Calendar Administrator Basics

Localist (Events Calendar) – https://events.in.gov

Localist is the public-facing calendar tool for IN.gov and the State of Indiana to help display past news and press releases while also promoting future in-person and digital events.

This document is specific to the State of Indiana employees and contractors that want a basic reference on how to use Localist. This document will outline the basics of Localist and provide links to other online resources to continue learning.

Please read below for the full table of contents and instructions on how to use Localist. If you have questions along the way, please contact creative3@egov.com or visit INWP to open a ticket about your issue.

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Login to Localist

NOTE: All administrators must be approved before they have access to Localist backend management. Please fill out a form here to request access: IN.gov Calendar & Press Release System on INWP

All users must go to https://events.in.gov to login. Once on events.in.gov, simply click the "Log in" button in the top header.

- **State Employees:** You will be directed to Access Indiana. Please use your state email to authenticate through IOT's active directory using your normal credentials.
- **Contractors:** You will be directed to Access Indiana. Please use the email you provided when requesting an account. The emails must match to ensure you get the proper administrative access. If you do not have an Access Indiana account, please sign up for one.

Access Your Calendar

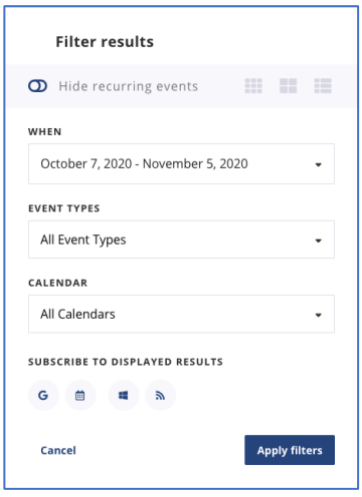
Your agency calendar is likely located using the same abbreviation or acronym that your agency website uses. An example would be IOT's website is www.in.gov/iot, IOT's calendar is events.in.gov/iot.

Once you have navigated to your calendar you can browse the upcoming events and view recent/past events on the homepage. There is a button to "Show all events" that will take you to a page that you can filter and subscribe to. This page is the full calendar and can be accessed by adding a /calendar to your calendar URL, the IOT example would be events.in.gov/iot/calendar.

Filters and Subscriptions

The filters can be used to customize the view of your calendar entries through various settings. You can change the display layout, change the sorting, restrict the dates of the events displayed, filter by experience, filter by type, and filter by calendar. Once these are applied you can then subscribe to the displayed filtered results.

Subscribing to the displayed results will set up a calendar subscription in the selected feed type. You can choose calendar subscriptions from Google, Outlook, a generic calendar subscription, or RSS feed. Each of these subscriptions is managed locally in whatever calendar option you subscribe to.



Calendar view Filter Dialog pop-up

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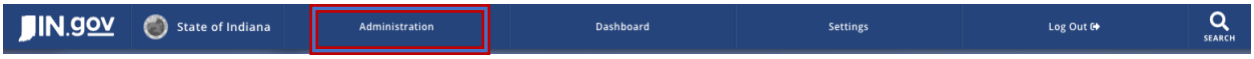
Administration Dashboard

To access the administrative dashboard, you will click “Administration” in the top header. That will take you into the Localist administrative backend interface.

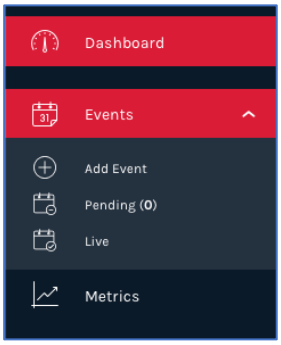


This dashboard will show you general information related to the entire calendar application. Each of the tiles can be clicked to view the specific list related to each of the numbers displayed.

You can also access the search functionality through the administrative dashboard.

The navigation for the dashboard is located on the far-left side of the screen with the options: Events and Metrics.

Creating Calendar Entries



To create a calendar entry, in the far-left side menu click Events > Add Event.

Description and explanation for each of the settings for the event are listed below:

Details

- **Publish Immediately:** This gives you the option to make the event public upon saving or make it a pending event to be published at a later time.
- **Name *IMPORTANT:** This is the title and heading of the event. This will be displayed prominently to promote the event.
- **Description *IMPORTANT:** This is where you will input the full-text description of the entry. There is no concept of a short description, so you will always enter in all of the available text in this area.
- **Status:** This is where you can modify an existing event to indicate either a postponement, cancellation or a sellout. This indication will be displayed on the calendar page.

Schedule

- **Start Date:** This is when the entry occurs (or occurred). You can use relative terminology here to populate a date, an example would be “next Tuesday” or “last Friday”. This also accepts other date formats. To verify the date you entered, look below the Repeating field in the Summary.
- **Start Time:** This is when the entry starts. This is an optional field if your entry does not have an exact time associated with it.
- **End Time:** This is when the entry ends. This is an optional field if your entry does not have an exact time associated with it.
- **Repeating:** This is for reoccurring events to set the frequency of future occurrences. Note: if you have more than one occurrence of the event that does not happen in any order, you can simply repeat this process by adding each entry using the “Add Above Schedule” button.
- **Summary:** This is an important recap of the settings and information entered in the previous fields.

