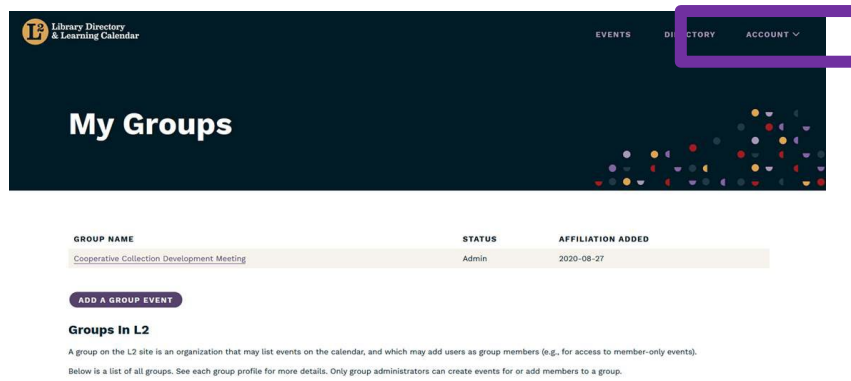**Library Directory & Learning Calendar**

July 2023

Create a New Event- Groups

URL: librarylearning.org

Step 1   Creating a new Event

    a. Login to begin creating a new event at librarylearning.org.

    b. Hover over *Account* and click *My Groups.*

    c. Click purple *Add A Group Event* button to open form.

    d. Type the event *Title* in the text field. **[required]**

Step 2   Setting Event Sponsor(s) [required]

Sponsor may be a regional library system, Illinois State Library, LLSAP, or group designated as an event sponsor.

    a. Add sponsor information by beginning to type the group sponsor name for a list of sponsors. An auto-suggest list of options appear. Select name of sponsor. **[required]** (The number in parentheses after the sponsor name is an internal identifier.)

    b. Select *Add Another Item* for additional sponsors. The first sponsor listed is considered the primary sponsor of the event; you may change the order by dragging on the left.

Step 3   Deciding Who Can View the Event

a. Choose from Public, Users affiliated to any location in L2, Users affiliated to this event's sponsor(s), or Sponsor's own staff only in the *Event View Access* dropdown. **[required]**

Definitions:
- Public (default) (Event can be viewed without being logged into L2)
- Users affiliated to any location in L2 (most logged-in users affiliated with a location can view)
- Sponsor's own staff only (Limits viewing events to selected event sponsor (s) staff. Must be logged in.)
- Users affiliated to any member library of this event's sponsor(s) (Limits view to event's sponsor members. Must be logged in.)

Step 4   Setting Event Date & Time

a. Enter the *Start/End* dates by clicking the calendar icon on the *Start/End Date* fields. **[required]**
b. Click the time dropdown menu to select the *Start/End Time* fields. **[required]**

Step 5   Defining Registration Period & Audience

a. Select *Checkbox* if using L2 for registration management. More options will be displayed. Event organizers would need to include URL in event description or use email tools to manually provide meeting URL to participants. See Manage Event Registration section below for instructions on exporting registrants list.

i. Select who may register for the event in the *Event Registration Access* dropdown.

Registration Access Options:
- None
- Logged in Users (default)

- Users affiliated with member libraries of the sponsors
- Users affiliated with the event's sponsor group
- Sponsor(s) own staff only

    ii. Define registration period by entering *Start/End Date* and *Start/End Time*.

b. Use *External Registration Link* for events outside the L2 registration system.

    i. Add URL

    ii. Add Link Text

Step 6 Setting Event Location(s)/Reserving Rooms

Event organizers can choose from three (3) different locations, Sponsor Location, Outside location, and Virtual location.

