MICHIGAN STATE UNIVERSITY

ANR EVENT SERVICES

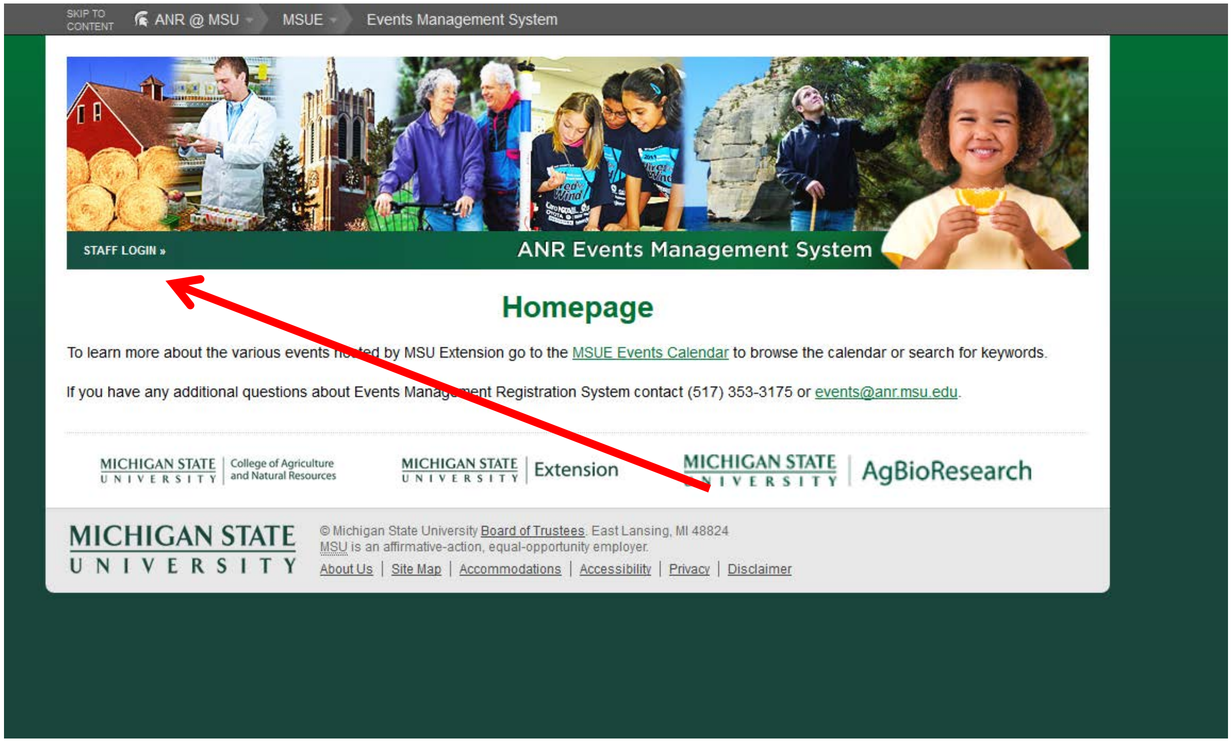
MICHIGAN STATE UNIVERSITY EXTENSION

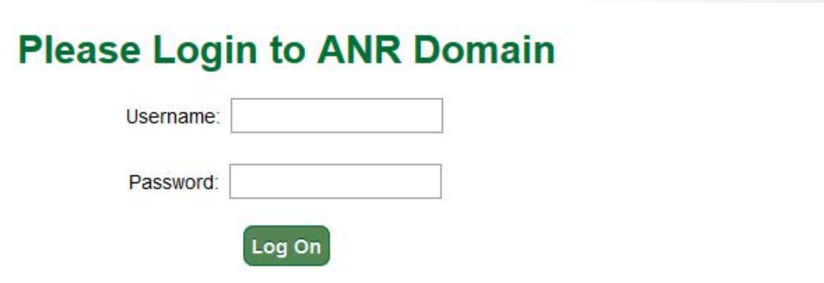
How to Create Your Own Event

Step- By- Step Instructions

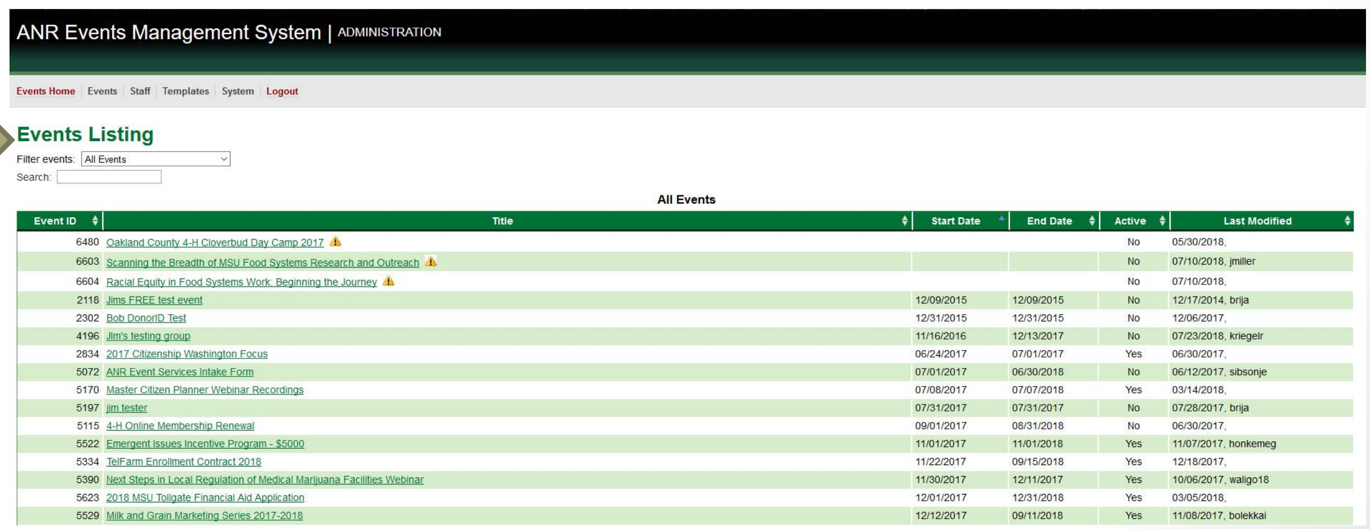
Step 1: Logging In

- Visit https://events.anr.msu.edu/index.cfm
- In left hand corner, click “STAFF LOGIN”:





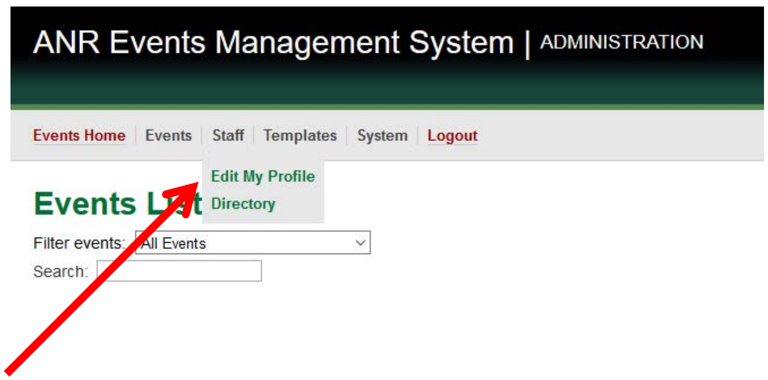
- You will be brought to the events dashboard screen where all the events you have created or have been added to are listed!

