and the NEW

Event Form
A FEW IMPORTANT NOTES BEFORE STARTING
Note the absence of tabs just below the title bar.
Instead, by clicking ‘More’ in the upper-right corner of the title bar, you can navigate to the functions you may want to use that you would have accessed using tabs.
The two simplest ways to access your events—from the ‘Your Upcoming Events’ and ‘Your Starred Events’ boxes—are still available where they’ve always been.
Right-click on an event name in the “Your Starred Events” to get a “Choose a View” pop-up box that lets you navigate to information about that event. Select:

- **Details** to view the event’s date, location, resources, etc.;
- **Calendar** to see the event date/s in a calendar;
- **Edit Event** to drill down into (open) the event to make changes (such as add resources);
- **Copy Event** to make a new request, for example, for an event that repeats annually;
- Or **Email Event Details** to email someone about the event, such as the scheduler, when you need to change the time or add a date.
And if you right-click on an object on the Home screen—a location, for example, the “Choose a View” pop-up lets you navigate to information about that space: **Details** for that space’s details; **List** to see it in a list; **Availability** to see when it is available; Or **Calendar** to see events in that space in a calendar format.
The new Event Form features convenient side navigation to the left of the form’s sections and fields. This makes it much easier to move through the form. **Click on any of the sections on the left side navigation box** to move to another section of the Form. This is much quicker than scrolling! **There are no ‘forward’ or ‘back’ arrows because the entire form is on one page.**
• The Event Form contains all of the same fields you have been filling out in the Wizard. However, some of these are now “nested” and require that you click on either a drop-down arrow (to select locations and resources) or a button to open. For example, if you are used to indicating the custom attribute asking whether food will be served, be sure to click in this section of the form (here is where that left-side navigation feature will come in handy). Please make it a habit to open this section. Information you indicate here is often useful to schedulers and service providers because it allows us to process your request accordingly.

• Click and open this information icon to view instructions and/or additional help for any field that displays it.
To submit a request, click: 

Event Form
1. Enter basic event information

Enter an Event Name (required), Expanded Event Name (optional), select an Event Type (required), and the Department-Program-Office (required). All but the event type can be changed at any time after submitting.
2. **Expected Head Count**: Enter your best estimate for attendance.

**Event Description for Publicity**

The Event Description you put here will appear on Smith online events calendars and in off-campus media outlets if the event is open to the public.
3. Enter date/time information about your event’s **first** occurrence.

Specify the date of the **first occurrence** of the event. If the event occurs on more than one day, you’ll add those dates in the next section.

The box next to “This event begins and ends on the same day” should ALWAYS be checked. **Even if your event is a recurring event, you should never indicate an end date here.**
3. Enter date and time - continued

Enter information about your event’s **first** occurrence.

Specify the start/end times of the first occurrence of the event. **The time you enter is the time the event starts.**
4. Additional Time

“Additional time” refers to time you want to be in the room before or after each occurrence of the event. Click the ‘Additional Time’ drop-down arrow to add **Pre-** or **Post-event time** to the event. To enter, click in the ‘minutes’ fields and type the time you need before or after the event begins/ends.

**! Do NOT indicate ‘Setup’ or ‘Takedown’ time.**

**! “Additional” or “recurring” dates are added in the next step.**

<table>
<thead>
<tr>
<th>Setup Time</th>
<th>0</th>
<th>0</th>
<th>0</th>
</tr>
</thead>
<tbody>
<tr>
<td>Days</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hours</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Minutes</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Pre-Event Time</th>
<th>0</th>
<th>0</th>
<th>0</th>
</tr>
</thead>
<tbody>
<tr>
<td>Days</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hours</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Minutes</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Post-Event Time</th>
<th>0</th>
<th>0</th>
<th>0</th>
</tr>
</thead>
<tbody>
<tr>
<td>Days</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hours</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Minutes</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Takedown Time</th>
<th>0</th>
<th>0</th>
<th>0</th>
</tr>
</thead>
<tbody>
<tr>
<td>Days</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hours</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Minutes</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
5. Indicate the dates your event repeats.
If your event has more than one occurrence, select the additional dates by clicking dates on the calendar, using the forward arrow to move to a different month.

Click ‘View All Occurrences’ to see all the dates added...

Click on the calendar below to add dates to your event. or click the button below to select a date pattern for your event.

