

technolutions

Events

Phase

Phase I

Section

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Overview

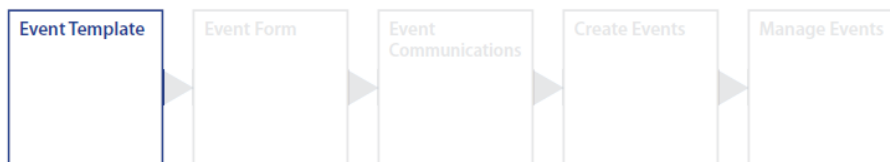
With the ability to create, schedule and invite attendees to events, as well as send automated emails, the event management system in Slate consolidates and simplifies office processes into a single, straightforward system.

⚠ 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.

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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 that 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.

New Template

Details

Location

Description

Limits

Notes

Template Name

Status

Timezone

Registrant Limit These options have moved to the Limits tab.

Privacy Do not display on public landing pages.

User

Admin Notify Email

⚠ 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.

Campus Tour Template

[Edit](#)

Location	 Slate University 234 Church St Fl 15 New Haven, CT 06510-1800 United States Edit Map Driving Directions
Folder	Templates
User	Technolutions.Service.Desk
Status	CONFIRMED
Documents	Edit Documents

[Edit Communications](#)[Edit Form](#)[New Query](#)[New Report](#)[Create Events](#)

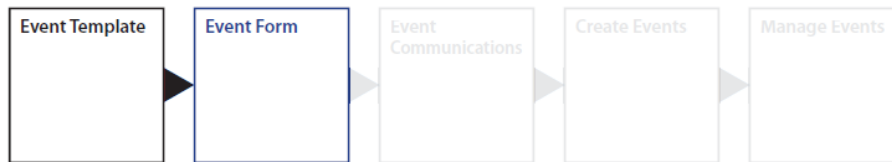
Upcoming Instances

Date/Time ▼	Description	Category	Status
-------------	-------------	----------	--------

Past Instances

Date/Time ▲	Description	Category	Status
-------------	-------------	----------	--------

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.



This Looks Familiar! The skills learned building the inquiry form are the same skills needed to build registration forms for events.

On the Template Management screen, click Edit Form.

★ Special Form Fields - Guests, Attendees, and Email Confirmation

If the registration limit should apply to guests as well, include a form field that is mapped to one of these two special form fields:

Guests

Map *Guests* on the event form to track the number of people, not including the registrant, that will attend the event with the registrant. If the registrant brings 2 guests, guests would be 2.

- **Type** - This field uses a prompt list, so use the Form Builder Palette to add a form field that is compatible with prompt lists.
- **System Field** - Map field to Special Form Fields and then select the Guests option.
- **Prompts** - By default, the prompt options go up to 5. Override system prompts to reduce this number, or even increase it.



Do Guests Count? Guests count toward the registration limit set for an event if "Include guests in registrant limit" is selected for the *Include Guests* setting under the Limits tab of the event settings. For example, the event may have a limit of 10 people. If 5 registrants each bring 1 guest, the limit would be met and the event would be marked as Full.

Attendees

The number of people, **including** the registrant, that will attend. For example, if the registrant brings 2 guests, attendees would be 3.

- **Type** - This field uses a prompt list, so use the Form Builder Palette to add a form field that is compatible with prompt lists.
- **System Field** - Map field to Special Form Fields and then select the Attendees option.
- **Prompts** - By default, the prompt options go up to 5. Override system prompts to reduce this number, or even increase it.

Attendee numbers also count toward the limit of the event if "Include guests in registrant limit" is selected for the *Include Guests* setting.

If the registrant limit is exceeded when guests are added, the registration limit default message or (or [custom message](#) if it has been configured) will appear in a pop-up window:

Postal Code

Student Type
 Adult Learning
 Graduate
 Online
 Undergraduate

Guests

Campus Tour
 Thursday, January 31 at 10:00 AM - Campus Tour
 Thursday, January 31 at 02:00 PM - Campus Tour

Information Session
 Thursday, January 31 at 09:00 AM - Information Session
 Thursday, January 31 at 01:00 PM - Information Session

Registration is no longer available because the registration capacity has been exceeded.

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

Type

Label

System Field

Export Key

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

Confirm Email Address

⚠ 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.

