

Events and online registration

Created: July 1, 2013

OVERVIEW

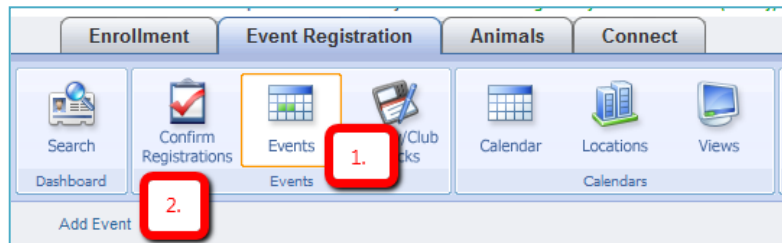
4-H Online has a robust events module that includes the ability to create an online calendar, process online registrations and (eventually) to accept credit cards and generate Group Enrollment records.

EVENTS

Events can be added and/or edited at any time, but the first step is to create an event or events.

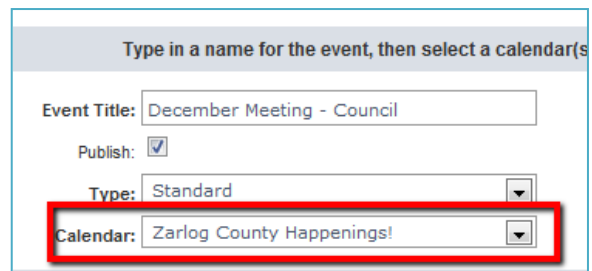
1. Click on the [Events] icon
2. Click on the [Add Event] menu item

This will bring up a data screen where you can add events to your calendar.



In the first section of fields, it is important to complete the following:

- **[Event Title]** - this is what gets displayed as a link for the event
- **[Account]** - this can be ignored
- **[Publish]** - if checked, this event will show up for the public
- **[Type]** - can be left set to [Standard]
- **[Calendar]** - if you have multiple calendars, be sure to choose the correct calendar for this event.
- **[Date Closed]** - this can be ignored.



The next three sections can be ignored as they only apply if online Event Registration is added to this event (see later in this user guide about adding online Event Registration).

Use the next two sections to “schedule” the event on the calendar.

The “repeating” event feature does not work. Each occurrence of an event will need to be entered individually.

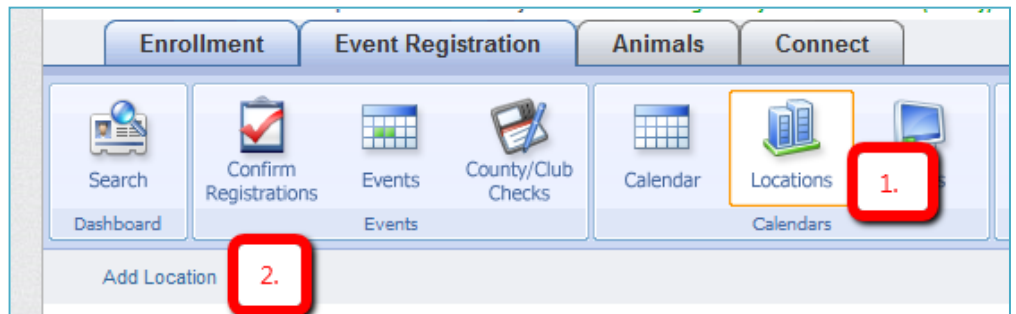
Comments and Contact information (the last two sections on the page) are optional, but it is strongly suggested that you complete the requested information.

3. Click [Save] to complete the event setup.

EVENT LOCATIONS

Event locations are handled a separate aspect. The first step is to create a record for each possible event location for this county. More locations can be added, or existing locations edited, as needed.

1. Click on the [Locations] icon.
2. Click on [Add Location] to enter information about each potential location. (Only [Location Title] is required.

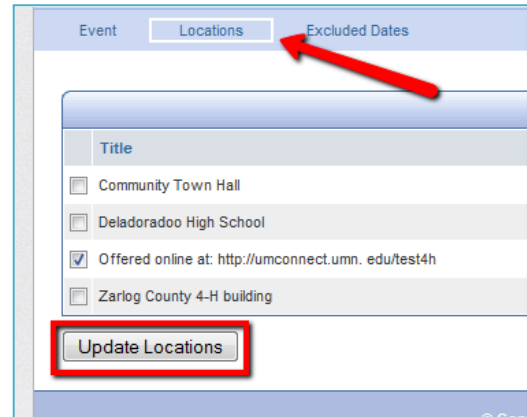


3. Click [Save] when done with each location.

Note: 4-H Online will keep track of location “conflicts”, so if a meeting location has multiple rooms, and might host multiple 4-H events on the same day, you will want to create a “location” for each meeting room.

