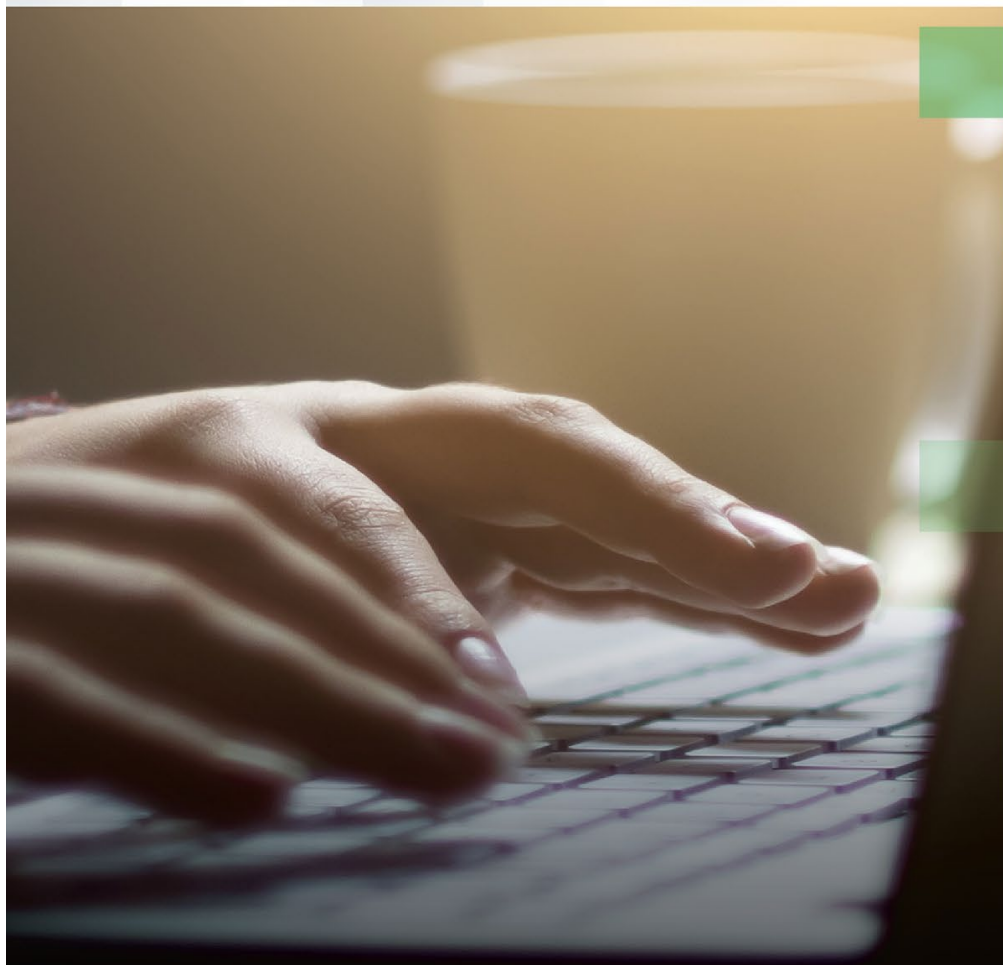
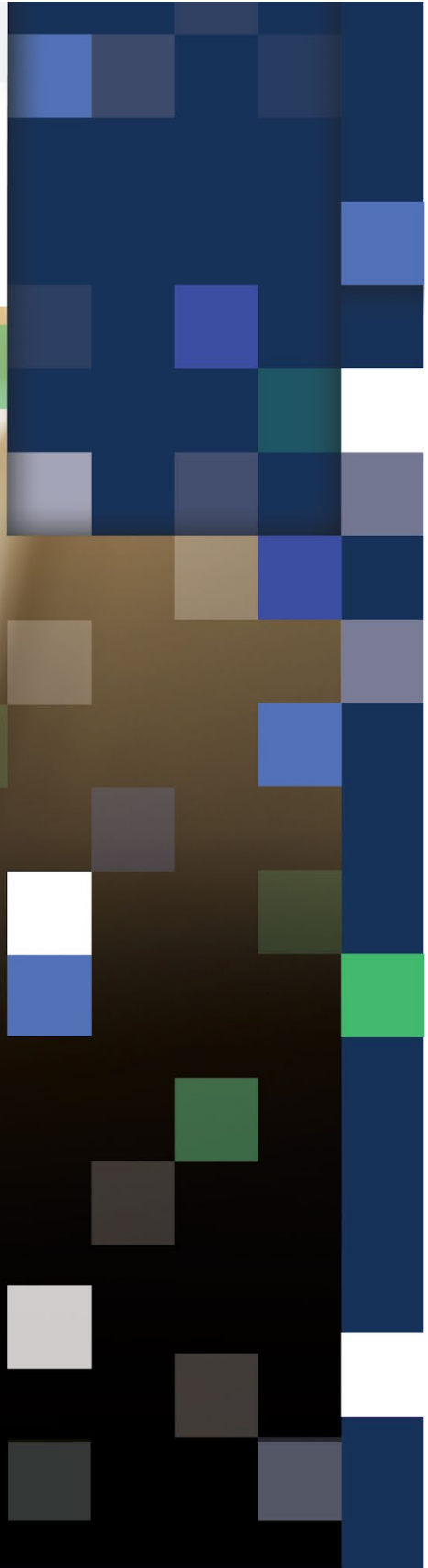




