Overview

With the ability to create, schedule and invite attendees to events, as well as send automated emails, the event management system in Slate consolidates and simplifies office processes into a single, straightforward system.

⚠️ Follow the Roadmap! The Slate Roadmap was ordered strategically so that appropriate and related skills are learned to ensure success while implementing Slate.

🌟 Best Practice: Focus on one type of event to start! Choose a single on-campus event that happens regularly (e.g., a campus tour), and use the following instructions to create a single event template with five test events. Once this has been mastered, then create additional templates and events.

Event Templates

Event templates save time and effort by allowing configuration for events in a central location. Event templates can be used to add recurring events en masse without the need for any additional configurations. All events that have an event template use that template’s registration form and communications. If changes need to be made to these items after the events have been created, those changes will only need to be made to the event template. It is best practice to use an event template when creating an event, even if only one event would currently use the template.

1. Click Events in the top navigation bar.
2. Click New Template
3. Enter the following User configurations:
   - **Template Name** - Give template a descriptive name. Include your program in the name. Ex: MBA Info Sessions
- **Status** - Make template Active.
- **Timezone** - The Timezone setting Autodetect from Location will use the information entered on the Location tab to determine the timezone of event.
- **Registrant Limit** - If this type of event has a registrant limit, this may be set at the template level. Events using this template will honor this limit unless a different registrant limit has been set on the individual event. Navigate to the Limits tab to provide a registration limit, if desired.
- **Privacy** - Leave this setting unchecked.
- **User** - This will default to User's name but may be changed to another user.
- **Admin Notify Email** - Skip this setting at this time.

Override Template Info

It is possible to override the basic event template settings on an individual event basis. For example, a single information session may meet at a different location than usual, and therefore has a lower registration limit. The location and registration limit for that individual event may be changed without impacting other events associated with that event template. Since the event is still associated with the event template, the registration form, event communications, and landing page will still function as normal.

If the event regularly occurs in the same location (for example, a campus tour always begins at the admissions office), enter that location information in the event template:

- **Online Event** - Leave this box unchecked.
- **Location Name** - Enter the location name.
- **Address Information** - Enter address information.
- **Preserve Formatting** - All addresses are sent to the USPS for validation and standardization. Check this box to prevent the address from being updated. This is generally useful for addresses where the USPS abbreviates a city name, or if a building name or room number information should be included.
Include description of your event. This description will display on the event registration page beneath the Title, Time, and Location information:

Any information provided on the Notes tab will only display administratively.

When basic template configurations are saved, the Template Management screen will display next.

The Template Management Screen

The Template Management screen contains resources to configure event template settings, while also providing an at-a-glance view of existing events that use the template:
Event Form

Constructing a registration form for an event template will ensure that the same form is used for every event using that template. For example, if it is decided later that one more field should be added to the campus tour registration form, the form associated with the template may be modified and will update the registration forms for all of the existing campus tour events.

 спецные поля: гости, участники, и подтверждение электронной почты

Если ограничение регистрации должно применяться также к гостям, то следует составить форму, которая отслеживает численность участников, включая зарегистрированных участников. Например, если участники привели 2 гостя, то на участники будет приходиться 3 человека.

Для гостей:

- **Type** - поле используется в качестве элемента справочника, поэтому добавьте поле в форму, которое соответствует ссылке справочника.
- **System Field** - поле связано с формой поля, установленным в палитру формы и выбранное в качестве поля для гостей.
- **Prompts** - по умолчанию, опции настройки по умолчанию заканчиваются на 5. Можете переопределить эти настройки, заменить их на 2, или добавьте еще несколько.

**Do Guests Count?** Гости отсчитываются в число ограничений регистрационной формы, если в настройках выбрано "Include guests in registrant limit". Например, при ограничении на 10 участников, если 5 участников привели по 1 гость, то в сумме их будет 15, и форму будет невозможно заполнить полностью.

Для участников:

- **Type** - поле используется в качестве элемента справочника, поэтому добавьте поле в форму, которое соответствует ссылке справочника.
- **System Field** - поле связано с формой поля, установленным в палитру формы и выбранное в качестве поля для гостей.
- **Prompts** - по умолчанию, опции настройки по умолчанию заканчиваются на 5. Можете переопределить эти настройки, заменить их на 2, или добавьте еще несколько.

Участники также входят в число ограничений, если в настройках выбрано "Include guests in registrant limit". Например, если дежурные привели по 1 гость, то в сумме их будет 20, и форму будет нельзя заполнить полностью.

Если регистрация превысила установленный лимит, можно вывести сообщение "registrant limit exceeded" в окне, предупредив о том, что регистрация закрыта.

**This Looks Familiar!** Навыки, которые вы приобретете при создании формы для заполнения заявления, также будут использоваться при создании форм для событий.

On the Template Management screen, click Edit Form.
Email Confirmation

The *Email Confirmation* system field can be used to ensure accurate email address entry.

