



LiveWhale Best Practices

2023-2024

Presented by the Office of the Executive Vice Dean and Chief Scientific Officer



User Tip: Use this hyperlinked table of contents to help navigate the document.

Table of Contents

1. LiveWhale Summary	3
2. Editing Essentials	4-8
2a. Title	4
2b. Image	5
2c. Event Summary	6
2d. Event Description	6
2e. Event Contact	7
2f. Event Type	7
2g. Locations	8
3. Final Product Example	9
4. Additional Information	10
5. Contact Us	11



LiveWhale Summary

An overview of the platform



What is LiveWhale?

The **PSOM LiveWhale Events Calendar** uses a unique CMS platform to digitally display upcoming events for departments, centers and institutes on an online, public-facing calendar. Events posted to the PSOM calendar are either created by users or automatically ported to the platform via the Penn EMS online room reservation system.

How can I use it?

The Events Calendar can be a wonderful way to spread awareness about events, as it is displayed on departmental websites, the University calendar, and digital displays located throughout PSOM's campus.

How can I obtain an account?

To obtain an account, please visit:
<https://events.med.upenn.edu/userguide/help-access-form.html>



Editing Essentials

Best practices for publishing events in LiveWhale

LIVEWHALE BEST PRACTICES

Events appearing on the PSOM events calendar MUST contain an **event title, image, short summary, event contact, event type**, as well as the **location plotted on the calendar system map** about two weeks before the date of a scheduled event.

Please review the information below to learn more about these requirements and additional tools and features available for editing events in LiveWhale.

EVENT TITLE

Recommended event title format:

Title of the event - speaker's name, degree

EXAMPLE: Science 101 - Jane Jones, M.D.



Options for editing unclear/incomplete event titles automatically ported from the Penn EMS online room reservation system:

- Edit the title directly in EMS
- Hide the event and create a new event in LiveWhale:

To hide an event:

- Log into LiveWhale and click **Edit this event** option at the bottom of the event description page.



- From the event editing page, click the dropdown in the top box on the right side of the screen, select **Hidden** and then save.





Editing Essentials

Best practices for publishing events in LiveWhale

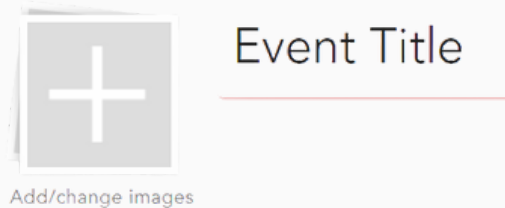


IMAGE

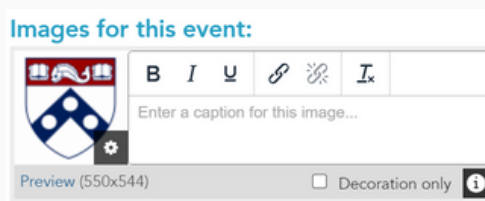
Note: If your image is a flyer or other document that contains text, it is recommended that you also link the file in the **Related Content** section of your event. This will allow viewers to see and download a high-resolution version of the flyer at a larger size.

To add an image to your event:

- Click the (+) labeled **Add/change images** to the left of the event title.



-
- Choose an existing image from **Your Image Library** by clicking on it
- OR
- Upload a new image from your computer by clicking **Upload images**, navigating to the file location, selecting the image, and clicking **Open**.
 - Add a brief caption for the image included under the **Images for this event** preview on the left-hand side of the page.



-
- Click **Save changes** when finished.



Editing Essentials

Best practices for publishing events in LiveWhale

EVENT SUMMARY

- In the **Summary** section, directly below the **Title**, enter a BRIEF summary of your event. One to two sentences are sufficient, 500 characters max.
- You may also enter a more detailed summary in the description box later in the form (located in the **Add event details** section below **Location**.)

EVENT DESCRIPTION

Include information that could be helpful for potential attendees and generating interest for your event. Depending on the type of event, you may choose to include information about the target audience, objectives and goals, themes, agenda/schedule, speaker(s), venue, rules, accessibility, registration/RSVP, sponsors, promotional links, and more.

User Tip: Below the **Add event details** section header, there is another section titled **Related Content** where you can upload a flyer or add a link to another event, file, or web address.



Editing Essentials

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EVENT CONTACT

Enter the following event contact information:

- **Name**
- **Penn email address**
- **Phone number**

EVENT TYPE

- This feature allows calendar viewers to filter events by type using the sorting feature located on the right-side panel of the calendar homepage (under **Show only**.)
- Assign event types by clicking checkboxes in the **Event type** section.
- Select all event types that apply; at least one event type is required.
- You must also select “Open to Public” or “Private Event” to categorize your event type.

Event type(s)*

Please Select "Open to Public" or "Private Event"*

- | | |
|---|--|
| <input type="checkbox"/> Open to the Public | <input type="checkbox"/> Postdoc Event |
| <input type="checkbox"/> Class | <input type="checkbox"/> Private Event |
| <input type="checkbox"/> Compliance & Training | <input type="checkbox"/> Reception |
| <input type="checkbox"/> Conference & Symposium | <input type="checkbox"/> Recruitment |
| <input type="checkbox"/> Faculty Professional Development | <input type="checkbox"/> Seminar & Lecture |
| <input type="checkbox"/> Grand Rounds | <input type="checkbox"/> Special Event |
| <input type="checkbox"/> Journal Club | <input type="checkbox"/> Student Event |
| <input type="checkbox"/> Meeting | <input type="checkbox"/> Thesis Defense |
| <input type="checkbox"/> Playgroup | <input type="checkbox"/> Uncategorized |

