SharePoint Calendar: Overlay with Color Coded Categories

**OVERVIEW**

Are you looking for a way to customize your SharePoint calendar? Color-coding event categories can help users easily identify and prioritize information, and can also help SharePoint administrators indicate which events are assigned to certain groups. And, best of all, it’s not difficult to do.

To get this done efficiently, SharePoint’s built-in calendar overlays are the way to go. There is a small amount of configuration up front, but the process doesn’t require a great deal of time or expert knowledge – all you need is a basic understanding of lists, columns, and custom views.

**STEP 1: CUSTOMIZE THE CATEGORY COLUMN IN THE CALENDAR LIST**

First, make sure to set up your event categories correctly. By default, SharePoint provides you with standard categories such as meeting, work hours, business, holiday, etc. You can edit these, adding your own categories and removing unnecessary ones.

**Add/Create the Calendar:**

- Navigate to the site where the calendar is located.
- Open the **settings menu** (looks like a gear) and choose **Add an app**.
- Choose **Calendar**
- Give the Calendar a unique **name** and click on **Create**
Click on the **calendar tab** and select **list settings**
- The standard list setting options appear including content types, columns, and views.

Scroll down to the **Columns section** and click on the **Category** column.
- The default choices for the category field are listed with each value on its own line.

Add, edit, and delete as necessary to set up your calendar category values.
- It is best to make this a **required** field otherwise the appointment may not show up on your overlay calendar.
- Keep in mind SharePoint has a limit of 10 calendar overlays.
- Click the **OK** button at the bottom of the page.

**STEP 2:**
**CREATE VIEWS FILTERED BY CATEGORY COLUMN**

Once you have created and saved your event categories, the next step is using the categories to create custom calendar views.

In order to view different color coded categories, a new view will need to be created for each item in the category list.
- Click on the **Calendar Tab** and select **Create View**.
In the bottom of this window, under *Start from an existing view*, click on *Calendar*.

- Give this new view a **Name** – naming it by the event category is typically the best approach.
- Leave the default settings as they are, but in the **Filter** section add a filter to show items when **Category** is equal to those you have created.
- **Show items when column Category** is equal to “enter your category value here.”
- Click **OK** to create the view.

If you have calendar events entered already, you’ll see them filtered on the calendar after clicking save.

- Repeat process for each category you’ve created.
STEP 3: 
CREATE A BLANK VIEW WHERE THE CATEGORY FILTERS FOR A NULL VALUE

Once you have set up a views for each category, you need to set up a new calendar view that will pull all your custom calendars together.

- **Follow the same process for creating** your filtered category views, but for this one, **leave the category blank**.
- **Name** this view something similar to Overlay, as you’ll use this view when applying the overlays.
- **Check the box** to Make this the default view.

In the **Filter** area, be sure to create a filter that’s not going to happen. You don’t want to have anything show up on this calendar by default because you are going to overlay the other calendars on top of it. If you don’t create the filter, every calendar event will be duplicated.
STEP 4:
ADD THE CALENDAR OVERLAYS

Now you have all your categories established and all your views set up, including an Overlay view that filters for a null value.

1. To add the calendar overlays, first open the view you just created, where the category filter is empty.
2. In the Calendar tab of the ribbon, click on the button that says Calendar Overlay.
3. Click the link for New Calendar and fill out the available fields. *(This was confusing to me at first as I’m not creating a new calendar at this point, I’m just choosing a new calendar to overlay).*
4. Give your overlay a name (most likely the category) and choose the color. *(colors are dependent on the color scheme of your site)*
5. Click the Resolve button – this action searches for calendar views on the site you choose to be used for overlays.
6. Verify the List and List View are referencing the correct calendar views.
7. **Repeat these steps to create an overlay for each calendar view.**
8. Click on OK when finished adding all of your new calendar views.
Each time you create an overlay, you’ll see those events added in the selected color to the calendar.

**USING THE CALENDAR**

- To add an event to the calendar, hover the mouse in the lower right-hand corner and click on **Add**.

- Type in the **title** of the event
- Location is optional
- Enter a start and stop **time** **OR** check the box in the bottom for an all-day event.
- Select a **category** from the drop down list.
- Click on **Save**.
**TROUBLESHOOTING**

Yes, color-coding a calendar is easy – but you still might run into some issues. Here are a few common scenarios:

<table>
<thead>
<tr>
<th>Too many event categories: SharePoint only allows you to create, apply, and color-code 10 calendar overlays.</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Duplicate events on your calendar. This happens when you don’t create a calendar view with a filter where the category is blank (<a href="#">see Step Three</a>). If you don’t use this blank calendar view, you are just adding the color-coded events on top of existing calendar events.</td>
</tr>
</tbody>
</table>