**Coursedog**



**COURSEDOG  
EVENTS  
END USER GUIDE**





# Events Scheduling

## Training and Reference Guide for End Users

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## Access / Login

### Logging In

- Courshedog works with most browsers, but Google Chrome is recommended.
- Log into Courshedog at [app.courshedog.com](http://app.courshedog.com) with your Winthrop email address. Winthrop is using single-sign-on, so you will be redirected to the Winthrop sso login page where you will log in with your credentials.

## Requesting An Event in the Courshedog UI

Additional help resources [here](#).

Request approval for Events directly within the Courshedog Events User Interface (UI). Note that which *type* of event you are able to submit requests for may depend on your Role permissions, which were set by your institution admins.

### Initiating the Request in the Courshedog UI

From the Homepage, select 'Request an Event' under 'Actions'.

The screenshot shows the Courshedog UI homepage for Winthrop University. At the top, there is a navigation bar with the Winthrop University logo and name on the left, and 'HELP CENTER', a notification bell, and a grid icon on the right. Below the navigation bar, the main content area is divided into three sections. The left section is titled 'Events Management' and contains a 'Home' link with a house icon. The middle section is titled 'Good Afternoon, Tim' and includes a 'To Do List' link and a message: 'Have any questions, visit the Help Center.' The right section is titled 'Actions' and contains two links: 'REQUEST AN EVENT' with a red envelope icon and 'MY REQUESTS' with a blue document icon.

You will be prompted to select an Event Type for your Event (based on the Event Types configured by your institution). Ensure you have an understanding of the various Event Types so that you can make a selection correctly.



## Events Management

 Home

 Events

## Request New Event

Please select the event type

Athletics

CONTINUE

Event Type Name	Use Case
Alumni and Donor Activities	Exclusively for Alumni, Donor, and Institutional Advancement Events
Athletics/Sports	For formal and informal sporting events
Conferences and Meetings	For approved university internal and sponsored conferences and for routine organizational and departmental meetings.
External Events	For use by the Office of University Events for all externally requested events
Late Meeting/Event Request	For any event or meeting requested less than 10 days in advance that does not require any special setup or dedicated staff. Late requests cannot be submitted for flexible spaces like Richardson Ballroom or McBryde Hall, or for any Athletic facility
Performance	Use for dance recitals, music performances, plays, concerts, or any ticketed event outside of athletics.
Prospective Student Recruitment Event	Use for internally organized and sponsored events for prospective students or new student Orientation.
Social Event/Party	For Campus department and student organization on-campus social gatherings.
Speakers and Lectures	Use for speakers and lectures for internal and sponsored events.
Special Event	Use for internally organized university community sponsored events such as Commencement, Convocation, Career Fairs, etc.
Study Room	Limited to space requests for academic spaces for study groups or review sessions.
University Camps	For approved internal and university supported camps that are multi-day or overnight.
Virtual Events	For virtual events only, no rooms or other space requested.



