

Public Meeting Calendar Author Guide

Secretary of the State

Version 2.0

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Overview

This Training Guide provides step-by-step instructions for Content Authors to schedule and edit meetings using the Public Meeting Calendar (PMC). This State of Connecticut CT.gov Training Guide covers the following topics:

1. User Roles.
2. Logging in to the System.
3. Managing Author Information.
4. Public Calendar Navigation.
5. Scheduling an Event.
6. Maintaining and Editing an Event.
7. Administrative tools for Authors.

Definitions

Throughout this manual, the following terms are used.

Public Meeting Calendar (PMC): The application chosen by the State and Connecticut interactive to maintain the schedule of public meetings on the Secretary of the State's (SOTS) calendar.

Event Author: End users of PMC with the authority to create and schedule an **Event**.

Event: An individual meeting, including its time, venue, agenda and minutes as it appears within the system.

Venue: The building, agency, or location where an **Event** is held.

Contact: Point of contact for attendees and observers of the **Event** for questions and information. The Contact need not and may not be the **Event Author**.

Agency Name: Name of the parent agency under which the **Group** is organized, e.g. Department of Administrative Services.

Group Name: Name of the group responsible for creating and holding an event, be it a board, commission, committee, etc. Usually part of an **Agency**; e.g. State

Properties Review Board is a group within Department of Administrative Services.

Title: Subject of the **Event**.

Event Submitted Date: The date and time that an Event is posted to the SOTS calendar.

User Roles

PMC supports two user roles. These are **System Administrator** and **Event Author**. This guide will touch on the Administrator role briefly and concentrate on the tasks and procedures for the Author role.

System Administrator

The **System Administrator** handles the maintaining of Agencies and Users and has the ability to modify Events created by **Event Authors**. Their responsibilities are:

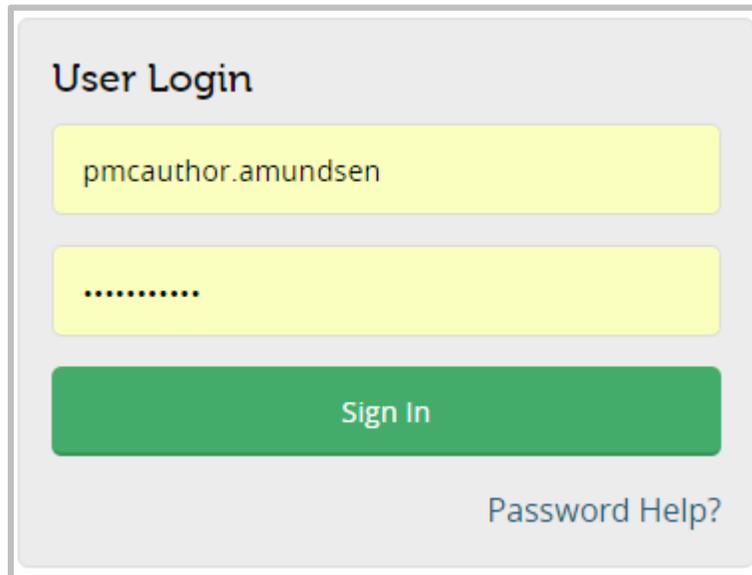
- **Manage Users** – Add new users or remove inactive ones, assign **Content Authors** to Agencies.
- **Manage Agencies** – Add new Agencies or Groups. Remove inactive Groups.
- **Manage Locations** – Add and remove venues for Events.

Event Author

The Event Author's primary function is creating and scheduling Events and assigning them to Venues. Their responsibilities are:

- **Create a New Event** – Create and schedule a meeting at a Venue.
- **Manage Events** – Edit information, cancel if necessary and attach minutes to the record of Events which have taken place.

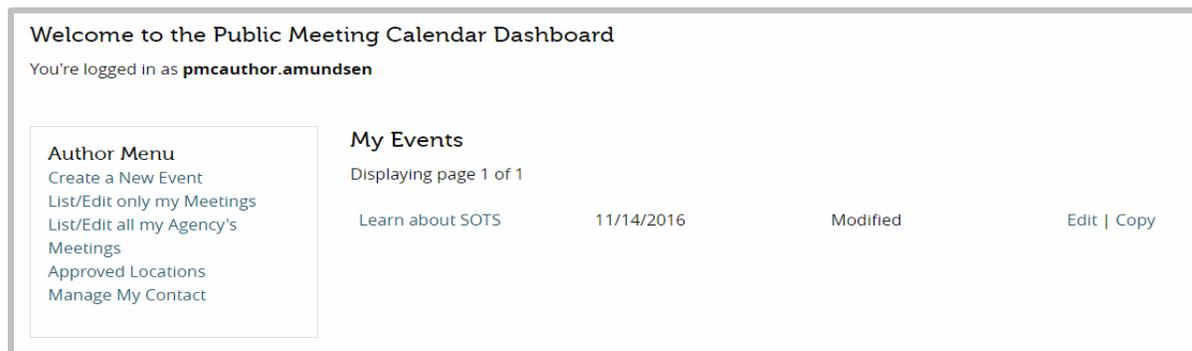
Logging in to PMC



The image shows a 'User Login' form. It has a title 'User Login' at the top. Below the title are two input fields: the first contains the username 'pmcauthor.amundsen' and the second contains a masked password '*****'. Below these fields is a green 'Sign In' button. At the bottom right of the form is a link for 'Password Help?'.

<http://egov.ct.gov/PMC/Account/Login>

1. In a web browser, navigate to <http://egov.ct.gov/PMC/Account/Login>
2. At the time of account activation, Event Authors will receive two emails from PMC administrators.
 - a. **Connecticut Public Meeting Calendar Account Notification** which contains the username.
 - b. **Connecticut Public Meeting Calendar Account Password Notification** which contains the password.
3. Enter the credentials found in those emails in the fields available and select **Sign In**.

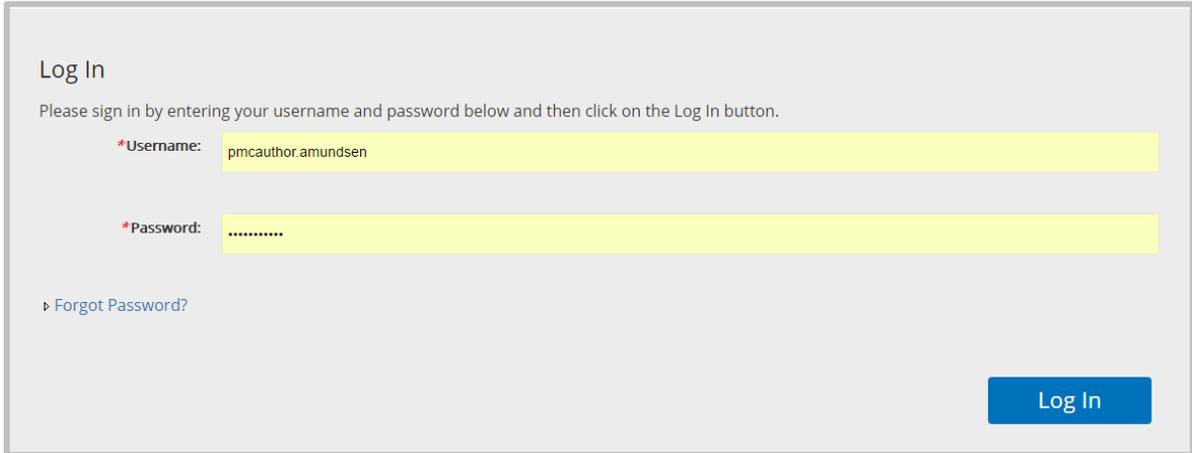


The image shows a screenshot of the 'Public Meeting Calendar Dashboard'. At the top, it says 'Welcome to the Public Meeting Calendar Dashboard' and 'You're logged in as pmcauthor.amundsen'. On the left is an 'Author Menu' with links: 'Create a New Event', 'List/Edit only my Meetings', 'List/Edit all my Agency's Meetings', 'Approved Locations', and 'Manage My Contact'. On the right is a 'My Events' section showing 'Displaying page 1 of 1' and a table with one event: 'Learn about SOTS' on '11/14/2016', with 'Modified' and 'Edit | Copy' links.

4. Once logged in, an **Event Author** will see the **PMC Dashboard**, which displays events created by that author and the **Author Menu**.

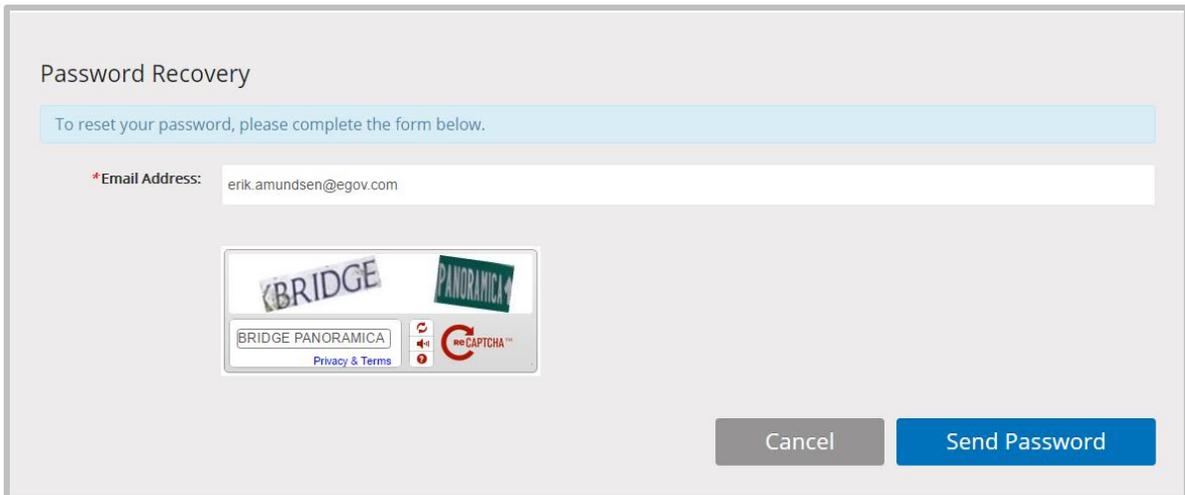
Forgotten Password or Username

1. Select the **Password Help?** link from the home page
2. Select the **Forgot Password?** link at the bottom of the second login window.



