



Event Planning Site

User Guide

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This user guide covers the basic functionality of the Event Planning Site from a user perspective. If you need additional technical assistance with the Event Planning Site, please open a ticket with the IT Help Desk at helpdesk@uams.edu. For all other event related questions, please email events@uams.edu.

Logging In

You can access the Event Planning Site at <http://events.apps.uams.edu/>. The front page will display the following:

The screenshot shows the UAMS Event Planning website. At the top, there is a dark red header with the UAMS logo on the left and 'UAMS Event Planning' on the right, with a 'Login' link. Below the header is a navigation bar with links for 'Home', 'Event Planning Guide', and 'Calendar of Events'. The 'Home' link is marked with a blue square containing the number '1'. The 'Event Planning Guide' link is marked with a blue square containing the number '2'. The 'Calendar of Events' link is marked with a blue square containing the number '3'. In the top right corner of the navigation bar, there is a 'Login' button marked with a blue square containing the number '4'. The main content area features a large 'Welcome!' heading, followed by a paragraph of text and a list of bullet points. The text mentions the 'UAMS Special Events Policy' and the 'Event Planning Guide'. The list includes 'Certain internal events', 'UAMS Regional Program events', and 'UAMS Outreach Initiatives defined more specifically in the UAMS Special Events Policy'. The 'UAMS Special Events Policy' link is marked with a blue square containing the number '5'. At the bottom of the main content area, there are two buttons: 'Submit an event' and 'Login'. The 'Login' button is marked with a blue square containing the number '4'.

1. Return to the **Home** Page
2. Click to access the **Event Planning Guide**
3. Display the Calendar of approved events
4. Access login screen
5. Review the UAMS Special Events Policy

To login to the site, click on either **Login** button and you will be prompted to enter your credentials.

Login

User Name

Password

Your login credentials will be your UAMS credentials. You can also select **Use default credentials** to automatically log in without typing your user name and password.

If you are unable to log in, please open a ticket with the UAMS Help Desk.

After logging in, you will see the following:

The screenshot shows the UAMS Event Planning website interface. At the top, there is a red header with the UAMS logo on the left and 'UAMS Event Planning' on the right, including a user profile icon for 'ChachereDonnaL' and a 'Logout' link. Below the header is a navigation bar with links for 'Home', 'Event Planning Guide', and 'Calendar of Events'. On the left side, there is a sidebar menu with options: 'Events', 'My Submissions' (circled in green), 'Approvals', and 'Pending Approvals' (with a notification icon). A green arrow points from the text 'Select to view all your submissions' to the 'My Submissions' link. The main content area features a 'Welcome!' message, a 'Log out of system' link (with a green arrow pointing to it), and a 'Submit an event' button (with a green arrow pointing to it and the text 'Click here to open the event request form'). The main content also includes a welcome message, a link to the 'UAMS Special Events Policy', and a list of event types: 'Certain internal events', 'UAMS Regional Program events', and 'UAMS Outreach Initiatives defined more specifically in the UAMS Special Events Policy'.

Click **Submit an event** to open a blank event request form.

Submitting Events

After clicking **Submit an event**, a new request form will display:

The screenshot shows the 'Event Request Form' interface. At the top, there is a red header with the UAMS logo and 'UAMS Event Planning' text. Below the header is a navigation bar with links for 'Home', 'Event Planning Guide', and 'Calendar of Events'. On the left side, there is a sidebar menu with options: 'Events', 'My Submissions', 'Approvals', 'Pending Approvals', 'Event Request Form', 'Contact Information', 'Day of Event', 'Event Info', 'Alcohol', 'Contracts', 'Media Coverage', 'UAMS Services', 'Printed Materials', 'Fundraising', 'UAMS Leadership', and 'Additional Info'. The 'Event Request Form' section is highlighted with a green box. A callout box points to the sidebar menu with the text: 'Jump to sections by clicking here on the section name'. Another callout box points to the 'Submit' button with the text: 'An event form can be saved for editing later or submitted for approval'. A third callout box points to a red asterisk next to a field label with the text: 'Required fields are marked with a red asterisk'. The main content area of the form includes a 'Please read before completing this form' section with three numbered instructions, a 'UAMS Special Events policy' section with two radio button options, and a 'Contact Information' section with input fields for 'Name *' (split into 'First' and 'Last') and 'Department/Division *'. At the bottom left of the form, there are 'Save' and 'Submit' buttons.

Scroll down to continue entering information into the form. There are helpful links, such as to Parking and Creative Services, throughout the form to assist you in submitting all required information for your event. If you do not have all your event information available, you can start a submission and **Save** the form for later. To access saved forms, go to **My Submissions** and click on your event to bring up the saved form. Once you have all event information entered, hit **Submit** to begin the approval process and you will receive an email notification that your request has been submitted.