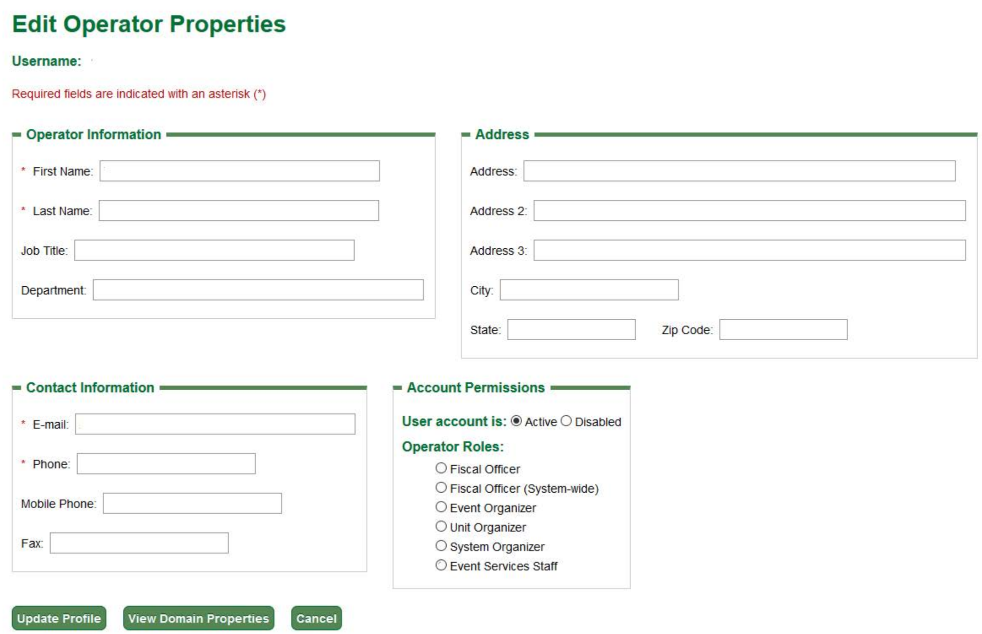


Event ID	Title	Start Date	End Date	Active	Last Modified
6480	Oakland County 4-H Cloverbud Day Camp 2017			No	05/30/2018,
6603	Scanning the Breadth of MSU Food Systems Research and Outreach			No	07/10/2018, jmiller
6604	Racial Equity in Food Systems Work: Beginning the Journey			No	07/10/2018,
2118	Jims FREE test event	12/09/2015	12/09/2015	No	12/17/2014, brija
2302	Bob DonorID Test	12/31/2015	12/31/2015	No	12/06/2017,
4196	JIm's testing group	11/16/2016	12/13/2017	No	07/23/2018, kriegelr
2834	2017 Citizenship Washington Focus	06/24/2017	07/01/2017	Yes	06/30/2017,
5072	ANR Event Services Intake Form	07/01/2017	06/30/2018	No	06/12/2017, sibsonje
5170	Master Citizen Planner Webinar Recordings	07/08/2017	07/07/2018	Yes	03/14/2018,
5197	jim tester	07/31/2017	07/31/2017	No	07/28/2017, brija
5115	4-H Online Membership Renewal	09/01/2017	08/31/2018	No	06/30/2017,
5522	Emergent Issues Incentive Program - $5000	11/01/2017	11/01/2018	Yes	11/07/2017, honkemeg
5334	TelFarm Enrollment Contract 2018	11/22/2017	09/15/2018	Yes	12/18/2017,
5390	Next Steps in Local Regulation of Medical Marijuana Facilities Webinar	11/30/2017	12/11/2017	Yes	10/06/2017, waligo18
5623	2018 MSU Tollgate Financial Aid Application	12/01/2017	12/31/2018	Yes	03/05/2018,
5529	Milk and Grain Marketing Series 2017-2018	12/12/2017	09/11/2018	Yes	11/08/2017, bolekkai

Step 2: Create Profile

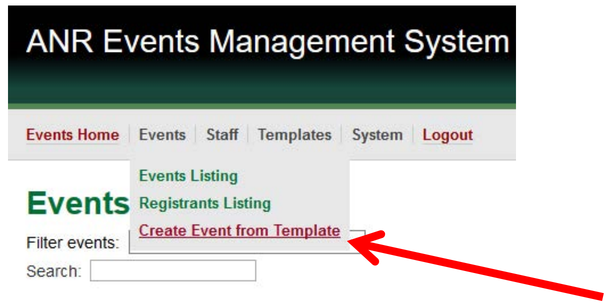
- Update your profile by clicking the Staff tab, and dropping down to “Edit my profile”. You will be directed to a page where you can insert your information. Click "Update Staff Information" to save your information.





Step 3: Event Template Options

- Click the “Events” tab, then drop down to “Create Event from Template”



- You will be brought to the screen shown below. Here you are able to select what template you will use. There are previews available for each template.

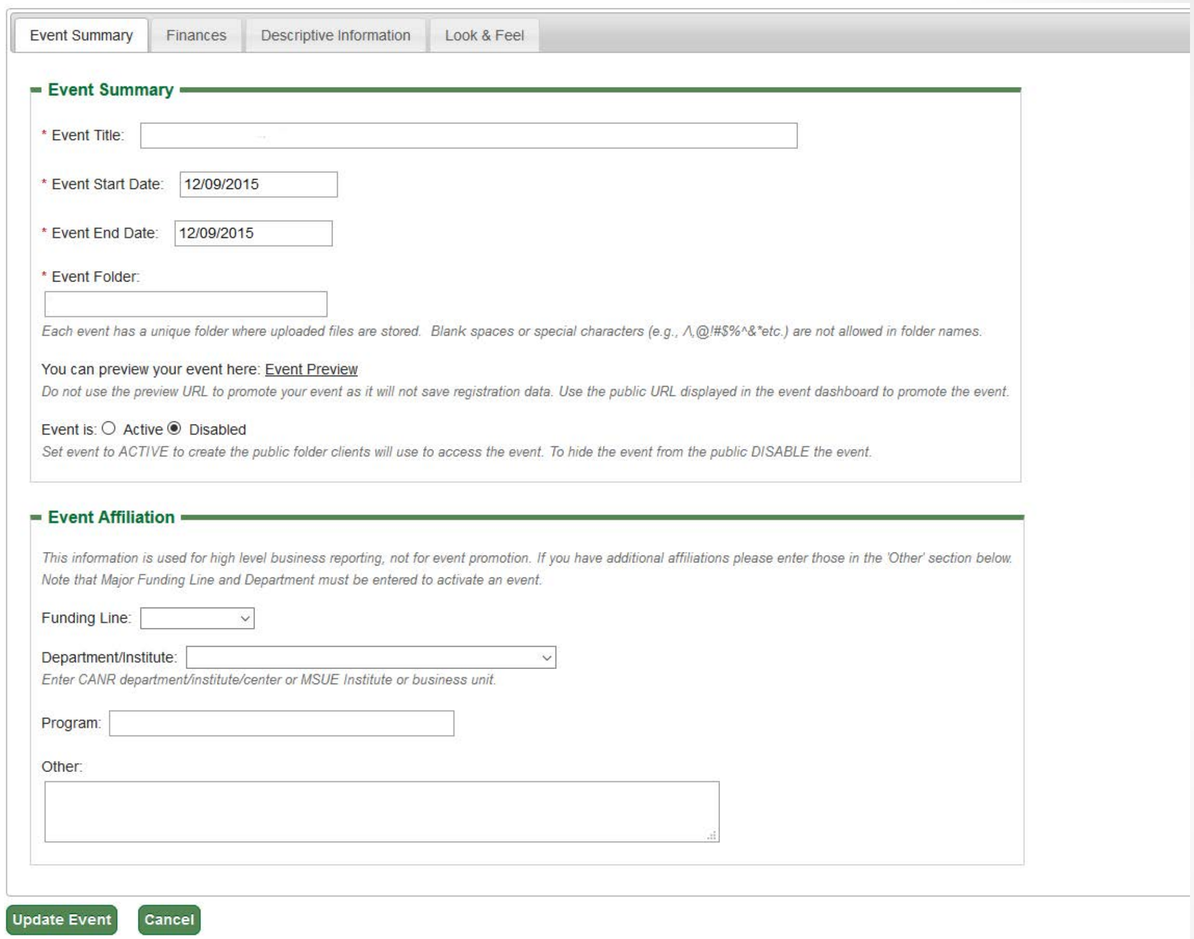
Create Event from Template

Template Name	Short Description	Actions
Basic Free Registration	put your short description here	Preview Create Event
Basic Event with Simple Charge	Short Description Here	Preview Create Event
Registration with multiple pricing options	short description here	Preview Create Event
Multiple Pricing and Multiple Registration Processes	short description	Preview Create Event
Signup Sheet	This template is used for a simple signup sheet or RSVP. No fees are involved.	Preview Create Event

