

How to create an event

- Click on **Create an Event** in the side navigation menu.

Event details

1. Each new event or series of events is automatically assigned an Event ID number.
2. Type the name of the **Organization** for this event, then select it from the drop down menu. **Note: If the Organization does not appear, it may need to be [added to the list of organizations](#).*
3. Enter an **Event Name**.
4. Add a **Summary**. This will show in search results.
5. If needed, check the box next to **Add a Full Description**. This allows for a longer description of the event, which can include text formatting as well as links.

Schedule ID: 13

Event Details

Organization

Q Soccer Stars



Event Name*

Exhibition Match vs West Ham United FC

Summary*

This will be a hugely attended match, due to the notoriety of the visiting team.

170 characters remaining

Add a Full Description

Location & time

An event's location and time can be selected in four different ways. Search for availability by location, or by date and time, and then determine if your event will only last a certain number of hours, or if the location should be reserved all day. Each of these ways allows you to choose between a single event occurrence, or a repeating event series.


Location & Time

Choose by Location ▾

Search & Select Locations

Locations You've Selected (0):

🔍 Start typing Location Name to search Location Path ▾ 🔍 LOCATION SEARCH


No Locations selected.

[+ Add a Custom Location](#)

Check Availability

All Day (All Open Hours) ?

Choose Dates

Do not publish the end date/time ?

Repeat Weekly

This is a Featured Event ?

Choose an Available Date

2022 > March < >

S	M	T	W	T	F	S
27	28	01	02	03	04	05
06	07	08	09	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	01	02

Specify Publish Date/Times

(UTC-05:00) Eastern Time (US & Canada) ▾

Public Event ▾ ?

Setup: 0 min ▾ ?

Breakdown: 0 min ▾ ?

Estimated Cost

Estimation For All Room Rentals 👁️ SEE COST \$0.00

Contact information

- Enter the contact information for the event coordinator or person whom visitors can contact with questions about the event.

Contact Information

Full Name

Sarah Dude

Phone

5555551234

Extension

817

Email

sarah.dude@dude1.com

Categories & keywords

Categories and keywords allow you to classify your event to make them easier to find when visitors search your site.

1. Choose any **Category** that applies to this event. Visitors will be able to search and filter events based on categories.
2. Enter any **Keywords** or tags that visitors may use to search for your event.

Categories & Keywords

Category

Q Start typing or use dropdown to choose a category ▼

1. Students



Delete

Keywords




Choir X

Performance X

Type a keyword (e.g. Home, Away, etc.) and hit Enter

Pictures & attachments

You can upload up to 5 pictures to an event, each with a maximum size of 3MB, and you can add up to 10MB of attachments.

1. **Upload** an attachment by locating the file on your computer, or pasting the attachment URL in the text field.
2. Click **Choose From Library** to find an attachment that has been added to the Event Publisher media library.
3. If you have multiple images for an event, click on the star icon in the top left corner of an attachment to select it as the **Default** for the event. This is the image that will be used in the event listing.
4. Click the T icon () to edit the alternate text that will display when a user hovers their mouse over the attachment. It is also used by visually impaired web browser assistance applications for WCAG conformance.
5. Click the trash can icon () to remove an attachment from the event.
6. Click the download icon () to open a picture in a new tab of your browser. If you click the icon on an attachment, it will be downloaded to your computer, where it can be viewed using the appropriate application.

Pictures & Attachments



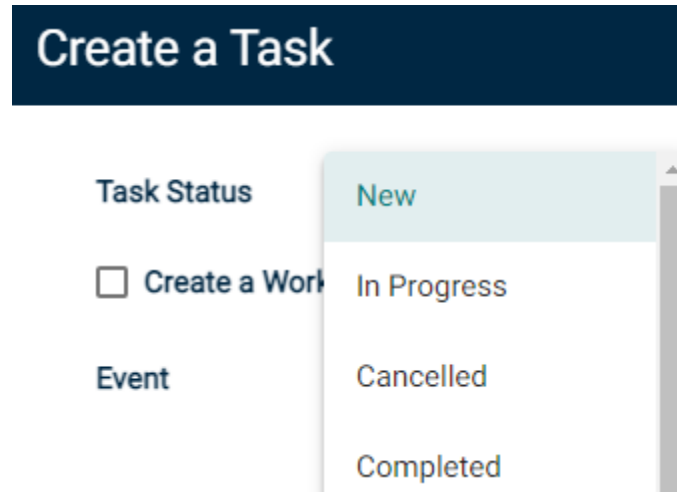
**This document is for internal and external use.*

Tasks

A Task represents something that needs to be completed in relation to this event. For our facilities, tasks will depend on what, where and when the event is. Some examples of tasks include HVAC, chairs, Food Handler's Certificates, etc.


