LiveWhale Calendar System

Instructions for Tarleton State University Calendar Maintainers

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1 BASIC INSTRUCTIONS

1.1 ADD EVENTS INTO THE LIVEWHALE SYSTEM

1.1.1 Log In

Bookmark http://tarleton.lwcal.com/livewhale/?login, and use your NTNET username (no @tarleton.edu required) and password to log in.

1.1.2 Calendar Groups

Under your name on the top-right menu, you should be able to select all calendars you have permission to update.

1.1.3 Add/Edit

Once you have selected the calendar group you want to work in, you can update events in that calendar or add new events. Make sure the Event details only includes information not displayed anywhere else on the event page.

1.1.4 Add Images

Since the calendar is being set up on our responsive template, we are going for the higher quality images and photos from cameras. Please make sure images are, at

We can create unlimited calendars and give unlimited user access, however, there some new techniques we can use to keep the calendar listing short while still giving you a customized display of your events.

minimum, **900 px wide by 600 px tall (3:2 ratio)**. That is a **landscape, or horizontal, orientation**.
(See Using Images for further information)

Good example: Planetarium schedule

1.1.5 Add a Call to Action (CTA) Button

It functions similar to the "Related Content" area, but it stands out the most on the page in order to send someone to a registration link, etc. For example, select any one of the Continuing Education courses to see a link to the Tarleton Marketplace. In Edit mode, it will look like this:

1.1.6 Share Your Events

You can share your event to any calendar group available, and the owner will determine if it is approved. If your event is held in a facility with its own calendar group (e.g., "**FACILITY**: Library") share your event to that group.

We encourage you to let us know what you want promoted on the Tarleton homepage by also selecting "Homepage Feature" on your important
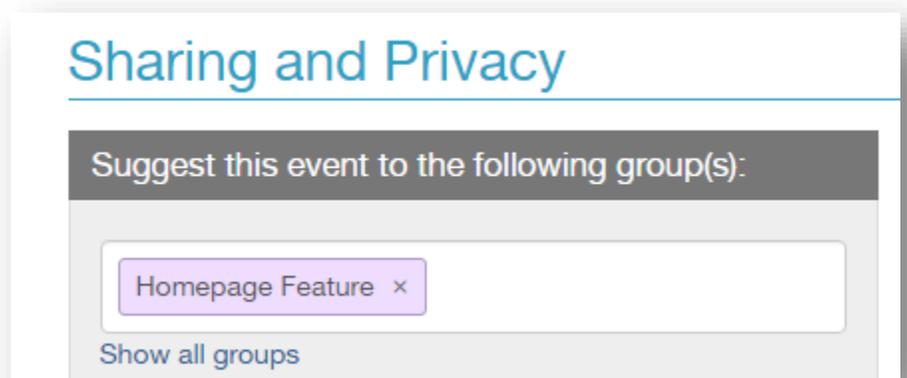
events. Please make sure there is a call to action and photo to make it engaging.

There are some **calendar groups you should not be sharing to**:

- Any calendar denoted "**DONOTUSE**" (we are experimenting with private calendar functionality), e.g.,
  - DONOTUSE: Admin
  - DONOTUSE: LiveWhale
  - DONOTUSE: Tarleton
- Any calendar denoted "**PRIVATE**" (we are experimenting with private calendar functionality)
- **Public**

1.1.7 Review Your Events

Once you've edited your events, you can preview them on your own calendar group. Under your name on the top-right menu, you should be able to select the *Group Calendar for [your current calendar group]*. To switch to another calendar group, select *Switch groups*.
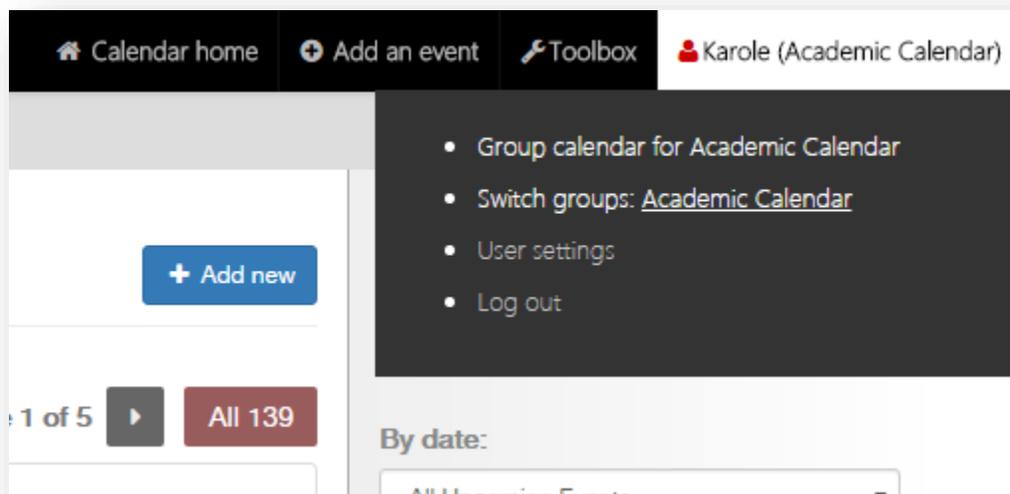
Typical reasons an event will appear blank on preview:

