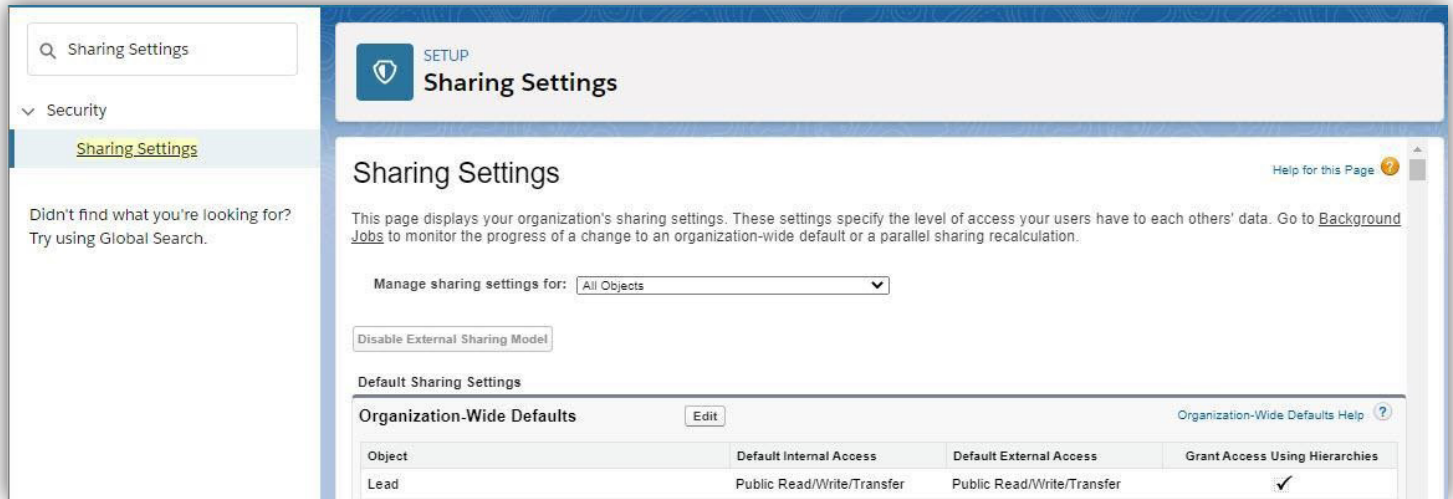

Save and your site is ready to be published.

If your site is brand new, then you will need to configure Sharing Rules as well (see next page).

Create Sharing Rules for Guest Site User on Your Force.com Site

First, go to the **gear** icon on the top left of your page and then click on **Setup**. Once there, click on **Sharing Settings**.

In Organization Wide Defaults, click on the **Edit** button.

Then, turn the **Secure Guest User Record Access** on.

Scroll all the way to the bottom to find this option.
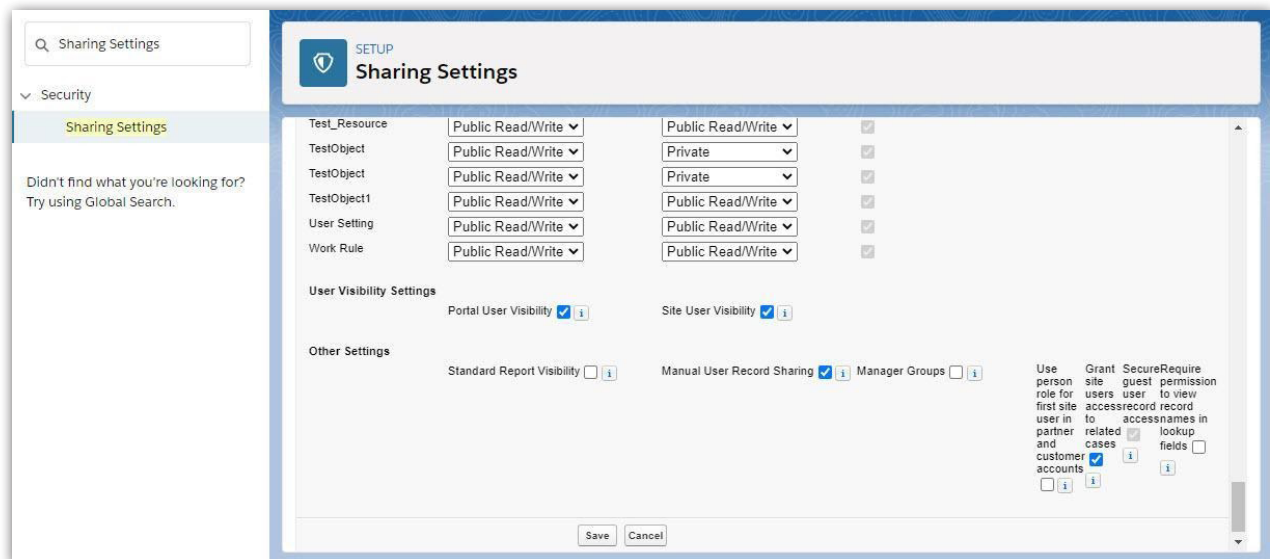
In order to support the visibility of the calendar and the data exposed by CalendarAnything LWC, your system admin must create sharing rules for all objects exposed on a Force.com site.