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- **Add Above Schedule *IMPORTANT:** There is a red button below the summary that you must click to add the schedule information to the event.

- **Confirmed Dates:** Once a date is added to the schedule you will have a list of confirmed dates. This allows you to enter more than one occurrence for the listed entry if needed.

Location

- **Experience:** This is where you can indicate what type of event the user can expect. In-Person, Virtual, or Hybrid allow for you to enter in information relative to the option you select. A physical location is available for in-person and URLs/instructions are for virtual. This might not apply to press releases or news entries.
- **Event Place:** This is the physical address that you can attach to the entry. Type-ahead is available in this field for existing locations to be selected. Places like Indiana Government Center North/South and the State Capital Building are examples. This only applies to in-person and hybrid events.
- **Room:** This is the room that corresponds to the place the event is being held at. This only applies to in-person and hybrid events.
- **Dial-In Instructions:** This is a place to provide instructions on how to dial into the virtual or hybrid event.
- **Stream URL:** This is a place to provide the URL of the digital stream of the virtual or hybrid event.
- **Stream Embed Code:** If your stream has an embeddable option, you can paste in the code to share with your attendees here. This only applies to virtual or hybrid events.

Photo

- **Upload:** Upload a single photo to represent your event.
- **Choose from Photo Library:** Choose from an existing library of images to select a photo that represents your event.

Classifications

- **Event Type:** This is where you can specify the type of entry. The current options are Events, Posts, Press Releases, or Public Notices.
- **Calendar *IMPORTANT:** This is an important field that you must ***select your agency*** to ensure that the entry shows in the filter list. You can also select other calendars that relate to the calendar entry. These calendars can be grouped and filtered for creating specific listings.
- **Groups *IMPORTANT:** This is an important field that you must ***select your agency*** to ensure that the entry shows in your agency calendar.

Custom Fields

- **Contact Name:** This is an optional field to display the associated contact's name.
- **Contact Phone:** This is an optional field to display the associated contact's phone.
- **Contact Email:** This is an optional field to display the associated contact's email address.

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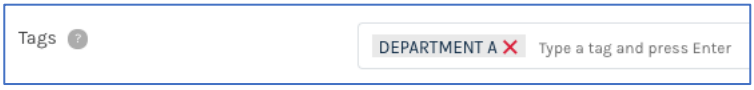
Additional Details

- **Keywords:** These are terms used for SEO only. They are not displayed anywhere on the calendar entry page. Make sure to **press Enter** after you finish typing to finalize the keyword.
- **Tags *IMPORTANT:** These are what you will use to help categorize your entries. If you want to create different segments of your calendar for specific topics, departments, campaigns, or other purposes, you will need to use tags to do this. Tags can be used to create customized lists on your websites as well. Make sure to **press Enter** after you finish typing to finalize the tag.



- **Hashtag:** This can be used for social media hashtags.
- **Event Website:** This is the website or URL associated with the calendar entry. This can be your agency website or another site that allows the visitor to get more information.
- **Vanity URL *IMPORTANT:** This is where you can customize the URL address of your event for marketing purposes. By default, it will be the name of the event, all lowercase with underscores.
- **Owner:** This is where you can supply an email address of the event owner. Ownership can be transferred by changing the email address, but the supplied email address will receive the notification associated with registration and other event updates.

User Engagement

- **Note:** All user engagement on events.in.gov is disabled. These fields will not do anything.

Visibility

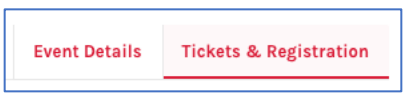
- **Exclude from Trending:** This can be used to not show the event on the homepage trending tab.
- **Visibility:** This is where you can modify the visibility settings for the event by choosing Public, Unlisted, and Restricted.
    - Public – This makes the event available on the agency calendar and the main calendar
    - Unlisted – This makes the event hidden on all calendars, but publicly accessible via a public link (via email or promotion).
    - Restricted – This is a private event that allows you to specify where it can be viewed.

Promotion

- **Sponsored:** This promotes the event to the top of the trending list and also provides a slightly different style to draw more attention.
- **Featured:** This allows you to promote your event at the top of the main events.in.gov homepage in the featured carousel.

Registration Events

If you have an event that requires tickets or registration you will need to set these up in a separate tab at the top of the event details, called “Tickets & Registration”. Click that tab to begin setting up your registration information.



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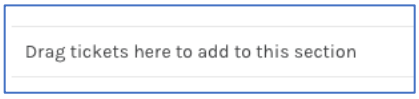
Tickets

- Each event must have a concept of a ticket to keep track of the number of users. These tickets consist of two parts:

1. **Add Ticket Type** – You have to first create a ticket type. This will be something that can help you organize your different tickets or groupings. This can be generic, like General Admission or Free. You can associate different tickets with different types if needed.
2. **Add Ticket** – You will then need to create a ticket that you will eventually add to the ticket type. When creating the ticket, you can specify the name, description, and if it's an in-person, virtual, or hybrid ticket.
    - **Additional Ticket Options**
        - **Availability Dates –** Specify when the tickets are available from and to.
        - **Settings –** Other settings including hiding a ticket until a promo code is entered, limiting the number of tickets, and min/max quantities per registration.
3. **Save your Ticket and Drag it into the Ticket Type**



Promo Codes

- Available for you to create special promotions for users to input promo codes to unlock discounts and ticket types.

