Creating an Event

1. Go to the Events page.
2. Click New and complete the Event fields (detailed below)
3. Click Save
4. Click Submit (all events must be approved by a SPoC (Tori))

Vocabulary Words

Portal-portion of Shades website that is directly connected to MP. Used for event registrations, volunteer sign-ups, etc.

Shades Website-NOT THE SAME AS THE PORTAL. www.shades.org This is the big church website. If you put an event in MP, it only shows up on the PORTAL calendar, not the big website event calendar. Talk to Jordan if you need assistance with anything involving the website. Talk to Tori if you need assistance with the portal or MP.

Group- groups that people are in within MP. SS classes, dgroups, bible studies, invitation contact groups, etc.

Event Participant-someone either registered for or checked into an event in MP.

Product-the baseline for how people pay when they register for an event. THIS IS REQUIRED FOR ALL EVENTS WITH REGISTRATION, EVEN FREE ONES!

Custom Form-a form created in MP used to gather additional information other than contact info. Can stand alone or be attached to an event or opportunity.

URL- Uniform Resource Locator (URL) or web address

Portal Calendar- separate from the website calendar. Lives on the portal section of the website and contains all MP events with the appropriate visibility levels.

Web Calendar-separate from the Portal calendar. This is a part of the website and does NOT talk to MP. Events on this calendar must be added via the website editing site. Get with Jordan if you need more info on this.

Check-In Suite-the primary attendance tool for MP. Contains check-in kiosks and Classroom Manager.

Creating an Event: Event Fields

Event Title: name of the Event.
*NOTE: make sure to put the **YEAR** in the title if it is an annual event! (Carnival, Women's Conference, Student Camp, etc.)
Event Type: the category of the Event.
Congregation: the Congregation the Event is for or hosted by. (Shades)
Location: the location where the Event is hosted. (Main Campus)
Meeting Instructions and **Description:** information about the Event so potential participants know what to expect. Please note that neither of these fields supports HTML. You're discouraged from adding formatting to text in these fields via HTML code, as it may interfere with other system functionalities.
Program: the ongoing ministry effort of which this Event is a part.
Primary Contact: the main contact of the Event. (Almost always a Shades staff member.)
Participants Expected: maximum number of participants expected before the Registration Active field is automatically set to No; this number is calculated based on registered Participants (and excludes canceled Participants).
Minutes for Setup: the number of minutes needed for setup before the Event start time (e.g., **15** for 15 minutes).
Event Start Date: the date and time the Event starts.
Event End Date: the date and time the Event ends.
Minutes for Cleanup: the number of minutes needed for cleanup after the Event end time (e.g., 15 for 15 minutes).
Canceled: if Yes, ***Cancelled*** automatically appends to the Event Title and any room, equipment or service reservations are automatically canceled.
Approved: a read-only field that is updated upon submission/approval.

Public Website Settings (aka: The Portal)

- **Visibility Level:** determines where the Event is visible:
    - **1-Private** does *not* show on the Portal and is intended to help you find events in the Platform that are for internal (private to the church) use (e.g., when using views, filters, reports). Please note that each customer internally defines what 'Private' means to them.
    - **2-Staff Only**: does *not* show on the Portal* and is intended to help you find events in the Platform that are for Staff Only (e.g., when using views, filters, reports).
        - *Note: while an event with a visibility level of 2 is not publicly visible on the portal, a participant in this event with any Participation Status value will see this event on the My Events page when logged into the portal.
    - **3-Staff & Church**: *does* show on the Portal with or without logging in.

  - **4-<u>Public</u>**: *does* show on the Portal with or without logging in. This will allow the Event, once it is approved, to appear on the church's "Event Calendar" Portal Page. (the difference between 3-Staff & Church and 4-Public would be determined by however you might want to use them internally for views, filters, or reports - your choice!).
  - **5-<u>Hidden:URL Required</u>**: *does* show on the Portal *only* to individuals who have the appropriate URL. To create the URL, append your event registration URL with the Event ID# of the specific event the registration is for (to get the URL, the Event ID# would be added to the end of your usual event signup link, such as https://my.shades.org/portal/event_signup.aspx?id=####.)