Step 4: Event Template

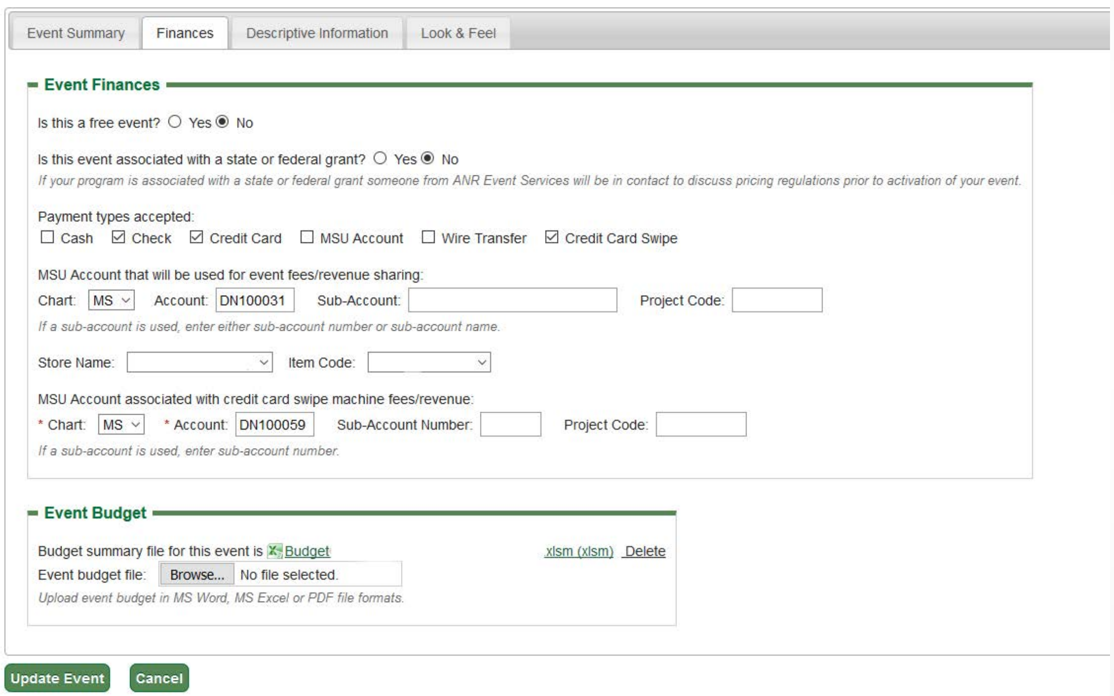
- Choose the event template you wish to use.
- It is important to not just look at the visual aspects of the event template, but also what the event registration does!
- We will go through making a *Basic Event with Simple Charge*

- You will need to..
  - Make an Event Title
  - Choose a Start/ End Date
  - Name the event folder
    - You'll want to make this a short description, along with the year
  - If you are sharing the registrant roster with participants, you will have to edit to include a notice to attendees as part of their registration



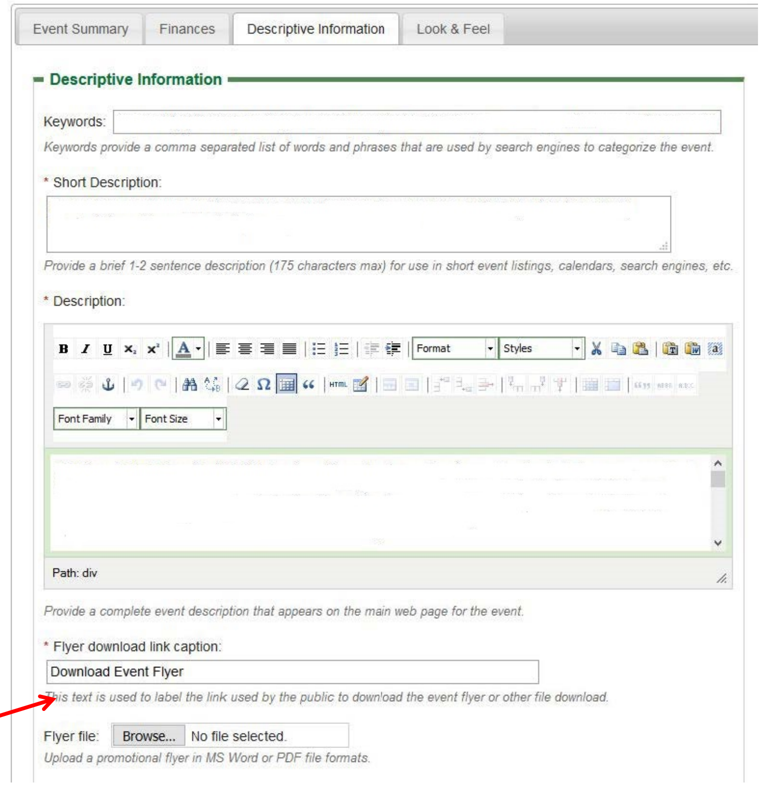
Step 5: Finances Tab

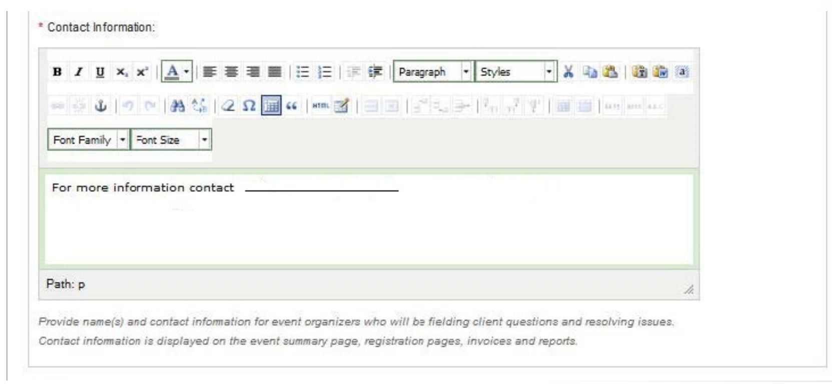
- Check whether or not the event is free
- Decide what payments you would like to accept
- If you add an MSU Account, plug in the account number that you want the money returned to after the profit
- If you are collecting credit cards, also check credit card swipe