Attendee Questions

- Available for you to ask for additional questions when a user is registering for an event. These questions will be stored for you to access in the event metrics.

Registration Settings

- These are settings that control the event registration parameters.
    - **Event Capacity** – Specify the number of attendees at your event.
    - **Reset Quantities per Instance** – If you have multiple instances of the same event you can spread out the registrations or reset them per instance.
    - **Registration Notifications** – The creator of the event can be notified when a new registration comes in.
    - **Payout Account** – This feature is coming in December of 2020. Until then all events must be free. Please contact Kevin O'Keefe at kokeefe@iot.in.gov to learn more.
    - **Compliance Level** – You can specify text that the user must agree to complete registration.

Pending and Past Events

In the left navigation, you can access pending events that are awaiting approval or have not been set to live and also past events that are live.

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Pending

- This is where you will see a list of events that have been created by non-administrators or events that have not been marked to go live immediately. From the list, you can quickly approve (make live) or reject (with a message) to manage the events.

Past (Live) Events

- This is where you will see a list of all your past and current events that are live on the calendar site. From this list, you can use the right section “Refine Results” to narrow down your list to specific items that you need to find.

Edit an Event – Promotion, Copy, Metrics

Once an event is live you have additional options to promote the event, clone the event to use the same settings for another event, or view the individual metrics for that particular event.

Promotion

- This tool is for sending notices to anyone listed on the event's attendees list.

Copy (Clone)

- This tool is for creating a new event by using the current one as a template.

Metrics

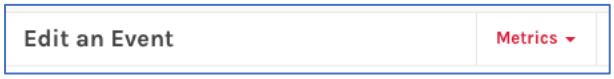
- This tool shows you people interested, audience geography, page views over time, and past admin activity (audit trail).

Metrics (Global/All Calendars)

Metrics are global across all of the different calendars. This provides a way to see the full scope of what is happening and trending on the IN.gov calendar.

- Approval Response Time – This will not be used. This would be for approving user-created events, which IN.gov is not allowing at this time.
- Audience Geography – This will show the location of users who have looked at the calendar.
- Events Created – This will show how many events have been created over time. You also can filter the list to show different types and topics.
- Trending Events – This will show the most popular events over the selected time period.
- Social Activity – This will show all of the different social sharing that has occurred with calendar events.

NOTE: Each event has metrics that are located in the top right section when you edit an existing event.



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Building Widgets (Syndication Feeds)

You can build custom event feeds that you can easily embed on your website. These feeds can be created by simply entering information in the pubic builder. Here are the steps to make a basic widget:

1. Go to https://events.in.gov/help/widget
2. Choose your settings

- IN.gov template along with type "List" will translate into the IN.gov Standard Agency Templates in the CMS with ease.
- You can choose **negative** days ahead to create a past feed.
- Be sure to select your agency under **Groups.**
- Mini Calendar option can be customized via site CSS.
- Other options are available upon request – please email Kevin O'Keefe kokeefe@iot.in.gov to enquire.

3. Click Generate Widget Code
4. Copy and paste that code on your page

Your Dashboard and Settings

When a user is logged in, they have access to additional buttons in the top header of the calendar site. These options control the personal settings related to their calendar and their user.

Dashboard

Users have many options here to customize their experience and notifications.

- **View Activity Feed** – This is a list of your notifications, events you've made, and pending events
- **Build an Email Digest** – This is a way to create an email subscription to be shown a specific list of events that you are interested in.
- **Build an Embed Widget** – This takes you to the public widget builder (explained above).
- **View Profile** – Shows your public profile.
- **My Calendar** – Shows a list of all the events you are registered for or are interested in.
- **Messages** – This will not be used. IN.gov does not allow for any comments or user interaction on events.in.gov
- **Following** – This shows you a list of the people, places, and groups you are currently following to help you manage your notifications.

Settings

Users can update their account settings, communication settings, and bulletins subscriptions here.

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Tips / Other Items

- If you are searching for a past event, the current calendar search only supports a single week view of past events. You can quickly find a workaround for this by modifying the URL associated with the date search:
    - https://events.in.gov/calendar/day/**2020/8/4**?order=date&days=7&experience=
    - Change those dates in the URL to whatever you need to look for, the order is the year, month, then day. The list will show you the next 7 days from that date.
    - An example would be https://events.in.gov/calendar/day/**2018/6/15**?days=7

Resources and Help

If you need assistance or training, please visit INWP to get more help:

- Issues - https://www.in.gov/inwp/webmasters/statewide-solutions/ingov-calendar-and-press-release-system/
- Training - https://www.in.gov/inwp/webmasters/training/
- Feature requests or other questions – kokeefe@iot.in.gov (Kevin O'Keefe)

For other information related to Localist and the application capabilities, please visit their support documentation site: http://support.localist.com/

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