*Please note: the event request form **DOES NOT** replace the parking or Conference Room & Table set up forms. You will need to submit these in addition to the event request form if those services are needed. Also, you will need to reserve your room through 25Live separately.*

Tracking an Event

After an event request is submitted, it will go through a series of approvals before the event is approved. There are three approval levels:

1. Calendar confirmation – the date must first be approved for the event
2. Institutional Advancement – the overall event is then approved by IA
3. Level 3 approvals: Based on selections made on the event request form, the event may need to be approved by the Office of the Provost, Campus Operations (if alcohol served), Chancellor's Office or Facilities and Parking (on campus events).

After levels 1 – 3 approvals are received, the event request form will go to level 4 where various groups will acknowledge or receive a notification that their services are requested. You can view where in the approval process your event is by going to **My Submissions**.

Typically, Calendar Confirmation takes 2 business days and Institutional Advancement and Level 3 approvals can require an additional 3 business days. However, your request may take longer if additional information is required in order to approve. Please allow 5 business days at a minimum for your request to be processed.

After selecting My Submissions, you will view a list of all your saved and submitted events.

The screenshot shows a table titled "Submitted Events" with columns for Name, Status, Event Date, Created, Submitted, and Actions. A search bar at the top left contains the text "Type event name here to search". A blue "+ Add event" button is at the top right. A dropdown menu is open for the "test level 4 approval" row, showing options: Status, Edit, Add documents, Cancel Event, and Copy Event. A pagination bar at the bottom shows "1 2 3 4 5 Next".

| Name | Status | Event Date | Created | Submitted | Actions |
|----------------------------|-----------------------------|------------|------------|------------|---------|
| 6/21 test | Approved | 06/21/2016 | 06/21/2016 | 06/21/2016 | Actions |
| test level 4 approval | Awaiting acknowledgments | 06/17/2016 | 06/09/2016 | 06/09/2016 | Actions |
| user testing event 6/9/16 | Approved | 06/17/2016 | 06/09/2016 | 06/09/2016 | Actions |
| 5/2 testing 2 | On Hold | 05/06/2016 | 05/02/2016 | 05/02/2016 | Actions |
| testing | Approved | 05/05/2016 | 05/02/2016 | 05/02/2016 | Actions |
| testing_email notification | Awaiting acknowledgments | 05/03/2016 | 04/28/2016 | 04/28/2016 | Actions |
| 4/8 testing | Cancelled | 04/11/2016 | 04/08/2016 | 04/08/2016 | Actions |
| Spring picnic 2016 | Saved | 04/08/2016 | 04/07/2016 | 04/07/2016 | Actions |
| Spring picnic 2016 | Awaiting secondary approval | 04/08/2016 | 04/06/2016 | 04/06/2016 | Actions |
| test saving | Cancelled | 04/05/2016 | 04/01/2016 | 04/01/2016 | Actions |

The event name, status, event date, created date and submitted date will display. Click on the **Action** button to the right of your event to perform additional actions on the request form. You can view the individual approval status, edit the submission, attach documents, cancel the event or copy the event. Also, a search bar at the top allows to search all your events based on name. There are eight possible statuses for your event:

1. Saved – event request form is saved but not submitted
2. Awaiting date approval – event is waiting on calendar confirmation (level 1)
3. Awaiting secondary approval – event is waiting on levels 2 and 3 approvals
4. Awaiting acknowledgments – event is waiting on level 4 acknowledgments
5. Rejected – event has been rejected by a reviewer in levels 1-3
6. Cancelled – submitter has cancelled the event
7. On Hold – a reviewer in level 1-3 has put the event on hold while additional information is gathered. A comment will display below the status with the reason.
8. Approved – all approvals and acknowledgments received

Please note: if your event is rejected, you will need to submit a new event request form and send it through the approval process again if you wish to resubmit.

You can click on a status to see which approvals or acknowledgments the event is waiting on. You can also add comments to yourself for each approval group (for instance, add a reminder to submit the parking form). “Pending” means the reviewer has not processed the request yet and “Notified” means an email notification was sent to the individual/group notifying them that an event requiring their services or input has been approved. Any approver marked “notified” will not need to process the event request form.

Event Details for **Demo test 8/25/16**

Awaiting approval from 2 group(s)

 Count of outstanding approvals

| Approver | Date | Status | Action By | Note / Reason | Note to Self |
|---------------------------|------------------|--|---------------|-------------------|---|
| Calendar Confirmation | Today at 3:09 PM | Approved | DouglassKerIM | Date is approved | <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div> <input type="button" value="Save"/> |
| Campus Ops - Alcohol | | Pending | | | <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div> <input type="button" value="Save"/> |
| Facilities and Parking | | Pending | | | <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div> <input type="button" value="Save"/> |
| Institutional Advancement | Today at 3:09 PM | Approved | DouglassKerIM | event is approved | <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div> <input type="button" value="Save"/> |