Step 6: Descriptive Information

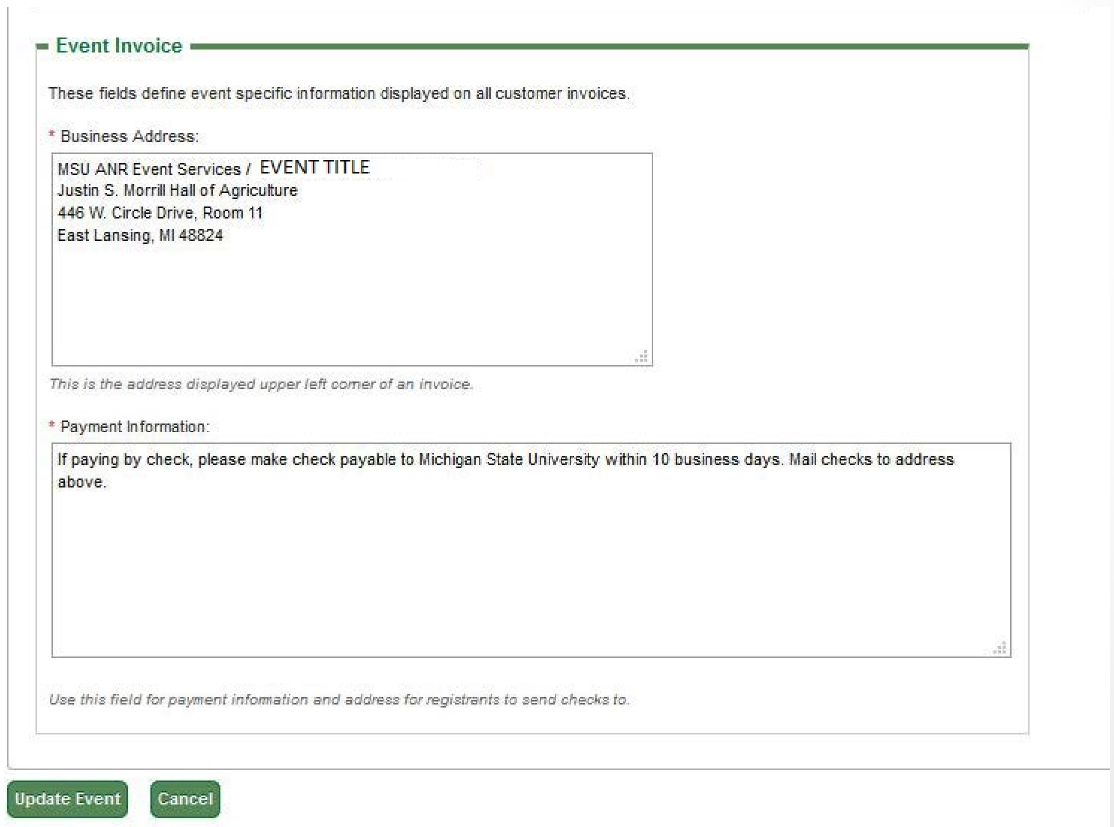
- Type in Keywords that may help find the event when searched
  - Including *MSU* and *MSU Extension*
- Add your descriptions
- Long Description:
  - When copying and pasting information a dialogue box will pop up- click allow access
  - Make sure all fonts are normal and common or it will not appear on your event page
- Insert Flyer (If needed)
- Add Contact Info
  - Should be in sentence format: "For information contact Jane Does at XXX-XXX-XXXX or at Jane.Doe@anr.msu.edu"





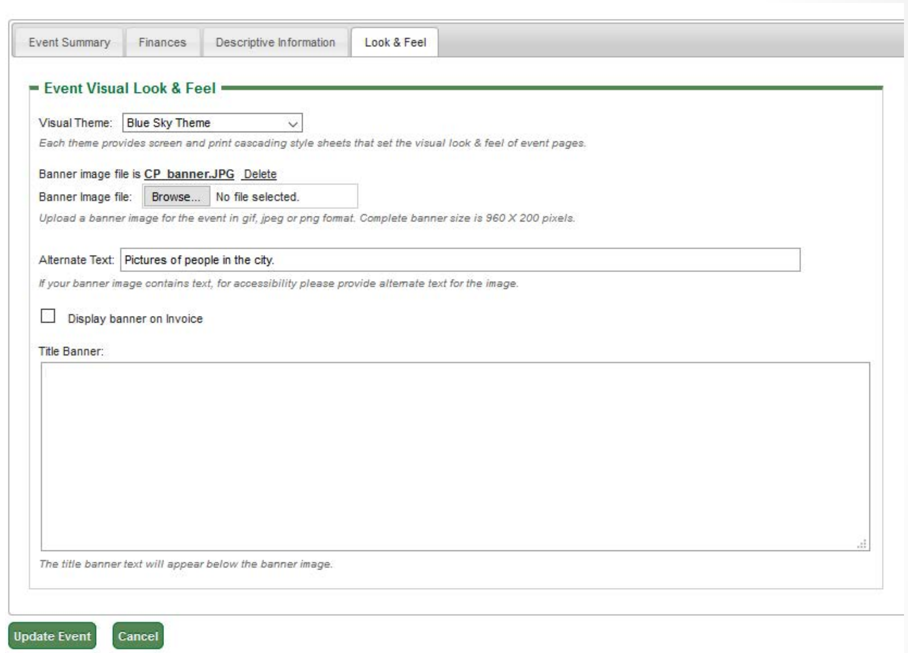
- At the bottom of the screen there is Event Invoice information
- Please leave the Business address as:

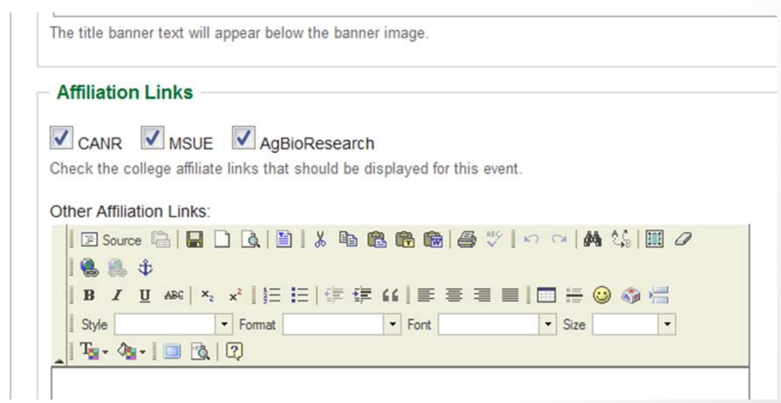
ANR Event Services
Justin B. Morrill Hall of Agriculture Michigan State University
446 W. Circle Dr., Room 11
East Lansing, MI 48824-1039



Step 7: Look & Feel

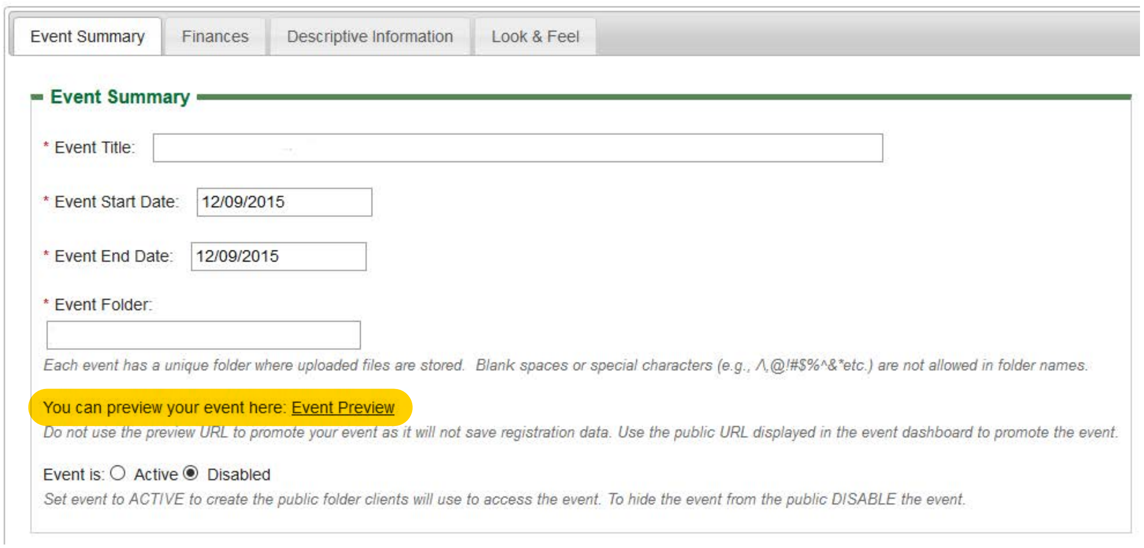
- Choose a theme
- You have the option of uploading a banner (960 x 200 pixels)
- Which ever affiliation links you check will show at the bottom of your site
  - You can also add links in the box provided and they will show as well





