

Event Submission Form Tutorial

Rev. 01 – 8/6/2021

Introduction

This Power Point will help you navigate the new digital Event Submission Form. This form is to be completed for every event at the lab to help determine its needs, whether they be from another department such as Event Services, Security, IT or any combination of the three.

Also, this form assists the division or department holding the event to keep visibility on events they are hosting. It will also help the Associate Director understand any budgetary needs from their division or department that may be needed to run the event successfully.

Events are ever changing, we know, so this form can be revised after being routed for approval. Initially, fill out each field to the best of your ability. Details on the form can then be changed as new information is presented.

Note, however, that certain fields—if changed—will reroute the form for signature.

Any field with a red asterisk (*) is mandatory and so must be filled in.

Event Services staff are available to help in addition to the information in this guide at eventservices@jlab.org.

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Form Components (1 of 2)

The form is broken down into the three tabs seen at the top of the form. They are as follows:

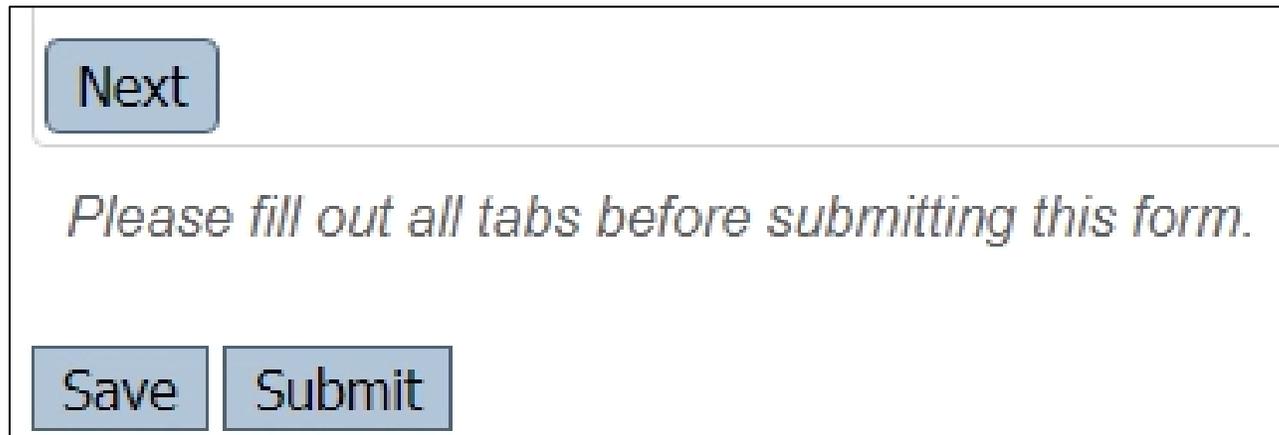
- **Basic Information** – This tab is a majority of the general information known about the event.
- **Financial** – This tab includes known budgetary items pertinent for the event.
- **Security** – This tab assists lab security personnel with understanding the scientific scope of the event and how it should be classified.



Form Components (2 of 2)

At the bottom, there are a few buttons as well:

- **Next** – This button will cycle through the different tabs at the top.
- **Save** – If you cannot finish the form in its entirety, you may click Save to capture your progress on this form and allow you to come back later and finish it.
 - *Note: This form does not automatically save as it is completed.*
- **Submit** – This button will route the form for signatures and approval. Click this only when the form is complete.

A screenshot of a form's bottom section. It features a light blue 'Next' button at the top left. Below it, centered, is the instruction 'Please fill out all tabs before submitting this form.' in a grey, italicized font. At the bottom left, there are two light blue buttons: 'Save' and 'Submit'.

Event Type

There are four main types of meetings. Select one that best fits your event.

- **On Site** – This option is for an event that will have 100% of the participants at the Jefferson Lab campus during the event.
- **Off Site** – This option is for an event that (1) will have 100% of the participants at a location *other than* Jefferson Lab during the event—and (2) is not virtual. A local conference center is one example of this, the key here being that the event is still at a physical location.
- **Virtual** – This option is for a 100% virtual event, with no attendees gathering at a specific physical location—at the Jefferson Lab campus or elsewhere. That is, each attendee is “remoting in” from wherever they are, via BlueJeans, Teams or a similar platform selected for the event.
- **Hybrid** – This option is for some of the participants to be at Jefferson Lab and some to remain virtual for the event. One example is a meeting in CEBAF Center F113 where 50% of the participants registered are in the room, but the other 50% are “remoting in” via BlueJeans, Teams or a similar platform selected for the event.