Then, locations must be assigned to events, as follows:

1. Click on the [Events] icon to list available events
2. Click on the [Edit] button for the desired event
3. Click on the [Locations] menu item
4. Click on the check box for the location of this event
5. Click on [Update Locations] (VERY IMPORTANT!)



CALENDAR PREVIEW

To view your calendars and events, click on the [Calendar] icon. This will take you to a preview of your calendar(s). If you have more than one Calendar, you will be able to see how it looks to show just one (or selected) Calendar(s). 4-H families viewing the calendar online will have the same option to show one (or selected) Calendar(s).

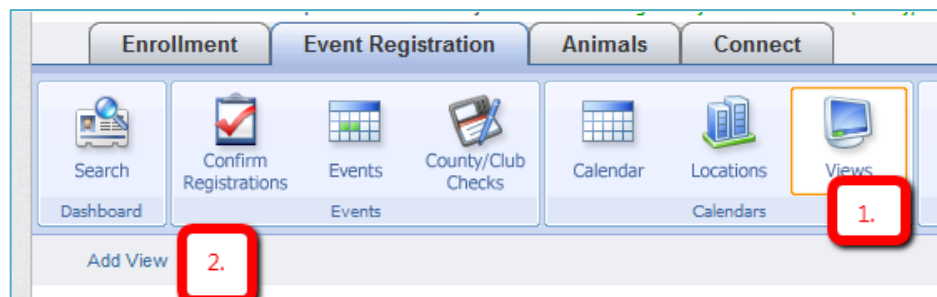
VIEWS

At this point, the event(s) you have created are only visible by you (not even other Managers will be able to see your calendar). So, in order to share it with others you must create a "View".

- Even though 4-H Online allows you to create as many different Views as you wish, you should only create one view for each county.

To create a [View]

1. Click on the [Views] icon
2. Click on [Add View]



3. Enter a [View Title]
4. If desired, enter a [Description]

View Information	
View Title:	<input type="text"/>
Description:	<input type="text"/>

4-H Online will display a list of calendars that you have access to, which is a reciprocal to all the Managers that have access to your "level". The [Calendar Title] coluID will probably be the most helpful in identifying calendars to include.

Calendar Title
Zarlog County Happenings!
Zarlog County Deadlines
Zarlog Ambies/Council meeting

Generally, you will NOT want to include any calendars titled [default calendar], as they are not likely actively maintained. If a calendar is actively being used, but is still named [default calendar] work with the owner of that calendar to give it a more meaningful name.

5. Click the check boxes next to the Calendars you want to include in this view.

Counties should generally include the following:

- One (or more) county calendar(s)
- The Regional calendar
- The State 4-H calendar

ADDING REGISTRATION TO AN EVENT

Once an event is created, you then have the option of adding “registration”.

You further have the option of allowing families the option of registering for an event themselves, online, through 4-H Online).

The steps to adding and managing registration will vary, but generally includes the following:

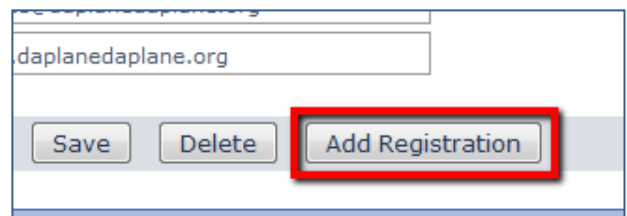
- Setting up the event (previous pages in this user guide)
- Adding registration (following pages in this user guide)
- Defining a registrant “type” (at least one type is needed.)
- Creating custom fields (at least one custom field must be added)
- Making the registration “active” so that it’s available to staff (and if desired, families)
- Confirming/processing registrations
- Running reports or other management data
- Reporting on actual attendees at the event

ADDING REGISTRATION

The first step in setting up registration is to “add” registration to the event. This is done at the bottom of the Event setup screen.

1. Click on [Add Registration]

You will know that registration is added when the top menu bar has all these items showing:



FINDING WHAT'S WHERE

There are a large number of options, settings and parameters that can change an event and/or how the registration works. However, it can be a challenge to remember or know where to find the right screen to access those options.

Here is a quick summary of where to find the most common options:

Event level options



- Event title
- The calendar that an even appears on
- **Status (VERY IMPORTANT!)**
 - **Testing:** registration setup and modification only
 - **Active:** event is open for staff and families to access and add their registrations
- Various options that control who, when and how an event can be accessed
- Date and description of the event

Registration/registrant type options



- Registration role (youth or adult)
- Dates that registration is open
- Sets the “base” registration fee (dollars), and if there are different fees for youth vs. adults, early or late registration, etc.