The screenshot shows a 'Log In' form. At the top, it says 'Log In' and 'Please sign in by entering your username and password below and then click on the Log In button.' There are two input fields: '*Username:' with the text 'pmcauthor.amundsen' and '*Password:' with masked characters '.....'. Below the password field is a link '› Forgot Password?'. At the bottom right is a blue 'Log In' button.

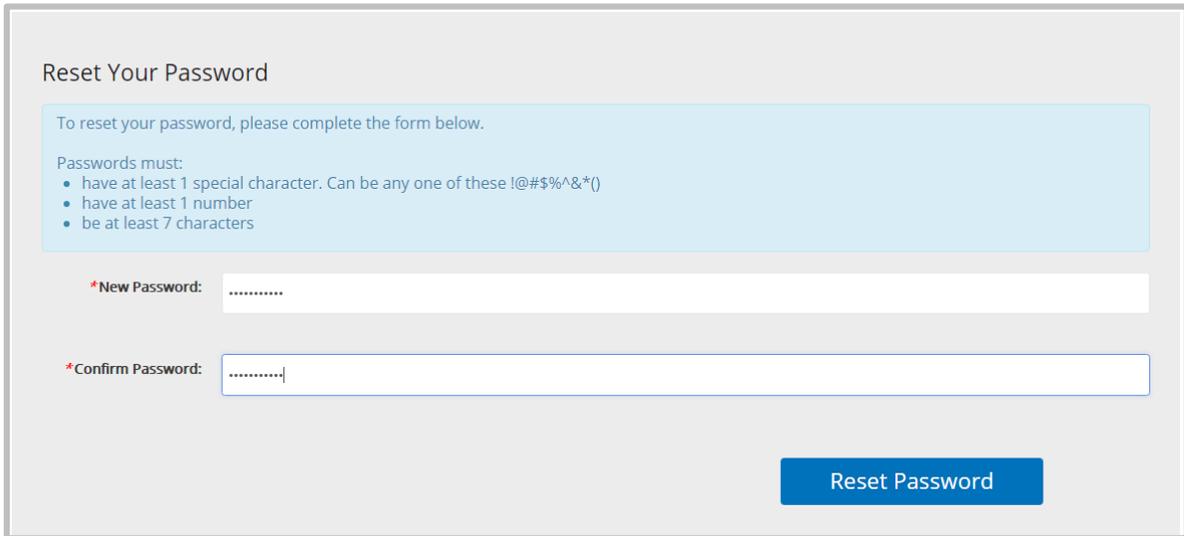
3. Enter the email address and fill in the CAPTCHA field. Select **Send Password**.



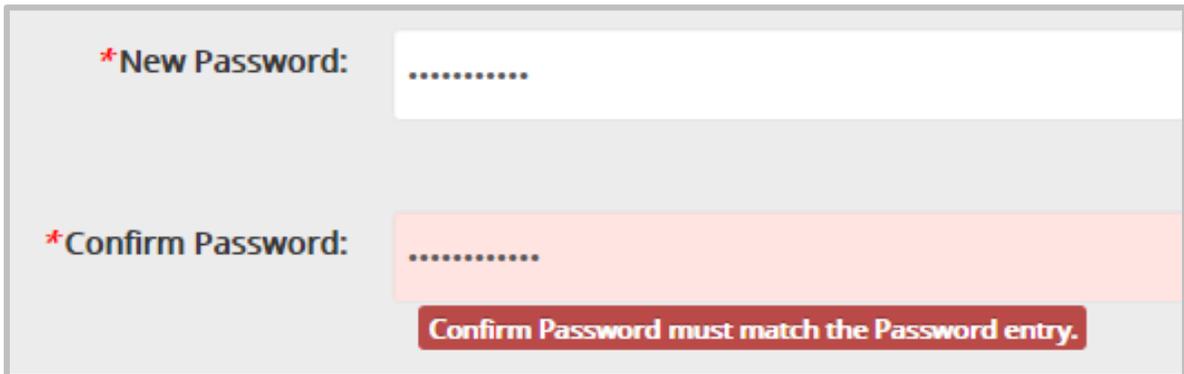
The screenshot shows a 'Password Recovery' form. It starts with the text 'To reset your password, please complete the form below.' There is an input field for '*Email Address:' containing 'erik.amundsen@egov.com'. Below this is a CAPTCHA image with the text 'BRIDGE PANORAMICA' and a 'reCAPTCHA' logo. At the bottom right are two buttons: a grey 'Cancel' button and a blue 'Send Password' button.

4. The system will generate a new password and send a message to the email address provided in a message entitled **Password Recovery**. Select the link in that email.

5. Enter and confirm a new password within the fields provided. Select **Reset Password**.



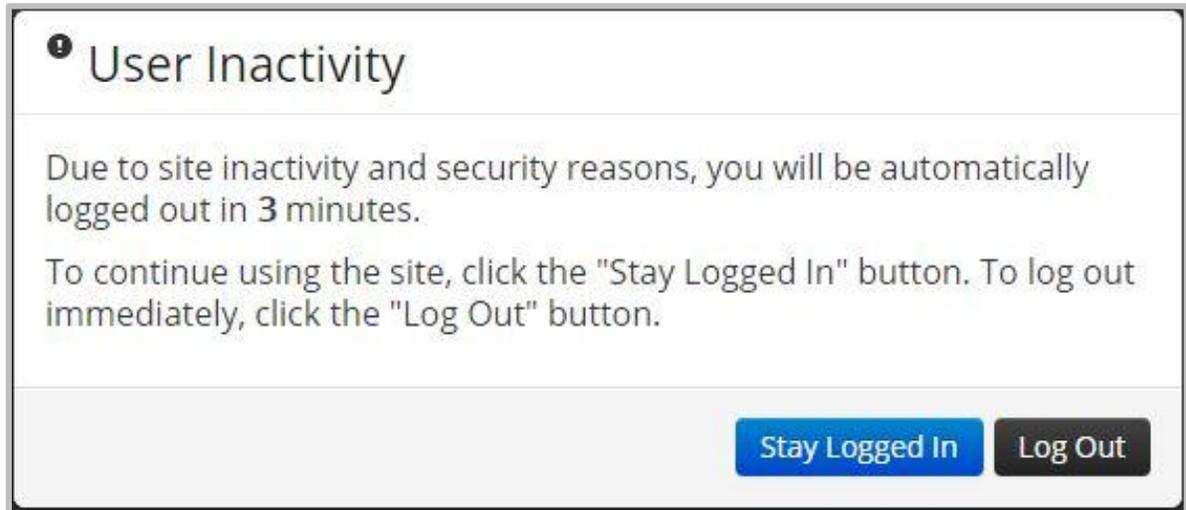
6. If the passwords do not match, the system will warn of the discrepancy.



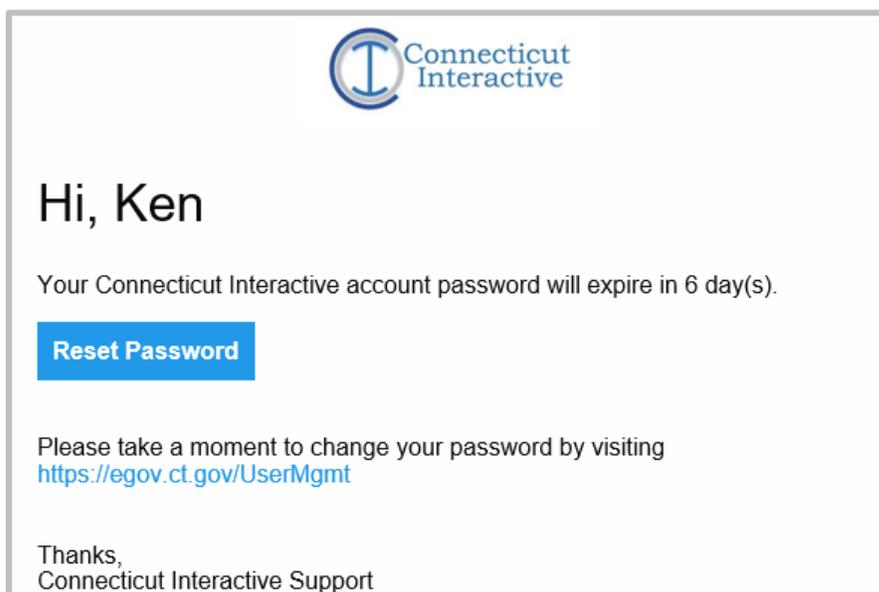
7. Login using the newly reset password.
8. The system will generate another email confirming that the password has been reset.
9. Content Author usernames are formatted as firstname.lastname for each Content Author. If this does not appear to be the correct username, contact a PMC Administrator.

Session and Account Inactivity

1. PMC logs out after a certain amount of inactivity in a session. Before it logs out, it will display the following warning dialog:



2. Select **Stay Logged In** to remain active in the session or **Log Out** to log out.
3. If an Event Author does not log in for 90 days, the account will lock. During the last 14 days, the system will generate a daily email reminder to log in and keep the account current.
4. If an Event Author does not log in during this time, they may follow the link provided in any of the reminder emails to reset their account.
5. If the Event Author has a locked account and does not have any of the email reminders, they must contact a PMC Administrator to reset their account.



Set Up Contact Information

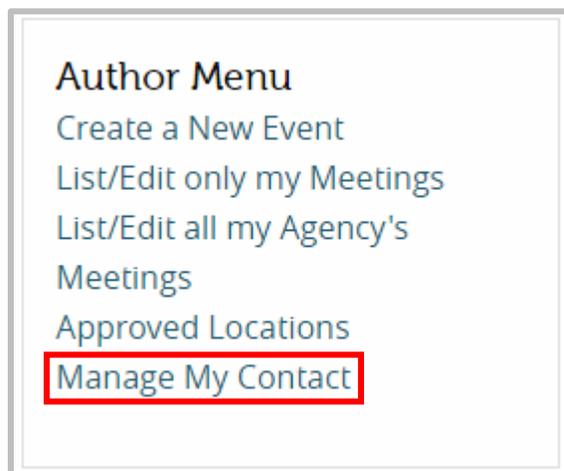


Manage My Contact Info Create New

Erik Amundsen Nickname: Author Erik	1 Constitution Plaza, 8th Floor Hartford, CT 06105	<input type="checkbox"/> Default	Edit Delete
---	--	---	---------------

<https://egov.ct.gov/PMC/Authoring/ContactInfo>

1. **Event Authors** must enter their **Contact Information** before they can create events.
2. In the **Author Menu**, select **Manage My Contact**.