Add a task

1. Select the **Task Status** from the drop-down menu.



2. If you need to associate this task with an event, begin typing in the **Event** field and select the event.
3. If you'd like to associate this task to a location, click **Search Locations** next to Location.
 - In the window that appears, search or filter the list and check the box next to each location needed for this task.
 - Click **Save**.
4. Select a task **Type** from the dropdown menu.
5. Enter a **Task Name**.
6. Enter a **Task Description**. This should be used to provide more detailed information that will give the task assignee the specific instructions for the task.

Create a Task

Location  1st Floor Lobby × **Add another location**
Start typing to find a location ▼ **SEARCH LOCATIONS**

Type
Event Setup ×

Task Name *
Event Setup - 1st Floor Lobby ?

Task Description
Please set up lobby for general gathering

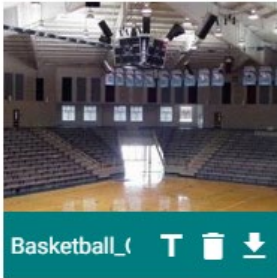
41/1500

7. Select the **Priority** for this task.
8. Assign a user to this task by selecting their name from the **Assign to** dropdown menu.
9. Select a **Time** and **Date** under Due Date for the task to be done by.
11. The **Reminder** will be set automatically based on your [Task Settings](#), but can be easily adjusted or removed.
 - Enter the **number of days or hours** before the task is due for the email notification to go out.
13. There are two Save options available:
 - Click **Save** to finalize your changes.
 - Click **Save & Add** to finalize your changes and begin creating a new task.

CHOOSE FROM LIBRARY

or

UPLOAD



SAVE

SAVE AND ADD

CANCEL

Editing and deleting tasks

1. Click **Edit** to reopen the Task and make changes to any of the previously entered fields.
2. Click **Delete** to remove the Task entirely.

Additional information

This is where any [Custom Event Fields](#) will show for this Site. This could include text fields, a checkbox field, or a multiple choice field. Required fields are marked with an asterisk (*) symbol.

Additional Information

Who is the target audience for this event?

Students

Staff

Parents

Other

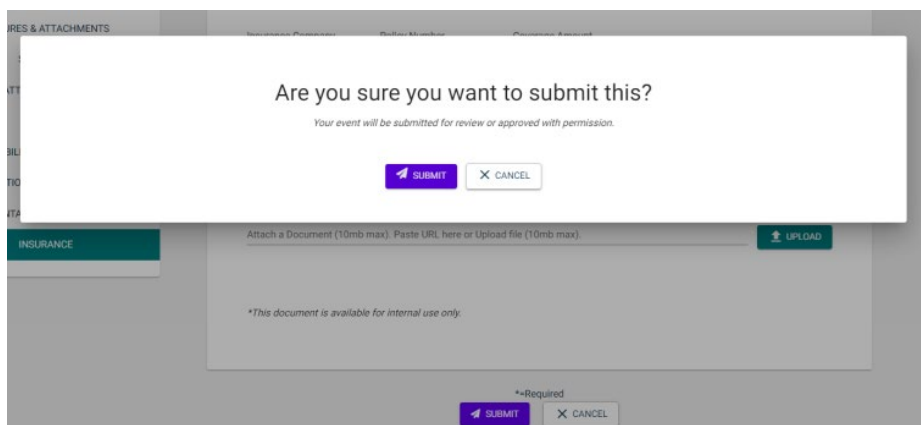
Insurance

When submitting a permit, insurance is **required**. You can provide the insurance information for an event, either by using the event organization's information or by entering custom insurance information.

1. The Custom option will be selected by default, but you can choose to **Use Organization's Insurance Info**, if you would like to auto-populate the insurance information of the organization holding this event.
2. If you leave **Custom** selected, you can enter the insurance information for this event manually.
 - a. Enter the **Insurance Company**.
 - b. Enter the **Policy Number**.
 - c. Enter the **Coverage Amount**.
 - d. Enter the expiration date of the insurance in the **Coverage Expiration** field.
 - e. Click **Upload** to select a file from your computer. The file will be added to the Insurance Document Library for future use.

Submitting the event

1. Click **Terms and Conditions** to review any terms that have been defined for this event form and then click **Agree**. **Note: This link will only appear if [Terms and Conditions](#) have been defined for this event form.*
2. When you have finished entering all necessary information on the event form, click the **Submit** button found at the bottom of the form.
3. In the window that appears, click **Save**.



The screenshot shows a confirmation dialog box with the text "Are you sure you want to submit this?" and a sub-note "Your event will be submitted for review or approved with permission." Below the text are two buttons: "SUBMIT" and "X CANCEL". The dialog is overlaid on a form with a sidebar containing "INSURANCE" and "RES & ATTACHMENTS". The form has a section for "Attach a Document (10mb max). Paste URL here or Upload file (10mb max)." with an "UPLOAD" button. At the bottom of the form, there is a note "*This document is available for internal use only." and another "SUBMIT" and "X CANCEL" button. A "**-Required" label is also visible.