ONLY use the ‘Ad Hoc’ repeat pattern to indicate your event’s additional dates.
Click ‘Remove’ if you entered a wrong date; then go back to the calendar to add the correct date or other dates.
You can “expand” or “collapse” the Event Locations and Resources sections by clicking the arrow at the end of these fields. Expand to select your locations/resources; collapse when finished with these sections.
If you see this in the ‘Event Locations’ section, click the ‘Refresh’ button!
6. Select Location(s)

Do **NOT** check either the 'Hide Locations with Conflicts' or 'Enforce Headcount' boxes!

To find an available space, EITHER select 'Saved Searches' and choose from 'Your Starred Locations' OR click the 'x' in the 'Search Locations' to get a blank field, type the first three or four letters of a space name and in this field, and hit your keyboard 'Enter' key. This produces a list of spaces that match those letters.
6. Select Location(s) cont.

If you see REQUEST to the left of a location name, the location is available! Click this box.

You may choose one or more available locations for your event. To choose another location, click ‘Request’ for another location on the list, or repeat the previous step. When you have ‘starred locations’ just click ‘Request’ from that list.

A selected location is saved in your request as a “preference” until the event is confirmed.
5. **Select Location(s)** cont.

If you see [**Available**] to the left of the location name, this means the location is available on some of the dates you’ve entered. If you need to use the same room on all dates, either select a location indicated as available, or repeat the process to find an available location for all dates, or select an available location from your starred locations.
5. **Select Location(s)**

cont.

Or, if you want to reserve the location when it is available, click “Conflict Details” to see when the conflicts are. Click to select the location, then choose dates it is available by going to the ‘View Occurrences’ box. Find another location available on the remaining dates.
5. Select Location(s) - Location Occurrence Editing

Click **View Occurrences** to check or uncheck dates.
5. Select Location(s) - Location Occurrence Editing
Uncheck dates that either you do not want the space or that it’s unavailable.

This is the *Locations* “View Occurrences” box. There is a ‘View Occurrences’ button on every individual requested/reserved location and resource block.
5. **Select Location(s)**

If you see “Unavailable” to the left of the location name, it is not available for any of the dates you’ve chose. Repeat the steps to find an available location, or select an available location from your starred locations.
If this is what you see in the ‘Resources’ section, click the ‘Refresh’ button!
6. Select Resource(s)

Requesting resources works similarly to locations. Either choose from the ‘Your Starred Resources” Saved Search (click the “Saved Searches” drop-down arrow) or click the ‘x’ in the adjacent field and type the resource you need. **When the matching list is returned, take care to choose “Campus Center” (or ‘Ctr’) if your event is in the Campus Center.** Use the **Reserve** (or **Request**) button to make selections. You may choose one or more available resources for your event.
Clicking ‘Reserve’ from the list here makes a list of your selected resources below.

<table>
<thead>
<tr>
<th>ID</th>
<th>Reserve</th>
<th>Resource Type</th>
<th>Quantity</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Reserve</td>
<td>Chairs</td>
<td>9976 / 9976</td>
<td>None</td>
</tr>
<tr>
<td>1</td>
<td>Reserve</td>
<td>Chairs - Folding</td>
<td>10000 / 10000</td>
<td>None</td>
</tr>
<tr>
<td>1</td>
<td>Reserve</td>
<td>Chairs - Stackable</td>
<td>10000 / 10000</td>
<td>None</td>
</tr>
<tr>
<td>1</td>
<td>Reserve</td>
<td>Change Order</td>
<td>9999 / 9999</td>
<td>None</td>
</tr>
<tr>
<td>1</td>
<td>Reserve</td>
<td>Computer - PC Laptop</td>
<td>10000 / 10000</td>
<td>None</td>
</tr>
<tr>
<td>1</td>
<td>Reserve</td>
<td>Custodial Support/Setup Needed</td>
<td>9998 to 9999 / 9999</td>
<td>None</td>
</tr>
<tr>
<td>1</td>
<td>Reserve</td>
<td>Data Projector</td>
<td>9999 / 9999</td>
<td>None</td>
</tr>
<tr>
<td>1</td>
<td>Reserve</td>
<td>Dumpster</td>
<td>10000 / 10000</td>
<td>None</td>
</tr>
<tr>
<td>1</td>
<td>Reserve</td>
<td>DVD Player</td>
<td>9998 / 9998</td>
<td>None</td>
</tr>
<tr>
<td>1</td>
<td>Reserve</td>
<td>DVD/VCR/TV (Campus Center ONLY)</td>
<td>10000 / 10000</td>
<td>None</td>
</tr>
</tbody>
</table>
7. Resource Occurrence Editing

You can enter different quantities and instructions for each resource, and check dates needed (or uncheck dates not needed) for each resource.