## Completing the Event Form in the Coursedog UI

Based on your Event Type selection, you will be directed to the correct Event Request Form. The Event Form has a series of 'cards' (Event Information, Meetings & Location, Contacts, etc.) where a collection of questions are stored. Complete the form's requested fields.

**Events Management**

- Home
- Events
- Rooms
- Organizations
- Resources
- Buildings
- Requests
- Reports
- Settings

### Request New Event

Conferences and Meetings Event Form

#### Event Info

Event Name **required** ?

Event Description **required** ?

Online link for More Event Information ?

**SUBMIT EVENT REQUEST**

**DELETE REQUEST**

#### Contents

- Event Info
- Event Contact(s) and Greek/Student
- Meetings & Locations
- Important - PLEASE READ
- Contracts and Acknowledgements
- Attachments - If you have a preferr...

**Required fields:** Your institution has decided the information that is required in order to run an Event of each specific type. When completing your request be sure to pay close attention to required fields, which are designated with a required block or red star. Required fields must be completed in order to be able to submit the form successfully.

**Contacts Card:** Indicate who will need to be notified about the progress of the Event request (the Event Requester (the person submitting the form) will automatically be added as a contact to be notified on status). Note that you can specify whether or not to send email notifications to other contacts for the event.


On the next card, indicate if the event for which you are requesting space should be included on the University Event Calendar. (In most cases this should be yes, unless the event is invitation only.) You may also request a parking lot from the dropdown list. Campus Police will officially reserve the space if parking is actually needed.


If you intend to apply for Cultural Event Status, the CE office will be notified of your intent. Please note, indicating yes does not actually apply for CE consideration. As event requester, you still will need to apply for Cultural Event status.




Selecting the food or alcohol options will notify our food services office, you will need to work with them if catering is needed.


If your event is indoors, please select yes for the Indoor AC/Heat as a reminder to facilities. You can also add any marketing image and have it display on the calendar page.





**Public Event Calendar** 


**Parking Lot Reservation Request** 


**Do you intend to apply for cultural event status?**


**Admission Charge** 

**Will Food be served?** **required** 

**Will alcoholic beverages be present?** **required** 

**Indoor AC / Heat On?** 

**Upload any promotional/marketing image** 





**Meetings & Location Card:** Your event can have multiple meetings if you require multiple rooms or the event is spread across time (i.e. a recurring meeting).

The screenshot shows a form titled "Meetings & Locations". It contains the following fields and options:

- All day
- Start Date: [text input]
- Start Time: [time input]
- End Date: [text input]
- End Time: [time input]
- Repeat: [dropdown menu with "None" selected]
- Location: [text input]
- Resources: [text input]
- Setup Times: [text input]
- Teardown Times: [text input]

A red trash icon is located at the bottom left of the form.

Within the Meetings & Location card complete the following:

- Whether your Event will occur All Day
- Start Date and Time of your Event
- End Date and Time of your Event
- Whether your Event will Repeat (i.e. have a recurrence pattern)
  - Note on Multi-Day Events: In order to ensure your multi-day event is accurately displayed on the calendar we recommend users create a new meeting for each day of the event. This is because events will only display on the calendar if their meeting start date is within the date range of the month, week, or day calendar view. To easily add multi-day meetings users can leverage recurrence patterns. On the 'Meetings & Locations' card, select 'repeat' and configure the desired settings:



**Recurrence** [X]

Predefined options

Repeat every

Repeat on

Ends

occurrences

**Meetings & Locations**

All day

Start Date \*  Start Time  End Date \*

End Time

Repeat

Location  Resources

- The Location of your Event: When viewing Rooms you can filter by room Availability, Room Type, Room Features, or you can search for specific Rooms
  - Rooms that would result in a double-booking conflict will show up with a red border
  - Note that selecting 'Select No Room' or 'Select TBA' (in the bottom left) could result in your Request being delayed or rejected (unless your event is not happening in-person)
- Whether your Event will require Resources
  - When adding Resources you must indicate Quantity
  - If you do not need any Resources, select 'No Resources Needed' in the bottom left corner





### Select Resources (1) ×

Selected: **Chairs (1)**  
You can select as many resources as you want.

