

# Localist Calendar Training Guide and Procedures Document

## Introduction to Localist

### Overview

Localist is a centralized calendar platform designed to streamline event promotion and engagement. This guide aims to equip administrators and users with the knowledge and tools necessary to effectively utilize the Localist Calendar, enhancing our event outreach and participation.

### Purpose of the Training Guide

This guide serves as a step-by-step resource for administrators, event managers, editors, and other designated users, covering the entire process of managing events, from creation to promotion.

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## User Roles and Permissions

### Understanding User Roles

Localist utilizes a role-based permission system. The main roles include:

- **Event Managers:** Manage events and classifications.
  - **Example:** Department Calendar Deputy's
- **Editors:** Can edit events but with limited access compared to managers.
  - **Example:** Other employees in a department, students, etc.
- **Event Author:** Event Authors can create and submit new events for review.
- **Event Coordinator:** Event Coordinators are Event Authors who can delete events within their allowed filters and help ensure quality events.

### Assigning Permissions

1. Navigate to the User Management section.
  2. Select the user you wish to modify.
  3. Assign or modify the role according to their function.
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## Classification System

### Introduction to Classification

Classifications help categorize events and enhance their discoverability using filters, groups, departments, and locations.

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## Creating and Managing Events

### Event Submission Process

1. Click "Submit an Event" on the dashboard.
2. Fill in all required details:
  - **Event Name**

- **Description**
  - **Date & Time**
  - **Location**
  - **Relevant Classifications**
3. Save or submit for approval.

### **Recurring Events**

- Use the "Repeat" function in the Date & Time section to set up recurring dates.

### **Event Approval Workflow**

1. Access the "Pending Events" queue.
  2. Review the submission for accuracy and compliance.
  3. Approve, reject, or provide feedback.
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## **Utilizing Widgets**

### **Overview**

Widgets can be used to display events on your website, enhancing visibility.

### **Creating and Embedding Widgets**

1. Go to the "Widgets" section in your dashboard.
2. Select the desired widget type.
3. Customize the settings (event filters, display style, etc.).
4. Copy the generated code.
5. Embed the code into your web page.

Detailed information can be found here: [Widgets](#).

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## **Bulletin: Email Marketing Tool**

### **Introduction to Bulletin**

Bulletin is a powerful tool for creating and managing email campaigns.

### **Creating Campaigns**

1. Navigate to the "Bulletin" tab.
2. Choose a campaign template.
3. Add events, customize the design, and select your recipient list.
4. Schedule the campaign or send it immediately.

Learn more about Bulletin here: [Bulletin](#).

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## Group and Department Pages

### Purpose and Benefits

Group and Department Pages provide context about event hosts and increase engagement by offering tailored event listings.

### Creating and Managing Pages

1. Select "Group/Department Pages" from the menu.
2. Add the group's name, description, and relevant images.
3. Link related events for better visibility.

Refer to the guide here: [Group & Department Pages](#).

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## Calendar Submission Process Using EMS

### Step-by-Step Procedure:

1. **Space Verification:** Before submitting a calendar listing, verify or reserve space using the Event Management System (EMS). This ensures the availability of the venue for your event.
2. **Email Confirmation:** Once you have reserved the space, you will receive an email confirmation within a few days confirming the availability.
3. **Public Calendar Listing:** After receiving confirmation, return to the Localist Calendar to submit your public event listing.
  - o If your event does not require a public listing, you can proceed with just the EMS scheduler.
4. **Department-Specific Submissions:** To add an event to the UP calendar (or a department-specific calendar), please coordinate with your department's calendar deputy.
  - o **You can view the specific deputy for each department here.**

### Making a Request Using EMS

- Click the "Make a request using EMS" button to access the EMS system and complete the space reservation request.
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## Training and Support Resources

### Accessing Support

For assistance:

- Visit the [Concept3D Help Center](#).
- Contact the support team for help.

## FAQ

### **Q: What's the difference between Groups & Departments?**

**A:** [Groups and Departments](#) are functionally the same, they just live in separate directories within Localist. We see a lot of Localist customers use Groups for student organizations or community clubs. While on the other hand, Departments are usually used for academic or internal departments.

### **Q: What's the difference between Featured & Sponsored Events?**

**A:** [Featured Events](#) get a spot in the Featured Carousel at the top of your homepage for effortless discoverability. Similarly, Sponsored Events receive a softer endorsement—they will have unique styling to make them pop and get a boost in the Trending algorithm.