Click the **View Occurrences** button …
This is the *Resources “View Occurrences” box*. There is a ‘View Occurrences’ button on every individual requested/reserved location and resource block.

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Conflicts</th>
<th>Including</th>
<th>Instructions</th>
<th>Quantity</th>
<th>Available</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set For All</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Tue 22 Oct 2019</td>
<td>6:00 am - 7:00 am</td>
<td></td>
<td></td>
<td>Please set up five rows of five chairs</td>
<td>25</td>
<td>9976/9976</td>
</tr>
<tr>
<td>Wed 23 Oct 2019</td>
<td>6:00 am - 7:00 am</td>
<td></td>
<td></td>
<td>Please set up chairs in three rows of ten</td>
<td>30</td>
<td>9976/9976</td>
</tr>
<tr>
<td>Thu 24 Oct 2019</td>
<td>6:00 am - 7:00 am</td>
<td></td>
<td></td>
<td>Please set up chairs in a circle</td>
<td>10</td>
<td>9976/9976</td>
</tr>
</tbody>
</table>

Use the **View Occurrences** button in each resource block to select or deselect dates, add instructions, and adjust quantities.
Click here, then click the ‘Select Custom Attribute’ drop-down arrow, scroll the list and click on a custom attribute.
At the end of the form, after clicking ‘Save’ ...

... on the next screen, click the ‘More Actions’ drop-down arrow to get this list ...

... and select ‘Add to Favorites’ to ‘Star’ the event!!
Reminders/Additional Tips

Remember that ‘starring’ your favorite events, locations, resources, organizations, and contacts gives you the quickest access to the objects you work with most often.

A filled star icon next to an item indicates the item is currently a favorite.

- Tap or click an empty star icon to **add** that object to your favorites.
- Tap or click a filled star icon to **remove** that object from your favorites.

Starred events, locations, resources, and organizations are all available in the default predefined group listed in the Saved Searches choices in the Search section.

You may also star event types as favorites. Contacts may be starred and unstarred, but only during event creation/editing.
1. Your ‘Event Start’ and ‘Event End’ dates are ALWAYS THE SAME.

Even if your event is a recurring event.

2. ‘Event Start’ Time is the Time the Event Starts!

3. If your event has more than one date (or, recurs), ONLY use ‘Ad Hoc Repeats’ to indicate additional dates.
ALWAYS ‘star’ your events, locations and resources!

NEVER

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submit a new request to change something on a reservation or a request already in place! This applies even when you’ve made an error on your request. The only time a separate or new request is needed is if dates in a recurring reservation meet at different times.
Should you submit a new request when you need to change something in a reservation or request already in place, or when you’ve made an error on your request?

NEVER submit a new request to change something on a reservation or request already in place! Even when you’ve made an error on your request.

The **only** time a separate or new request is needed is when a date (or dates) in a recurring reservation meets at a different time.
• Never attempt to change the date, time or location(s) of your event/request once it has been submitted. This will un-reserve your reservation without anyone knowing this has happened (and it won’t be corrected). In other words, you will not have a space reserved for your event. Only a space scheduler can make these changes. **ALWAYS CONTACT THE SCHEDULER TO REQUEST A CHANGE TO THE DATE, TIME OR LOCATION.**

• The event reference number is displayed when the event is saved. Always have this number handy when requesting any changes to a reservation.
Final Notes

ALWAYS ‘star’ your events, locations and resources!

Questions/changes concerning your space reservation --

  BEFORE it is confirmed:
   Kathy San Antonio

  Once it has been confirmed:
   the space scheduler
   (save your confirmations!)

Questions about services for your event --

   if your event is in the Campus Center:
     Emma Roberts (interim),
     ext. 4988
   if anywhere else:
     - Steve Campbell for setup and non-technical equipment
     - Moses Diaz for tech support