Author Menu

- Create a New Event
- List/Edit only my Meetings
- List/Edit all my Agency's Meetings
- Approved Locations
- Manage My Contact**

3. On the **Manage My Contact Info** page, select **Edit**.



Manage My Contact Info Create New

Erik Amundsen Nickname: Author Erik	1 Constitution Plaza, 8th Floor Hartford, CT 06105	<input type="checkbox"/> Default	Edit Delete
---	--	---	----------------------

4. Enter Contact Info in the fields provided.

Edit Contact Info

Contact Name

Address Line 1 *

Address Line 2

City *

State

Zip *

Phone

Email

5. Fields marked with red asterisks (*) are mandatory fields. PMC will not permit an Event Author to save without populating these fields.

Contact Name

The Contact Name field is required.

Address Line 1 *

Address Line 1 is required

6. PMC supports multiple Contact Information entries for a single Event Author if needed. Select **Is Default** for the contact information that is desired to display by default.
7. Provide a **Nickname** for the Contact Information, if desired.

Is Default?

Nickname

Author Erik

Provide a nickname for this contact information



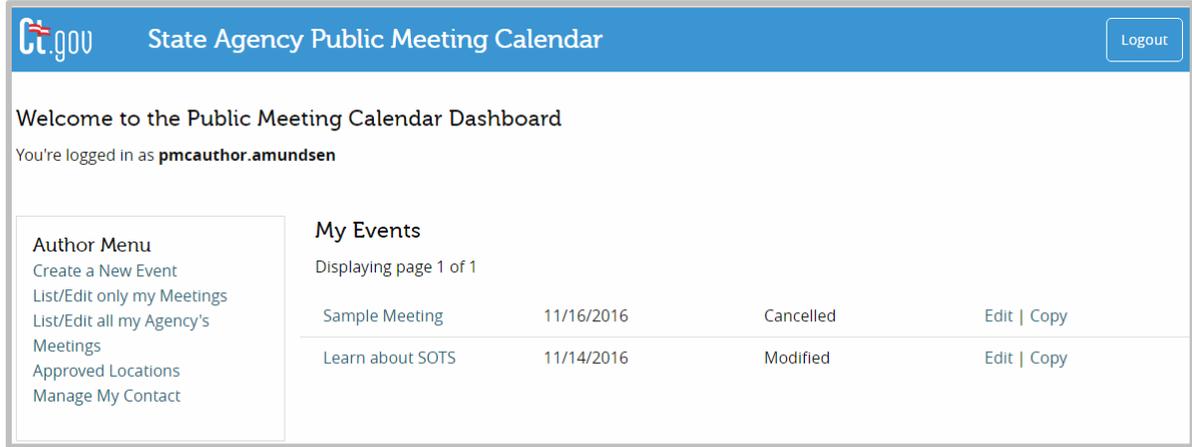
8. Select **Save** to commit changes.

9. If additional **Contact Info** entries are required, select **Create New** and follow the above procedure to create an additional **Contact Info** entry.

Manage My Contact Info **Create New**

Erik Amundsen Nickname: Author Erik	1 Constitution Plaza, 8th Floor Hartford, CT 06105	<input type="checkbox"/> Default	Edit Delete
---	--	---	---

Navigating the Calendar



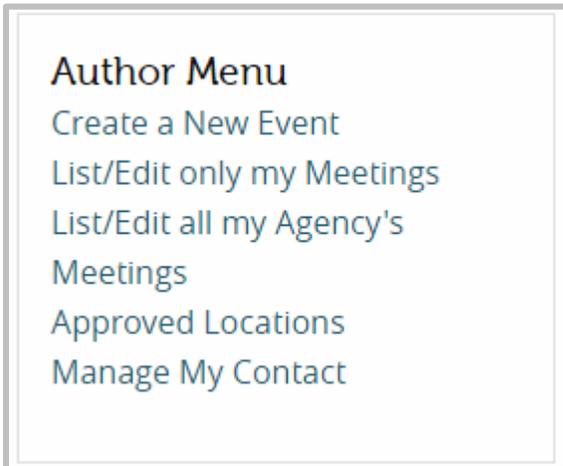
The screenshot shows the 'State Agency Public Meeting Calendar' dashboard. At the top, there is a blue header with the 'ct.gov' logo, the title 'State Agency Public Meeting Calendar', and a 'Logout' button. Below the header, a welcome message reads 'Welcome to the Public Meeting Calendar Dashboard' and 'You're logged in as pmcauthor.amundsen'. The main content area is divided into two sections. On the left is the 'Author Menu' with the following options: 'Create a New Event', 'List/Edit only my Meetings', 'List/Edit all my Agency's Meetings', 'Approved Locations', and 'Manage My Contact'. On the right is the 'My Events' section, which displays 'page 1 of 1' and a table of events.

Event Title	Date	Status	Actions
Sample Meeting	11/16/2016	Cancelled	Edit Copy
Learn about SOTS	11/14/2016	Modified	Edit Copy

The Author Menu

<https://egov.ct.gov/PMC/Authoring/Event>

1. The Author Menu contains necessary authoring and editing tools.
 - a. **Create a New Event** allows **Event Authors** to schedule an **Event** to a **Venue**, define purpose, and upload an agenda.
 - b. **List/Edit only my Meetings** displays a list of an individual **Event Author's** scheduled **Events**. This displays by default on the dashboard upon first login.
 - c. **List/Edit all my Agency's Meetings** displays a list of **Events by Agency** to which the **Event Author** is attached, allowing the author to edit the **Events** they created and view the **Events** created by other authors in their agency.
 - d. **Approved Locations** displays a list of venues for reference.
 - e. **Manage My Contact** allows an **Event Author** to modify their **Contact Information** or add a new **Contact Information** Entry.



A list of the Author Menu options, enclosed in a light gray box. The items are: Author Menu, Create a New Event, List/Edit only my Meetings, List/Edit all my Agency's Meetings, Approved Locations, and Manage My Contact.

Calendar View



The screenshot shows the 'State Agency Public Meeting Calendar' interface. At the top, there is a navigation bar with 'Calendar View', 'List By Agency', and 'Search By Keyword' buttons. Below this, the current week is identified as 'Week of November 14'. A navigation bar includes 'Previous' and 'Next' buttons, along with 'DAY', 'WEEK', and 'MONTH' view options. The main content is a table with columns for each day of the week (Monday 14 to Friday 18). Each cell contains a list of meeting events, such as 'Governor's Council on Climate Change Meeting' on Monday and 'Diabetes Advisory Council' on Tuesday. 'More...' links are provided for several events.

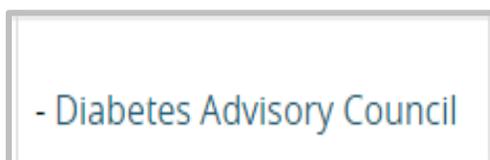
<https://egov.ct.gov/PMC/>

1. Select the **State Agency Public Meeting Calendar** in the banner on any page in PMC to enter the calendar view.
 - a. **Best Practice: Right-Select the link and select Open Link in New Tab option to open the calendar view in a different tab.** Once in calendar view, navigation buttons and menus that direct to the authoring functionality of PMC do not display.
 - b. Calendar **Week** view for the current week displays by default.
2. Select **Previous** or **Next** to view past or future weeks.



This screenshot shows a close-up of the calendar navigation bar. It includes the text 'Week of November 14', view options for 'DAY', 'WEEK', and 'MONTH', and navigation buttons for '< Previous' and 'Next >'. Below these are tabs for each day of the week: 'Monday 14', 'Tuesday 15', 'Wednesday 16', 'Thursday 17', and 'Friday 18'.

3. Select an individual **Event** title to display the full view of that Event.

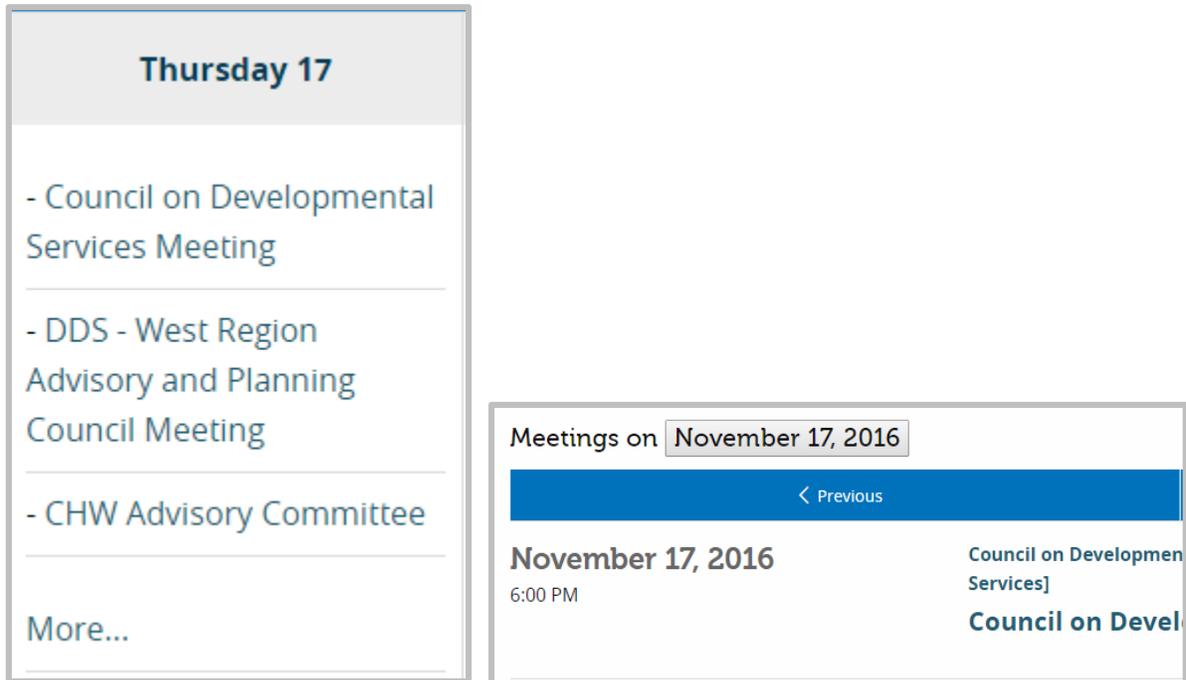


- Diabetes Advisory Council



Department of Public Health
Diabetes Advisory Council

- Select the **More...** Option on any day to open the Day view.