Event Type *

On Site * Off Site * Virtual * Hybrid *

Event Visibility *

Internal Meeting Only * Open to JLab Community * Open to General Public * Community Partner Meeting *

Event Visibility

This field selection helps determine the participant scope of the event. Select the one that best fits your event.

- **Internal Meeting Only** – This event includes only Jefferson Lab employees—and will almost always be at the Jefferson Lab campus.
- **Open to JLab Community** – This event can include other registered individuals such as Jefferson Lab Users. This option can also include DOE personnel and/or other government officials and their staff.
- **Open to General Public** – This event can include individuals outside of the Jefferson Lab community—those who are not badged. Examples of this are the lab’s Open House or a similar event to which families of our lab community are invited.
- **Community Partner Meeting** – This event includes individuals from an approved organization, which we are helping facilitate at our site. Examples of this are a K-12 event with Science Education or hosting the City of Newport News for an event they need space for.

Basic Information Tab: Proposed Location and/or Virtual Platform

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Proposed Location and/or Virtual Platform

This is where you envision the event taking place, whether in a Jefferson Lab conference room (i.e., *on-site*, in say F113), for example, or via BlueJeans (*virtual*)—or both (*hybrid*).

Please note that submission of this form does not reserve the desired location.

Upon review of your needs, a recommendation will be made for the best conference room(s) or other arrangement, and a reservation will need to be entered in the O365 calendar system. Event Services will be active in assisting you to find the perfect fit for your event given space available.

Proposed Location and/or Virtual Platform *

*** Please note, submission of this form does not reserve the desired location. Upon review of your needs, a recommendation will be made for the best conference room(s) and a reservation will need to be entered in the O365 calendar system.*

Basic Information Tab: Event Title and Related Info

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Event Title – Enter the name of the event here.

Organizer – Enter the name of the primary contact for all logistical questions and needs for this event.

Organizer Phone – Enter the phone number of the above person.

Event Chair – Enter the name of the person selected to run the scientific or event program. They will usually be the individual corresponding with speakers at the event, putting together the flow of the agenda and selecting talks, etc.

Chair Phone – Enter the phone number of the above person.

Co-Chair – If the event is large enough to warrant a second chair to assist the Event Chair, enter that individual's name here.

Co-Chair Phone – Enter the phone number of the above person.

Event Moderator – In some virtual meetings, an individual is typically needed to assist with the digital moderation of the meeting—including facilitating Q&A sessions, troubleshooting technical problems as best they can, etc. Enter that individual's name here if such a moderator is needed.

Event Title *	
<input type="text"/>	
Organizer * ?	Organizer Phone *
<input type="text" value="Joshua Cameron (jcameron)"/>	<input type="text" value="(757) 269-7409"/>
Event Chair ?	Chair Phone
<input type="text"/>	<input type="text" value="(555) 555-5555"/>
Co-Chair (optional) ?	Co-Chair Phone (optional)
<input type="text"/>	<input type="text" value="(555) 555-5555"/>
Event Moderator ?	
<input type="text"/>	
Host Organization *	Co-host Organization
<input type="text"/>	<input type="text"/>

Host Organization – Enter the name of the organization that is hosting the event.

Co-Host Organization – Often, Jefferson Lab partners with another organization to host an event. Enter the name of that organization here, if applicable.

Basic Information Tab: Proposed Dates, Times, Etc.

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Proposed Start Date/Time and Proposed End Date/Time

These fields should be a rough idea of when the event starts and when it concludes. If your event covers multiple days, these fields should show the first day and time it begins and the last day and time—when the event is over.

Individual days of every start/end are not important here as that will typically be finalized in an agenda—whether formal or informal—later. An example would be a multi-day conference that starts on a Monday at 8 a.m. and runs all week, each day, then wraps up on Friday at 12 p.m. with a close-out session.

Additional Occurrences for this Event

Add Additional Meeting For This Event – Sometimes an event to be submitted will be one in a series. If yours is such an event, with other, separate-but-similar occurrences known to happen in a calendar year, enter the additional occurrences here. This will assist with approval ahead of time of all instances at once.

For example, if a monthly seminar is to be held on a similar topic or from a similar organization each month all year, you would select as many as needed. You will be instructed to enter the Proposed Start Date/Time and Proposed End Date/Time as above for each additional occurrence you add.