### **Q: Why Trending instead of Upcoming?**

**A:** In today's digital age, a trending list is industry standard. For example, The New York Times sorts its news by relevance instead of chronologically. So most people will also expect your events to be listed in the same way. What's more, [Trending](#) pushes the most unique and popular events to your homepage for users to easily discover!

### **Q: Who can create Widgets?**

**A:** Any public site visitor can make a [Widget](#)—this means that your events can be promoted all over the web! For example, another department within your organization or a community partner can make a Widget of your events for their sites, which will ultimately drive traffic back to your calendar.

### **Q: How can you add Localist events to your personal calendar?**

**A:** We encourage you to add events to your personal iCal, Google Cal, or Outlook Calendar so you'll never miss out on your org's happenings. You can [subscribe](#) to any Filtered pages or Event Details Pages, so make sure to look out for the calendar icons!

### **Q: What's the ideal EventReach score?**

**A:** A healthy [EventReach](#) score will fall around or above 70%.

### **Q: How often do Feeds import?**

**A:** [Feeds](#) import **once a day, overnight** EST/EDT. So, if you update a Feed during the day, those changes will not be reflected in Localist until the next day.

### **Q: What is a Widget vs a Widget template?**

**A:** Templates are the various Widget designs from which you can select in the Widget builder. While [Widgets](#) are the actual display of your events on another page.

### **Q: How can I notify attendees of an event's Status change?**

**A:** If you're using Register, you can gather a list of attendee's emails from the View Confirmed Tickets page in the event's edit form. Then, using our [Promotion](#) tool you can

send an email to those folks to let them know the event has been Canceled, Postponed, or Sold Out. In addition, any users who clicked I'm Interested will get an email reminder the day before the event is set to take place, so they'll see the status update here as well!

**Q: Are Tags & Keywords case sensitive?**

**A:** Both [Tags](#) and [Keywords](#) are not case sensitive. So for example, if you use the Tag "Localist" and the Tag "localist" they will be seen as the same regardless of case.

**Q: What's the difference between Bulletin and Digest?**

**A:** Bulletin and Digest allow you to send event newsletters from your Localist platform. [Bulletins](#) are sent by Bulletin Managers and have a higher level of layout and content flexibility. On the other hand, Digests are a self-serve way for users to send events to themselves based on Groups, Departments, Places, Filters, and Tags/Keywords.

**Q: Will approved events go back to the Pending Queue if a user makes edits?**

**A:** Yep! Once a base-level user edits their event, it will go back into the [Pending Queue](#) and become unpublished until an Event Manager or Editor reviews it again.

**Q: How can I export events from Localist?**

**A:** If you're able to integrate with a standard ICS or RSS [Feed](#), you can export events from the calendar on the All Events page, Filtered pages, or Event Details pages by selecting either the Apple iCal or RSS icons. If neither of the above work or you prefer to work in JSON, then you would use the [API](#). The only caveat here is that this will only return raw data as per usual with APIs.

**Q: How can I communicate to users that certain events have been recently added to the calendar?**

**A:** For events that have been approved within the last 30 days, a "NEW" label will automatically display on the event card. This label will be automatically removed once the event has been live on your calendar for 31 days. Just as a heads up, this feature is exclusive to our new theme Emphasis. If you're interested in adopting the new theme on your calendar, check out our [Emphasis documentation](#) to get the ball rolling!

**Q: Can you set up multiple levels of approval for events?**

**A: Yes!** The new roles Event Editor and Event Author are now available, and replicate the previous functionality of the "Publish Events" privilege.

- **Event Editor** - Can use the Admin Add Event Form, CAN publish to live calendar
- **Event Author** - Can use the Admin Add Event Form, CANNOT publish to live calendar

**Q: How can Event Authors (without publishing privileges) view/edit their events while waiting for approval?**

**A:** When an Event Author (without publishing privileges) submits or edits an event, it will go to the Pending Queue to be reviewed by another Admin. While events are in the Pending Queue, here's how these folks can access/edit them:

1. Navigate to the **homepage** > click the **user menu dropdown** > **Dashboard**
2. Scroll down to **Activity Feed** > **Pending Events**
3. Click the **event**
4. On the Event Details Page, scroll to the **Event Tools** section at the bottom
5. Select **Admin Event Editor** to edit via the Admin Add Event Form
6. Upon saving changes, the event will remain **Pending** until it's approved

**Q: How can I use Localist to send mass emails to our community?**

**A:** Our internal tool, [Bulletin](#), allows you to create, manage, and send newsletters directly from your Localist platform. If you aren't already providing a newsletter that highlights events then we've got you covered. Check out our [Bulletin Localist](#) to learn more about this feature.