- **Special characters and formatting (e.g., extra spaces, ",", &)** included in Event details, Contact information, or Event cost

- Use of **ampersand (&)** in Event title, Event details, Tags, Call to Action Button, Contact information, Event cost, or Related content

If you notice anything odd about your event in the calendar listing or event detail views, email www@tarleton.edu with the following information:
1. What should or should not have appeared on your event.
2. Calendar Group name (e.g., FACILITY: Recreational Sports Center)
3. Web Address of the event page
4. Section not showing up correctly (e.g., images, cost, contact info)

2 IN-DEPTH INSTRUCTIONS

2.1 USING IMAGES

Please make sure images are, at minimum, **900 px wide by 600 px tall (3:2 ratio)**. That is a **landscape, or horizontal, orientation**.

2.1.1 Image Standards and Adjustments

Understandably, these dimensions will require event maintainers to request that their designers build not only flyer/poster orientation images but landscape ones which will help in advertising on our TVs/digital signage, social media, and calendar system platforms.

While it is preferable that graphics be the correct 900x600 dimensions, some exceptions are allowed. However, these rare instances should incorporate "white space" around the image. White space can be any appropriate color that complements the original graphic, preferably the background color of the slideshow on the event details view which is a light gray (Hex Code: #D9D6DA; RGB Code: 217, 214, 218).

Do not include text heavy flyers/posters for your event images. These images should not contain a lot of text because

1. information will be hard to impossible to read on the image making them inaccessible, and
2. event information will be duplicated on the event details where the content should be displayed.

Instead, focus on an image that represents the tone or activity of the event. If you are using a logo, make sure there is enough "white space" (e.g., gray background where no important imagery is) surrounding it to make it fit in the 900x600 dimensions.

Add Images to Library ×

Hide Details

Bonfire_8247.jpg **uploaded successfully!**

bonfire_8247.jpg

Enter a caption for this image...

Enter a credit for this image...

Enter a comma-separated list of keywords for this image...

Save this image or cancel and close
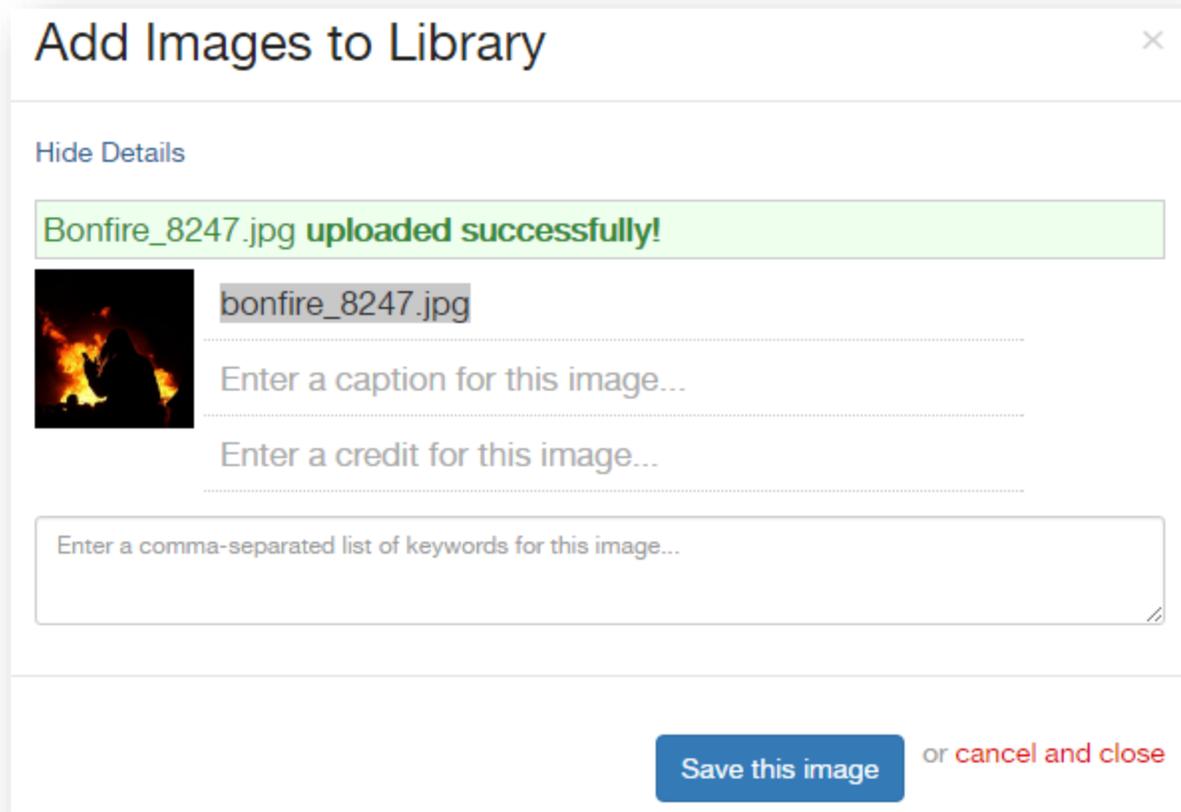
2.1.2 Alternative Text