Q Search for resources...

Viewing 1-2 of 2 < PREVIOUS NEXT >

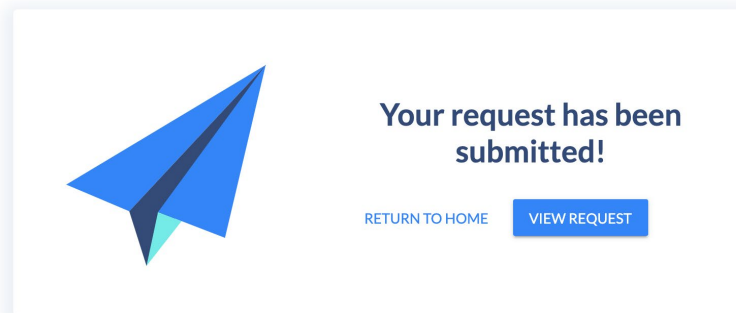
Chairs <span>i</span>			
TYPE	CATEGORY	COST	QTY AVAILABLE
<a href="#">Equipment</a>	Food Services	\$10	1 of 12
NOTES Notes about how this resource should be used...			

Food Services <span>i</span>			
TYPE	CATEGORY	COST	QTY AVAILABLE
<a href="#">Service</a>	Not Found	Not Found	10

[NO RESOURCES NEEDED](#) SAVE

### Submitting an Event Request in the Coursedog UI

When you have finished completing the Event Request, click 'Submit Event Request'. Once submitted, your dashboard will display successful submission.



### Tracking an Event Request in the Coursedog UI

Upon submission, click on 'View Request' to see details of your event. From this view, you can see where your event is in its approval workflow and what activity has been taken on the Event request by reviewers (under 'Request Toolbox'). You may also delete your request in the top right of the screen.



← ALL REQUESTS Submitted on 9/8/2020 at 9:42 AM by Test User1 ( uapc-cuny@example.com ) ARCHIVE REQUEST DELETE REQUEST

### Event Request

Request Type	Author
New Event	Test User1
Event Name	Event Type
Test Submitting	Athletics

Organization Making Request

### Request Toolbox

Status: Approved  
Decisions: ✔✔

DECISION WORKFLOW ACTIVITY

This request has been approved! [Click here](#) to view the event.

Alternatively, you may also find the Event Requests you created by navigating to 'Requests' on the left hand navigation and clicking on 'Created by Me'.

### Events Management

- Home
- Events
- Rooms
- Organizations
- Resources
- Buildings

### Requests

FILTER SORT BY Date Created Search For Requests

Vote Required 0	Assigned To Me 0	<b>Created By Me 1</b>	All Requests 15	Archived Requests 0
-----------------	------------------	------------------------	-----------------	---------------------

NAME	REQUEST TYPE	DECISIONS	STATUS
<b>Test Submitting</b> Added 4 minutes ago by Test User1	New Event	✔✔	Approved

Clicking on the Request name will take you to the specific Request's page to view details and status.

← ALL REQUESTS Submitted on 9/8/2020 at 9:42 AM by Test User1 ( uapc-cuny@example.com ) ARCHIVE REQUEST DELETE REQUEST

### Event Request

Request Type	Author
New Event	Test User1
Event Name	Event Type
Test Submitting	Athletics

Organization Making Request

### Request Toolbox

Status: Approved  
Decisions: ✔✔

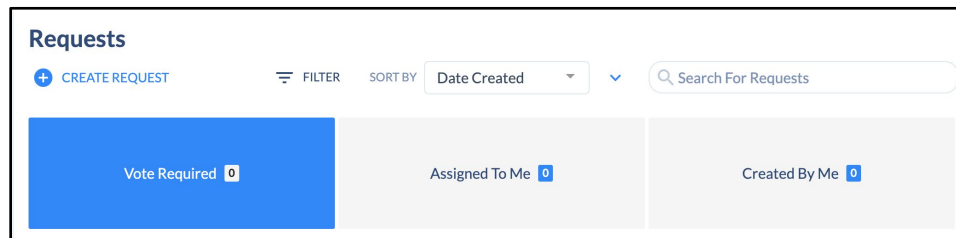
DECISION WORKFLOW ACTIVITY

This request has been approved! [Click here](#) to view the event.