Custom fields

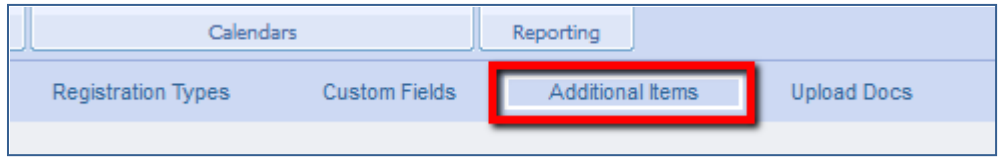


- This is where you collect all the information unique to your event. There are no custom fields when you first add registration - you must create whatever is needed by the event.
- A dollar fee can be attached to custom fields. For example, charging \$10 for a t-shirt, or \$5 for a meal.

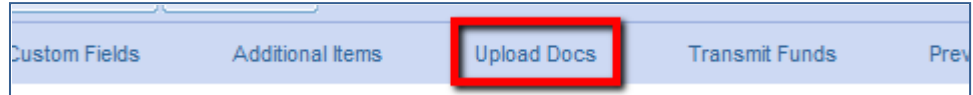
Additional items (optional)

- If an event involves

registering multiple items per one registrant, [Additional Items] will store data specific to individual items entered in event.



Uploading documents (optional)



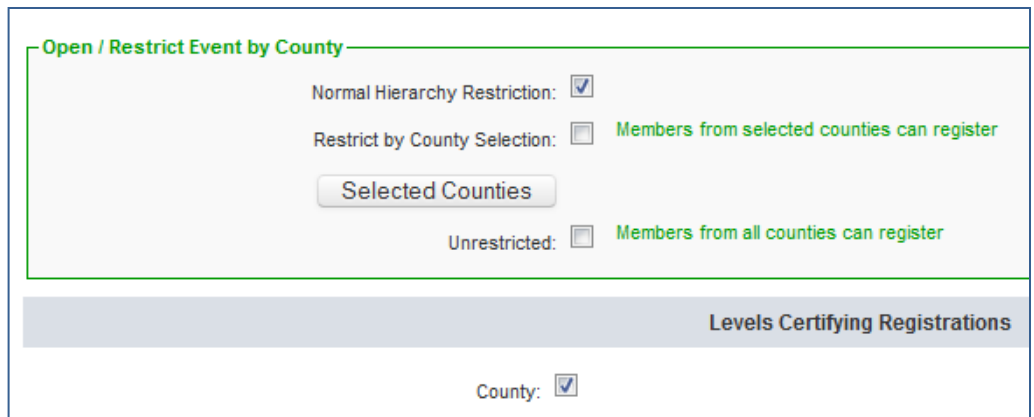
This option allows you as the the organizer, you can upload a document (for example, special instructions for the event) that can be accessed by registrants (but only after their registration is complete). On a related note, under Custom Fields (below) you can allow each registrant to upload a document as part of their registration. If you have items that a participant needs as part of the registration process upload those to your website and include the url to the website in the custom fields - type = group (see the Custom Fields section on page 9 for setup).

EVENT SETUP - COUNTY, REGIONAL OR STATEWIDE ACCESS AND CERTIFICATION

Relative to event registration, the following two options are found on the [Event] setup screen.

- When registration has been added, that event is then available in the county, region (or statewide) that corresponds to the Manager account used to create the event. For example if you are logged in as a Regional Manager when creating an event, all counties in that region will have access to the registration. If a different (larger or smaller) number of counties is desired, you can use these options to change that selection.

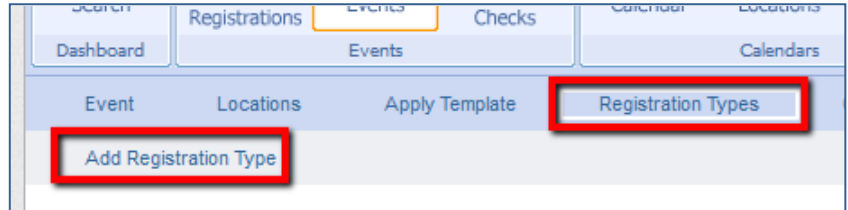
- If families will be registering online, you have the option of keeping those registrations Pending until they have been reviewed/certified by staff (Manager).



REGISTRATION TYPES

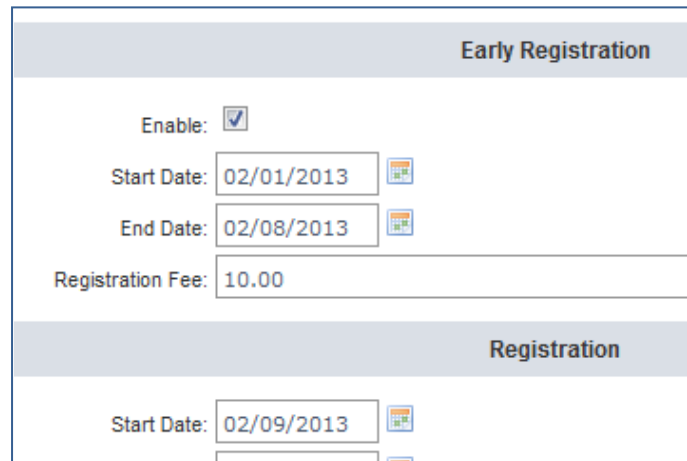
You must define at least one Registration Type in order to proceed. If both youth and adults will be registering, then you must define at least two [Registration Types] (one for youth and one for adults). You may have more than two if that's helpful for the situation.