Step 8: Update Your Event

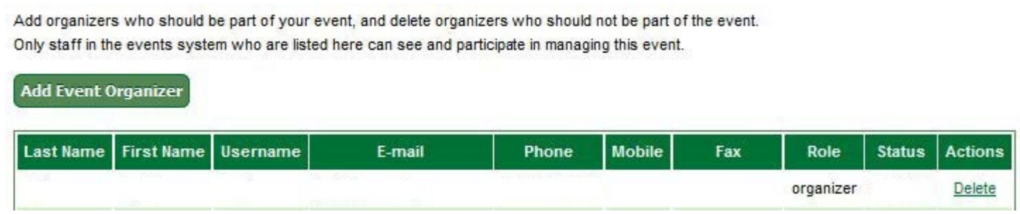
- Update your event so that all changes made will be saved.
- ***Remember**, your event will remain *in development* and *disabled* (not accessible to the public) until the Event Services staff has activated the event.

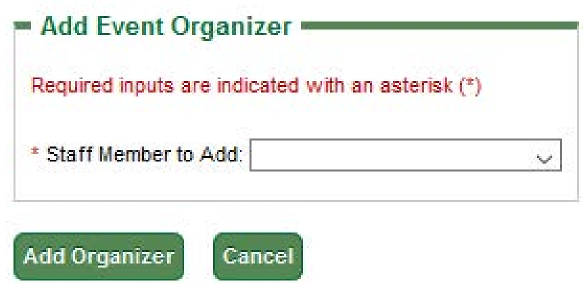


- You can review your event using "Event Preview".
- To activate your event, email events@anr.msu.edu requesting activation, and the ANR Events Services team will review your event.
    - Make sure to review the "Activation Checklist" document to ensure quick activation.

Step 9: Event Organizers (optional)

- If you would like another person to have all the same editing capabilities as you.
- Click the tab Event Organizers, then “Add Event Organizer”.
- Choose from the drop box who you would like to add as an event organizer.
  - Do not add ANR Event Services staff as your event organizers.

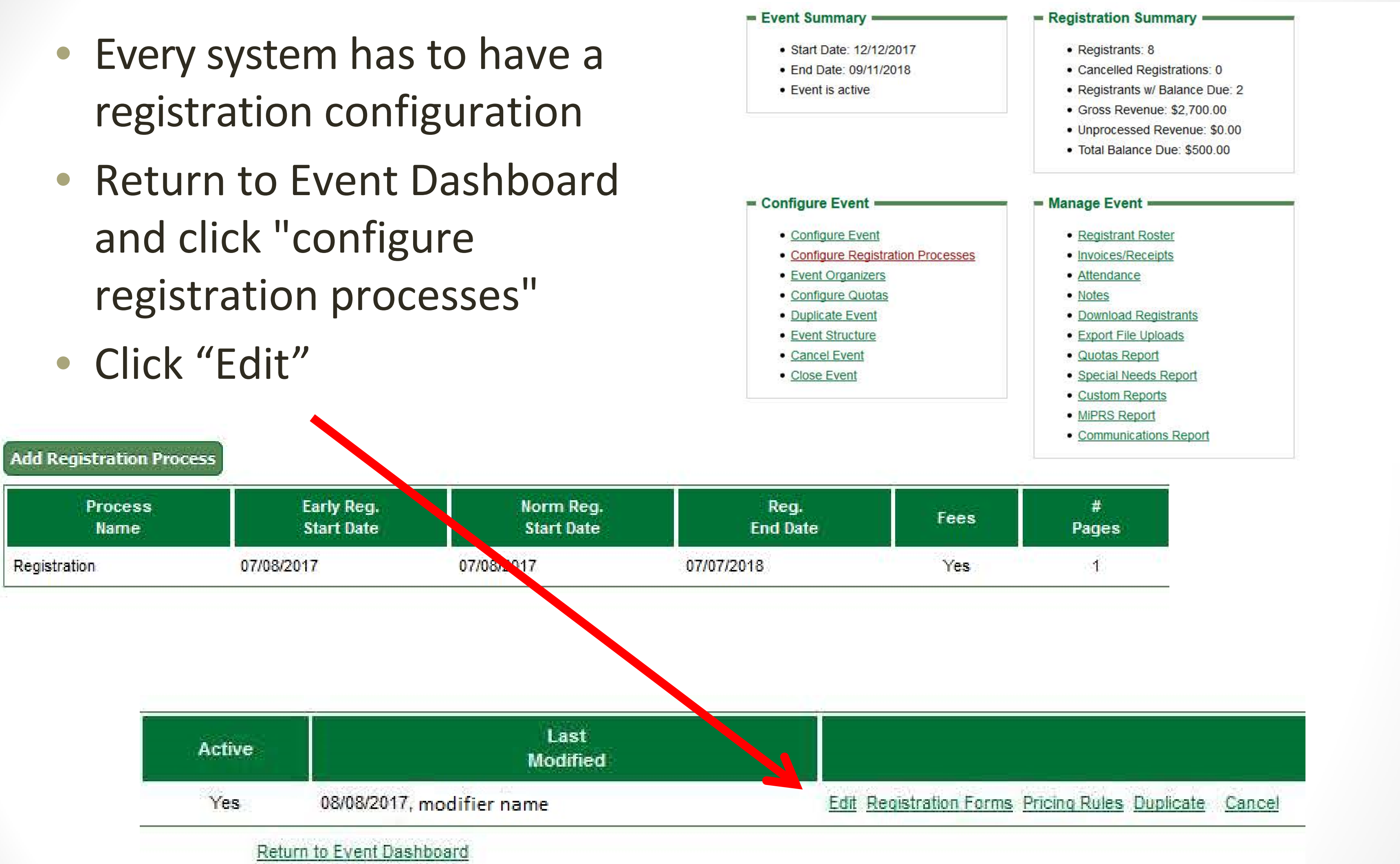




Remember**:** to update an organizer's information, use the staff directory section.

Step 10: Registration Configuration

- Every system has to have a registration configuration
- Return to Event Dashboard and click "configure registration processes"
- Click “Edit”



Event Summary

- Start Date: 12/12/2017
- End Date: 09/11/2018
- Event is active

Registration Summary

- Registrants: 8
- Cancelled Registrations: 0
- Registrants w/ Balance Due: 2
- Gross Revenue: $2,700.00
- Unprocessed Revenue: $0.00
- Total Balance Due: $500.00

Configure Event

- Configure Event
- Configure Registration Processes
- Event Organizers
- Configure Quotas
- Duplicate Event
- Event Structure
- Cancel Event
- Close Event

Manage Event

- Registrant Roster
- Invoices/Receipts
- Attendance
- Notes
- Download Registrants
- Export File Uploads
- Quotas Report
- Special Needs Report
- Custom Reports
- MiPRS Report
- Communications Report

