How to Perform a Mass Registration in Events After the Event

Ver. 1.1

6June2017

Advance Events Management

Task 1   **Create an Event**

1. Click on GOTO (pointed finger) in the menu bar above the Open Applications drop down list.

2. In Application window type EVTNEW and click on GO.

3. Complete all fields highlighted.

4. Click Save after you have all fields completed to your satisfaction.

5. After you save your event will show up. Note the Event ID of your event.

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Event Detail
Actions   Print

2017 (August) Outstanding Faculty Luncheon #2519

Type	Awards and Honors	**Venue**	Arkansas Union Ballroom
Status	Active	**Start Date**	08/11/2018 8:00 AM
Stage	Invitation	**Stop Date**	08/11/2018 7:00 PM
Purpose	Appreciation/Recognition		

Task 2	Add an Event Organizer

An organization is participating in the logistics surrounding your event.

1. On the left hand navigation tree select "**Organizers**"

2. Click on New in the Organizers list form.

3. Enter the entity ID of the organization helping with the event logistics and the Contact ID of the main contact for the event. You can use F2 to perform an entity lookup in order to populate Organization ID field and Contact ID field.

4. Save.

Task 3.   **Enter IDs on clipboard or upload IDs to Clipboard.**

Task 4.   **Go to Mass Registration under Events, load IDs from Clipboard.**

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And then click GENERATE.

1. It will ask you again if you want to Mass register XXX and you click OK.

2. Go back to the main event page and click "OVERVIEW" and it should show

Invitation count, RSVP / Registrations and Participants Attended.

Task 5   **Sample Events Reporting**

UA Invitee Mail File

1. From the Event Overview, select the Reports from the top Actions menu.

2. Scroll through the reports list and select *UA Invitee Mail File*.

3. To specify a particular list of invitees, enter a particular Invitation ID; otherwise, click on *Run Report* to include all invitees.

4. Select CSV from the Export menu in the Report Viewer red ribbon bar.

5. Review your invitees contact information.

UA Participants Details File

1. From the Event Overview, select the Reports from the top Actions menu.

2. Scroll through the reports list and select *UA Participants Details File*.

3. Select your preferred Prospect Group, then click on *Run Report*.

4. Select CSV from the Export menu in the Report Viewer red ribbon bar.

5. Review your planned participants' details information.

UA Events Participation Status

1. From the Event Overview, select the Reports from the top Actions menu.

2. Scroll through the reports list and select *UA Events Participation Status*.

3. Click on *Run Report* to update the status to Attended for those with a blank status. **Note:** You must code Did Not Attend, Walk Up, and Cancelled prior to running this report.

4. Return to your event to verify the status changes.

Task 6	Cloning an Event

This is an event you hold annually, and you would like to be able to copy this event to save time and use many of the same attributes for next year's event.

1. In the Dinner context, select *Clone* on the navigation menu. The *Clone Event* screen will display your dinner. The dinner event will be checked.

2. On the detail display at the bottom, change the event name to "XXX Dinner Evening 2014."

3. Change the Start Date to a date in 2014. On the stop date, only change the month and day – the year will update based on the new start date.

4. Click on **Save** on the *Clone Event* form header.

5. Select *Clone* on the Clone Event header. A *Clone Event* screen will display, allowing you to specify all the data you want to clone. Uncheck any desired items. Click on OK.

6. You should receive a message that cloning was successful. Click on OK, and the new event will be displayed.