Thursday 17

- Council on Developmental Services Meeting
- DDS - West Region Advisory and Planning Council Meeting
- CHW Advisory Committee

More...

Meetings on **November 17, 2016**

< Previous

November 17, 2016 6:00 PM

Council on Developmental Services]
Council on Devel

- Select the **Day** view to display the events scheduled for the current day.



Meetings on **November 17, 2016** DAY WEEK MONTH

< Previous Next >

November 17, 2016 6:00 PM

Council on Developmental Services [Council on Developmental Services]
Council on Developmental Services Meeting

⌵

- Select Previous or next to view past or future dates.



- Select the Expand Option at the far right of each Event Entry to display the full Event information.



November 15, 2016
2:00 PM to 3:30 PM

Department of Public Health
Diabetes Advisory Council

- Select the Month view to see all of the events scheduled for the current month, displaying from last to first.



Meetings in November 2016

DAY WEEK MONTH

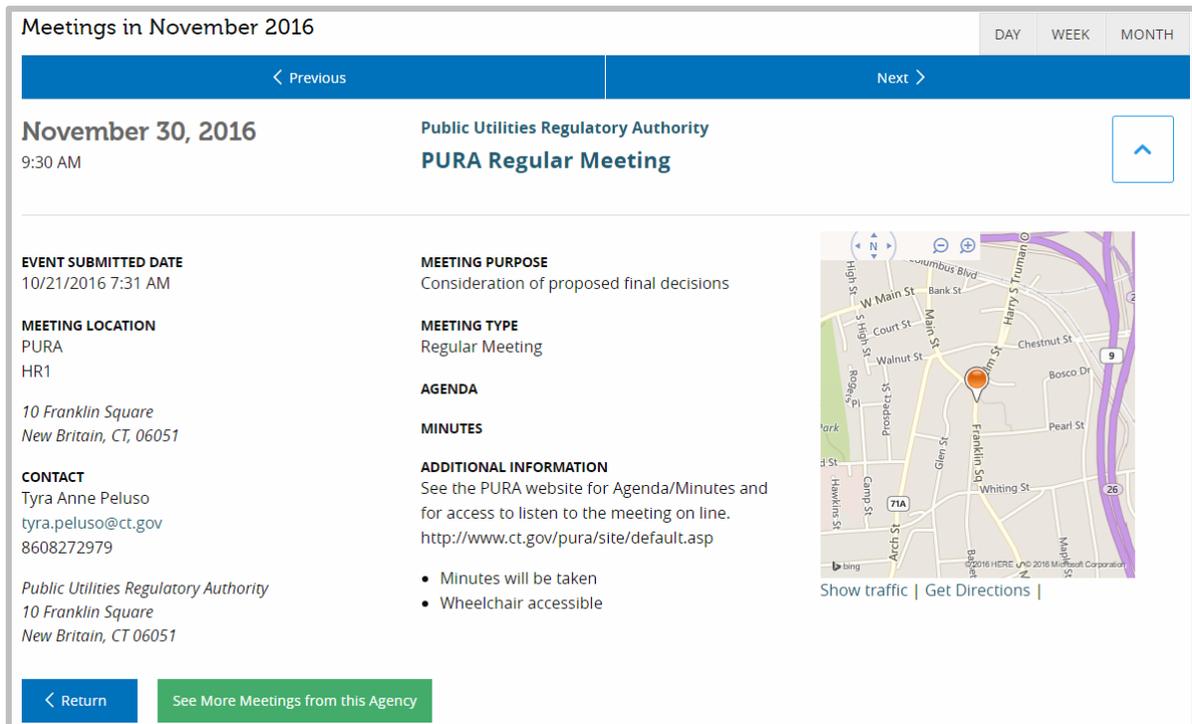
< Previous Next >

November 30, 2016 9:30 AM	Public Utilities Regulatory Authority PURA Regular Meeting	▼
November 29, 2016 10:30 AM	Connecticut Siting Council Connecticut Siting Council Petition No. 1266 Field Inspection/Doosan/Waterbury	▼
November 28, 2016 1:00 PM to 4:00 PM	State Education Resource Center SERC Board of Directors Regular Meeting (Cancelled)	▼

- Select Previous or next to view past or future dates.



- Select the Expand Option at the far right of each Event Entry to display the full Event information.



Meetings in November 2016

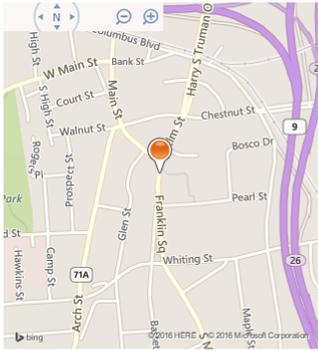
DAY WEEK MONTH

< Previous Next >

November 30, 2016
9:30 AM

Public Utilities Regulatory Authority
PURA Regular Meeting

▲

<p>EVENT SUBMITTED DATE 10/21/2016 7:31 AM</p> <p>MEETING LOCATION PURA HR1 10 Franklin Square New Britain, CT, 06051</p> <p>CONTACT Tyra Anne Peluso tyra.peluso@ct.gov 8608272979 Public Utilities Regulatory Authority 10 Franklin Square New Britain, CT 06051</p>	<p>MEETING PURPOSE Consideration of proposed final decisions</p> <p>MEETING TYPE Regular Meeting</p> <p>AGENDA</p> <p>MINUTES</p> <p>ADDITIONAL INFORMATION See the PURA website for Agenda/Minutes and for access to listen to the meeting on line. http://www.ct.gov/pura/site/default.asp</p> <ul style="list-style-type: none"> Minutes will be taken Wheelchair accessible 	 <p>Show traffic Get Directions </p>
---	--	--

< Return See More Meetings from this Agency

- The map allows visitors to **Show traffic** or **Get Direction**.

See More Meetings from this Agency

12. Select the **See More Meetings** from this **Agency** in any **Event** entry to display a list of **Events** filtered by **Agency**.



Filter by Group [Agency]: Public Utilities Regulatory Authority

January 25, 2017 9:30 AM to 10:30 AM	Public Utilities Regulatory Authority PURA Regular Meeting	
January 18, 2017 9:30 AM to 10:30 AM	Public Utilities Regulatory Authority PURA Regular Meeting	
January 11, 2017 9:30 AM to 10:30 AM	Public Utilities Regulatory Authority PURA Regular Meeting	

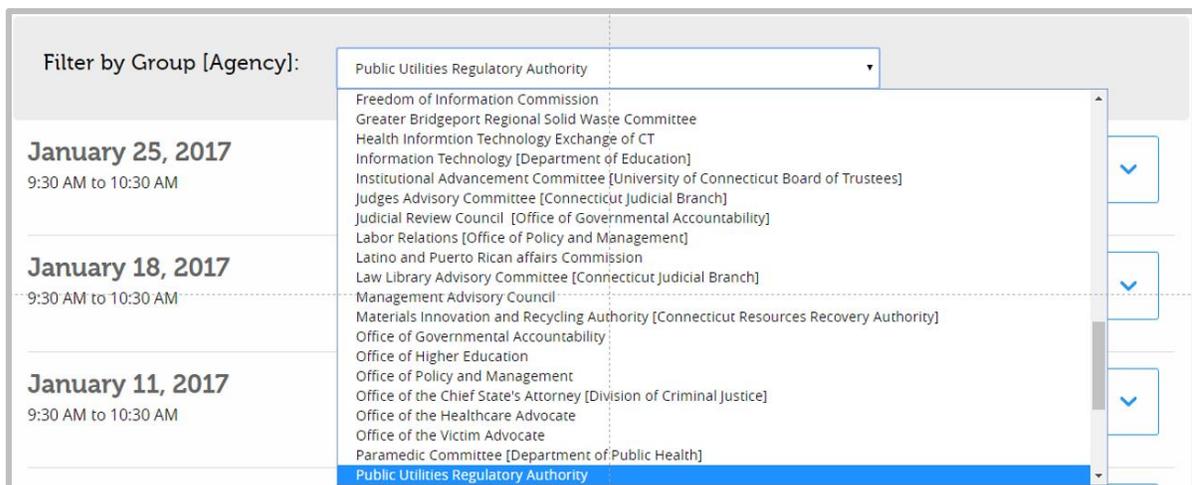
13. On any page of the calendar, it is possible to return to the default calendar view by selecting the **Calendar View** option at the top right.



Calendar View | List By Agency | Search By Keyword

14. Select the List By Agency option to display a filtered search for Events by Agency.

15. Use the dropdown menu to choose the Agency under which to search.



Filter by Group [Agency]: Public Utilities Regulatory Authority

- Freedom of Information Commission
- Greater Bridgeport Regional Solid Waste Committee
- Health Information Technology Exchange of CT
- Information Technology [Department of Education]
- Institutional Advancement Committee [University of Connecticut Board of Trustees]
- Judges Advisory Committee [Connecticut Judicial Branch]
- Judicial Review Council [Office of Governmental Accountability]
- Labor Relations [Office of Policy and Management]
- Latino and Puerto Rican affairs Commission
- Law Library Advisory Committee [Connecticut Judicial Branch]
- Management Advisory Council
- Materials Innovation and Recycling Authority [Connecticut Resources Recovery Authority]
- Office of Governmental Accountability
- Office of Higher Education
- Office of Policy and Management
- Office of the Chief State's Attorney [Division of Criminal Justice]
- Office of the Healthcare Advocate
- Office of the Victim Advocate
- Paramedic Committee [Department of Public Health]
- Public Utilities Regulatory Authority**

- Select the Search by Keyword option to display a keyword-search field.

🔍 Search

November 17, 2016 1:30 PM to 3:30 PM	Department of Labor State Apprenticeship Council	▼
February 16, 2017 1:30 PM to 3:30 PM	Department of Labor State Apprenticeship Council Meeting	▼
May 18, 2017 1:30 PM to 3:30 PM	Department of Labor State Apprenticeship Council	▼

The Author Menu

<https://egov.ct.gov/PMC/Authoring/Event>

- My Events** displays the **Events** an author has created, their date and status.