For example, to publish a force.com site with an event calendar see the next section, **Create a Sharing Rule For CA_Calendar Object**.

Create a Sharing Rule For CA_Calendar Object

Fill in the Sharing Rule label. The criteria defines what will be shared with your site user and depends on your use case. In this example, we will create a rule that gives the Guest Site user access to all calendars. Please make sure you are sharing with the right Guest Site user.
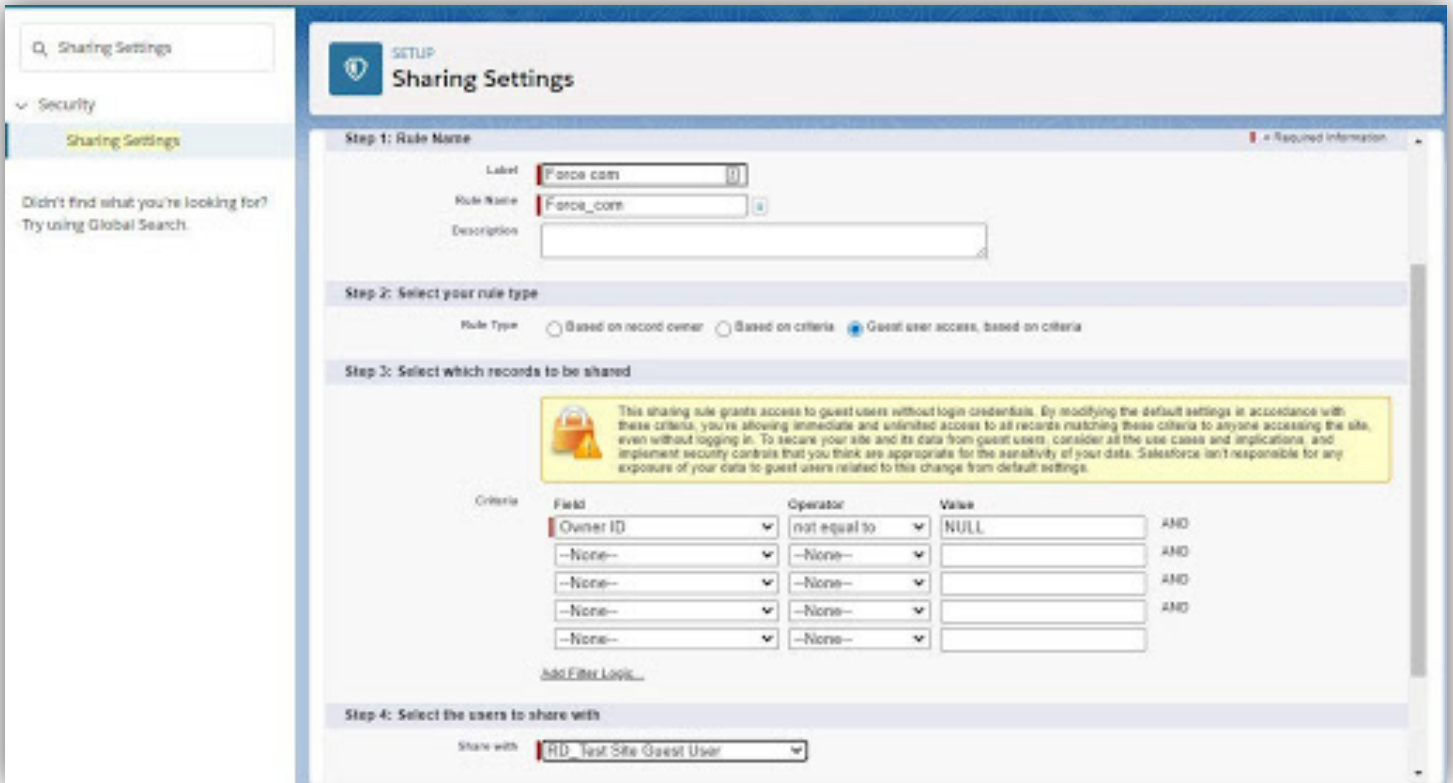
Once shared, the Guest Site user can access the calendars but not the records displayed on the calendar. You will have to replicate the process for each object that feeds into the calendar.

Create and Assign Custom Calendar Anything LWC Permission Set for a Guest User

Salesforce is removing the View All, Modify All, Edit, and Delete object permissions on all objects for guest users in new and existing orgs. These permissions are removed for custom objects and standard objects. Guest users can only have Read and Create object permissions. See **SF SPRING 2021 RELEASE NOTES** for more.

How does this change affect calendars published on Force.com sites?

Guest Site Users will receive an error message and will not be able to view the calendars. If the View All, Modify All, Edit, and Delete object permissions are part of a permission set or permission group and assigned to a guest user, then the guest user is removed from the permissions set or permission set group. Guest users also lose access to other permissions that are included in those permission sets and permission set groups.