- **Featured on Calendar:** When this value is set to "Yes" the Event will be listed when selecting "Show only Featured Events." Various 3rd party applications may make use of this field in other ways.
- **Online Registration Product:** if registration is occurring for this Event, the Product controls the fee amount.
  *NOTE: You must have a product for any event with registration, even if the event is free!
- **Registration Form:** If you would like additional questions answered when someone is registering for the event, include a custom form here.
- **Registration Start:** the date registration should open.
- **Registration End:** the date registration should close.
- **Registration Active:** must be Yes for registration to be open. If you want registration to close, you can manually set this field to False. Note that other items may close registration before you manually set this field to False, such as either the Participants Expected field value or the Registration End date being met. These items will not update the Registration Active field to "False", but will prevent registrations from being submitted on the Portal.
- **Register into Series:** If Yes, any registrants in an Event are added to all subsequent, future Events in this Event series. For example, you have a 3-day Marriage Retreat on Dec 2,3,4. In November, Sally registers for the Dec 3 Event. The routine will automatically register Sally for the Events on Dec 3,4. Although the Event on Dec 2 is in the future it is not subsequent to the Dec 3 Event, therefore Sally will not be registered by the routine. A link on your website must be updated to a future event in order for new event registrants to be added to future events.
- **External Registration URL:** Add a complete URL to this field if you wish to use a 3rd party form to take registrations for this event (a Product does not need to be chosen for events with an External Registration URL, *and will be ignored if present*). The URL in this field replaces what would normally happen when the Sign-Up button is clicked on the Event Registration for this Event.
  *NOTE: This is <u>not the same</u> as the hidden URL you use for special forms or surveys.
- **Web Approved:** a read-only field that is updated upon submission/approval.

Check-in Information - Related to Check-In Suite

- **Allow Check-In:** if Yes, this Event is eligible for the Check-In system.
  *NOTE: If you have a specific group you would like to be eligible for check in, attach it under the Rooms & Groups subtab.
- **Search Results**: a multi-tiered option which enables/disables and shows/hides Guests.
  1. Allow Guests (Show Everyone) - Registered, Expected, and Guests can check-in. All members of all families visible.
  2. Allow Expected Only (Show Everyone) - Registered and Expected can check-in. All members of all families visible.
  3. Allow Expected Only (Show Expected Only) - Registered and Expected can check-in. Only family members who are Registered or Expected appear. Families with no Registered or Expected members are hidden.
- **Early Check-In Period:** the number of minutes before the Event start time that participants can check-in. If left blank, the default is 60 minutes.
- **Late Check-In Period:** the number of minutes after the Event start time that participants can check-in. If left blank, the default is 30 minutes.

Notification Settings

Registrant Message — use this field to set an email to send to a registrant no matter how a person is added to an event. As long as they have a status of 02 Registered, they will get an email with this message if one is applied to this field.

Days out to Remind — use this a field where a user can put the number of days before the Event Start Date when a reminder will be sent. As long as the Event Participant has a status of 02 Registered, they will get an email if a value is applied to this field. If this field is blank, no reminder will be sent. The system counts each night prior to the event as one of the nights. So, if you want it to send the day before, add a 1 to the days out to remind.

Optional Reminder Message — allows the user to overwrite the default reminder message with an event-specific reminder message.

Send to Heads — will send the message to the registrant as well a two Heads of Household in the Registrant's Household if they have a different email address than the registrant. The messages will be automatically adjusted to say Parent of.

Notification Settings (Example)

The following is an example notification:

- Event Start Date: 6/11/2020 09:00
- Days Out to Remind: 1

This will run on 6/10/2020 12:00 AM or 5:00 AM (**Depending on when your nightly routines are scheduled as this is different for every customer)
So if you want it to run on 6/7/2020 at midnight, you would set the Days Out = 4

Other Event Information

- **On Connection Card Tool:** determines whether the Event appears on the Connection Card Tool. We currently do not utilize this tool, so do not worry about this field.

Accounting Information

- **On Donation Batch Tool:** Set this value to Yes for mission trips, memorials, commemoratives, and other events to which individuals may wish to earmark funds over a limited period of time. The actual dates of the event do not impact when and whether this event appears in the Batch Manager Tool.
- **Project Code:** the project code that registration fees are charged to.
- **Force Login**: if Yes, the registrants are required to log into the Portal before completing registration. Except for rare occasions, we **always** set Force Log In to YES.

Special Considerations

Expected Participants

This field only looks at the number of participants on the Event who have a Participation Status of **Registered** (not Interested or Canceled). Registration is closed when this number is reached, but this does not prevent registrations in progress from moving forward. For example, a parent can be filling out registrations for multiple children and then submit them at one time, or two different people could be registering at the same time. This can result in total registrations exceeding this expected number. The system does **not** automatically reopen an Event if Registrations are canceled or removed from the Event. A Platform user must manually set Registration Active back to Yes.

When the trigger changes the Registration Active from True to False as a result, the change will be recorded in the Audit Log.

Multi-Day Events/Recurring Events

Events that span multiple days should be set up with a separate Event record for each day or even each session. This enables more accurate attendance, as well as the ability to leverage of facility management and Check-In functionality. This also makes it clear on your Portal Event Calendar the Start and End times for each day's Events.

If you create these Events as a recurring Event series using Copy, you can use the Register into Series feature to register a person into all Events in the series. For example, a weekend conference might be three Events: Friday night, Saturday morning, and Saturday afternoon.