- **System Field** - Map field to Special Form Fields and then select the Email Confirmation option.

**Edit Field**

- **Status**: Active
- **Type**: Text Box
- **Label**: Confirm Email Address
- **System Field**: Special Form Fields - Email Confirmation
- **Export Key**: sys:email2

**Note:** The second email address entry is unique in that the value will not be stored in any other field other than the form field. This mapping is used only to prevent form submission if the Email Confirmation value does not exactly match the Email Address form field that is mapped to the Email system field under the Student Record.

The email addresses entered do not match.

- **Email Address**: Test@technolutions.com
- **Confirm Email Address**: Test@technolutions.net

⚠️ **Using Internal Only Fields**

Sometimes events require additional administrative processing steps once a student has registered. For example, a registrant for a campus tour may need to be assigned to a student guide.

A useful way to manage post-registration work is to add fields to the registration form that are configured as Internal Only. An Internal Only field will not display on the public registration page, but it will display on the administrative registration page. For example, create form field for Tour Guide.

- **Type** - Be sure to select a compatible format type for your question.
- **Label** - This text will only display for your Slate administrators.
- **System Field** - Internal Only fields can be mapped or unmapped.
- **Export Key** - Provide an export key if you choose to keep your field unmapped.
- **Prompts** - In this example, the prompts would be the names of the student guides.
- **Options** - Be sure to check the Internal Only box.

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Hidden versus Internal? Hidden fields never display on the registration page, even if the registration page is being viewed administratively. If you need to be able to enter data into a field that should only display administratively, then configure the field as Internal Only.

After a student registers for the event, the processing team may open and edit the registration. When editing the event registration, the Internal Only fields will be visible to the processing team.

Create Events
On the Template Management screen, click the button to batch-generate individual events. Provide details for your events:

- **Page Title** - Name the event. This title will appear on the public registration page.
- **Folder** - Important: Create a folder for events. **Folders are Critical!** Events will be publicized based on folder names. Be sure to provide clear and informative folder names (e.g., “Campus Tours”). **Important: the first time that you create an event, you should choose ‘Other’ from the folder drop-down, and in the box type your program. Ex: MBA. Afterward, for every event that you create, you will always choose your program name as the folder. To create a subfolder, choose ‘Other’ and type the name of the event category in the box.**
- **Status** - Set the status to Confirmed/Active.
- **Recurrence** - If creating more than one event, click the Recurrence box.
- **Date Range** - Provide the date range for which events should be created, and the time of the events.
- **Deadline** - Provide a deadline, if required. If no deadline is provided, Slate will use the Start Time.
- **Weekdays** - Select the days of the week during which event occurs. In this example, a Campus Tour will be scheduled for Monday, Wednesday, Friday, and Saturday at 1:00 pm during for first 10 days in November.
- **Registrant Limit** - Navigate to the Limits tab to provide a registration limit, if desired. If template has a limit, that limit will be used once events are created.
- **Privacy** - Leave the Privacy setting unchecked.

Provide location information for events on the Location tab. If event template includes this information, the template address information will be used once events are created.

A description may be included on the Description tab. This information will display below the page title for an individual event. If the event template includes a description, the template information will be used once events are created.

After saving, the individual instances of the event will be created and will display on the Template Management screen:
Different Details? Create separate batches!

Use the same template to create events that occur at various times on different days. For example, a campus tour summer schedule might look like this:

Monday, Wednesday, Friday at 1 pm
Tuesday and Thursday at 10 am

Create events for M,W,F events first; then create T, Th events.

Use the same template to create events that occur at various locations. For example, information sessions might be in two different locations on campus, like this:

Building 1 at 1pm
Building 2 at 1pm

Create events for Building 1 events first; then create Building 2 events.

Manage Event Instances
After creating events, they will also appear in the event calendar view:

**Event Structure**

There are three basic event structures that are used most often in Slate.

**Event Models At a Glance**

A. Use Form Fields on main campus visit template to determine if a prospective student will participate in additional activities while visiting campus.

B. Use Related Events on main campus visit template to allow the prospective student to register for additional events on the same day without submitting additional registration forms.

C. Use separate event registration forms for different on-campus activities.

A combination of the models above may also be used. Please submit a Service Desk request to review which model will work best for a given process.

**Event Structure A - Use Form Fields**

This event structure is often used to allow registration for multiple on-campus activities that occur on the same day on a single registration form. The main event’s registration limit is sufficient for all of the possible activities.
Institutions that use this structure need to know if the registrant intends to participate in the other on-campus activities. Typically there are only a few, if any, follow-up questions.

Use Form Fields on the main campus visit template to determine if a prospective student will participate in additional activities while visiting campus:

**When to Use Structure A** Institutions that decide to use Event Structure A typically have these event characteristics:

- Registration limit of the main event is sufficient for the other on-campus activities.
- The registration form for the main event is sufficient to capture the information needed, with very few exceptions.