ADD SPONSOR LOCATION   **ADD OUTSIDE LOCATION**   **ADD VIRTUAL LOCATION**

a. Adding Sponsor Location(s)

Sponsor Location: Includes reservable rooms (for system service centers, Illinois State Library, and catalog consortia offices) and non-reservable library locations. Room reservations at your own organization are automatically approved. Rooms at other locations outside your organization can be requested but require approval. Example, Networking Group requesting use of a meeting room at a regional library system would require system staff to approve the request. Designated staff will receive an email notification.

    i. Select *Add Sponsor Location* for system service centers, Illinois State Library, videoconference sites, or library locations. Begin by typing location name and a list will auto-suggest a list of options. **[required]**

    ii. Select *Start/End Date* and *Start/End Times* to allow for additional time for setup and cleanup.

        Example: event starts at 10:00 a.m., you will need time to get set up and your attendees to be signed in and seated before the start of the meeting. Set start time for 9:30 a.m. After selecting date and time, the system checks for availability.

iii. Requesting a Room Setup, Reserving Room Options & Equipment

1. Select *Room Setup* layout options. Room setup varies depending on location. There may be instances where there is only one or no option to choose from.

   Options:
   - Auditorium/Theater
   - Conference Table
   - Small Group
   - Square
   - U Formation

2. Select *Room Options* needs. Check all that apply. Possible room options available may be HDMI cables, extra tables, and flip chart are just a few examples of reservable items. Options vary depending on location. Check all that apply.

iv. Set meeting *Format* **[required]**

   Options:
   - In-person
   - Videoconference Site
   - Online
   - Other
   - Telephone
   - N/A

v. Event Capacity & Waitlist

   Event capacity and waitlist must be set for each location.

1. Add event *Capacity* for this location or enter zero (0) for no limit. **[required if using L2 registration]**
2. Enable waitlist by selecting *Checkbox*.
3. Add *Waitlist Capacity* or enter zero (0) for no limit.

For additional sponsor locations, repeat Step 6a by selecting Add Sponsor Location or select Add Outside Location or Add Virtual Location if it applies.

b. Selecting Outside Locations

Outside library locations are **not** reserved through L2. Event organizer needs to reserve directly with individual location(s).

    i. Select *Add Outside Location* for off-site locations.
1. Add Existing Location by typing in the location name field for a list of options and select from the list the prepopulated list.
2. Outside locations are entered for informational purposes only. Reservations are made directly with the location.

    ii. Choose a meeting *Format*. **[required]**

Options:
- In-person
- Online
- Telephone
- Videoconference Site
- Other
- N/A

    iii. Add *Capacity* this location. Enter 0 for no limit. **[required]**

    iv. Enable *Waitlist* capabilities and set maximum number on waitlist. Enter zero (0) for no limit.

    v. Create New Location or Temporary Location. This is a location that is not on the prepopulated list under *Add Outside Location*.
1. Enter *Location Name on the Create Location* tab. **[required]**
2. Enter physical location information; *Company, Street Address, City, State, and Zip Code.* **[required]**
3. Enable the *Temporary* location *Checkbox* for one time use that does not need to be affiliated with other events.
4. *Save location*.

    vi. Choose a meeting *Format*. **[required]**

Options:
- In-person
- Videoconference Site
- Online
- Other
- Telephone
- N/A

vii. Add event registration *Capacity*. **[required if using L2 registration]**

viii. Enable *Waitlist* capabilities and set maximum number on waitlist for each location. Enter zero (0) for no limit.

For additional outside locations repeat Step 6b or select Add Sponsor Location or Add Virtual Location if it applies.

c. Selecting Virtual Location(s)

i. Select *Add Virtual Location* for online platforms.

ii. Select a list of *Virtual Locations* from dropdown. **[required]**

Options:
- Adobe Connect
- Conference Phone Call
- GoToMeeting
- GoToWebinar
- Microsoft Teams
- Moodle
- RAILS Live Streaming Video
- Virtual Location
- WebEx
- Zoom

iii. From dropdown set *Format*. **[required]**

Options:
- In-person
- Online
- Telephone
- Videoconference Site
- Other
- N/A

iv. Add event registration *Capacity*. **[required if using L2 registration]**

v. Enable *Waitlist* capabilities and set maximum number on waitlist for each location. Enter zero (0) for no limit.