Groups in Events

- You would associate Groups with Events to:
  - facilitate attendance-taking (e.g., in My Groups, Check-In, MobileTools or for the Group Attendance Tool).
  - Facilitate Group management (e.g., the Event would appear on the Group's calendar in My Groups).
  - Facilitate reporting (e.g., if you wanted to see Event attendance specific to a certain Group).
- To associate a Group with an Event, you can either:
  - Go to the Event > Groups sub-page > Add Groups, or
  - Go to the Group > Events sub-page > Add Events.
- If you put your group(s) in the Rooms & Groups subtab, they will automatically appear in the Groups subtab. Placing groups in the Rooms & Groups subtab makes those groups available for **Check-In** for that event.
- If you associate a Group with an Event, you can copy the association forward into an Event Series by checking the Groups box on the copy window.

- When you associate a Group with an Event, an **Event Group** record is created in the Facilities folder.

Group Members becoming Event Participants

Group Participants of a Group associated with an Event become Event Participants by any of the following:

- Checking into the Event using Check-In,
- Being marked present in Classroom Manager,
- Being marked attended in MobileTools,
- Being invited/marked attended from the Portal My Groups page,
- Being marked as attended from the Group Attendance Tool, or
- Registering for the Event on the Portal.

*NOTE: If you need to delete a participant/registrant from an event, contact Tori. This is NOT the same as removing someone from a group!

Associating Groups with Multiple/Recurring Events

The most straightforward option for associating Groups with multiple Events is to do so when you create an Event Series. Simply create your first Event, associate the Groups, and check the Groups box on the copy window when you create the Series.

Another option is to manually associate a Group with existing Events. To do so:

1. On the Events page, select all the Events you want the Group to be associated with.
2. Save the selection on the Events page.
3. Go to the Groups page, and open the desired Group.
4. On the Events sub-page of the Group, click Add.
    - Click the [...] next to Events.
    - In the selection drop-down, choose the selection you created in Step 2.
    - Click Confirm Selection.
    - Click Save.
5. Repeat Steps 3 and 4 for any additional Groups you want these Events associated with.

Another option is to manually associate an Event with existing Groups. To do so:

1. On the Groups page, select all the Groups you want the Event to be associated with.
2. Save the selection on the Groups page.
3. Go to the Events page, and open the desired Event.
4. On the Groups sub-page of the Event, click Add:
    - Click the [...] next to Groups.
    - In the selection drop-down, choose the selection you created in Step 2.
    - Click Confirm Selection.

- Click Save.

5. Repeat Steps 3 and 4 for any additional Events you want these Groups associated with.

Removing the Association between Events and Groups

To end the association between specific Events and Groups, Tori will need to delete the Event Group records. This process doesn't delete the Events or the Groups themselves - rather, just the connection between them.

Allowing Online Visibility & Registration

An Event appears on the Portal Event Calendar if the following conditions are met:

- It has a Public Visibility Level
- The Event is Approved and Web Approved.

An Event allows registration if ALL of the following conditions are met:

- One of the following Visibility Level conditions are true:
  - Visibility is Public
  - Visibility Level is "Hidden: URL Required" and the user has the specific URL
  - Visibility Level is "Staff & Church" and user is logged into the Portal
- It has an Online Registration Product
- Registration is Active
- The Event is Approved
- Registration is available for the current time

Event registration opens when ANY of the following conditions are met:

- It is on or after the Registration Start date (if one is supplied)
- It is a year before the Event Start Date (If no Registration Start date is supplied)

Event registration closes when ANY of the following conditions are met:

- The number of registrants meets the number of Participants Expected
- It is after the Registration End date (if one is supplied)
- It is after the Event End Date (If no Registration End date is supplied)

Event Registration on the Portal

1. Create the Event in the Platform.
   - If you want to use an External URL for registration, utilize the External Registration URL field in the Event Setup.

2. If desired, you can preview the Event before sharing it with others. A simple way to do this is to set the Event's Visibility Level to 5-Hidden: URL Required and then view the signup using the direct URL.
   Public urls: replace the Event ID for the signup page:
   https://my.shades.org/portal/event_signup.aspx?id=<event_id>
3. Submit the event for approval.
4. Once complete, you can direct potential registrants to the Event Calendar or provide them a direct link to the desired Event on the Event Calendar.