My Events

Displaying page 1 of 1

Sample Meeting	11/16/2016	Cancelled	Edit Copy
Learn about SOTS	11/14/2016	Modified	Edit Copy

- Select the title of an **Event** to display its full information.

November 16, 2016
4:30 PM to 10:29 PM

EVENT SUBMITTED DATE
11/16/2016 12:46 PM

MEETING LOCATION
DEEP - Russell Room
Kurt Russell Room

*79 Elm Street
Hartford, CT, 06106*

CONTACT
Erik Amundsen

*1 Constitution Plaza, 8th Floor
Hartford, CT 06105*

01 Training Agency [Training Agency]
Sample Meeting (Cancelled)

MEETING PURPOSE
Learn to use the PMC application to schedule Events on the calendar

MEETING TYPE
Regular Meeting

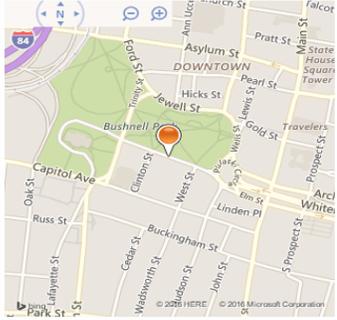
AGENDA

- content_manager_workaround.pptx 11/16/2016 12:46 PM

MINUTES

ADDITIONAL INFORMATION

- Minutes will be taken
- Wheelchair accessible
- Deaf interpreter available
- Video conference available



[Show traffic](#) | [Get Directions](#)

3. [Select **Edit** to edit the **Event**'s information.](#)

Edit Event

Choose Group [Agency] Calendar *

01 Training Agency [Training Agency] ▼

4. [Select **Copy** to create a new instance of an existing **Event** to schedule.](#)

Create Public Event

Choose Group [Agency] Calendar *

01 Training Agency [Training Agency] ▼

Choose Contact *

Contact

Erik Amundsen

*1 Constitution Plaza, 8th Floor
Hartford, CT 06105*

CTI Offices
Room 815

*1 Constitution Plaza
8th Floor
Hartford, CT 06105*

Comments: Sign in at security desk.

[Overwrite Location](#)

Create a New Event

Create Public Event

Choose Group [Agency] Calendar *

01 Training Agency [Training Agency] ▼

Search Locations *

Type the name of the venue to use an existing location

Create New Location

Contact

Erik Amundsen

*1 Constitution Plaza, 8th Floor
Hartford, CT 06105*

<https://egov.ct.gov/PMC/Authoring/Event/Create>

1. In the **Author Menu**, select **Create a New Event**.

Author Menu

- Create a New Event
- List/Edit only my Meetings
- List/Edit all my Agency's Meetings
- Approved Locations
- Manage My Contact

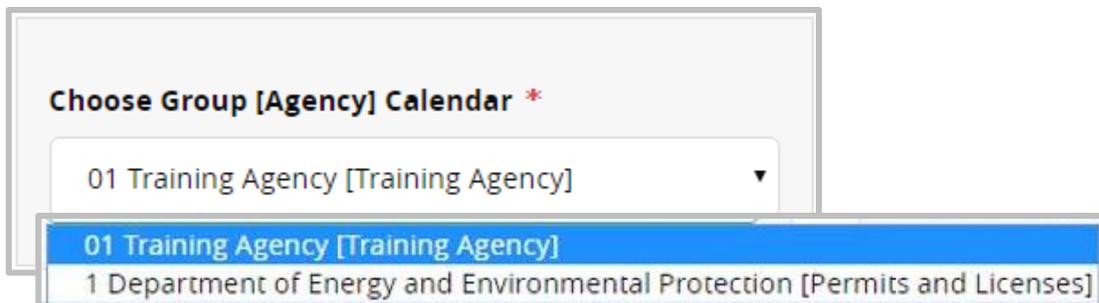
2. Choose the **Group [Agency] Calendar**.



Choose Group [Agency] Calendar *

01 Training Agency [Training Agency] ▼

3. If the **Event Author** is associated with more than one **Group** or **Agency**, these will be available as a dropdown list. Select the appropriate **Group** or **Agency**.



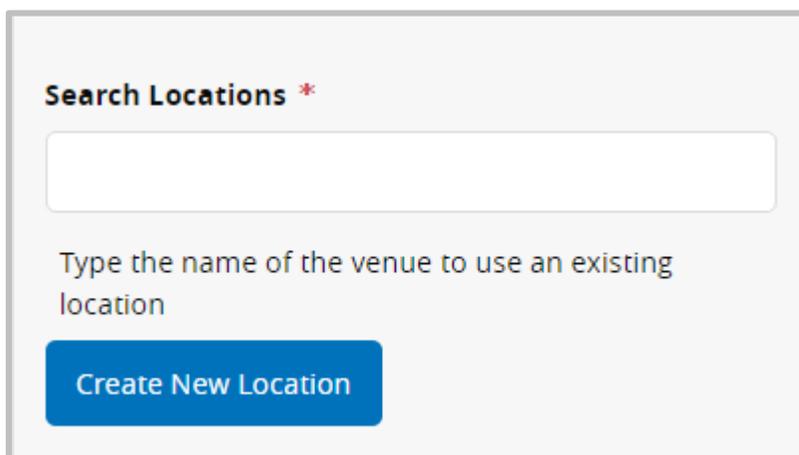
Choose Group [Agency] Calendar *

01 Training Agency [Training Agency] ▼

01 Training Agency [Training Agency]

1 Department of Energy and Environmental Protection [Permits and Licenses]

4. Each **Event Author** should be assigned to one or more **Group** or **Agency** by their **Content Administrator**. If this is not the case, PMC will not allow them to create a new **Event** and instruct the **Event Author** to contact their **Content Administrator**.
5. Enter the **Venue** name under Search Locations.

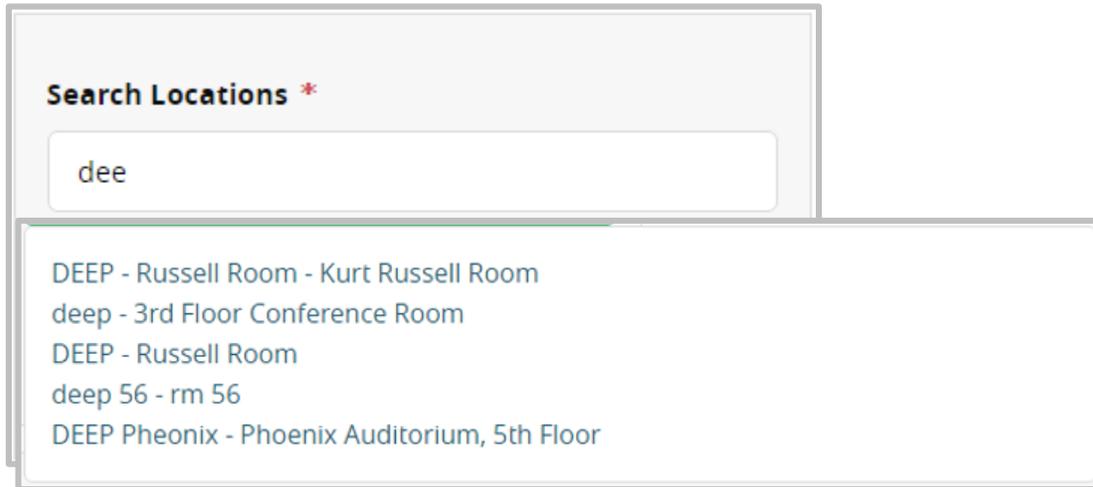


Search Locations *

Type the name of the venue to use an existing location

Create New Location

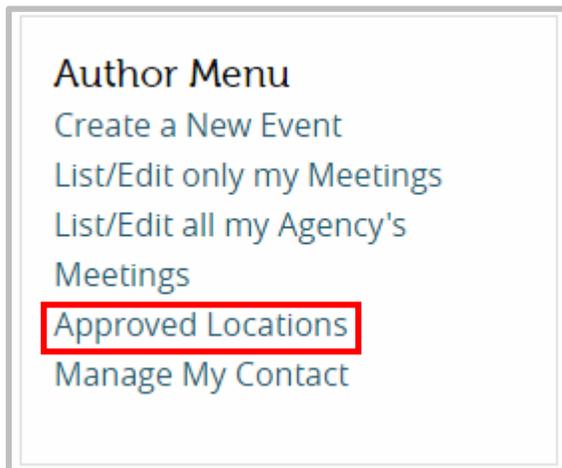
6. PMC will populate **Venue** options in a dropdown for this field following the third keystroke. If the desired **Venue** is available among the options, select it.



The screenshot shows a search interface with the title "Search Locations *". Below the title is a text input field containing the text "dee". A dropdown menu is open below the input field, displaying a list of search results:

- DEEP - Russell Room - Kurt Russell Room
- deep - 3rd Floor Conference Room
- DEEP - Russell Room
- deep 56 - rm 56
- DEEP Pheonix - Phoenix Auditorium, 5th Floor

7. If a desired **Venue** does not appear in the search, select **Approved Locations** in the **Author Menu**.



The screenshot shows the "Author Menu" with the following options:

- Create a New Event
- List/Edit only my Meetings
- List/Edit all my Agency's Meetings
- Approved Locations** (highlighted with a red box)
- Manage My Contact

- Browse the **Index of Approved Locations** for the name of the **Venue** and return to the **Create a New Event** page via the **Author Menu**.

Index of Approved Locations	
Venue Name test 1 Room 11 Handicapped Accessible <input checked="" type="checkbox"/>	<i>One Constitution Plaza</i> <i>Hartford, CT 06103</i> 8609566302 Comments comments test 1
Venue Name test 2 Room 12 Handicapped Accessible <input checked="" type="checkbox"/>	<i>100 Constitution Plaza</i> <i>Hartford, CT 06103</i> 8609566303 Comments comments test 2

Create New Location

- If a new venue must be created, choose the **Create New Location** option.
- Enter the Venue Name and location information for the Venue as completely as possible. Red asterisks mark mandatory fields.