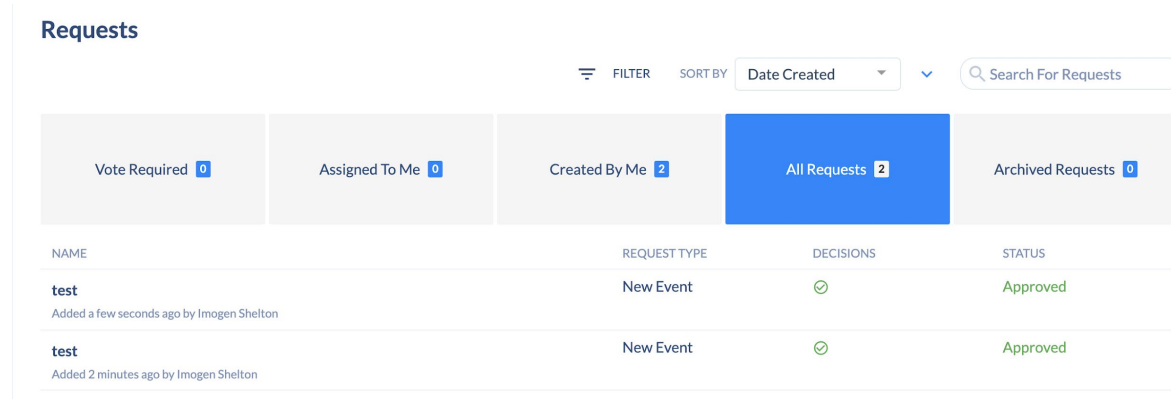
## Approving An Event Request in the Coursedog UI

If you are a user that has approval responsibilities for requested Event Types you will be able to manage all event requests that require your review in the Coursedog Events UI . The 'Requests' tab in the dashboard (left hand navigation) is the central location to approve and track event requests.



After event requests are submitted, if you are in the approval workflow, the event will appear under the 'Vote Required' column on your instance. You additionally will receive notifications.

Select the request from the list that appears to see more detail and vote/approve if you are a resource that action is required of.



In the request detail page you will be able to review the event request details, the status, take action/vote if a decision is needed from you, review the approval workflow of the event request and any associated activity with the event submission.



Event Request

Request Type	Author
New Event	Imogen Shelton
Event Name	Event Type
test	Speaker

Event Info

Event Name *
test

Request Toolbox

Status: Approved

Decisions: Approved

[DECISION](#) [WORKFLOW](#) [ACTIVITY](#)

This request has been approved! [Click here](#) to view the event.

Note: There may be fields in the event request form that should be utilized by the approver(s). These fields may have been left unfilled by requesters or they may have been hidden from requesters and meant solely for the use of approvers or users of another Role type in the Events platform. Review the request details/submission carefully for any such fields.




If an Event is successfully approved, the Event will be automatically updated in the 'Events' list and the Public Site.

## Editing An Event Request Submitted through the Coursedog UI

Additional help resources [here](#).

If you have submitted an event request for your institution through the Coursedog UI, and you need to modify the content of the request, you are able to do so in Coursedog. The fastest way to navigate to your personal event requests is via the home page. Simply click 'My Requests' under the action bar on the right.

### Actions

-  REQUEST AN EVENT
-  MY REQUESTS
-  VIEW PUBLIC EVENT SITE

If your Role permissions set by your institution allow, the author of a request will have an "Edit Request" button on the top right corner.



