

---

## 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.

The screenshot shows the 'Event Detail' application window. The title bar reads 'Event Detail' with 'Actions' and 'Print' buttons. Below the title bar, it says 'New Event'. The main window has a sub-header 'Detail (72200)' with 'Save', 'Cancel', 'Actions', and 'Help' buttons. The form contains several fields, some of which are highlighted in yellow:

- Event Name\* (text input)
- Type\* (dropdown)
- Status\* (dropdown)
- Stage (dropdown)
- Content (dropdown)
- Purpose (dropdown)
- Account Number (dropdown)
- Venue Code (dropdown)
- Venue (text input)
- Venue State/Prov (dropdown)
- Show On AWC (dropdown with 'NO' and 'No' options)
- Capacity (text input with '0')
- Note/AWC Event Desc (text area)
- Start Date (calendar icon)
- Start Time (dropdown)
- Stop Date (calendar icon)
- Stop Time (dropdown)
- Active (checkbox, checked)
- Cancelled (text input with calendar icon)
- Planning Start (text input with calendar icon)
- Warning % (text input with '0')

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.

---

## How to Perform a Mass Registration in Events After the Event

Ver. 1.1

6 June 2017

---

Event Detail		<a href="#">Actions</a>	<a href="#">Print</a>
2017 (August) Outstanding Faculty Luncheon		#2519	
<b>Type</b>	Awards and Honors	<b>Venue</b>	Arkansas Union Ballroom
<b>Status</b>	Active	<b>Start Date</b>	08/11/2018 8:00 AM
<b>Stage</b>	Invitation	<b>Stop Date</b>	08/11/2018 7:00 PM
<b>Purpose</b>	Appreciation/Recognition		

---

## How to Perform a Mass Registration in Events After the Event

Ver. 1.1

6 June 2017

---

---

### 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.

**Organizers** Actions Print

**2017 (August) Outstanding Faculty Luncheon #2519**

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

Save completed successfully

**Organizers (72222) (1/1)** Save New Cancel Actions Help

Organization	Contact
Development #357615	#97029

**Organization\***   Development

**Contact ID**   M

**Notes**

---

## How to Perform a Mass Registration in Events After the Event

Ver. 1.1

6June2017

---

4. Save.

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

The screenshot displays the 'Clipboard' interface. At the top, there is a header 'Clipboard' with an 'Actions' menu. Below the header, there are several sections with buttons:

- Modify Content in the Current Clipboard:** Buttons for 'New', 'Delete', 'Clear', 'Clear All', and 'Import List'.
- Create or Update a Saved ID List:** Button for 'Save'.
- Work with a Saved ID List:** Buttons for 'Load List', 'Merge List', 'Intersect', and 'Exclude'.
- View or Update a List Header:** Button for 'List Headers'.

Below these sections is a section titled 'Entity Clipboard (50462) (1/58)'. It includes a navigation bar with 'Items 1 to 15 of 58' and navigation arrows. A table of IDs is shown, with the first row highlighted in blue. The ID '2034' is selected. A large blue vertical bar obscures the names of the entities.

ID	Entity Name
2034	...ges Jr.
6656	M...
6657	M...
6971	M...
8351	M...
8352	M...
12499	T...
16406	M...
16407	M...
20798	D...
20799	M...
24677	M...
26323	M...
31468	D...
32838	D...

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

---

## How to Perform a Mass Registration in Events After the Event

Ver. 1.1

6June2017

---

The screenshot shows a web application interface with a breadcrumb trail: Home > Event Mass Registration > Clipboard. The main content area is titled 'Mass Registration' and displays details for the event '2017 (August) Outstanding Faculty Luncheon #2519'. The event details include: Type: Awards and Honors, Status: Active, Stage: Invitation, Purpose: Appreciation/Recognition, Venue: (blank), Start Date: 08/11/2018, and Stop Date: 08/11/2018. Below the details, there is a prompt: 'Please select 'Get Saved ID List' or 'Get From Clipboard' to populate the Entity List.' The 'Entity List (72283) (58)' section shows a table with a 'Name' column and a 'Registration Status\*' column. The first row is partially visible, showing 'Th' and '#2034'. The 'Mass Registration (96070)' section at the bottom has buttons for 'Generate', 'Cancel', and 'Help'. A left sidebar contains a navigation menu with options like Overview, Detail, Event Tree, Codes, Clone, Fees, Gifts, Honorees, Invitations, Manage Wait Lists, Mass Assign, Mass Refund, Mass Registration, Organizers, Participants, Participation Update, and Payments.

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.

## How to Perform a Mass Registration in Events After the Event

Ver. 1.1

6 June 2017

**Event** Actions Print

**2017 (August) Outstanding Faculty Luncheon #2519**

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

**Invitations Overview (100277)** Actions Help

<b>Invitation Count</b>	0	<b>Invitee Count</b>	0
<b>Invitation Declined Count</b>	0	<b>Invitee Declined Count</b>	0
<b>Invitation No Response Count</b>	0	<b>Invitee No Response Count</b>	0

**RSVP/Registration Overview (100278)** Actions Help

<b>RSVPs/Registrations</b>	58	<b>Planned Participants</b>	58
<b>RSVPs/Registrations Cancelled</b>	0	<b>Cancelled Participants</b>	0

**Registration Fees & Gifts Overview (100279)** Actions Help

<b>Fees</b>	0.00	<b>Due</b>	0.00
<b>Paid</b>	0.00	<b>Gifts</b>	0.00

**Planned Participation Overview (100280)** Actions Help

<b>Participants Attended</b>	58	<b>Participants No Show</b>	0
<b>Participants Walked Up</b>	0		
<b>Total in Attendance</b>			
		58	

---

### Task 5 Sample Events Reporting

---

#### UA Invitee Mail File

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

---

## How to Perform a Mass Registration in Events After the Event

Ver. 1.1

6 June 2017

---

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."

---

## ***How to Perform a Mass Registration in Events After the Event***

Ver. 1.1

6June2017

---

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.