Registration Walk-Through

Once someone clicks "Sign Up":

1. The individual is required to provide the attendee's First Name and Last Name. Either Email OR Phone is required (even though both have a red asterisk). Address information is not required in this step.
   - *NOTE: It is **not** possible to change the required information or the text for the field titles in this section.
2. If the individual logs in, they have the option to pre-fill the contact info fields with the info of anyone in their Household.
   - *NOTE: It is **not** possible to configure the way the names appear in the drop-down or which fields auto-populate. Also, if a user logs in, chooses a pre-fill option and overwrites the pre-filled values, this will **not** update a person's Contact record. Rather, it will be recorded on the Notes field of the Event Participant record. To change the information that pre-fills, a user needs to make a change on their My User Account page.
3. If you associated a Custom Form with your Event, the individual then completes the necessary Custom Form information.
   *NOTE: custom form completion is required **per registrant**. Example: when families register for VBS, each child must be registered separately.
4. What happens next depends on whether the Event is free or requires payment:
   - **For free events**: so long as nothing else is in the individual's cart, clicking Next finishes the registration process and a confirmation page is displayed. From the confirmation page, the individual has the option to Add Another Person.
   - **For payment-required events:** clicking Next takes the individual to the Transaction Summary page, which allows you to Add Another Person or simply move on to Complete Transaction and provide payment information.

Event Configuration for Check-In Suite

Check-In Suite pulls the Events in Ministry Platform for a Check-In Kiosk and/or Classroom Manager session(s). Each Event has fields specific to Check-In Suite that must be set correctly in order for an Event to display in Check-In Suite.

Event Fields Related to Check-In Suite

- **Allow Check-In:** If Yes, Check-In Suite is enabled for the Event.
- **Early Check-In Period:** The number of minutes before the start of an Event when individuals can begin to check-in to an event. If left blank, the default reigns (60 minutes).
- **Late Check-In Period:** The number of minutes after the Event's Start Time when individuals can continue to check-in to an event. If left blank, the default reigns (30 minutes).
- **Search Results**: Dictates how Expected Participants and Guests appear in search results in Check-In Kiosk and enables/disables allowing Guests to check in.
- **Congregation:** Dictates which events will show with the congregation filter applied.

Configuring Events

Ministry Platform is where all event editing/configuration takes place.

- Add any groups that require Check In Kiosk and/or Classroom Manager to the Event that on the Rooms & Groups sub-page.
- Ensure the Events have Allow Check-in set to Yes.

> **Tip:** Create your first Event of the series and add all your Rooms & Groups on the Rooms & Groups sub-page. Then, copy your Event for the desired recurrence making sure to **also** copy the Rooms & Group sub-page.

Adding Participants

There are several methods for adding Event Participants to Events in Check-In Suite. This can be done automatically at the time of the event via Check-In Kiosk, or manually by posting attendance via a variety of other Ministry Platform tools and applications.
*NOTE: The Group each Participant belongs to (not the Event) determines the room the individual goes to, and what name tags are needed. Also, the Group Roles given to each participant determines what type of tags they will receive. (Teacher, Director, Class Member, Team Member, etc.)

Types of Check-In Events

Weekly Programs (Regular Events)

Description: Includes Sunday Services. Most Participants are in Groups to facilitate recurring Check-In Kiosk sessions.

Event Settings:

- Allow Check-In: Yes
- On the Rooms & Groups sub-page of the Event, add the Rooms and Groups you want to allow check-in for.
- Allow Expected Only (Show Everyone) - Registered and Expected can check-in. All members of all families visible.

Drop-In Events

Description: All active Participants in MinistryPlatform are able to check-in.

Event Settings:

- Allow Check-In: Yes
- Late Check-In Period: If desired, you can set a long late Check-In Period if the Event is one in which people come and go throughout the Event period (e.g., an open house).
- Allow Guests (Show Everyone) – Literally anyone in MP can check-in. All members of all families visible.

RSVP Events

Description: Only pre-registered individuals (already have an Event Participant record) can check-in at a workstation in unattended mode.

Event Settings:

- Allow Check-In: Yes
- Prohibit Guests: Yes
- Allow Expected Only (Show Expected Only) - Registered and Expected can check-in. Only family members who are Registered or Expected appear. Families with no Registered or Expected members are hidden.

Ongoing Events

Description: Daily Events like "office guest" can be created. The goal is to know someone came and to give them a name tag. Very similar to drop in events, but these are continuous.

Event Settings:

- Allow Check-In: Yes
- Late Check-In Period: If desired, you can set a long late Check-In Period if the Event is one in which people come and go throughout the Event period (e.g., an open house).
- Allow Guests (Show Everyone) – Literally anyone in MP can check-in. All members of all families visible.

Volunteer Check-In Events

Description: Individuals check-in based upon their ministry team and role in a specific Event.

Event Settings:

- Allow Check-In: Yes
- Setup each Group Participant with the appropriate Group Role.
- On the Rooms & Groups sub-page of the Event, add the Rooms and Groups you want to allow check-in for.
- Allow Expected Only (Show Expected Only) - Registered and Expected can check-in. Only family members who are Registered or Expected appear. Families with no Registered or Expected members are hidden.