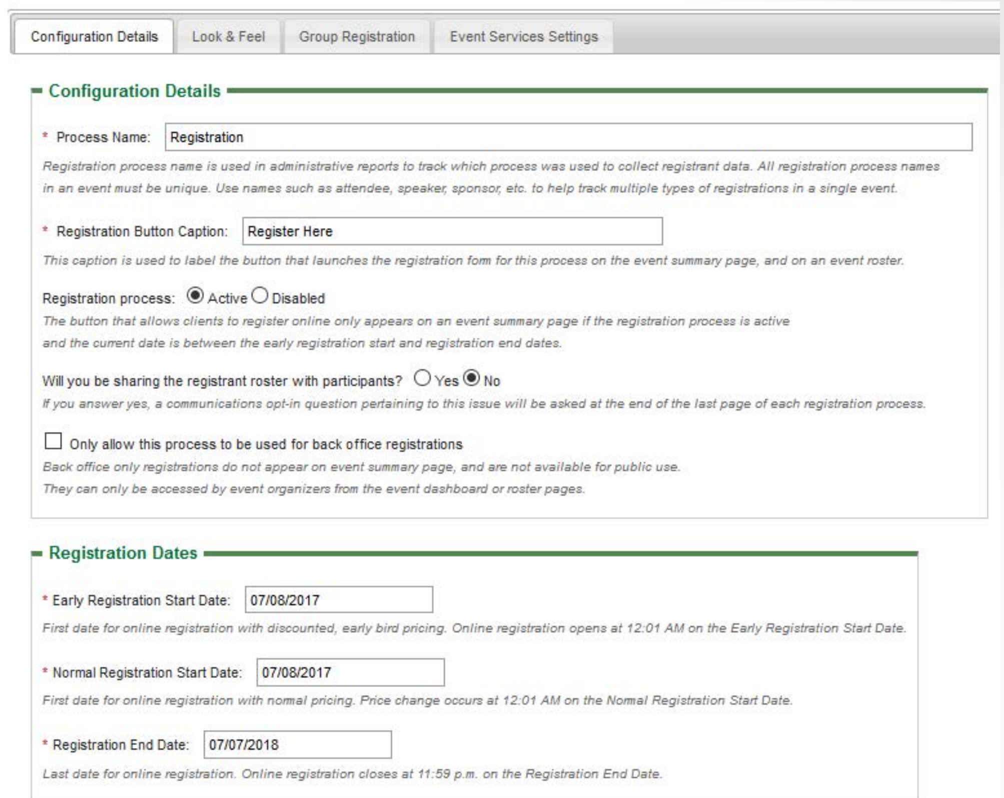
Add Registration Process

Process Name	Early Reg. Start Date	Norm Reg. Start Date	Reg. End Date	Fees	# Pages
Registration	07/08/2017	07/08/2017	07/07/2018	Yes	1

Active	Last Modified	
Yes	08/08/2017, modifier name	Edit Registration Forms Pricing Rules Duplicate Cancel

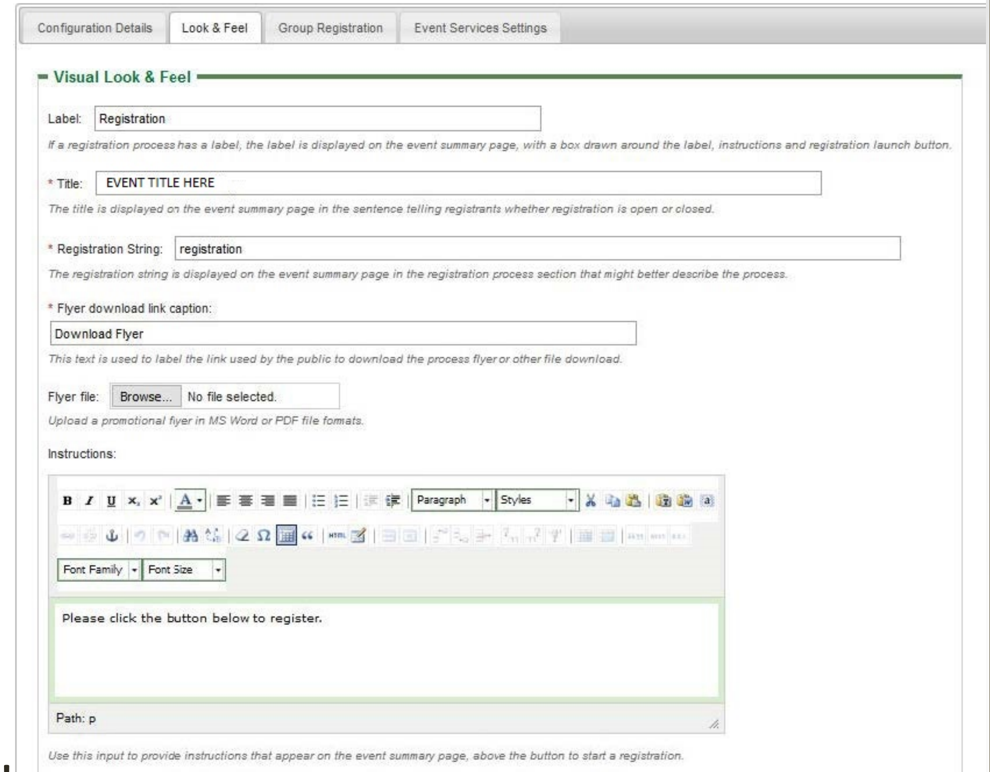
Return to Event Dashboard

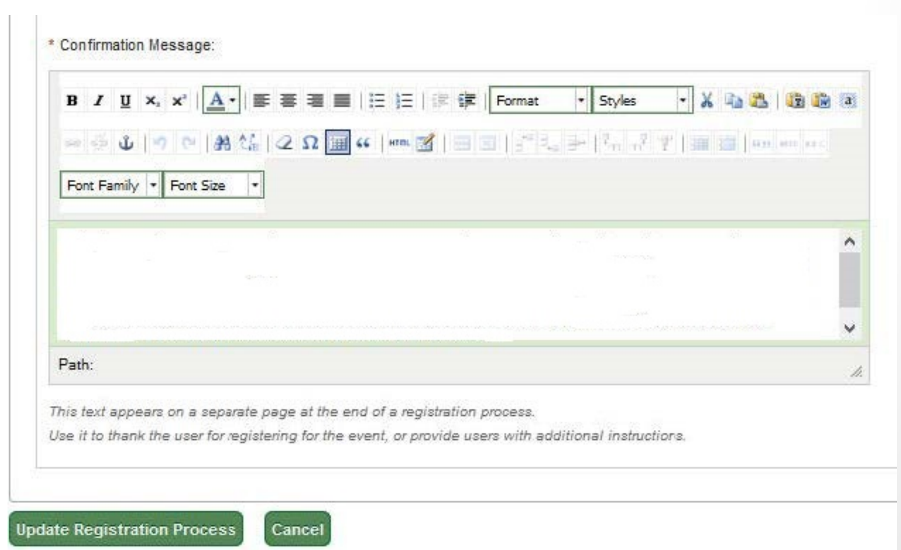
- Choose your configuration name and your start/ end dates for registration
  - Registration start date should be the date of creation
  - Registration end date should be the day before the event occurs
- Keep the registration active so that it will be shown on the summary page