The screenshot shows a form with the following sections:

- Proposed Start Date/Time ***: A date input field followed by an HH:MM time input field.
- Proposed End Date/Time ***: A date input field followed by an HH:MM time input field.
- Additional Occurrences for this Event**: A text area with a red link "Add Additional Meeting For This Event".
- Requested Room Setup**: A dropdown menu currently showing "Default".

Requested Room Setup

This dropdown option is what you propose to be the layout of the room you would like. This will assist Event Services in starting a dialogue with you on which room works best for your event as well as the best layout.

Go [here on our website](#) for examples of what these setups typically look like.

Basic Information Tab: Estimating Attendees

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Attendee Estimates

Exact numbers this early in an event's conception can be difficult to obtain. Enter to the best of your knowledge, at the time of this event submission, the totals below.

Total Physical Attendees – This is the sum total of the below attendees that would be at the event in person.

Total Virtual Attendees – This is the sum total of the below attendees that would be remotely (i.e., virtually) connecting to the event.



Of the total how many are:

- **Jefferson Lab Employees** – Enter the number of badge-holding Jefferson Lab employees.
- **Users** – Enter the number of registered, badged Jefferson Lab Users.
- **Public Visitors** – Enter the number of visitors that are not Jefferson Lab badge holders.
- **DOE Visitors** – Enter the number of DOE employees.
- **Students** – Enter the number of post K-12 students.
- **VIP Visitors** – Enter the number of VIP visitors such as mayors, senators, Office of Science visitors, etc.
- **Domestic Visitors** – Enter the number of visitors who are U.S. Citizens.
- **International Visitors** – Enter the number of Foreign National visitors, regardless of immigration status.

Attendee Estimates		
Total Physical Attendees *	Total Virtual Attendees *	
<input type="text"/>	<input type="text"/>	
<i>Of the total how many are:</i>		
Jefferson Lab Employees *	Users *	Public Visitors *
<input type="text"/>	<input type="text"/>	<input type="text"/>
DOE Visitors *	Students *	VIP Visitors *
<input type="text"/>	<input type="text"/>	<input type="text"/>
Domestic Visitors *	International Visitors *	
<input type="text"/>	<input type="text"/>	

Basic Information Tab: Describing the Event

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Description of the Event – Briefly describe here in plain language what the event will be about and what will be discussed. This will assist in describing the event to both visitors and the Jefferson Lab community. This will also be the default text used to create a social media release. Please specify in the description if you would like the event to be public or closed to Jefferson Lab participants.

Description of the Event (this is how your event will be promoted in the community) *

Would you like this event promoted on Jefferson Lab's social media? *

Yes * No *

Would you like this event promoted on Jefferson Lab's social media?

Select whether or not you would like this event posted on Social Media.

We have a strong social media presence about lab activities, but not every event involving the lab is always so advertised. There's a busy, planned schedule for social media write-ups that is ongoing through the Communications Office, so this option ensures your event's place in that rotation.

This can be used to inform the general populace on the engaging science we are doing at the lab, or it may also be an invitation—if it is a public event.

Basic Information Tab: Categorizing the Event

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Event Categories

By completing the Event Submission Form this information will automatically create and post your event to the Jefferson Lab calendar. Selecting the additional categories, your event will be added to those respective calendars as well. Select as many below as needed to categorize your event.

Scientific – This category includes any events that are primarily scientific in nature.

Education – This category includes events primarily targeted at students.

Employee – This category includes events primarily targeted at Jefferson Lab employees.

Other – This category includes all events that have a focus specific to some other audience, narrow in scope but not included above.

Event Categories:

Scientific

Colloquia

Conferences

Reviews

Seminars

Workshops

Meetings

Scientific Deadline

Education

Undergraduate and Graduate

Kindergarten - 12th Grade

Teachers

Fellowships

Education Deadline

Employee

Staff/JAG Event

Employee Deadline

Holiday

Shutdown Day

HR Sponsored Activity

Other

(EIC) Electron Ion Collider

Artificial Intelligence (AI)

Biomedical Technology Center (BTC)

Public/Community Affairs

Femto Center

IT Services

Note: Selecting either of the below IT services for your event will automatically create a Service Now ticket (i.e., IT is immediately notified of your intent). Select either or both if need be.

Video Conferencing – If a virtual platform such as Teams will be used to host virtual attendees to the event, select this box. For additional information on how to determine the best virtual platform for your event, please go here to the Plan a Conference section of the Event Services website.