1. Click on [Registration Types]
2. Click on [Add Registration Type]
3. **Title:** give a title to the Registration Type - this title will appear on the invoice and in reports. Generally, you will want to include "youth" or "adult" in the title of the Registration Type.
4. **Role Type:** choose if this registration will be open to Youth, Adults or Contacts (we don't use Other or Donors in ID). If, for example, registration is needed for both you and adults, additional Registration Types will be needed.



Registration: The next main purpose of Registration Types is to set dates for registration (not the date of the event) AND (if used) the fee to register.

You can optionally choose to [Enable] and early or late registration period, each with a different fee.

A screenshot of a configuration form. The form has two main sections: 'Early Registration' and 'Registration'. The 'Early Registration' section includes: 'Enable:' with a checked checkbox, 'Start Date:' with a date field containing '02/01/2013' and a calendar icon, 'End Date:' with a date field containing '02/08/2013' and a calendar icon, and 'Registration Fee:' with a text field containing '10.00'. The 'Registration' section includes: 'Start Date:' with a date field containing '02/09/2013' and a calendar icon.

CUSTOM FIELDS

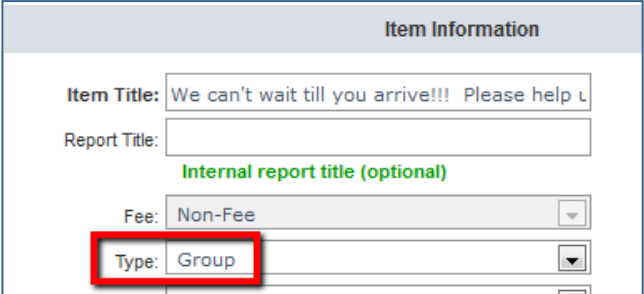
In order for an event to be available, at least one [Custom Field] must be defined. And in order to create a custom field, at least one Custom [Group] must be defined.

1. Click on [Custom Fields].
2. Click on [Add Custom Field].

This is the screen where you will add (create, or define) fields for this event. You have a large number of options and flexibility so it often helps if there is a paper copy of the registration form to work from.

Custom field: Group

When the [Add Custom Field] screen loads the first time for an event (at this point no custom fields exist) it will only allow you to add a [Group].



3. Enter an [Item Title]. (you can enter a longer string of text i.e. website url here) you are not limited on the length.

4. Scroll down and click on either [Visible] or [Required].



Registration Types			
Registration Types	Off	Visible	Required
	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

5. Scroll down and click on [Save] or [Save & Add a New Item].

A [Group] becomes a header in your online registration form. (If desired, more than one Group/Header can be used on the same form.). See table below for a sample/illustration.

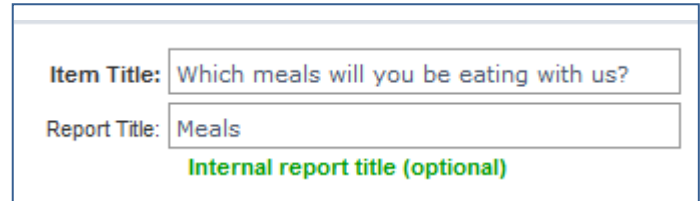
You can add a large amount of HTML content to the Group and Title Bar elements, including registration instructions and links to downloadable files.

Adding other fields

Once at least one [Group] has been created, you will then add the rest of the fields needed to collect registration data for this event.

When adding a custom field, note the following distinction:

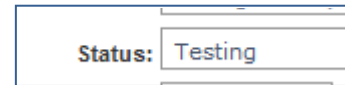
- [Item Title] is displayed online in the form and so should be more descriptive. It can be as long as needed.
- [Report Title] (optional) is used on reports and in data exports (Excel sheet coluID headers) and is only used by staff. It should be descriptive, but as short as possible in length.



The screenshot shows a form with two input fields. The first field is labeled 'Item Title:' and contains the text 'Which meals will you be eating with us?'. The second field is labeled 'Report Title:' and contains the text 'Meals'. Below the second field, the text 'Internal report title (optional)' is displayed in green.