This page will also include payment information and cancellation options

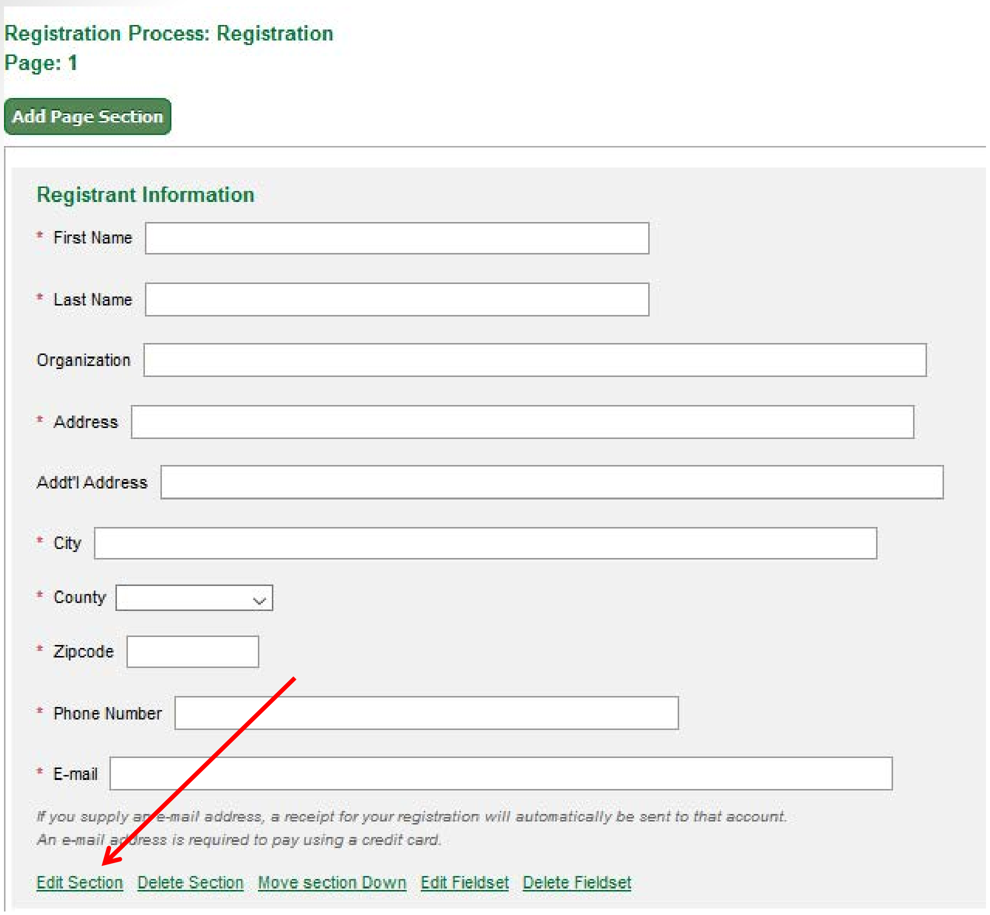
- Switch over to the "Look & Feel" tab- right next to configuration details
- Here you can:
  - Add instructions (if needed)
  - Keep/ Change the registration button caption
  - Add a confirmation message for those who have registered.
- Then update your information!
  - The confirmation message should state the event title, date, time, and location. It should also include any information regarding parking, materials, or additional reminders for attendees prior to the program.



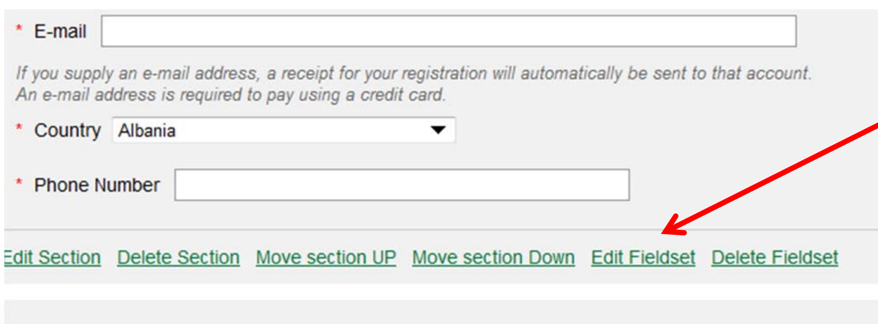


Step 11: Registration Forms & Pricing Rules

- Update your registration process.
- Under Configure Registration Processes, click "Registration Forms"
- The registration forms have pages and sections which have already been created for you. All you have to do is click "Edit"