 Individual approval group

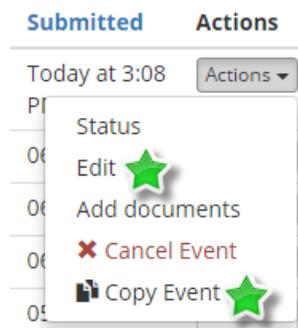
You can add notes for yourself to the event

Comment from reviewer

Editing or Copying an Event

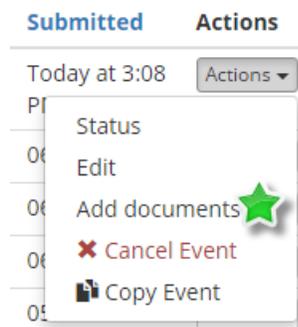
An event may be edited after it is submitted. Click the **Action** button on My Submissions to the right of the event submitted date. Select **Edit** from the list and the event request form will open for you to edit. Save the request form and a notice goes to event@uams.edu that the event has been edited since submission with a list of the updates made to the form.

An event may also be copied, which can be useful for similar events or events that happen on a regular occurrence. Click the **Action** button on My Submissions to the right of the event submitted date and select **Copy** from the list. All fields from the original event request form will be copied to a new form and you can update the necessary fields.

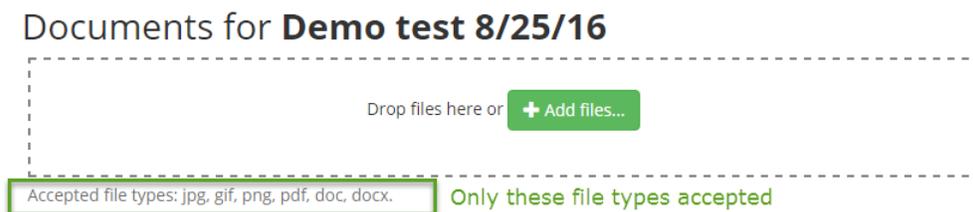


Adding Documents

To add supporting documents to your event request form, Click the **Action** button on My Submissions to the right of the event submitted date and select **Add Documents** from the list.



A new screen will display with a box that you can drag your files to or select **Add Files** to choose files from your computer.



Reviewers will be able to view the documents you upload.

Using the Event Planning Guide & Calendar

In addition to submitting and approving event requests, the Event Planning Site has a useful guide to assist you in planning events. Click on the **Event Planning Guide** menu at the top to open it. Navigating the guide is easy:

The screenshot shows the UAMS Event Planning website interface. At the top, there is a red header with the UAMS logo on the left and 'UAMS Event Planning' on the right, including a user profile 'ChachereDonnaL' and a 'Logout' button. Below the header is a navigation bar with 'Home', 'Event Planning Guide', and 'Calendar of Events'. A left sidebar menu contains 'Events', 'My Submissions', 'Approvals', 'Pending Approvals', 'Event Planning Guide', 'Getting Started', 'Date and Venue', 'Event Promotion', and 'Contact List'. The main content area is titled 'Getting Started' and 'Event Idea'. It includes a list of questions for planning an event, such as 'What is the goal of your event?' and 'Who is your audience?'. A 'Helpful Tip!' box provides advice on checking room availability and creating a timeline. Annotations with green boxes and arrows point to 'Return to your submissions here', 'Click on the section name to view its content', and 'Helpful tips and examples are provided in the event planning guide'.

UAMS

UAMS Event Planning

Home Event Planning Guide Calendar of Events

Events

My Submissions

Approvals

Pending Approvals

Event Planning Guide

Getting Started

Date and Venue

Event Promotion

Contact List

Getting Started

Event Idea

The first step to planning an event is to think about why you are having it and what you hope to achieve. These questions should help you gain the necessary focus.

- What is the goal of your event?
 - To raise awareness?
 - To honor someone?
 - To celebrate an occasion?
 - To present information?
- How do you plan to raise funds?
- Will you provide continuing education? (Rely on the experts! Contact the [Office of Continuing Education](#) to help guide you through the accreditation requirements.)
- Who is your audience?
- What is the appropriate venue?
- Will this event conflict with or be held in conjunction with other campus or unit events?
- What is your budget for the event?

Helpful Tip!
Check room availability before filling out the submission form.
Create a timeline and stick to it. [Click here for a sample timeline \(MS-Word\)](#)

Event Budget

It is important to create a budget during the pre-planning stage. Creating a budget will help you decide if the event is cost effective as well as answer many planning questions. Below is a list of expenses to consider when planning your budget:

- Space Rental
- Parking

You can also view all approved events on the Calendar. Only events that have been approved by all levels will display here. Accessing the calendar before submitting your event will help you determine if any conflicts exist on your selected date and will help with calendar confirmation. Additionally, instructions are available to add events to your Outlook calendar. Clicking on an event will display the event details (date, location and description).