Search saved locations

Venue Name *

Room

Comments

Handicapped Accessible

Address Line 1 *

Address Line 2

City *

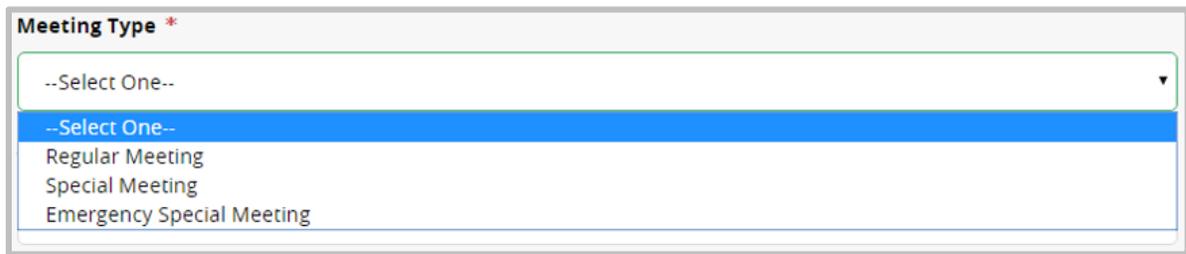
State

Connecticut ▼

Zip *

- Do not select the Handicap Accessible option unless the Venue is clearly marked at the physical location with the Handicap Accessible sign.

12. Under **Meeting Type**, select the type of meeting this Event will be.



The screenshot shows a dropdown menu titled "Meeting Type *". The menu is open, showing the following options: "--Select One--", "Regular Meeting", "Special Meeting", and "Emergency Special Meeting". The "Regular Meeting" option is currently selected and highlighted in blue.

- Select **Regular Meeting** for an **Event** that is part of or intended to be a part of a series of **Events** which are regularly scheduled and recurring.
- Select **Special Meeting** for an **Event** which is scheduled as a one-time-only meeting with sufficient advance notice.
- Select **Emergency Special Meeting** for a one-time-only **Event** scheduled in response to an urgent issue requiring immediate attention.

13. Enter a **Title** for the **Event**.



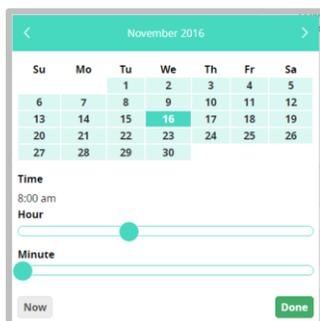
The screenshot shows a text input field titled "Title *". The field contains the text "PMC Training".

14. Enter the Date for the **Event**.



The screenshot shows an empty text input field titled "Event Date *". A small calendar icon is visible in the bottom left corner of the field.

- Selecting the field or the Calendar Icon below **Event Date** brings up a calendar that **Event Authors** should use to schedule date and time for the meeting start.
 - Use the sliders to set **Event** start time in hours and minutes.
 - Select **Now** for the current time.
 - Select **Done** when finished.



The screenshot shows a mobile interface for scheduling an event. At the top, it displays "November 2016" with navigation arrows. Below is a calendar grid with the date "16" highlighted in green. Underneath the calendar, there is a "Time" section showing "8:00 am". Below this, there are two sliders: "Hour" and "Minute". At the bottom, there are two buttons: "Now" and "Done".

16. Use the **End Date** to set the end time for the **Event**. This field is identical in function to the **Event Time** field above.
 - a. Do not enter an end to the **Event** before the beginning; the system will not save the **Event**.

Create Public Event
The end date must fall after the start date

17. Enter a Purpose to briefly describe what the purpose and agenda are for the Event. Select the bottom-right of the field and drag to expand it, if necessary.

Purpose *

Learn to use the PMC application to schedule Events on the calendar

18. Select **Choose File** under the **Agenda File** heading to upload an Agenda to attach to the **Event**, if desired.
 - a. Navigate the file explorer window to the target file and select **Open** to attach it to the Event.
 - b. Once chosen, the filename will appear next to the **Choose File** option.

Agenda File

Choose File content_man...around.pptx

19. Select the appropriate check boxes if the following are true about the Event.
 - a. Meeting minutes will be taken.
 - b. An Interpreter for Deaf/Hard of Hearing persons will be present.
 - c. Video Conferencing will be involved.

Minutes Being Taken

Deaf Interpreter

Video Conferencing

- Enter any additional information (e.g. special parking instructions) as required. Select the bottom-right of the field and drag to expand it, if necessary.

Additional Info

- Select Create to save the **Event** to the calendar. A dialog box will confirm successful creation of the **Event**.
- PMC will also generate an email to inform the **Event Author** of successful **Event** creation.
- The Event will also display on the **Event Author's** Dashboard.

<p>Author Menu</p> <ul style="list-style-type: none"> Create a New Event List/Edit only my Meetings List/Edit all my Agency's Meetings Approved Locations Manage My Contact 	<p>My Events</p> <p>Displaying page 1 of 1</p> <p>Sample Meeting Created Successfully!</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <tr> <td style="padding: 2px 5px;">Sample Meeting</td> <td style="padding: 2px 5px;">11/16/2016</td> <td style="padding: 2px 5px;">Active</td> <td style="padding: 2px 5px; text-align: right;">Edit Copy</td> </tr> <tr> <td style="padding: 2px 5px;">Learn about SOTS</td> <td style="padding: 2px 5px;">11/14/2016</td> <td style="padding: 2px 5px;">Modified</td> <td style="padding: 2px 5px; text-align: right;">Edit Copy</td> </tr> </table>	Sample Meeting	11/16/2016	Active	Edit Copy	Learn about SOTS	11/14/2016	Modified	Edit Copy
Sample Meeting	11/16/2016	Active	Edit Copy						
Learn about SOTS	11/14/2016	Modified	Edit Copy						

- Select the title of the **Event** to view the **Event** information.

November 16, 2016

4:30 PM to 10:29 PM

EVENT SUBMITTED DATE
11/16/2016 12:46 PM

MEETING LOCATION
DEEP - Russell Room
Kurt Russell Room

79 Elm Street
Hartford, CT, 06106

CONTACT
Erik Amundsen

1 Constitution Plaza, 8th Floor
Hartford, CT 06105

01 Training Agency [Training Agency]

Sample Meeting

MEETING PURPOSE
Learn to use the PMC application to schedule Events on the calendar

MEETING TYPE
Regular Meeting

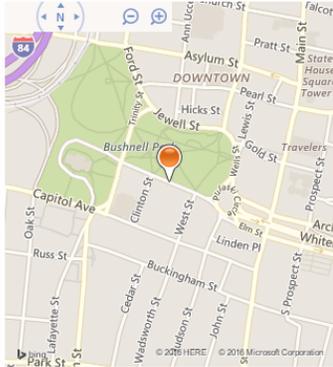
AGENDA

- content_manager_workaround.pptx 11/16/2016 12:46 PM

MINUTES

ADDITIONAL INFORMATION

- Wheelchair accessible



Show traffic | Get Directions |

[Return](#)

[See More Meetings from this Agency](#)

CHANGE DATE **CHANGE HISTORY**

Edit Event Information

November 16, 2016
4:30 PM to 10:29 PM

EVENT SUBMITTED DATE
11/16/2016 12:46 PM

MEETING LOCATION
DEEP - Russell Room
Kurt Russell Room

79 Elm Street
Hartford, CT, 06106

CONTACT
Erik Amundsen

1 Constitution Plaza, 8th Floor
Hartford, CT 06105

[Return](#)
[See More Meetings from this Agency](#)

01 Training Agency [Training Agency]
Sample Meeting

MEETING PURPOSE
Learn to use the PMC application to schedule Events on the calendar

MEETING TYPE
Regular Meeting

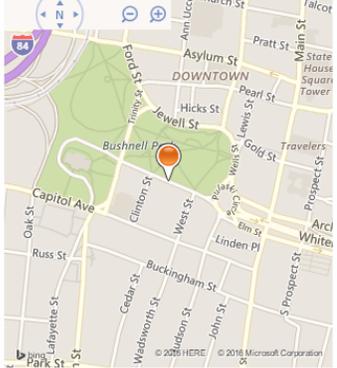
AGENDA

- content_manager_workaround.pptx 11/16/2016 12:46 PM

MINUTES

ADDITIONAL INFORMATION

- Wheelchair accessible



Show traffic | Get Directions |

CHANGE DATE

CHANGE HISTORY

<https://egov.ct.gov/PMC/Authoring/Event/>

1. **Event Authors** are able to edit and change information on **Events** after creation, and both before and after the **Event** itself.
2. From the Dashboard find the **Event** to be edited and select Edit. Use **List/Edit only my Meetings** in the Author Menu if necessary to see the list of **Events**.

Author Menu

- Create a New Event
- List/Edit only my Meetings
- List/Edit all my Agency's Meetings
- Approved Locations
- Manage My Contact

My Events

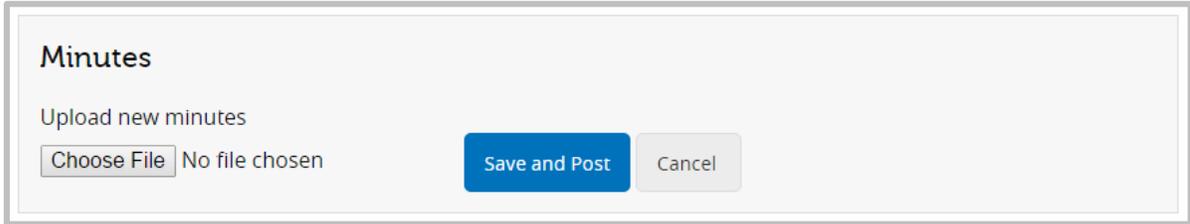
Displaying page 1 of 1

Sample Meeting Created Successfully!