Help Center

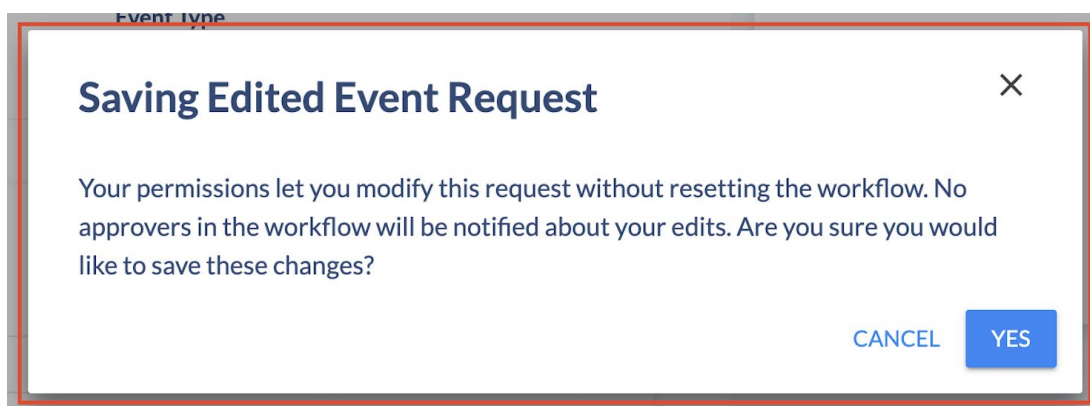


EDIT REQUEST

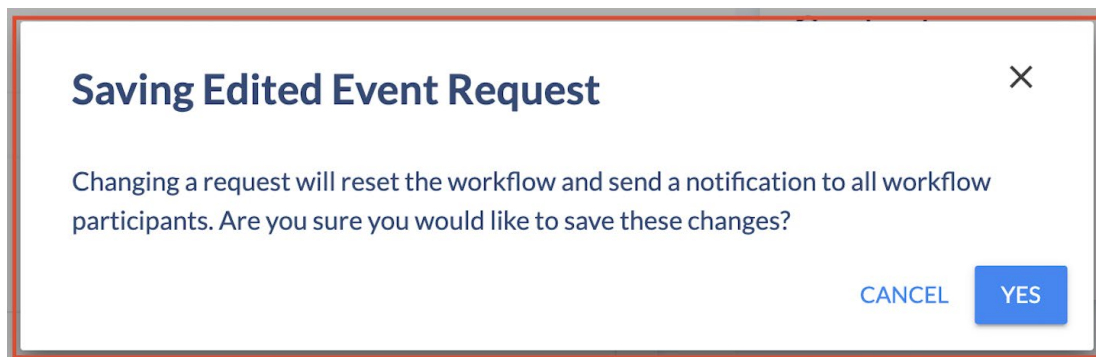
DELETE REQUEST

Depending on the permissions set by your institution, upon editing the event and hitting 'Save' the workflow might reset or not. You will be notified of the appropriate downstream effects.

- If your permissions enable you to Edit Requests Without Updating Workflow, you will see the below message



- If your permissions do not allow you to Edit Requests Without Updating Workflow, you will see the below message





## Editing An Existing Event

If your permissions set by your institution allow, you may be able to Edit an Existing Event or Request Event Changes.

### Edit an Event or Request Event Changes

In order to either Edit an Event or Request Event Changes, navigate to Events in the left hand navigation and select a given Event. Your allowed actions are specified under 'Actions' in the right hand side and depend on the Role permissions your institution set.

The screenshot shows the event management interface for a "Tennis Match". On the left, there is a navigation arrow and a small image of a tennis player. The event details are as follows:

- Tennis Match**
- Event ID: JpF6AqDDIRHsYLHmyQJu
- Event Type: Athletics
- Created by Baruch College (baruch@example.com) at Sep 8, 2020 10:13 AM
- Last edited by Baruch College (baruch@example.com) at Sep 8, 2020 10:13 AM

Below the event details is a form titled "Organization Making Request". The form has a label "Organization" with a dropdown menu and a help icon. Below the dropdown, there is a note: "If 'Other', please detail Organization below".