? **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:

Campus Tour Template

[Edit](#)

Location  [Slate University](#)
 234 Church St Fl 15
 New Haven, CT 06510-1800
 United States
[Edit Map](#) [Driving Directions](#)

Folder [Templates](#)

User [Technolutions Service Desk](#)

Status [CONFIRMED](#)

Documents [Edit Documents](#)

- [Edit Communications](#)
- [Edit Form](#)
- [New Query](#)
- [New Report](#)
- [Create Events](#)

Upcoming Instances			
Date/Time ▼	Description	Category	Status
11/01/2017 01:00 PM	Campus Tour	Campus Tours	Confirmed
11/03/2017 01:00 PM	Campus Tour	Campus Tours	Confirmed
11/04/2017 01:00 PM	Campus Tour	Campus Tours	Confirmed
11/06/2017 01:00 PM	Campus Tour	Campus Tours	Confirmed
11/08/2017 01:00 PM	Campus Tour	Campus Tours	Confirmed
11/10/2017 01:00 PM	Campus Tour	Campus Tours	Confirmed

🔗 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:

Events

Mon	Tue	Wed	Thu	Fri	Sat	Sun
29	30	31	1	2 1:00pm Campus Tour #0	3 1:00pm Campus Tour #30 FULL	4
5 1:00pm Campus Tour #30 FULL	6	7 1:00pm Campus Tour #0	8	9 1:00pm Campus Tour #0	10 01:00pm Campus Tour #0	11

Events that have met the registrant limit will display as grey boxes in the calendar view.

Tentative events appear as yellow boxes in the calendar view.

Cancelled events appear as pink boxes in the calendar view.

Your event folders display in the right-hand column. Click a folder to view scheduled event instances for just that folder.

Folders

- All Events
- Campus Tours
- Information Sessions
- Templates

Users

Dates

Legend

- Available
- Tentative
- Cancelled/Declined
- Full

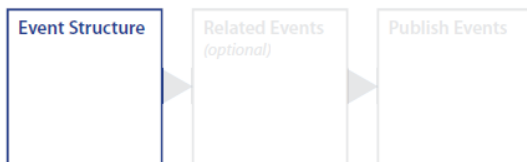
#Registrants+Guests (Attendees)

Use the Users dropdown to display events that are associated with a particular user in your office.

⚠️ Override the Template: When an event instance is edited (e.g., the time, event status, registration limit) the new details will override any template information for that event instance only.

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Event Structure



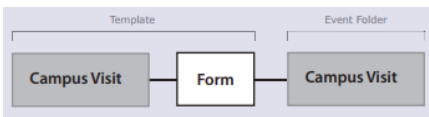
There are three basic event structures that are used most often in Slate.

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:

Campus Visit

Would you like to attend one of our group information sessions?
Sessions run hourly from 9AM – 12PM and 1PM – 3PM
 Yes
 No

Will you join us for lunch?
 Yes
 No

Dietary Preference:
 Vegetarian
 Kosher
 Gluten free
 No preference

Would you like to attend a class while on campus?
 Yes
 No

Select a class you would like to attend:
 Biology
 Math
 English
 Physics

Class Time

Class Name

Class Buddy

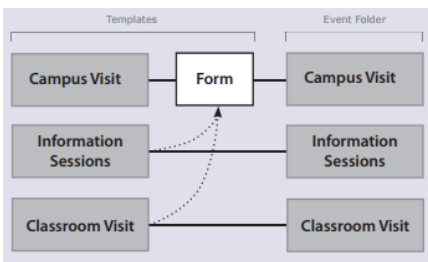
Callouts:
 - Participation in an individual event constituent (an information session, lunch, or a classroom visit) is collected through unmapped form fields on the main registration form.
 - Configured to show conditionally for registrants who said Yes to the Lunch question.
 - Configured to show conditionally for registrants who said Yes to the Attend a Class question.
 - Configured as Internal Only fields.

★ **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.

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Event Structure B - Use Related Events



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.

Campus Visit

Spend the day with us!
 While you are on campus, consider participating in other activities that we offer to help you get a feel for campus life!

Group information sessions are hosted by admissions counselors, and they offer an overview of the admissions process and financial aid.

- Monday, June 1 at 9:00 AM – Information Session
- Monday, June 1 at 10:00 AM – Information Session
- Monday, June 1 at 1:00 PM – Information Session
- Monday, June 1 at 2:00 PM – Information Session

Get a feel for being a student on our campus by participating in a class visit. You will be paired with a current student who will take you from the Admissions Office to the class.

- Monday, June 1 at 9:00 AM – 11:00 AM – Physics Class Visit
- Monday, June 1 at 9:00 AM – 11:00 AM – Biology Class Visit
- Monday, June 1 at 9:00 AM – 11:00 AM – Chemistry Class Visit
- Monday, June 1 at 10:00 AM – 11:20 AM – Math Class Visit
- Monday, June 1 at 11:00 AM – 12:20 PM – History Class Visit

Callout:
 Participation in an individual constituent event (an information session or a classroom visit) is collected through a Related Event. A prospective student becomes a registrant for any Related Event that is selected.

★ **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.