The alternative text in LiveWhale is the "caption for this image."

Alternative Text: *To comply with accessibility standards*, this text is required on each image to provide blind users with the ability to gather similar context of your message and your image. Text is treated like anything you would read, so it follows similar capitalization, punctuation, and grammar rules to aid screenreaders read the description of the image correctly. Pretend the image cannot load on the page and you can only see text: what would still explain what was important on the image for all your audiences?

While this would typically be a great place for additional features like links to webpages, we cannot condone that usage at this time as it is breaking the page layout.

You must be very careful about what text you choose because it could accidentally be visible to your audience. Something like "dog" or "girl" will not

explain the purpose or tone of the event to our blind constituents, so please give them a more explanatory phrase. For example, if a student organization is running a pet adoption booth, "A smiling puppy waiting for a forever home" would be more appropriate as it supports the event message and the tone you want to present.

2.1.3 Using an Image Only as a Thumbnail

If you have no desire for a slideshow or image showing on your event page – just on the calendar listing:
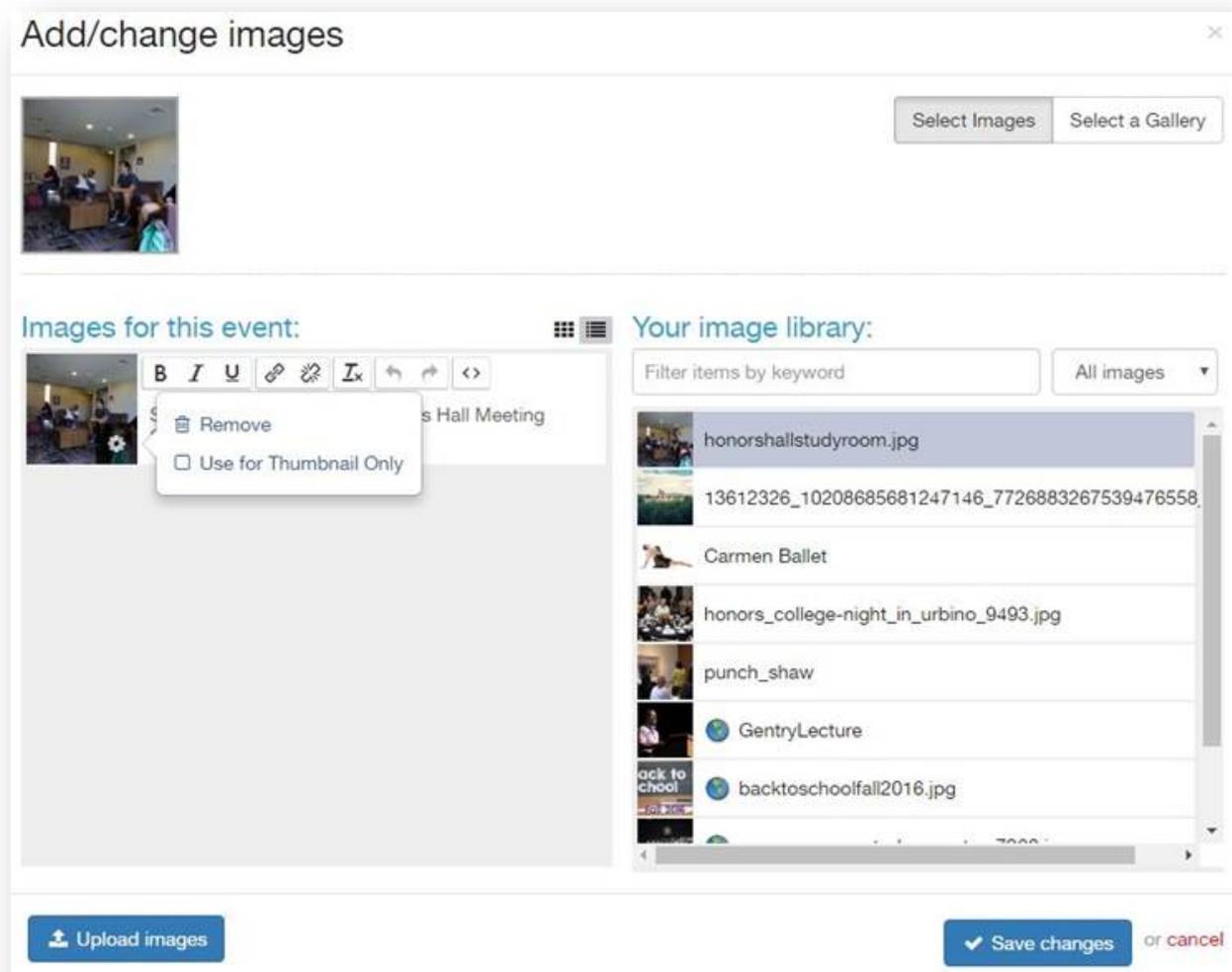
When adding/editing images on your event, select the gear icon on the bottom right of your image and then select "Use for Thumbnail Only".