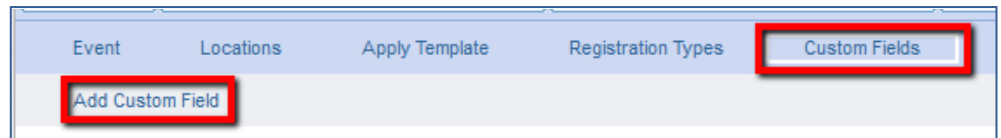
There are 16 different kinds of fields or elements you can add, which are detailed below. These are the steps for adding a [Checkbox] field.

1. First, make sure that the [Event] is set to [Testing] (which is required for editing Custom Fields). If you do need to change it from [Active] to [Testing], be sure to click [Save] at the bottom of the [Event] setup page before proceeding.



The screenshot shows a dropdown menu with the text 'Status: Testing' selected.

2. Click [Custom Fields] in the Events toolbar.
3. Click [Add Custom Field].



The screenshot shows the Events toolbar with several buttons: 'Event', 'Locations', 'Apply Template', 'Registration Types', and 'Custom Fields'. The 'Custom Fields' button is highlighted with a red box. Below the toolbar, the 'Add Custom Field' button is also highlighted with a red box.

4. Enter an [Item Title] and if desired, a [Report Title].
5. Enter/specify other fields, as desired. (Note that some fields have slightly different options)
6. Make note of which [Group] this field will be in.
7. Scroll down and click on either [Visible] or [Required].

All of these fields/settings, except [Type], can be changed later.

8. Click on [Save].

This will display the area where you can add the [Checkbox] choices

Enter Item List Options	
Option Title	Max Available - Number of items available for registration
<input type="text"/>	<input type="text" value="0"/> 0 for unlimited
<input type="button" value="Add Option"/>	

9. Enter the desired [Option Title] and click [Add Option]. Repeat as desired.

10. Click one of the “Save” options at the bottom.




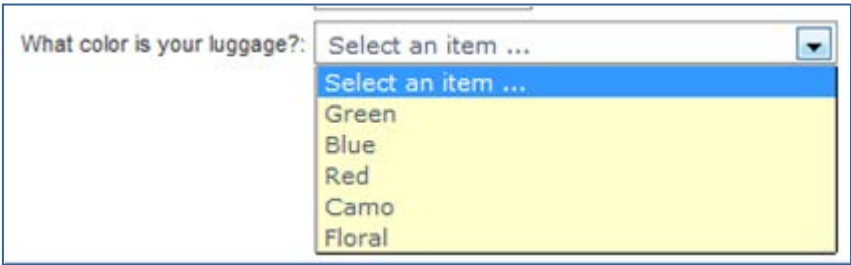

11. Click [Preview] to see how the added field(s) will be displayed.

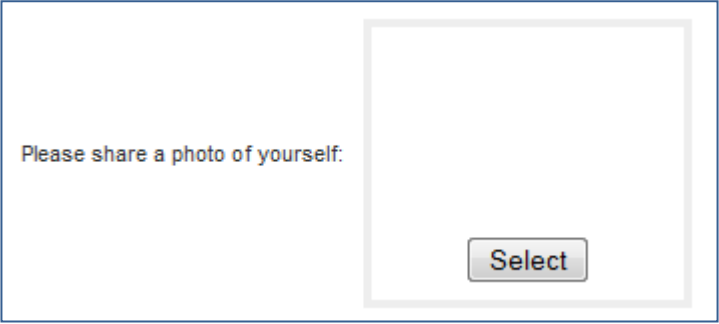
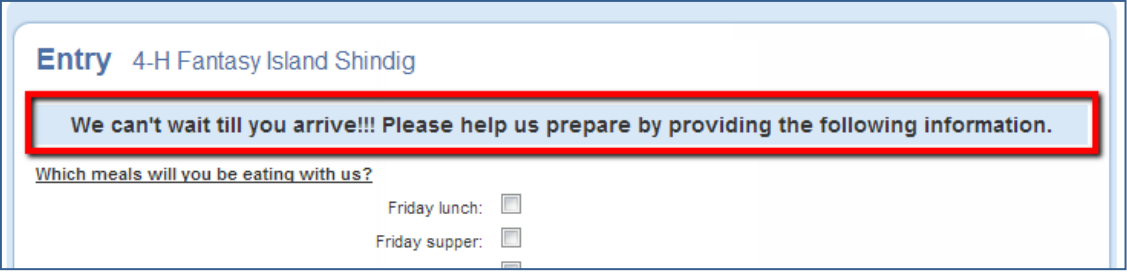


ad Docs	Transmit Funds	Preview
---------	----------------	----------------

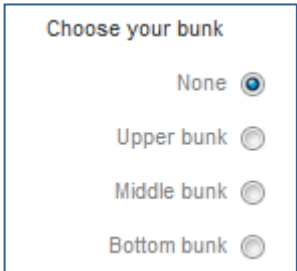


Adding fees

Most field allow you to add a financial fee. For full implmentation of financial data, see the separate section on fees/finances.