Editing Essentials

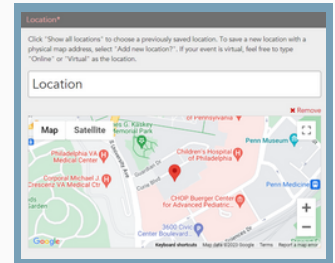
Best practices for publishing events in LiveWhale



LOCATIONS

There are two options for adding locations to events:

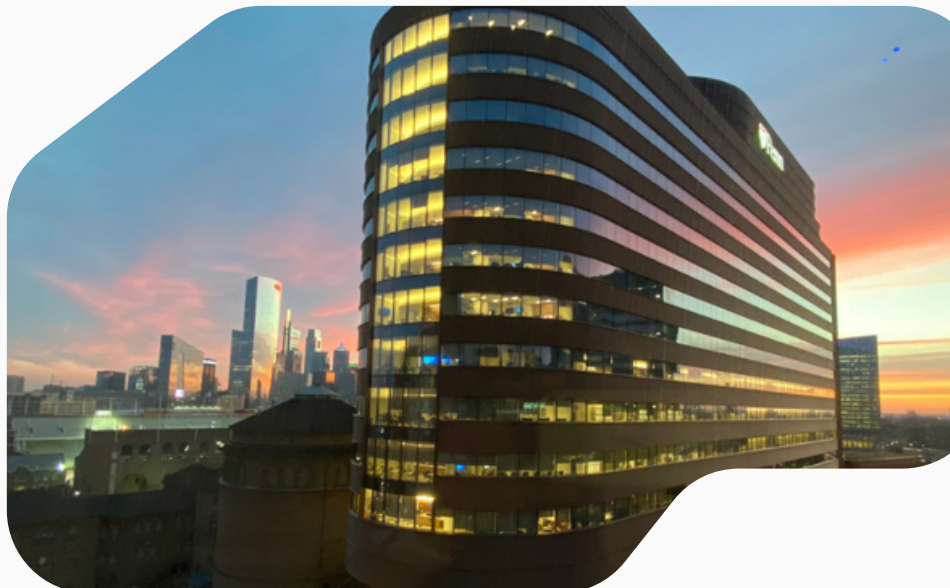
- To add a new location:
 - Check the box **Add new location?**
 - Enter the street address in the **Address, ZIP, coordinates, or other location info** field, then click **Add**.
 - Adjust the red map marker pin as needed.
- To add an existing location:
 - Click the **Show all locations** button, then choose an existing location from the list of locations that appears. The name, address and plotted map will appear by default.
 - Update the information about the saved location as needed by editing the title in the description box.



User Tip: If the event has a private location, we recommend filling the location box with one of the following descriptions:

"Registrants will be notified of the event location" or

"Zoom link will be provided to registrants"





Final Product Example

Below is an example of an event that complies with our Best Practice Standards:

CORRECTLY FORMATTED EVENT TITLE

EVD Seminar Series - Jonathan A. Epstein, MD

LOCATION PLOTTED ON A MAP

2:00pm - 3:00pm EDT
505 Jordan Medical Education Center



IMAGE OF SPEAKER OR EVENT



EVENT CONTACT

Contact Info:
nhighley@mail.med.upenn.edu

Related Content:
• [Seminar Flyer.docx \(Document\)](#)



SHORT SUMMARY

“Coordinating tissue interactions: notch signaling in cardiac development and disease”

Lecture and Q&A with Jonathan A. Epstein, MD (William Wkoff Smith Professor, Perelman School of Medicine)

Posted to calendar: [PSOM General Interest](#)

Event types: [Seminar & Lecture](#)

[Edit this event](#) [Add to my calendar](#)

EVENT TYPE



Additional Information

Additional resources to improve your LiveWhale events

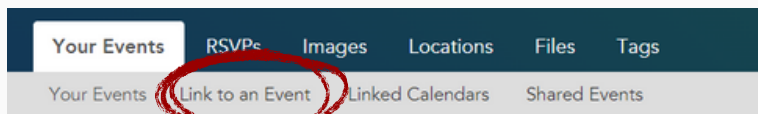
MONTHLY STATS REPORT

Event quality reports are sent to LiveWhale users for each calendar group at the beginning of the month. Scores reflect the extent to which a given calendar group's events comply with the Best Practice Standards outlined in this document. These reports include average event scores, events to improve, high scoring events, and total events.

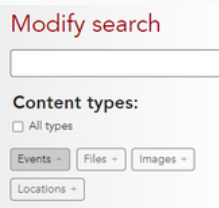
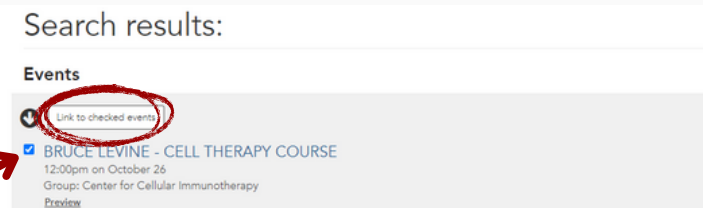


EVENT SHARING FEATURE

LiveWhale allows you to link events published by other departments, centers and institutes to your group's calendar. This is a great tool for events that are hosted by more than one group.



To link an event published by another calendar group to your group's calendar:



- Log in to LiveWhale, select **Your Events**, and then click **Link to an Event**.

- Select the small box next to event(s) you would like to highlight, then click **Link to checked events** to complete.

FEATURED EVENT TAG

The Office of the EVD/CSO uses the *featured event* tag to highlight upcoming events on the PSOM and EVD/CSO homepages. **If this tag is added to your event, please do not remove it.**



**Contact us
with any
questions**

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