2.1.4 Filename Standards

Please make sure that each image has an appropriate name ("".jpg"" is not required in the name) to assist you in organization and searchability. You can adjust these later in your calendar group's Images library.

2.1.5 Image Credit

If a student or external designer/photographer is responsible for the work on the image, you can *optionally* add in credit by just entering in the name of the individual/organization.

2.1.6 Image Keywords

You can also add in keywords that help you search for this image later when your library gets larger and you need to reuse it.

2.2 CALENDAR OWNERSHIP

Many of you have started to receive emails from LiveWhale requesting you review events that other calendar maintainers have requested to **Share** to your calendar group. You'll receive a link to preview the event and a link to your calendar group's list of events where you can approve / reject them:
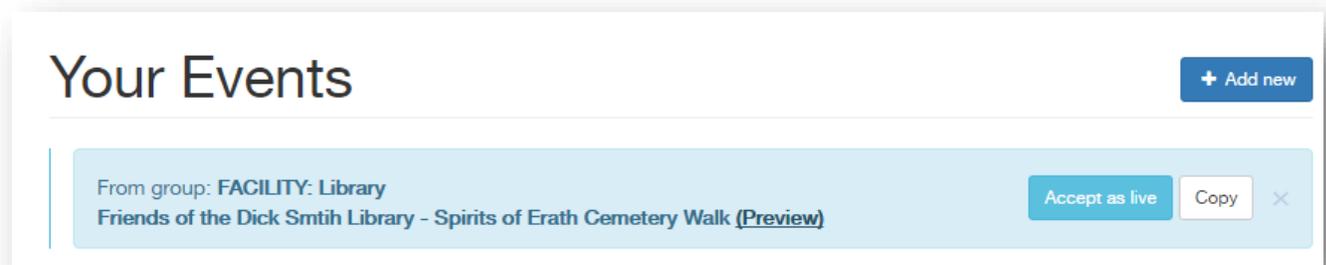
If you are receiving these or viewing these on your calendar group's event listing, congratulations, you are an owner on your calendar group, so you can determine the applicability of any requested event for your particular audience(s)!

2.2.1 Email Notifications

If you have access to one or more calendar groups, and your settings have you configured to receive email notifications, these emails are informing you of any activity on your calendar group(s) or event(s) you have requested to share:

- If an event is shared to your calendar group (someone is requesting approval to add their event to your calendar), then you will receive an email about that share request.
- If you have access to more than one calendar group, you will get share requests for all calendars, not just the ones you primarily maintain.
- They don't come in a single daily digest.

2.2.1.1 Removing Email Notifications

1. Log into LiveWhale Calendar System, and go to the *User Settings* under your name (top-right of the screen).
2. Underneath your full name is your email address and a *Send* checkbox. Uncheck this box.
3. Select *Save Settings*.