For additional virtual locations repeat Step 6c or select Add Sponsor Location or Add Outside Location if it applies.

Step 7   **About the Event**

a. Primary Event Image

Default image is a confetti placeholder if a different image is not added.

i. Choose a new image by selecting *Add New Media Item*. Image will be shown as a circle, so a square image works best. Do not use an image with a transparent background.
    1. Upload a png, gif, jpg jpeg image by choose a file. (32 MB limit)
    2. Enter *Alternate Text*. Provide a brief description of the picture. At the end of the description add a period so that screen reader software recognizes it is the end of the description.
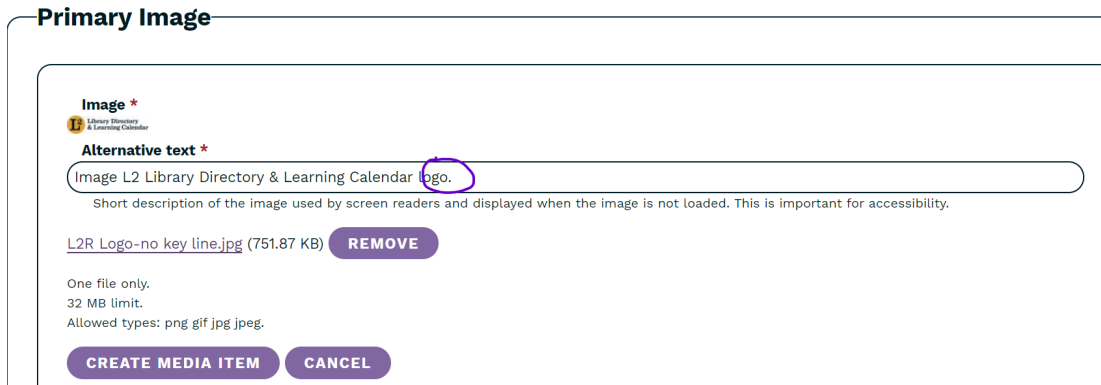
3. Click *Create Media* Item
b. Event description
    i. Intro Text - Event description exports to external system websites.
    ii. Primary Content – Additional space to add event details.

Event organizers can choose to enter full event description in the Intro Text editor or split between Intro Text editor and Primary Content editor. It is recommended to enter at least a brief event summary in the Intro Text editor.

Step 8 Event Types, Topics, & Audiences Metadata

a. *Event Series* if applicable. Submit a help desk ticket at help@librarylearning.org with adding a new event series.
b. Choose one or more *Topic* areas from a list of more than 30 different topics.
c. System Program(s) (For regional library system events only, not applicable for group event sponsors)
d. Choose an *Event Type* from a list of options.

Program	Networking
Training	Social
Webinar	Special Event
Meeting	Closing
Conference	Vendor Demonstration
Discussion	Other

e.   Choose from one or more *Audiences* options.

Academic Libraries   Special Libraries
Public Libraries   Library Directors
Library Trustees   System Staff
School Libraries

f.   Enter Event *Tag* in the free text field and click *Add Another Item* for the 2nd tag

Step 9   **Calendar Widget**

a.   Enable *Show Add to Calendar Widget* for calendar invite functionality. (Enabled by default.)

Step 10 **Presenter Information**

a.   Click *Add New Presenters* button to enter *Name, Title*, and presenter *Bio*.
b.   Upload presenter headshot. (png, gif, jpg, jpeg formats only; 32 MB limit)
c.   Provide a brief description of the picture. At the end of the description add a period so that screen reader software recognizes it is the end of the description.
d.   Click *Create Presenter*
e.   Multiple Presenters Repeat Step 10

Step 11 **Event Documents**

a.   Add event documents by using add new document button.
b.   Provide a document *Name*. **[required]**
c.   Choose file and add brief *Description* title. (16 MB limit; acceptable file formats txt, rtf, doc, docx, ppt, pptx, xls, xlsx, pdf)
d.   Repeat for additional documents

Step 12 **Event Contact**

a.   *Event Contact* - type the person's name and select from a list of users.
a.   *Event Contact Internal* - type the system internal contact for event and select from a list of users. Displays only to users with specific permissions.