Use Related Events on the main campus visit template to allow the prospective student to register for additional events on the same day without submitting multiple registration forms. Maintain a distinct registration limit for the different activities. This structure allows separate constituent event communications.
When to Use Structure B

Institutions that decide to use Event Structure B typically have these event characteristics:

- The additional on-campus activities have set registration limits that differ from the main event.
- The registration form for the main event is sufficient to capture the information needed for the other on-campus activities, with very few exceptions.
- The additional on-campus activities require significant changes to the communication plan.

If event processes require administrative setup specific to one of the related events, add Internal Only fields to the form for that related event’s template.

Important! Do not delete the basic fields that are pre-populated on the form.

Automated Communications

Upon Registration-type communications for the Campus Visit template are sent to registrants. Upon registration communications are never sent for related event registrations.

Communications for related events that use any other triggers, including ‘Upon Update’ or ‘Hours before event,’ are all sent for any registrants, regardless of which registration form was submitted.

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Event Structure C - Use Separate Forms

This event structure is used for more complex on-campus events, where a single registration form would become cumbersome to collect all of the required information for each activity.

Prospective students can be directed to Event Landing Pages where each of the on-campus events are listed. Communication plans can be used to market additional events to encourage registrants to sign up for those other activities.

When to Use Structure C

Institutions that decide to use Event Structure C typically have these event characteristics:

- Complex registration forms that cannot be accommodated elegantly on a single registration form.
- A constituent event requires a complex ‘upon registration’ communication.

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Event Structure - Use a Combination

A hybrid event structure may be used:

Important! To ensure a smooth transition for event processes, discuss event structures in advance before deciding which path to take. Submit a Service Desk request to go over event set up.

Event Management

Settings

Once an event has been created, the screen to manage registrations and edit the event itself resembles the following:
This event management screen will display the high level settings of the event, including:

- The date and time of the event
- The event location (with a map that can be edited). If the location is associated with a dataset record, the name of the location will be linked to the record.
- A link to the event template
- The event folder
- The user associated with the event
- The status of the event
- The public URL for the event. This URL can be edited to feature a vanity URL.
- Any documents associated with this event

All of these settings can be adjusted by editing the event using the top right Edit button on the event management screen.

If a Notes form is associated with this event, a Notes tab will be present near the top right of the event management screen.

Edit and Export Options

On the right side of the screen, the following options are available to further edit the event and its components, export data, or view responses:

<table>
<thead>
<tr>
<th>Option/Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit Communications</td>
<td>Navigates to the overview of communications associated with this event.</td>
</tr>
<tr>
<td>Edit Form</td>
<td>Navigates to the registration form associated with this event. If this event has a template, navigate to the template form to make changes.</td>
</tr>
<tr>
<td>Export Data</td>
<td>Automatically builds and runs a query of all registrants and the data associated with their form responses for this event.</td>
</tr>
<tr>
<td>Export PDF</td>
<td>Automatically renders a PDF of all form responses for this event. Each form response will also display the Form User, Form Title, Form Date, Form Status, and Form Submitted Date.</td>
</tr>
<tr>
<td>New Query</td>
<td>Automatically builds a query of all registrants and the data associated with their form responses for this event. Additional exports and filters can be inserted as desired.</td>
</tr>
<tr>
<td>New Report</td>
<td>Automatically builds a report of the event registration data. This report can be saved or exported if desired.</td>
</tr>
<tr>
<td>Survey Responses</td>
<td>If an event survey form is associated with this template, a report of the survey responses can be viewed here.</td>
</tr>
</tbody>
</table>

Registrants and Launching Registration
Below the event settings, registrants, space available, and check in/registration options show:

### Registants (2)

<table>
<thead>
<tr>
<th>Registrant</th>
<th>Payment Due</th>
<th>Status</th>
<th>Submitted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shepherd Test, Katie Test</td>
<td></td>
<td>Registered</td>
<td>01/31/2019</td>
</tr>
<tr>
<td>Turchan Test, Paul Test (Test)</td>
<td></td>
<td>Registered</td>
<td>01/31/2019</td>
</tr>
</tbody>
</table>

Note the following:

- The number for the Registrants count does not include guests.
- The Launch Check In option should be used to mark registrants as Attended or No Show.
- The Launch Registration option should be used if multiple registrations are submitted sequentially. This is typically used for day-of registrations, as submitting a registration from this screen will automatically mark this registrant as attended.
- The Space Available count will subtract the number of registrants and guests from the Limit set on the event.
- The Pending counts will only show for forms marked as Save for Later.
- Once at least one registrant is marked as attended, the Total registrants including guests count will display the number of attended registrants, with and without guests.

When an event registration is selected from the event management screen, the form response can be displayed, edited, rescheduled, or deleted.

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