2.2.2 When to Approve

You can select **Accept as live** if the event meets applicability requirements for your calendar group. If you have more than one calendar group, please check the name of the calendar group in the top-right corner next to your name, before approving. When determining what meets applicability requirements for your calendar group, consider the relevance to the audience looking specifically at your calendar:

- **Example #1:** You own a facility calendar group and a calendar maintainer shared an event with you that occurs in, on or near your facility.
- **Example #2:** You own an audience based calendar group (e.g., Faculty and Staff, Alumni, or Student Affairs calendars or any of the Location calendars), and a calendar maintainer shared an event with you that would benefit that audience.

- **Example #3:** You own an academic calendar group whose majors might be interested in the subject matter or purpose/goal of the event a calendar maintainer shared.

2.2.3 When to Reject

You can select the **X button (for rejecting)** if the event does not meet applicability requirements for your calendar group:

- **Example #1:** You own a calendar group that may have a student audience (e.g., any academic college, department, program, or unit), but the event the calendar maintainer shared with you does not reflect any purpose/goal of your area.
  - Using the screenshot above, good calendars for the Spirits of Erath County Cemetery Walk event *might* only be the Library calendar group (because they host the event) and the Social Sciences calendar group (because lectures on history or history of this area would be interesting for the majors in that department). Think about these carefully, and contact Web Services if you have any concerns on specific events.

> You cannot edit which calendar groups you shared your event to if the event is already approved for a specific calendar group, so contact that calendar maintainer (or Web Services) about deleting that event on their specific calendar group – it will not affect your event.

- **Example #2:** A calendar maintainer accidentally shared an event with you that has no relevance to your calendar group.

2.2.4 When to Edit the Event

Access to edit an event on your calendar group depends on who is the owner of that event:

- If you **own that event on your calendar group,** you can make any changes you want which will reflect on all the calendar groups you've shared that event on.

- If a calendar maintainer **shared that event on your calendar group and you approved it**, you can adjust some aspects of the details that will only affect your calendar group's version of the event. You can also delete the event without affecting the original calendar group's version. If the changes you have need to be reflected on all calendar groups the event is shared to, please contact the owner of the event to make these edits.

  Currently, you can edit the following areas which will affect only your own calendar group:
  - Feature event
  - Live/Hidden
  - Event types/Categories
  - Tags

A shared event (an event not owned by your calendar group) is designated by the chain link next to the title of the event:

2.3 TAGS

2.3.1 Local Tags
Your calendar group may have your specific Local Tags. You may create as many as you want. Should a tag been deemed cross-group worthy, it can be converted to a [Global Tag](#).

2.3.1.1 Naming Conventions
Following this conventions will reduce errors displaying your event and loss of functionality:

- Do not use special characters and formatting (e.g., extra spaces, ",", &, :)
- Do use camel case on all words (e.g., "International" not "international")
- Keep it simple and short

2.3.1.2 Best Practices

Events are different from blog posts in that you don't need to create a tag for every keyword regarding your event. Keep your list short and to the point.

Unless you need to list more than one event by name for use on a calendar view (e.g., event listing), you probably don't need a tag:

- **INCLUDE THEM IN THE DESCRIPTION:** Keywords should be included in your **Event details** that make it searchable. Do not keyword stuff, merely use the word conversationally within the explanation of the event.
- **SHARE TO THE APPROPRIATE CALENDAR GROUPS:** You can share your events with other calendar groups, so they see subjects related to them. For example, a Research calendar group is available to share to regarding research-related events. If you find you are creating a lot of events for a specific group, such as an organization, contact Web Services about recommending a new calendar group. Events can be shared across but listed specifically there, similar to the ACADEMIC CALENDAR: Final Exams calendar group.
- **AVOID REDUNDANCY:** Any words used in event types do not need to be created as tags. For example, "Alumni" and "Student" are already audience event types, so they are searchable when selected for a certain event. "Tours" is already a part of the name for the event type "Open Houses and Tours".

2.3.2 Global Tags

Global tags are shared across all calendar groups. The following are our current Global Tags. We may at times add new ones for your use.

2.3.2.1 Student Types

Use for events relevant to the following student types to allow students to focus on their specific events.

- Doctoral
- Graduate
- International
- Transfer
- Undergraduate

2.3.2.2 Tarleton Systems

These are commonly used across multiple calendar groups pertaining to maintenance, training, etc.

- Banner
- Blackboard

2.3.2.3 Seasonal Periods

These help organize events based on times of the academic year to handle things. E.g., All final exams for a particular semester, enrollment processes for a particular semester

- Fall
- Spring
- Summer

2.3.2.4 Special Events

A variety of events span multiple calendar groups, so these tags assist in relating relevant content across calendars.