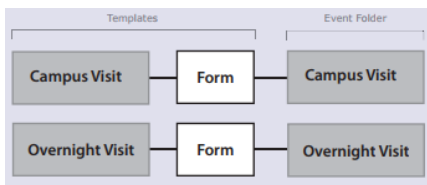
⚠ **Important!** Do not delete the basic fields that are pre-populated on the form.

🔔 **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.

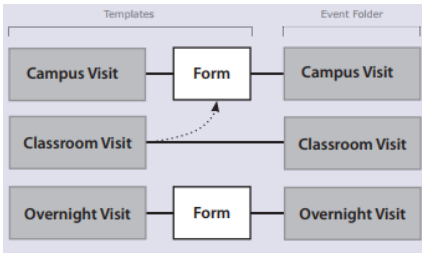
<p>Campus Visit</p> <p>Would you like to attend one of our group information sessions? Sessions run hourly from 9AM – 12PM and 1PM – 3PM</p> <p><input type="radio"/> Yes <input type="radio"/> No</p> <p>Will you join us for lunch?</p> <p><input type="radio"/> Yes <input type="radio"/> No</p> <p>Dietary Preference:</p> <p><input type="radio"/> Vegetarian <input type="radio"/> Kosher <input type="radio"/> Gluten free <input type="radio"/> No preference</p> <p>Would you like to attend a class?</p> <p><input type="radio"/> Yes <input type="radio"/> No</p> <p>Select a class you would like to attend:</p> <p><input type="radio"/> Biology <input type="radio"/> Math <input type="radio"/> English <input type="radio"/> Physics</p> <p>Class Time</p> <p><input type="text"/></p> <p>Class Name</p> <p><input type="text"/></p> <p>Class Buddy</p> <p><input type="text"/></p>	<p>Overnight Visit</p> <p>Would you prefer to stay in a co-ed dormitory or a single sex dormitory? Note: Your student host will be the same sex.</p> <p><input type="radio"/> Co-Ed <input type="radio"/> Single Sex</p> <p>Will you require special accessibility accommodations during your stay?</p> <p><input type="radio"/> Yes <input type="radio"/> No</p> <p>Please Explain:</p> <p><input type="text"/></p> <p>If you are traveling alone, will you require transportation to and from the airport?</p> <p><input type="radio"/> Yes <input type="radio"/> No</p> <p>Arrival Time:</p> <p><input type="text"/></p> <p>Airline and Flight Number:</p> <p><input type="text"/></p> <p>Student Host</p> <p><input type="text"/></p> <p>Student Host Meeting Location</p> <p><input type="text"/></p> <p>Student Host Meeting Time</p> <p><input type="text"/></p>
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★ **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.

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Event Management


Settings

Once an event has been created, the screen to manage registrations and edit the event itself resembles the following:

[All Events](#)

Visit Campus

[Notes](#) [Edit](#)

Date	Wednesday, January 2, 2019 at 08:00 AM until 05:00 PM UTC -05:00
Location	 Slate University 234 Church St New Haven, CT 06510-1804 United States Edit Map Driving Directions
Template	Master Visit
Folder	Master Visit
User	Technolutions Service Desk
Status	CONFIRMED
URL	https://slate-showcase.test.technolutions.net/register/?id=261577a2-ee4f-4dc8-966d-f6ed2fb7cb9e Edit URL
Documents	Edit Documents

Edit Communications
Edit Form
Export Data
Export PDF
New Query
New Report
Survey Responses

Registrants (1) [Launch Check In](#) [Launch Registration](#)

Space Available: 49

Registered	Cancelled	Waitlist	All Registrants	<input type="text" value="Search Registrants..."/>
Registrant	Payment Due	Status	Submitted ▲	
New Registration				
Turchan Test, Paul Test		Registered	01/31/2019	

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:

Option/Button	Description
Edit Communications	Navigates to the overview of communications associated with this event.
Edit Form	Navigates to the registration form associated with this event. If this event has a template, navigate to the template form to make changes.
Export Data	Automatically builds and runs a query of all registrants and the data associated with their form responses for this event.
Export PDF	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.
New Query	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.
New Report	Automatically builds a report of the event registration data. This report can be saved or exported if desired.
Survey Responses	If an event survey form is associated with this template, a report of the survey responses can be viewed here.

Registrants and Launching Registration

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

Registrants (2) Launch Check In Launch Registration
 Space Available: 11 Pending: 1 Total registrants including guests:
 Pending including guests: 1 4

Registered	Cancelled	Waitlist	Pending	All Registrants	Search Registrants...		
Registrant					Payment Due	Status	Submitted ▲
New Registration							
Shepherd Test, Katie Test						Registered	01/31/2019
Turchan Test, Paul Test (Test)						Registered	01/31/2019

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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