Step 13 **Template feature**

   a. Enable the *Template* feature if you would like this event to be made available as a template for other events.

Step 14 **Publishing Options**

   a. Set event to publish at future scheduled time or leave blank to publish the event immediately upon saving.

▼ Scheduling options

Publish on

mm/dd/yyyy

--:--:-- --   🕐

Enter a date and time. Leave the date blank for no scheduled publishing.

Step 15 **SAVE**

Manage Event Registrations

Event organizers can manage registrations by selecting the Analysis tab. Analysis features include:
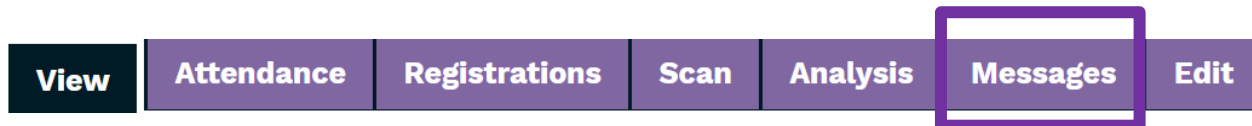
- Add registrations
- Cancel registrations
- Manage waitlist
- Print sign in sheet (pdf)
- Event Analysis (Exports registrants list to an Excel file)
- Add event attendance
- Event Evaluation (notes about the event for future reference)

Contact Registrants

Event organizers can compose a message in the text editor to registrants and additional recipients by selecting the *Message*s tab. Click *Send Message* button at bottom left to contact recipients. Sender will receive a copy of the sent message.

The text editor allows for basic formatting and the ability to add a link. If you need to include an attachment, consider exporting the registrants' list from the Analysis tab and email separately. **Note: This feature applies when registration is handled through the L2 registration management system. Events where registration is handled through Zoom, GoToMeeting and similar products, registrants will NOT be notified.**

| View	Attendance	Registrations	Scan	Analysis	Messages	Edit

Event Cancellation

Event organizers may cancel an event by selecting the *Edit* tab on the event page.
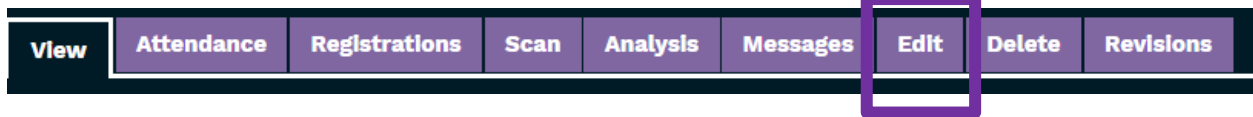
The following actions occur when Canceled is selected when using the L2 event registration system. **Note: Events where registration is handled through Zoom, GoToMeeting and similar products, registrants will NOT be notified.**

Scroll to the bottom of page and click *Cancel Event* button.
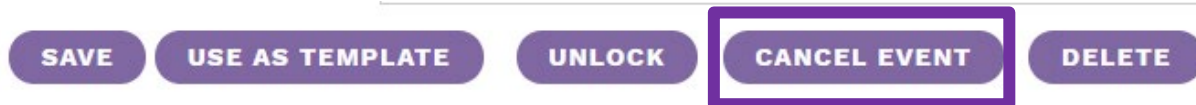
The following actions occur when Canceled is selected when using the L2 event registration system. **Note: Events where registration is handled through Zoom, GoToMeeting and similar products, registrants will NOT be notified.**

1. Cancels all registrations and waiting-list registrations for the event.
2. Sends an email to everyone who was registered, to notify them that the event has been canceled.
3. Cancels any room and equipment reservations that are attached to the event.
4. Prepends "**Canceled**:" **[to the event title]**, keeping the event on the L2 calendar but conspicuously labeled as canceled.

Contact Us/L2 Help

https://librarylearning.org/help