- Commencement
- Extended Hours
- Finals
- Homecoming
- Poster Presentation
- Symposium
- Thesis Presentation
- Transition Programs
- Transition Week

2.3.2.5 Price Tags

Make your events stand out if you need (or want) to inform people of the price (or lack thereof) for an event. People love free.

- Free Event
- Paid Event

2.4 EVENT TYPES

Event Types are LiveWhale's categories. These are not to be confused with calendar groups or [tags](#). These aid a calendar viewer with determining the type of event they are interested in attending. Any event may have one or more Event Types designated.

2.4.1 Audience Types

Audience types are meant to determine who an event would be directed towards. It is not for telling certain audiences to promote an event to another audience, so keep it limited to the actual intended audience types.

- **Audience: Faculty**
- **Audience: Staff**
- **Audience: Students**
- **Audience: Alumni**
- **Audience: Members Only** : Does not show the event on the public calendar. Intended for your own calendar group's audience.
- **Audience: By Invite Only** : Does not show the event on the public calendar. Intended to inform the appropriate individuals of an event occurring as well as that it is only for individuals who have been specifically invited.
- **Audience: General Public**

2.4.2 Audience Locations

Audience locations are meant to aid individuals looking for events that are directed towards campus locations. Some events will require all audience locations to be selected, such as certain academic calendar events (e.g., enrollment, payment deadlines).

- **Audience: Stephenville**
- **Audience: Fort Worth**
- **Audience: Midlothian**
- **Audience: Waco**
- **Audience: Global Campus – Online**

2.4.3 Other Event Types

All other categories are actual event types, such as a lecturer & speaker or arts & performance.

- **Arts and Entertainment** (e.g., art exhibits, musical or theatrical events, movies)
- **Athletics** (e.g., NCAA events)
- **Deadlines**
- **Enrollment and Registration**
- **Holidays** (e.g., special office closures)
- **K-12 Activities and Camps**
- **Key Important Events** (e.g., events promoted university-wide and involves university-wide planning/participation)
- **Lectures and Speakers**
- **Meetings and Fundraisers**
- **Office Hours** (e.g., operational hours, extended hours)
- **Open Houses and Tours**
- **Receptions and Mixers**
- **Scheduled Maintenance**
- **Sports and Recreation** (e.g., health and wellness events, non-NCAA sports events)
- **Training and Conferences**

The *Office Hours* event type was added to assist you in providing a specific area that displayed your operational hours, if you need them. Keep in mind, for some events, you'll want to use multiple categories like *Office Hours* and *Audience: Members Only* to keep redundant events from appearing on the Public Calendar.

2.5 RELATED CONTENT

Any event may have related content attached to assist attendees with understanding the event or providing them with important information needed at the event (e.g., parking information, maps, signage for move-in). Use these in

PDF versions of event fliers are not necessary on descriptions or related content as this information can be described in as much detail as needed on the event's description.

moderation as the more related content you add, the more buttons on the side of the event detail page. This can cause confusion due to the blank space.

- **Events**: Do not use the related events option as these display oddly on the page right now.
- **Files**: Only PDFs are allowed. You may combine documents into one PDF (e.g., an event packet) to reduce confusion on the page.
- **Web Addresses**: You may provide more information regarding an event or other key events from the calendar. Event webpages are discouraged, since the event information should be on specific events in the LiveWhale calendar and we can customize the events to display the full list of events in one link.

2.6 EVENT RSVP (FOR SMALL EVENTS)

If you don't need a whole lot of information from your attendees and they don't need to pay to attend the event, we recommend you use the RSVP functionality of LiveWhale instead of Wufoo. If you are using another service (e.g., cVent, EventBrite), use the Call to Action button to encourage them to register online.

2.6.1 RSVP Form

Each RSVP form has the following form fields by default:

- Name
- Email
- Phone
- Comments
- Number of attendees

If you would like your attendees to provide additional information, use the *Special Instructions* field to ask them to add it to the *Comments* form field.

2.6.2 Notifications

You can provide an automated email response when your attendees submit their RSVP. You can also be notified when the RSVPs are submitted, or come back to LiveWhale's *Toolbox* menu, under *Event RSVPs* (there will be a number beside it with all new entries).

2.6.3 Limiting RSVPs

You can decide how many attendees may RSVP as well as create a waiting list for overflow.