Audio-Visual – If microphones, video recording, projectors or other such equipment are to be involved in your event, select this box. In the description of the technological needs for the event, briefly describe your known IT needs for this event.

IT Services:

Selecting IT services will automatically create a Service Now ticket.

Video Conferencing

Audio-Visual

Description of the technological needs for the event (A/V, network, wifi, etc.)

Basic Information Tab: Registration Pages and Related Info

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Does this event require a Jefferson Lab Registration Page? – If the participants need to be tracked via an internally made registration page by Event Services, select Yes. Note that any events involving money taken in from a registration fee or exchange of any sensitive information must have a Jefferson Lab Registration Page.

Does this event require a Jefferson Lab created, non-Indico website? – Sometimes, specifically for larger conferences, a website will need to be created with more information than just registration. If this needs to be created in-house utilizing a Jefferson Lab hosted site created in Drupal, select Yes.

FYI: Indico, as noted below, is the oft-used registration website used by the scientific community. “Non-Indico” therefore simply indicates your event’s above-described need for a website with options that Indico doesn’t provide.

Does this event require a Jefferson Lab Registration Page? *

Yes * No *

Does this event require a Jefferson Lab created, non-Indico website? *

Yes * No *

Does this conference have an existing Indico website? If yes, what is the URL?

Indico websites are science-related event sites, which many Jefferson Lab Staff and Users facilitate. For more information on Indico, please go to: <https://indico.jlab.org/>

Does this conference have an existing Indico website? If yes, what is the URL? –

The scientific community sometimes uses Indico to create a site for their event and/or agenda. If this is the case, enter the link here. For more information on Indico, please go to:

<https://indico.jlab.org/>

Please note an Indico registration may not replace a Jefferson Lab registration page. Event Services does not have the ability to manage or change the Indico system.

Approving AD – This should be the Associate Director whose budget, discretionary or otherwise, will supply any funding for this event.

Is direct Jefferson Lab funding support requested? – Select Yes if any Jefferson Lab funds are needed to pay for the event *outside of* registration fees.

Will a registration fee be charged? – Select yes if the event will be charging participants a registration fee.

Will catering be required? – If any catering will be required, select Yes and then fill out the description of needs in the box that displays. Event Services will work with you to determine how these requests can be met and offer ideas and assistance with catering.

It is understood the numbers given are estimates only. Should your financial need change, it is your responsibility to change it on this document. If your financial estimations change more than 20% greater than previously estimated, it will require the rerouting of the ESF.

Approving AD * ⓘ

Is direct Jefferson Lab funding support requested? *
 Yes * No *

Will a registration fee be charged? *
 Yes * No *

Will catering be required? *
 Yes * No *

Estimated cost to Discretionary Funds covering JSA employees for reception attendance and other unallowable charges. *

Estimated cost to Discretionary Funds covering JSA employees for reception attendance and other unallowable charges – Enter a rough estimate of how much discretionary cost to the lab will be needed to cover JSA employees for evening receptions and any other unallowable charges.

Remember, all JSA employee attendance to evening events must come out of Discretionary Funds and cannot be covered by other Contract Funds.

Charge Codes for Funding

Jefferson Lab has many types of funding and charge codes—and more than one such code might be tied to your event. Please put the primary fund code(s) below. The Budget Office and Event Services can assist with understanding these codes better.

Non-Discretionary Charge Code for allowable charges – These are any charges coming from Jefferson Lab funds that are not discretionary, and that come from a Project and an Org as labeled by the Budget Office.

Discretionary Charge Code for unallowable charges – Any unallowable charges must come out of a Discretionary Fund. These codes also include a Project and an Org: All Discretionary fund Projects begin with “DIS” and the Org is always JSALLC.

Charge Codes for Funding

Non-Discretionary Charge Code for allowable charges

Project * **Org ***

Choose One ▾ Choose One ▾

Discretionary Charge Code for unallowable charges

Project * **Org**

JSALLC

For any questions regarding the questions on this tab, please contact the Jefferson Lab Security office. Their website can be found [here](#).

Has the event organizer determined the information to be presented or discussed as not releasable to the general public? *

Yes * No *

Will this event involve sensitive technology?

Yes No

The Science and Technology (S&T) Risk Matrix review was conducted by the Division and determined the event's topic (is) or (is not) restricted in the current S&T Risk Matrix: *

Restricted * Not Restricted * Not Applicable *

Who made the determination for the above questions? *