Types of fields that can be added:

<p>Check box</p>	<p>Collects “all that apply” types of data. Must click [Save] to add the check box (listed) options.</p>	
<p>Date</p>	<p>Forces a mm/dd/yyyy format.</p>	
<p>Decimal</p>	<p>Accepts two places decimal, numerical data. Allows math operations to be done on the data (also see the “number” field).</p>	
<p>Drop Down List</p>	<p>One option for collecting “choose one” type of data - ([Radio Button] is the other). Must click [Save] to add the drop down options.</p>	
<p>Email</p>	<p>Forces email format (keep in mind that all emails supplied as part of enrollment are available as part of the registration data and reports).</p>	

<p>File Upload</p>	<p>This can be used to force/request that a .pdf or .jpg be uploaded as part of the registration.</p>	
<p>Group</p>	<p>Creates a header and also “groups” common fields.</p>	
<p>Multi-line text</p>	<p>Creates a text field/box for entering longer amounts of data.</p>	
<p>Number</p>	<p>Will only accept numbers. The big advantage of a [Number] field is that you can do math operations with on this field in the reports. (For example, adding a [Total]) (also, see the “decimal” field).</p>	
<p>Phone</p>	<p>Forces phone number format (keep in mind that all phone numbers supplied as part of enrollment are available as part of the registration).</p>	

Radio button	<p>One option for collecting “choose one” type of data - ([Drop Down List] is the other). Must click [Save] to add the radio button options.</p>	
Random	<p>Generates a randomly assigned number that is only visible and accessible through the Reports tool (does not show up on the screen).</p>	
Single line text	<p>Creates a text field for entering simple strings (one or a few words) of text.</p> 	
Social Security number	<p>Do not use!!!</p>	
Title Bar?	<p>Like the Group element (above) you can use this element to provide helpful information and break up the form into sections for the form users.</p> 	
Zip	<p>Forces zip code format (keep in mind that all zip codes supplied as part of enrollment are available as part of the registration).</p>	

Editing fields, placement and order

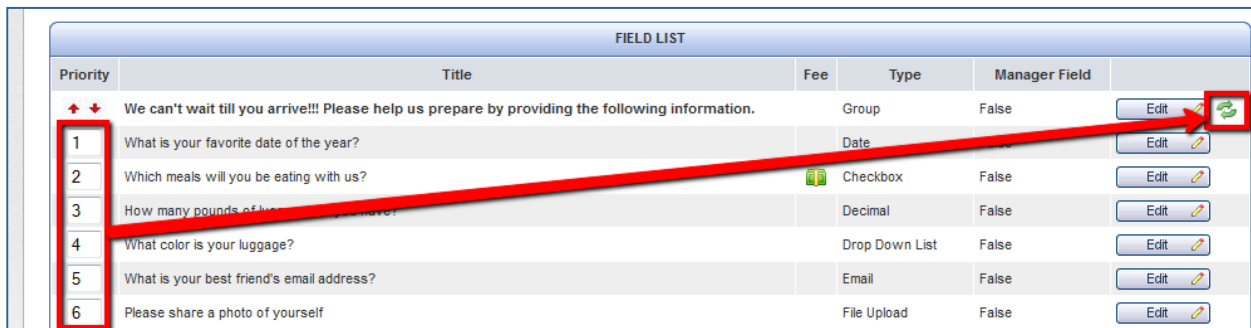
It is not possible to change the horizontal placement, formatting or layout of any field. You can however, change the order in which fields appear.









To edit an existing field:

1. Click on [Custom fields].
2. Click on the [Edit] button.

To change the order of fields WITHIN a group:

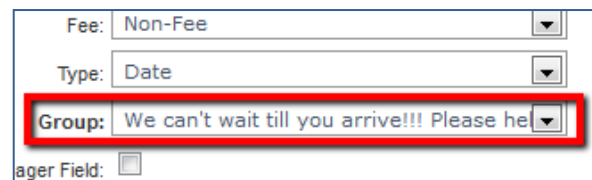
1. Update the numbers to the left of each field
2. Click the double green arrows to have 4-H Online re-arrange the field order



Priority	Title	Fee	Type	Manager Field	
+	We can't wait till you arrive!!! Please help us prepare by providing the following information.	Group	False		Edit 
1	What is your favorite date of the year?	Date			Edit 
2	Which meals will you be eating with us?	 Checkbox	False		Edit 
3	How many pounds of...	Decimal	False		Edit 
4	What color is your luggage?	Drop Down List	False		Edit 
5	What is your best friend's email address?	Email	False		Edit 
6	Please share a photo of yourself	File Upload	False		Edit 

To change the GROUP that a field resides in:

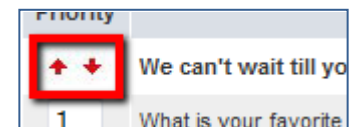
1. Click on the [Edit] button for that field.
2. Change the [Group] in the corresponding drop-down.