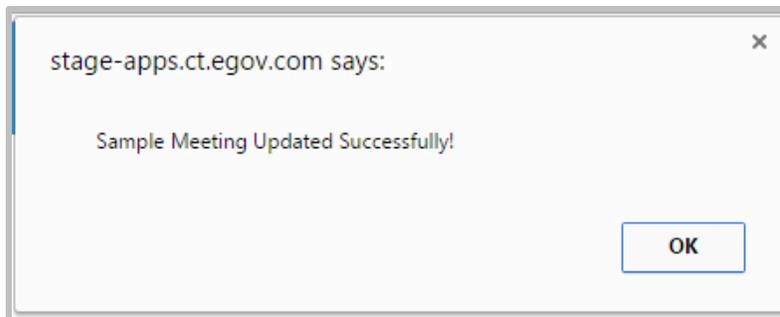
Sample Meeting	11/16/2016	Active	Edit Copy
Learn about SOTS	11/14/2016	Modified	Edit Copy

3. Event Authors are able to edit and change any information entered in the [Create a New Event](#) procedure:
 - a. **Group or Agency.**
 - b. **Venue.**
 - c. **Meeting Type.**
 - d. **Title.**
 - e. **Start and End Date/Time.**

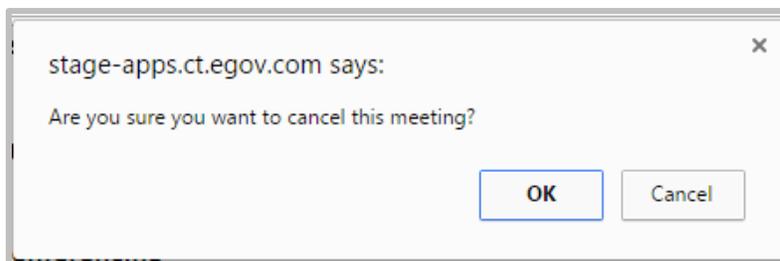
- f. **Purpose.**
 - g. **Special Considerations.**
 - h. **Additional Info.**
 - i. **Uploaded Agenda.**
4. In addition, Event Authors are able to upload Minutes to an Event that has already taken place. To do this, scroll down to the Minutes section of the Edit page and select Choose File to upload the minutes from a local computer.



5. Navigate the file explorer window to the target file and select **Open** to attach it to the Event.
6. Once chosen, the filename will appear next to the **Save and Post** option.
-  7. Select the Update option to commit the changes.
8. A dialog box will display to confirm successful update.



-  9. Select the **Cancel this Meeting** option at the bottom of the page to cancel the meeting.
10. Select **OK** in the dialog box that appears to confirm cancellation.



11. The Event will display on the **Event Author's Dashboard**.

<p>Author Menu Create a New Event List/Edit only my Meetings List/Edit all my Agency's Meetings Approved Locations Manage My Contact</p>	<p>My Events Displaying page 1 of 1 Sample Meeting Created Successfully!</p> <table border="1"> <tr> <td>Sample Meeting</td> <td>11/16/2016</td> <td>Active</td> <td>Edit Copy</td> </tr> <tr> <td>Learn about SOTS</td> <td>11/14/2016</td> <td>Modified</td> <td>Edit Copy</td> </tr> </table>	Sample Meeting	11/16/2016	Active	Edit Copy	Learn about SOTS	11/14/2016	Modified	Edit Copy
Sample Meeting	11/16/2016	Active	Edit Copy						
Learn about SOTS	11/14/2016	Modified	Edit Copy						

12. Select the title of the **Event** to view the **Event** information.

November 16, 2016
4:30 PM to 10:29 PM

EVENT SUBMITTED DATE
11/16/2016 12:46 PM

MEETING LOCATION
DEEP - Russell Room
Kurt Russell Room

79 Elm Street
Hartford, CT, 06106

CONTACT
Erik Amundsen

1 Constitution Plaza, 8th Floor
Hartford, CT 06105

01 Training Agency [Training Agency]
Sample Meeting (Modified)

MEETING PURPOSE
Learn to use the PMC application to schedule Events on the calendar

MEETING TYPE
Regular Meeting

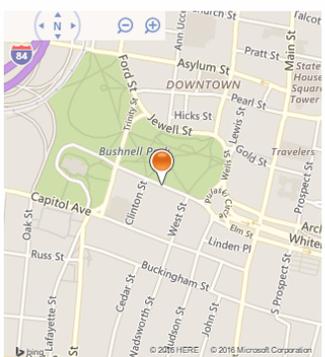
AGENDA

- content_manager_workaround.pptx 11/16/2016 12:46 PM

MINUTES

ADDITIONAL INFORMATION

- Minutes will be taken
- Wheelchair accessible
- Deaf interpreter available
- Video conference available



Show traffic | Get Directions |

< Return

See More Meetings from this Agency

CHANGE DATE	CHANGE HISTORY
11/16/2016 4:41 PM	Sample Meeting

13. The edits committed to the **Event** will display under **Change Date** and **Change History** below.

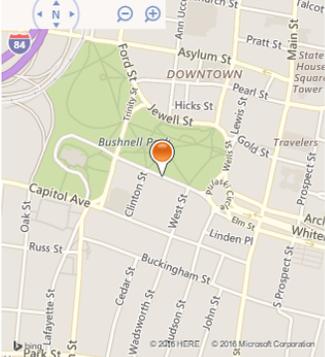
14. Select the Show More option in the bottom right to expand the **Change History**.

CHANGE DATE	CHANGE HISTORY
11/16/2016 4:41 PM	Sample Meeting

15. The **Change History** lists all the things that were changed during the edits.

CHANGE DATE	CHANGE HISTORY
11/16/2016 4:41 PM	Sample Meeting 
EVENT DATE 11/16/2016 4:30 PM	GROUP [AGENCY] 01 Training Agency [Training Agency]
EVENT SUBMITTED DATE 11/16/2016 12:46 PM	MEETING PURPOSE Learn to use the PMC application to schedule Events on the calendar
MEETING LOCATION DEEP - Russell Room Kurt Russell Room 79 Elm Street Hartford, CT, 06106	MEETING TYPE Regular Meeting ADDITIONAL INFORMATION <ul style="list-style-type: none"> • Wheelchair accessible
CONTACT Erik Amundsen 1 Constitution Plaza, 8th Floor Hartford, CT 06105	

16. If the **Event** was cancelled, that fact will be reflected in the **Event Information**.

<p>November 16, 2016 4:30 PM to 10:29 PM</p> <p>EVENT SUBMITTED DATE 11/16/2016 12:46 PM</p> <p>MEETING LOCATION DEEP - Russell Room Kurt Russell Room 79 Elm Street Hartford, CT, 06106</p> <p>CONTACT Erik Amundsen 1 Constitution Plaza, 8th Floor Hartford, CT 06105</p>	<p>01 Training Agency [Training Agency] Sample Meeting (Cancelled)</p> <p>MEETING PURPOSE Learn to use the PMC application to schedule Events on the calendar</p> <p>MEETING TYPE Regular Meeting</p> <p>AGENDA <ul style="list-style-type: none"> • content_manager_workaround.pptx  11/16/2016 12:46 PM</p> <p>MINUTES</p> <p>ADDITIONAL INFORMATION</p> <ul style="list-style-type: none"> • Minutes will be taken • Wheelchair accessible • Deaf interpreter available • Video conference available 	 <p>Show traffic Get Directions </p>
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System Administrator Overview

This Training Guide provides step-by-step instructions for **System Administrators** to manage **Groups** and **Agencies, Venues, Events,** and **Event Author** information using the Public Meeting Calendar (PMC). **System Administrators** are expected to be familiar with **Event Author** tasks and functions as outlined in the preceding section. This State of Connecticut CT.gov Training Guide covers the following topics:

1. Managing User Accounts.
2. Managing User Account Information.
3. The Agency Dashboard.
4. Setting up an Agency.
5. Editing an Agency.
6. Administrator Editing Functions.

Managing User Accounts

Request a new System Administrator Account

1. Requests for new **System Administrator** Accounts must be routed to the primary SOTS **System Administrator**.
2. Contact Taffy.Womack@ct.gov
 - a. Subject Line: **SOTS Calendar Admin User**.
 - b. Body: Include name of prospective **System Administrator**, Phone Number and email address.
3. SOTS Administrator will contact Connecticut Interactive to set up the account.
 - a. Subject Line: **SOTS Calendar Admin User**.
 - b. Body: Include name of prospective **System Administrator**, Phone Number and email address.
4. Connecticut Interactive will generate a user id and password and contact the new **System Administrator**.
5. Connecticut Interactive will provide 2 monthly trainings on the PMC system, each month. The **System Administrator** is responsible for attending one or more of these sessions as needed.

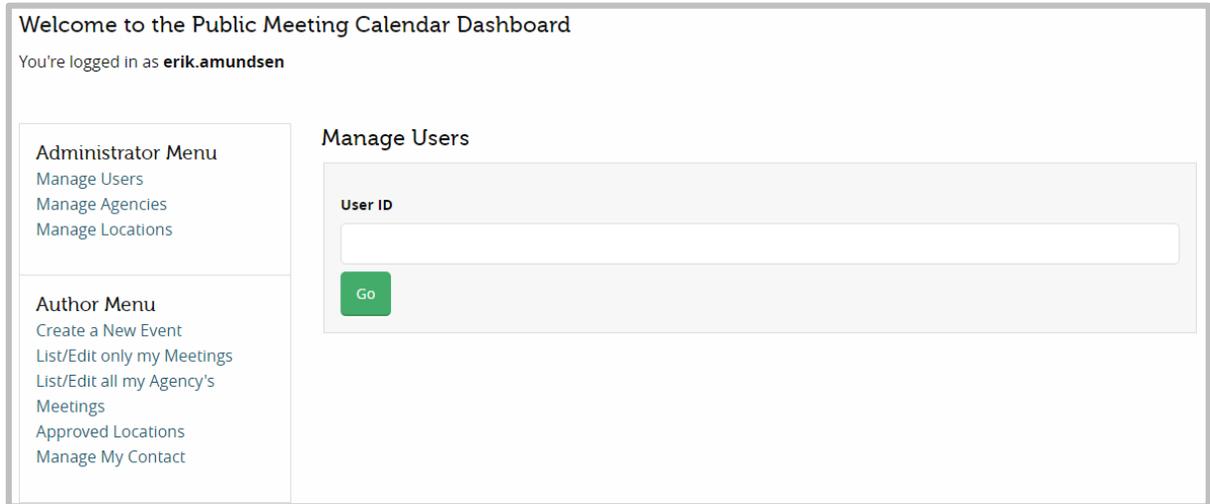
Request a new Event Author Account

1. Requests for new **Event Author** accounts must be routed to the primary SOTS **System Administrator**.
2. Contact Taffy.Womack@ct.gov
 - a. Subject Line: **SOTS Calendar Author User**.
 - b. Body: Include name of prospective **Event Author**, Phone Number and email address.
3. SOTS Administrator will contact Connecticut Interactive to set up the account.
 - a. Subject Line: **SOTS Calendar Author User**.
 - b. Body: Include name of prospective **Event Author**, Phone Number and email address.
 - c. Names of **Agencies** or **Groups** for which the **Event Author** will be creating events. If a needed **Agency** or **Group** is not yet extant in the system, the requesting **System Administrator** will need to create it.
4. Connecticut Interactive will generate a user id and password and contact the new **Event Author**.
5. Connecticut Interactive will provide 2 monthly trainings on the PMC system, each month. The **Event Author** is responsible for attending one or more of these sessions as needed.