On the right side, there is an "ACTIONS" panel with the following options:

- EDIT EVENT (highlighted with an orange box)
- EDIT EVENT TYPE
- DELETE EVENT
- VIEW REQUESTS
- REQUEST CHANGES (highlighted with an orange box)
- DOWNLOAD PDF

### Editing Meetings and Locations Recurrence Patterns

If editing the Meeting & Locations card, keep in mind that the card will automatically collapse recurrence patterns and will show just the first meeting by default. If the user uncollapses the recurrence pattern (by clicking on 'Show All Meetings in Recurrence Pattern'), they can view all meetings individually.



**Meetings & Locations**

All day

Start Date	Start Time	End Date	End Time
Sep 14, 2020	09:00 AM	Sep 14, 2020	10:00 AM

Repeat  
Every 1 week on Mon, repeated until Sep 29, 2020

Location Resources

Setup Times Teardown Times

[SHOW ALL MEETINGS IN RECURRENCE PATTERN](#)

When editing events, if a user is editing the recurrence pattern in the collapsed view, they are able to edit all meetings in the recurrence pattern together. Users are notified of this via a yellow banner at the top of the card.

**Meetings & Locations**

You are currently editing all meetings in the recurrence pattern

All day

Start Date	Start Time	End Date	End Time
<input type="text" value="Sep 14, 2020"/>	<input type="text" value="09:00 AM"/>	<input type="text" value="Sep 14, 2020"/>	<input type="text" value="10:00 AM"/>

Repeat

Location Resources

Setup Times Teardown Times

[SHOW ALL MEETINGS IN RECURRENCE PATTERN](#)

If a user is editing individual meetings, the user can now switch between editing a "single" meeting, and editing "this and following meetings". Users are notified of this via a yellow banner at the top of the card.



You are currently editing only this meeting. SWITCH TO "EDIT THIS AND FOLLOWING MEETINGS"

All day

Start Date \*      Start Time      End Date \*      End Time

Sep 21, 2020      09:00 AM      Sep 21, 2020      10:00 AM

Repeat

Every 1 week on Mon, repeated until Sep 29, 2020

Location      Resources

Setup Times      Teardown Times

## Viewing All Available Rooms in a Calendar View

If you would like to see what events are taking place on campus in a calendar view, click on Events on in the menu on the left hand side. Click "Calendar View". This view will give you only non-academic events. If you would also like classes & academic events to appear, in the top right corner check the box "Show Academic Events".

To make this view your default, click on Saved Views and "Save Current View".

The screenshot shows the 'Events Management' interface. On the left is a navigation menu with 'Events' selected. The main area shows 'Calendar View' for September 2020. A 'Saved views' dialog box is open in the center, displaying 'No saved views' and a 'SAVE CURRENT VIEW' button. In the top right corner, the 'Show Academic Events' checkbox is checked. The background calendar shows a grid of dates with event blocks.

Next, name this view (ie; Events & Academic Events) and click SAVE.





## Save view



You can choose which rules should be saved

Name \*

Events & Academic Events

### Base Filters

View is month

Include Academic Meetings is true

CLOSE

SAVE

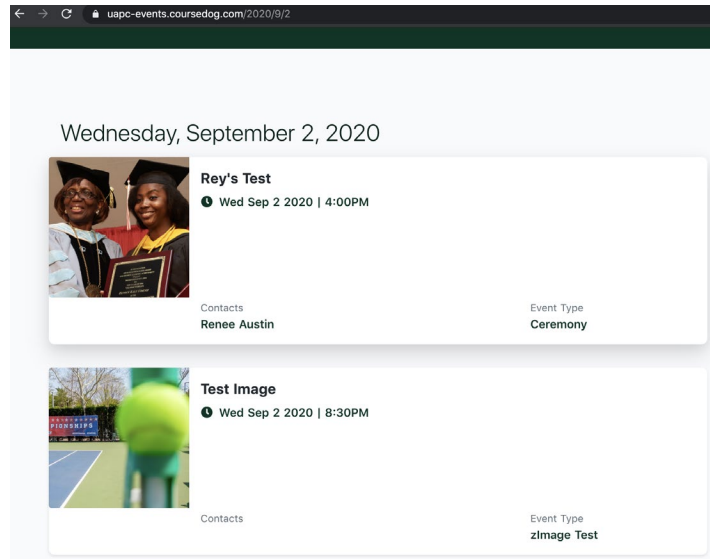
To save this view as your default view, click on the top right drop down menu and select Account Settings. Select the saved view as your Default View.