Fee: Non-Fee
Type: Date
Group: We can't wait till you arrive!!! Please he
Manager Field:

To change the ORDER OF GROUPS:

1. Use the red up/down buttons to the left of the [Group] header.



Priority	
+	We can't wait till yo
1	What is your favorite

Template

If you have a new event similar to a previous event, you can use a previous event as a template for a new event. Note that applying a template will ERASE all existing Custom Fields and other settings?

1. Click.....

GOING "LIVE"

Once all setup for an event is complete, the form is ready for use. HOWEVER, it will not be available until going back into the Event setup screen and changing the [Status] to [Active]. Don't forget to scroll down and click on [Save].

REGISTERING A MEMBER (YOUTH OR ADULT VOLUNTEER)

After an event has been set up and set to [Active], members can then be registered.

Registration (adding an event to a member) is always done from the Member (Family) list page. If registration is open to families, it will show up for them. If registration is restricted to Managers only, then only Managers will see the event to add it.

1. Scroll down to the bottom of the page, to the section title [Register for an Event].
2. Click [Member Name] and locate the desired member.
3. Click on the desired event to add.

Registration Types			
Title	Description	Worksheet	Register
Youth Registration		Worksheet	Register

If the desired event does not show up, check the following:

- If registration is restricted to Managers only, then families will not see the event to add it.
- The registration window (dates registration is open) must fall appropriately.
- The event must be in the future.
- The event [Status] must be set to [Active].

To continue with the registration

4. Click on [Register]
5. Complete [Custom Fields] as requested
6. Click on [.....
7. Click on confirm.

Note that “payment” is required for all events, even if there no cost associated with the event. Also, note that until the Credit Card option is enabled for ID, the only payment option available is the “County/Club Check” which refers to a process where the families pay any amount due to their club or county (in the form of cash or check) and then (in theory) the club or county submits one check to the “Event”.

Once a registration is submitted, it will then remain pending, if “certification” is required.

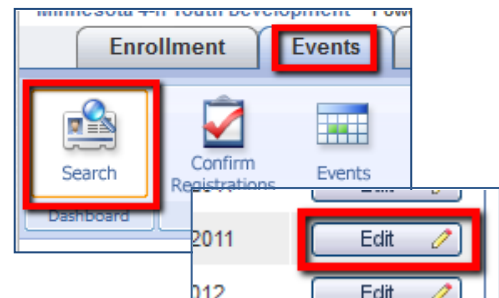
To confirm registrations, click on

EDITING AN EXISTING REGISTRATION

If a registration needs to be edited, that is possible only for staff.

If the registration is set up to require confirmation, the registration needs to be confirmed before it can be edited.

1. Click on the [Events] tab, and then the [Search] icon (if necessary).
2. Locate the desired registration, using the Search tools on that page.
3. Click on the [Edit] button of the desired registration for the desired member.
4. Under the [Entries] section, click on the green link, to access the registration.



If the link is not “live”, it means the registration is either incomplete or it has not been confirmed.

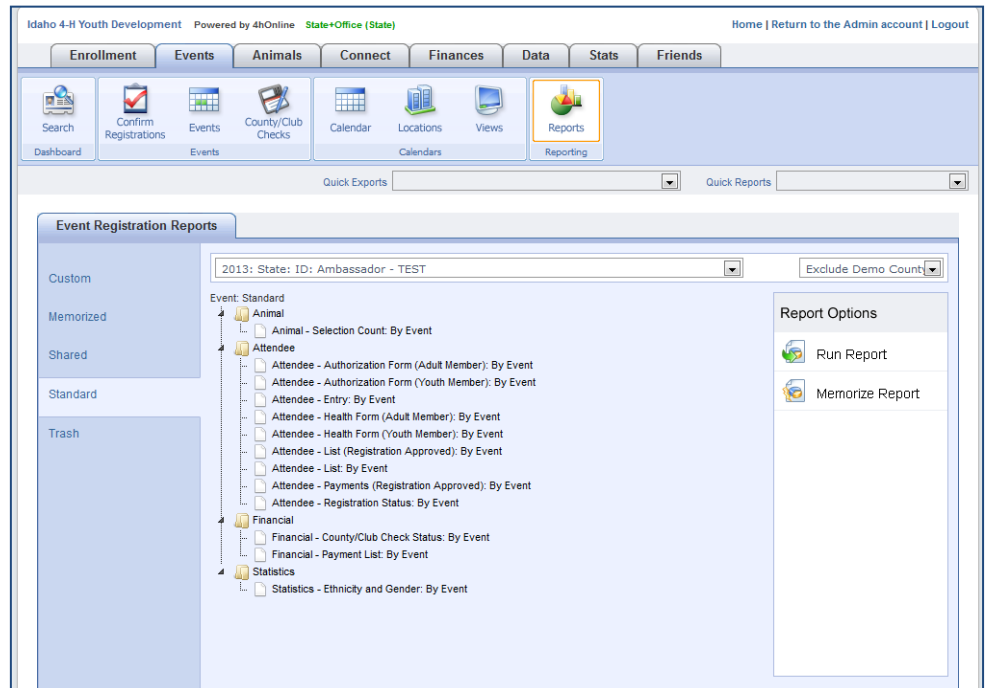
EVENT DATA REPORTING

Generating reports on Event registration data is similar to, but different than “Enrollment” reports.