If your attendees can bring others, you can provide a maximum number. The number registered and on the waitlist will show pub

If you don't want responses coming from potentially fake accounts, you can limit them to specific email addresses or domains (e.g., @tarleton.edu, @go.tarleton.edu) to ensure they are Tarleton students, faculty, staff, etc.

2.6.4 Manage Event Registrations

Under LiveWhale's *Toolbox* menu, under *Event RSVPs*, you can manage registrants to each of your events. It provides options to manage confirmed and waitlisted attendees:

- Cancel, uncancel and delete reservation options
- Mark registrants as having attended or not attended
- Print off a list of registrants
- Export the registrant list to CSV
- Email all registrants
- Add notes about specific registrants for event owner usage

2.6.5 Exporting the Registrant List to CSV

LiveWhale allows you to export the registrant list to a CSV file which you can edit and print out for your own use. If you need to do mail merge with the information, you may notice that the first and last name are combined on the CSV file. Microsoft Office has very simple instructions for splitting the name inside Excel.

3 CONCERNS YOU MAY HAVE

Please let us know if you have any questions or concerns. We do have a number of questions we can answer right now:

3.1 HOW DO I KEEP EVENTS I ADD FROM BEING SHOWN ON THE

PUBLIC CALENDAR?

The Public Calendar will automatically be pulling events off of all Calendar Groups automatically, **except**

- Any Calendar Group you specify with us should not have any events pulled.
- Any Events with the following Event Types (categories) selected:
  - o **Audience: Members Only** - used for strictly private calendar events that only people in your program should know about.
  - o **Audience: By Invite Only** - used for any events that you want people to know need an invitation to be allowed to attend.

Do not attempt to share to the "Public" calendar group. All events are automatically pulled, except the ones listed here. Your own calendar display (e.g., departmental homepage event listing) will not be affected by these event types. Contact Web Services if you want to adjust the default display of your own calendar.

3.2 I NEED MULTIPLE CALENDARS, GIVEN THE VARIOUS PROGRAMS I OFFER. HOW DO I GET THOSE CUSTOMIZABLE DISPLAYS OF EVENTS?

There are three criteria that will determine what displays on any customizable calendar display or widget (feed):

- Calendar Groups
- Event Types (categories):
  - *Audience Types*: we included faculty, staff, students, alumni, members only, by invite only, and general public
  - *Audience Locations*: we included Stephenville, Fort Worth, Midlothian, Waco, and Global Campus - Online
  - All other categories are actual event types, such as a lecturer & speaker or arts & performance.

> The *Office Hours* event type was added to assist you in providing a specific area that displayed your operational hours, if you need them. Keep in mind, for some events, you'll want to use multiple categories like *Office Hours* and *Audience: Members Only* to keep redundant events from appearing on the Public Calendar.

- Tags: These help you get more specific in your customizations.
  - E.g., FACILITY: Recreational Sports Center may have rather important tags for Fitness & Wellness, Outdoor Pursuits, and Intramural Sports, however, within Fitness & Wellness, they may want to use additional tags to display only Group X sessions, etc.
  - E.g., Academic Calendar may be the primary Calendar Group using three global tags for Fall, Spring, and Summer, however, if you have events you want to promote seasonally, you can also utilize these tags in addition to any others on your events.

As we convert your websites to the responsive (mobile-friendly) template, we will be able to give you fully functional calendars within your own websites, not just the smaller widgets (feeds). This will allow for more interactivity within your own

website which can include better searchability and archival usage (e.g., adding videos and images to events that have passed), if desired.

3.3 YOU MENTIONED NEW LIVEWHALE FEATURES. WHAT ARE THEY?

There are new sections available on Events, such as
- Event cost
- Contact information
- Call to Action (CTA) button
- Event types
- Tags
- Related Content
- RSVP

As we work on adding them into the functionality of the system, you will hear more about them. For example, we are polling you, our calendar maintainers, on the use of an appointment scheduler that could be added to your RSVP form. Contact Web Services for more information.

3.4 WHAT IS THE DIFFERENCE BETWEEN A REPEATING EVENT AND A STANDALONE EVENT?

Not every calendar system interprets this the same way, so here is what LiveWhale's calendar is doing:
- *Repeating*: Think of it like a course a student would register for, such as a Monday and Wednesday weekly class or a three-day seminar. If you are going to the event, **you are attending on each and every day** of the event.
- *Standalone*: If you are signing up to attend a particular event, you are doing so for that particular instance. If you need to state that a particular event repeats **in its entirety** multiple times (i.e., a theatre production), you will

need to make a duplicate of the event (on the event listing screen menu options).