The screenshot shows the 'Account Settings' page. On the left, there is a sidebar with 'Profile' selected. The main content area is titled 'Profile Settings' and includes sections for 'General' (with fields for First Name: 'Coursedog' and Last Name: 'Admin'), 'Password' (with a 'Reset Password' section and a field for 'Enter current password'), and 'Default Views'. In the 'Default Views' section, a dropdown menu is open, showing 'Events View' selected and 'Events & Academic Events' as the chosen option. A yellow circle highlights the 'Default Views' section and the dropdown menu. In the top right corner, a user profile dropdown menu is visible, with 'ACCOUNT SETTINGS' highlighted by a yellow circle. Other items in the dropdown include 'Coursedog Admin' and 'LOG OUT'.

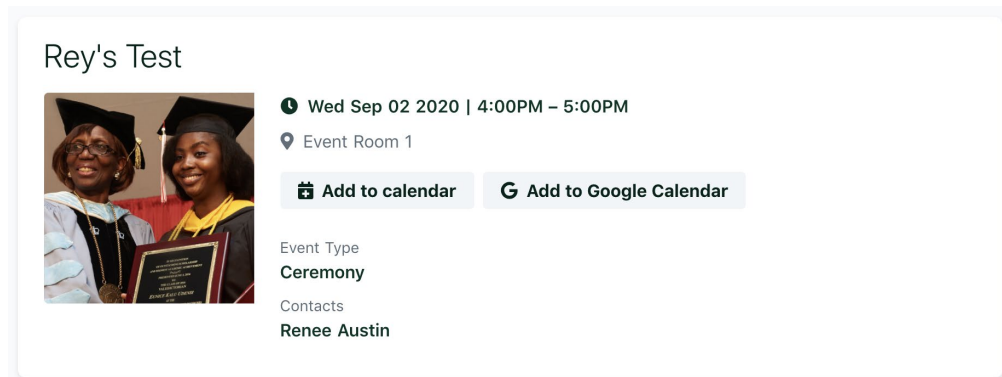
## Calendar Integration

Additional help resources [here](#).

It is quick and easy to add events from the Coursedog Public Events calendar to your personal calendar. In the Public Events Site, click on a given Event card (you may click either on the Event Name - the bold text at the top of the card - or in the blank space on the card).

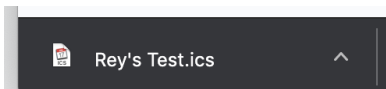


From the Event Card, you will see two buttons to add the Event to your calendar. The first is for Outlook/iCalendar, and the second is for Google Calendar.



## Outlook/iCalendar

When you click 'Add to calendar', a download will run in your browser. Open the link and you will be able to add the event directly to your calendar.



## Google Calendar

To add an event directly to your google calendar, select 'Add to Google Calendar'. You will be prompted to log in or if you are already logged in the event will automatically open in a new tab. Here you can make any edits to the event before saving it directly to your google calendar.



× Rey's Test

Save

Sep 2, 2020 4:00pm to 5:00pm Sep 2, 2020 Time zone

All day Does not repeat

Event Details Find a Time

Add video conferencing

Make it a Zoom Meeting

Event Room 1 Event Building

Notification 10 minutes

Add notification

adelezica@coursedog.com

Busy Default visibility

Guests

Add guests

Guest permissions

Modify event

Invite others

See guest list

## Admin User Guide

This user guide focuses on the features and functionality in the Events platform specific to End Users. If you are interested in reviewing the user guide developed to support Admin use of the Events platform please request this from your Coursedog account representative