Click on the [Reports] icon **IN** the Events tab.

Reports are specific to a single event:

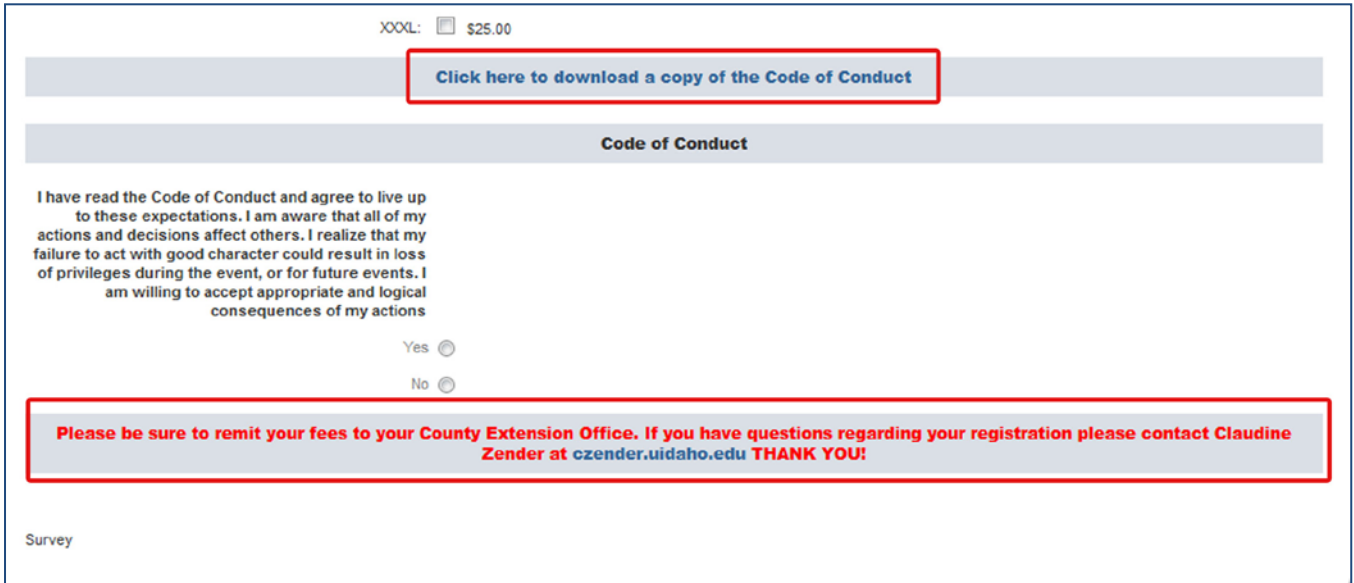
- At the top of the report screen there is a dropdown for [Events] to indicate which event is being worked with.
- Reports can only be run on one event at a time.
- Custom reports are specific to one event. If you’d like to use a report on a different event, you must first copy the report.



APPENDIX

These tips will be helpful if you are wanting to add a hyperlink to a website (i.e. specific event website) or add an email link button in the custom fields (remember it needs to be 'group' as that allows the most space for larger amounts of text/flexibility to format).

The sample below shows a hyper link to download a Code of Conduct. The bottom line of text is formatted in a different color and provides an option to email an event contact.



XXXL: \$25.00

[Click here to download a copy of the Code of Conduct](#)

Code of Conduct

I have read the Code of Conduct and agree to live up to these expectations. I am aware that all of my actions and decisions affect others. I realize that my failure to act with good character could result in loss of privileges during the event, or for future events. I am willing to accept appropriate and logical consequences of my actions

Yes

No

Please be sure to remit your fees to your County Extension Office. If you have questions regarding your registration please contact Claudine Zender at czender.uidaho.edu THANK YOU!

Survey

Basic HTML Codes

Hyperlinks - If you put a hyperlink in a group (i.e. in a section that participants will encounter during registration) you want to make sure that it is coded to so the hyperlink opens in a new browser window.

Code

```
<a href="insert your target url here" target="_blank">What your link should say</a>
```

Font color -

Code

```
<font color="red">Text to be red is here</font>
```

Email someone

Code

```
<a href="mailto:insertemailaddress@example.net">text or put email address</a>
```