3.4.1 Recommendations

1. Given the manner in which LiveWhale works, you will more often than not be working with standalone events. That means you will need to duplicate the event and adjust it (i.e., change the date/time as well as remove the "(copy)" from the event title).

2. If you have a repeating event already in your list, LiveWhale displays additional copies of that event representing each day it will occur, which can be confusing to work with considering they don't indicate which start date they are originally associated with.

3. When you use any of the menu options (particularly with duplication of events), please do not refresh the page, as this will repeat the commands previously acted on, despite the boxes and options not being selected visually.

3.5 WHAT IS THE DIFFERENCE BETWEEN CANCELING AND DELETING AN EVENT?

- **_Canceling_**: This is an event that people have known about for a while on the calendar, maybe even RSVP'ed for, but circumstanced occurred that required the event to be canceled. When canceled, LiveWhale automatically adds a "canceled" to the beginning of the event title, so you don't have to change anything directly on the event.
  There are a couple ways to cancel an event:
    - (1) gray box "Cancel Event" at the top right of the edit screen
    - (2) checkbox "This event is canceled" in the dark gray box at the bottom of the edit screen.

  Do not confuse these with the red "cancel and go back" link at the top left of the edit screen next to "Edit an event" as this is merely how you go back to the event listing without changing anything on the event.
- **_Deleting_**: This is an event that hasn't been publicized enough to warrant canceling. Deleting an event takes it entirely off the calendar system.

3.6 WHAT ARE THE DIFFERENCES AMONG THE PRIVACY OPTIONS?

There has been some confusion over what is a "private" event or private calendar.

First, you should only be using the "Everyone" option under the "Privacy options" at the bottom of the edit screen for an event. Any other option would require logging into the LiveWhale calendar system. While we have unlimited user access, each user has to be manually added in to receive permissions, and this is not an easy or organized area to maintain. Therefore, we are keeping the user list down to employees and student workers who are specifically charged with updating their respective calendar group(s).

Second, when we make the final switchover to the new calendar system, the Public Calendar will be pulling events off of all Calendar Groups automatically, **except**
- Any Calendar Group you specify with us should not have any events pulled.
- Any Events with the following Event Types (categories) selected:
  - **Audience: Members Only** - used for strictly private calendar events that only people in your program should know about.
  - **Audience: By Invite Only** - used for any events that you want people to know need an invitation to be allowed to attend.

Note that these Event Types are aggregate. For example, if you select **Audience: Members Only** and **Audience: Students**, the event will not suddenly appear on the Public Calendar, nor will it appear on the Student Life calendar just because **Audience: Students** was selected. Using multiple Event Types allows you to create more and more specific calendar lists (smaller and smaller sets). They will not override the previous conditions we are programming in.

Third, each calendar group is going to only be visible to your direct audience, which is anyone who goes to your website, email, or social media and either sees an event listing feed pulled from the calendar system onto your unit website or a link to your specific calendar group (i.e., Faculty and Staff Life). The Public Calendar will be the most prominent and accessible calendar and will only collect your calendar group's events that don't fall under the criteria mentioned above.

3.7 CAN I USE TSU IN MY DESCRIPTION, LOCATION NAMES AND OTHER AREAS OF THE EVENT DETAILS?

We are Tarleton State! However, we are often confused with Texas Southern University or Texas State University, and many more, by our usage of "TSU." While it's okay to use "TSU" on campus, external audiences (e.g., emails, social media, news articles, and websites) will not understand we are different from those guys who may be getting negative news that accidentally gets associated with Tarleton.

The Texas A&M University System has provided us with naming conventions to reduce this confusion: **When promoting Tarleton on anything going to external audiences, use only "Tarleton" or "Tarleton State University."**

Please check through your event titles, descriptions, locations, and anywhere else you have "TSU" in the LiveWhale calendar system. If you don't know how "TSU" got on a particular area, please feel free to contact us for assistance, and we will switch them out for you.

4 GREAT EXAMPLE USE CASES

Here are some other ways the calendar can be implemented:

- http://www.tarleton.edu/calendar/academic/ - Customized with semester tags to aid in searchability
- http://www.tarleton.edu/calendar/finals/ - Customized tags allow students to see better which date specific exams they might take
- http://www.tarleton.edu/calendar/tsmri/ - Add your own tags to customize a promotional link for a conference with multiple events or registration deadlines
- http://www.tarleton.edu/calendar/transitionweek/ - Add your own tags to customize a calendar view specific to a major event on multiple days with multiple sessions
- http://www.tarleton.edu/calendar/recsports/ - Use your own custom tags to organize program-based events, so we can link to customized views of your events on specific pages of your website