CalendarAnything LWC Default Permission Set includes Edit and Delete permissions for CalendarAnything LWC custom objects.

This is what your organization's Salesforce admin will need to do before the Spring'21 Release is applied to your organization to avoid service interruption for Force.com calendars.
- o Clone CalendarAnything LWC Default Permission Set

- o Open newly created permission set

- o Go to Object Settings

- o Update object permissions for CalendarAnything LWC custom objects to Read access

CA_Calendar	Read
CA_CalendarByUsers	No Access
CA_CalendarTokens	Read
CA_CreatingFields	Read
CA_FiltersPlural	Read
CA_GroupsMembersPlural	Read
CA_GroupsPlural	Read
CA_HoverFieldsPlural	Read
CA_Sites	Read
CA_Test_Page	--
CA_tests	No Access
CA_UserSettings	Read
CA_WebCalendars	Read

- o After the new permission set is ready, update Permission Set Assignment for all Site Guest Users

In Setup, go to **Sites >** click on **Site Label > Public Access Settings > View Users** > click on user's **Full Name > Edit Assignments** (Permission Set Assignments).

CalendarAnything LWC properties

CalendarAnything LWC properties are optional.

Default View Mode
Agenda is the default view. Admin can change the default view to one of other options we offer, such as Day, Day with grouping or Week.

Calendars Available to Enable
Admin can list Calendar friendly names (comma separated) or Calendar IDs to limit the number of calendars available to users.

Calendars to Enable at Startup
Admin can list Calendar friendly names (comma separated) or Calendar Ids that will be loaded by default every time the user opens the page. It will override any selection made by the user from the list of available calendars. If left blank, no calendars will be loaded when the user opens the application for the first time. To enable calendars, tap on the navigation icon and select calendars from the list.

Calendars Available for New Records
Admin can limit the list of calendars available to users to create new records. Enter calendar ID or Name from 'Name and Color' of calendar setup.

Height
Set component height in px. For mobile recommended height value is set to 500.

Auto Hide Date-Picker property
When checked, will auto hide date picker calendar after user selected some date.

Record Dynamic Filter Field property
Used to filter records when a component is placed on the record page. For example:

- o   Add component on Account page

- o   Set Record Dynamic Filter Field = Id

- o   Add Dynamic filter on Calendar Edit > 'Filter Criteria': Related To = DYN
  Then only calendar events related to the current Account will be displayed with the component.

Display Mode Selector
If checked, will display View Mode selector.

Display Create New Record Icon
If checked, will display + icon (Create New).

Display Calendar Selector
If checked, will display Calendar Selector.

Display Refresh Icon
If checked, will display Refresh icon. Clicking the Refresh icon will display the latest records for all selected calendars.

Display Today Icon
If checked, will display Today icon.

Use CalendarAnything Create Form
If checked, will use a custom record create form based on Create and Edit Popup within calendar setup. Otherwise, will use standard new record layout for selected record type.

Enabled Calendars Only on Create
If checked, will only display the currently selected list of calendars to choose from when creating new records.

Additional User Settings
Admin can specify default user settings in JSON format. For example: {"swimlaneEnableListViews":false}

Max Reference Options
Admin can define the number of related lookup objects to load on start. For optimal performance, we recommended to set Max Reference Options to 10 or less.

Static Caching Time (minutes)
Cache time limit for object's metadata and user's permissions.

Session Caching Time (minutes)
Cache time limit for calendar's information.

Purchasing CalendarAnything LWC Licenses

CalendarAnything LWC costs can be found on our **APPEXCHANGE LISTING**.
Initial license purchases are at the annual rate for a one-year subscription which entitles you to all upgrades of the application released during the year. Any additional licenses prior to the subscription renewal date will be calculated on a prorated basis.

You are not required to purchase CalendarAnything Licenses for all Salesforce users in your organization--only for users needing Read, Write or Edit access to CalendarAnything.

For larger companies, Silverline CRM offers volume discounts and a site license option. We also offer a nonprofit discount. Please contact us for details.

You are able to purchase licenses directly from the CalendarAnything package installed in your organization via Stripe Checkout.

To purchase licenses via Stripe Checkout directly from the installed package, navigate to **Your Name>> Setup>> Installed Packages**. Click the Configure link and a Stripe Checkout window will appear. Follow the on-screen instructions to purchase your licenses. Once the purchase is complete, the CalendarAnything licenses will be active in your organization.

If you are unable to purchase licenses using this method, contact us at: **calendaranything@silverlinecrm.com**

Support

Since 2009, Silverline has helped clients deploy, manage, and enable continuous value with Salesforce's portfolio of products. Silverline also develops powerful solutions deployed on the Salesforce Platform, best practice industry accelerators, and robust third-party apps. CalendarAnything is the most customizable calendar app for Salesforce. It allows you to display any standard or custom Salesforce object on a calendar. Download the free trial today and find out why CalendarAnything is the highest rated calendar application on the **APPEXCHANGE**.