Remove a PMC User Account

1. Requests to remove a user account must be routed to the primary SOTS **System Administrator**.
2. Contact Taffy.Womack@ct.gov
 - a. Subject Line: **SOTS Calendar [USER ID] Removal**.
 - b. Body: Include name of user account to be removed.
3. SOTS Administrator will contact Connecticut Interactive to remove the account.
 - a. Subject Line: **SOTS Calendar [USER ID] Removal**.
 - b. Body: Include name of user account to be removed.
4. Connecticut Interactive will remove the user account from the system and contact the SOTS **System Administrator** with confirmation of the removal.
5. User Accounts expire after 90 days of inactivity.

Managing User Account Information



Welcome to the Public Meeting Calendar Dashboard
You're logged in as **erik.amundsen**

Administrator Menu
Manage Users
Manage Agencies
Manage Locations

Author Menu
Create a New Event
List/Edit only my Meetings
List/Edit all my Agency's Meetings
Approved Locations
Manage My Contact

Manage Users

User ID

Go

<https://egov.ct.gov/PMC/Admin/Users>

1. For **System Administrators**, the **Manage Users** screen is default upon login.
2. Enter a User ID in the marked field to manage that user's account and permissions. Select **Go**.



Manage Users

User ID

Go

3. Make certain the user's name is complete and correct, or the system will not recognize the user name.



Manage Users
User not found.

User ID

Go

- PMC displays the user's information and the **Groups** or **Agencies** to which they belong.

User Details

User
pmcauthor.amundsen
Email

User has access to the following Groups [Agency]

1 Department of Energy and Environmental Protection [Permits and Licenses]	✖ Revoke Access
01 Training Agency [Training Agency]	✖ Revoke Access

Group [Agency]

Type the name of the agency, then you may "Add User to Agency"

Add User to Agency
Cancel

[Manage Another User](#)

- PMC displays the **Agencies** to which an **Event Author** is attached and allows a **System Administrator** to **Revoke Access** to **Agencies** to which an author should no longer have access.

1 Department of Energy and Environmental Protection [Permits and Licenses]	✖ Revoke Access
01 Training Agency [Training Agency]	✖ Revoke Access

- Enter the name of an **Agency** to attach an **Event Author** to it and give them access to create **Events** for that group.

Group [Agency]

1 Department of Energy and Environmental Protection [Permits and Licenses]	
Agency test 2 wf - 20160210 modified [Department Agency test 2]	

- PMC will populate **Agency** options in a dropdown for this field following the third keystroke. If the desired **Agency** is available among the options, select it.

1 Department of Energy and Environmental Protection [Permits and Licenses]
 Agency test 2 wf - 20160210 modified [Department Agency test 2]
 Architectural Licensing Board [Department of Consumer Protection]
 Commission of Pharmacy [Department of Consumer Protection]
 Connecticut Insurance Department
 Department of Agriculture
 Department of Consumer Protection [Home Inspection Licensing Board]
 Department of Consumer Protections
 Department of Corrections
 Department of Developmental Services
 Department of Energy and Environmental Protection [Air Pollution Control]
 Department of Environmental Protection [Public Utilities Regulatory Authority]
 Department of Pot Luck Supper Planning
 Department of Public Health [Regulation and Licensure]

Add User to Agency

- Once an Agency is chosen, select **Add User to Agency**.

- PMC will display the updated list of **Agencies** to which an **Event Author** belongs.

1 Department of Energy and Environmental Protection [Permits and Licenses]	✖ Revoke Access
Department of Pot Luck Supper Planning	✖ Revoke Access
01 Training Agency [Training Agency]	✖ Revoke Access

Manage Another User

- Select the **Manage Another User** option to return to the main **User Account Information** page.

Managing Agencies

Welcome to the Public Meeting Calendar Dashboard
You're logged in as **erik.amundsen**

Administrator Menu
Manage Users
Manage Agencies
Manage Locations

Author Menu
Create a New Event
List/Edit only my Meetings
List/Edit all my Agency's Meetings
Approved Locations
Manage My Contact

Manage Group + Create New Agency

Group	Agency	
01 Training Agency	Training Agency	Details Edit Events
1 Department of Energy and Environmental Protection	Permits and Licenses	Details Edit Events
Agency test 2 nwf	State 1	Details Edit Events
Agency test 2 wf - 20160210 modified	Department Agency test 2	Details Edit Events

<https://egov.ct.gov/PMC/Admin/Agency>

1. The **Manage Agencies Dashboard** displays a list of all available **Agencies**. Scroll through the list to the desired **Agency**.
2. Select the **Details** option to view the **Agency** details.

Department of Pot Luck Supper Planning
Details | Edit | Events

Agency Details

Agency Link
<https://stage-apps.ct.egov.com/PMC/#agency39>
Edit | Back to List

Group Name
Department of Pot Luck Supper Planning

Group Website
<https://google.com>

Agency Name

Agency Users

Display Name	User Id	Options
Barbara Sladek	barbara.sladek	Revoke Access Details
Pmcauthor Amundsen	pmcauthor.amundsen	Revoke Access Details
Test User4	tempuser4	Revoke Access Details

3. Each **Agency** has an **Agency Link**, which allows users to view that **Agency** and its **Events** directly within the PMC system.

Agency Link

<https://stage-apps.ct.egov.com/PMC/#agency39>

4. **Group Name** refers to the name of the **Group** or **Agency** itself.
5. **Group Website** links to the web page of the **Group** or **Agency**.
6. **Agency Name** is the name of the larger **Agency** to which a **Group** belongs, if any.

Group Name

Department of Pot Luck Supper Planning

Group Website

<https://google.com>

Agency Name

7. Agency Users lists all **System Administrators** and **Event Authors** associated with the **Group** or **Agency**.
 - a. Select the **Revoke Access** option to remove them from the **Group** or **Agency**.
 - b. Select the **Details** option to access the user's account details, enabling a **System Administrator** to [Manage User Account Information](#) as needed.

Agency Users

Display Name	User Id	Options
Barbara Sladek	barbara.sladek	Revoke Access Details
Pmcauthor Amundsen	pmcauthor.amundsen	Revoke Access Details
Test User4	tempuser4	Revoke Access Details

[Edit](#)

[Back to List](#)

8. Select the **Edit** option to edit **Agency** details.
9. Select **Back to List** to return to the list of all **Agencies**.
10. System Editors not associated with a **Group** or **Agency** will not be able to edit it, and must [Associate their own account](#) with the **Agency**.

Agency Edit - Department of Pot Luck Supper Planning

You have no right to edit this agency.

11. In the edit screen for an agency, it is possible to edit the name, website and larger Agency to which a Group or Agency is attached.

Agency Edit - Department of Pot Luck Supper Planning

Group Name *

Group Website *
If Group does not have a website then enter an agency website.

Agency Name

Has Approval Workflow

12. Workflow functionality is not supported in the CT.gov instance of PMC, so **DO NOT** select the **Has Approval Workflow** option. If selected, it will prevent any **Event Authors** from successfully creating events.



13. Select + Create New Agency to create a Group or Agency.

14. Fields marked with a red asterisk (*) are mandatory.

Create New Agency

Group Name *

Group Website *
If Group does not have a website then enter an agency website.

Agency Name

Has Approval Workflow

15. Enter a **Group Name**.

Group Name *

16. Enter the URL for the **Group Website** or **Agency Website** as needed.

Group Website *
If Group does not have a website then enter an agency website.

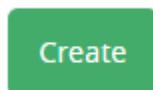
17. If this is a **Group** which is part of a larger **Agency**, enter the Agency Name here.

Agency Name

Has Approval Workflow

18. **DO NOT** select the **Has Approval Workflow**.
CT.gov's instance of PMC does not support workflows, and selecting this option will prevent **Event Authors** from

creating **Events**.



19. Select **Create** when finished.

20. Select **Event Authors** using the [Managing User Account Information](#) process and associate them with the **Group** to allow them [Event Creation](#) access.

Managing Locations

Manage Locations
+ Create New Location

<p>Legislative Office Building</p> <p>Room Legislative Office Building</p> <p>Handicapped Accessible</p> <input type="checkbox"/>	<p><i>300 Capitol Avenue, Hartford, CT 06103</i></p> <p>Comments</p> <p>testing the edit function for the managing locations function</p>	<p>Edit Delete</p>
---	--	----------------------

<https://egov.ct.gov/PMC/Admin/Location>

1. The **Manage Locations Dashboard** displays a list of all available **Venues**. Scroll through the list to the desired **Venue**.
- + Create New Location
 2. Select the **Edit** option to view the **Venue** details.
 3. Select **+ Create New Location** to add a new Venue.
4. Edit and existing or create a new **Venue** by entering the **Venue** Name and location information for the **Venue** as completely as possible. Red asterisks mark mandatory fields.

Search saved locations

Venue Name *

Room

Comments

Handicapped Accessible

Address Line 1 *

Address Line 2

City *

State

Connecticut
▼

Zip *

5. Do not select the Handicap Accessible option unless the **Venue** is clearly marked at the physical location with the Handicap Accessible sign.
- Save
Create
 6. Select **Save** to commit the changes or **Create** to save the new **Venue**.

System Administrator Event Editing Options

Edit Event

Choose Group [Agency] Calendar *

01 Training Agency [Training Agency] ▼

Choose Contact *

eamundsen ▼

Contact

Erik Amundsen

*1 Constitution Plaza, 8th Floor
Hartford, CT 06105*

1. The process for editing **Events** is already covered in the [Authoring Section](#) of this documentation and will not be reproduced here. This section focuses on the options available only to the **System Administrator** Role.

Delete this Meeting

2. **System Administrators** have the option of deleting an Event as well as Cancelling it. A deleted event does not appear at all on the calendar once it has been deleted.

Delete Event

Are you sure you want to delete this?

11/29/2016 2:15 PM to 3:15 PM

Purpose: Learn to Edit from System Admin perspective.

DEEP - Russell Room
Kurt Russell Room

*79 Elm Street
Hartford, CT 06106*

This location is handicapped accessible

Created 11/22/2016 2:01:02 PM

Modified by Erik Amundsen on 11/22/2016 2:09:08 PM

Delete

Cancel