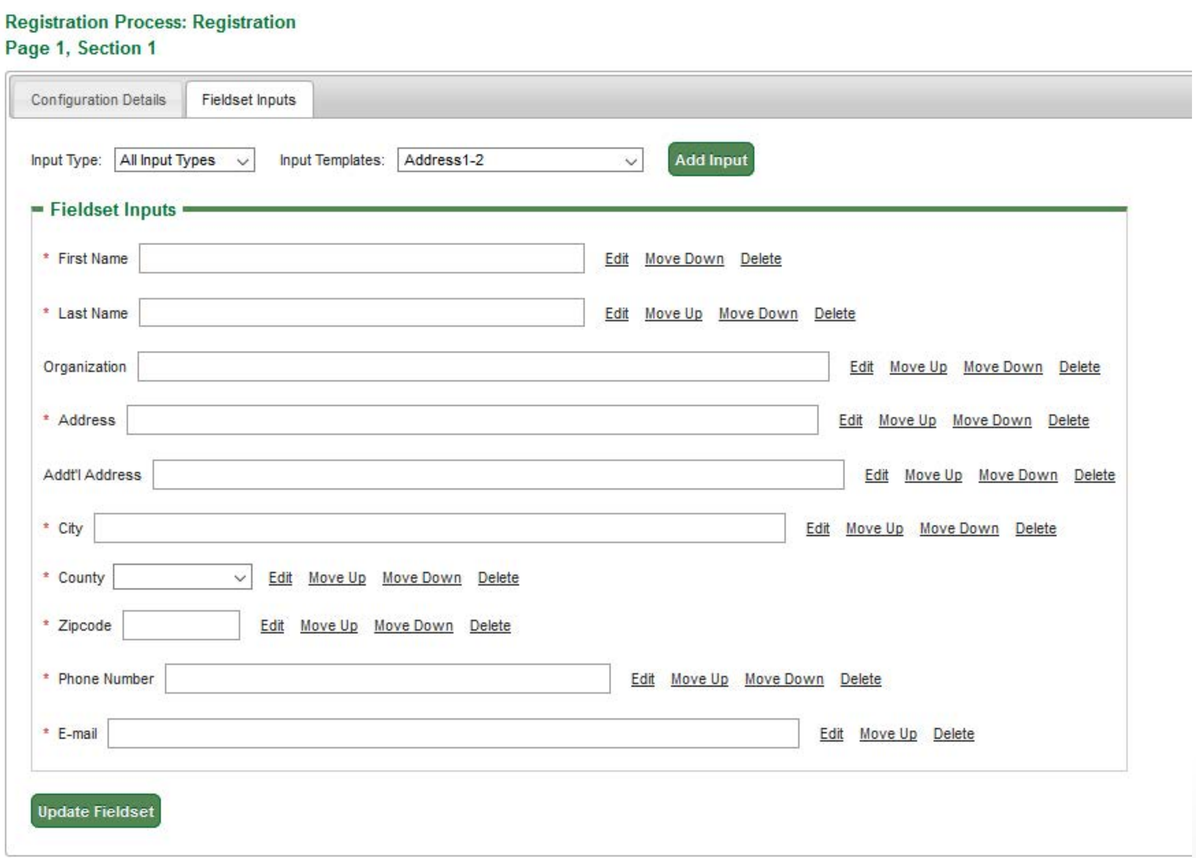


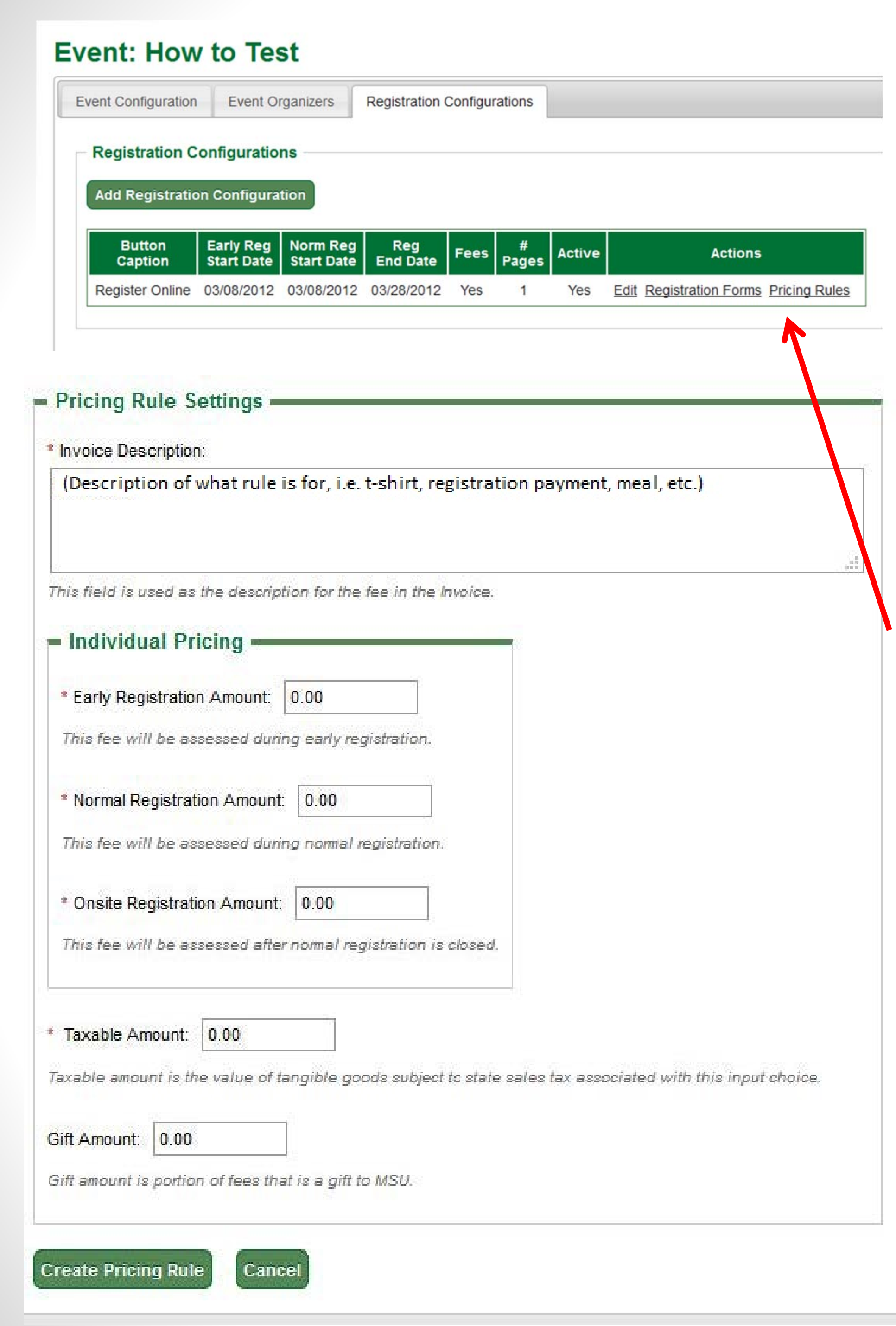
- Here, you can edit the registration instructions.



- You can also add/edit the field sets that you would like to appear on this page by clicking “Edit Fieldset”

- Click the tab “Fieldset Inputs”
- Here, you can choose to add a field from the dropbox list of fields. Then, click “Add Input”
- On the sides of each field set you can click “Move Up/Move Down”, to organize the questions however you want. To make the fieldset required, click “edit” next to the specific fieldset you want required, then check the box “Required input” under the Input Validation tab.

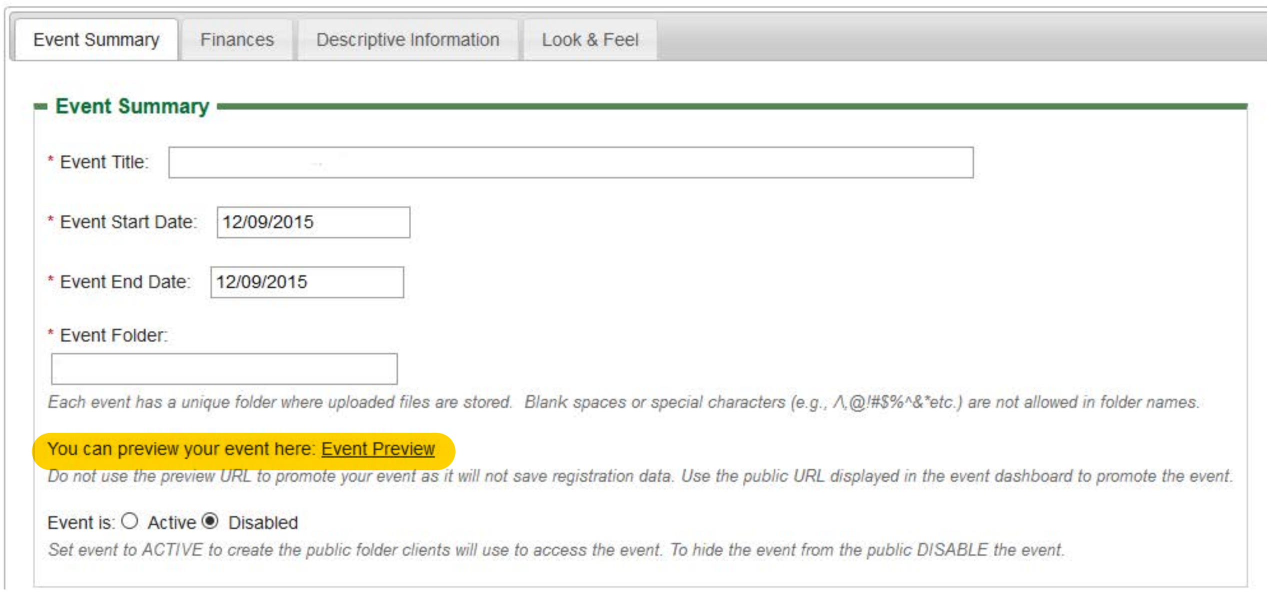




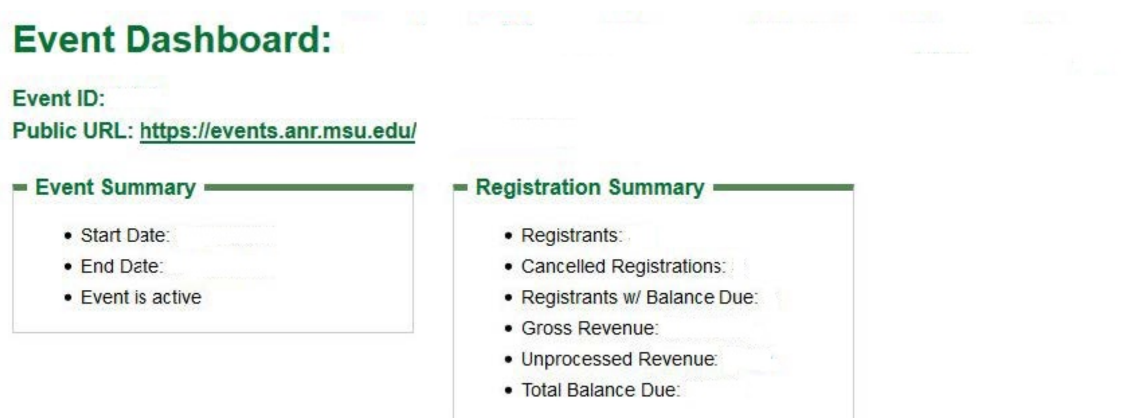
- Don’t forget to update your fieldset before going to another tab. Then you can return to editing your registration page.
- Next, we will look at how to edit the registration price.
- Click “Pricing rules.”
- Select the field set option that need(s) a pricing rule and click Add Pricing Rule.
- You can change any of the information here you want regarding early, normal, and onsite registration fees.
  - Note: You will have to do the calculations for the amounts taxable!
  - Note: Description is what appears on the invoice.
- When finished click Create Pricing Rule.

Step 12: Update Event

- Update your event and see how it looks!
- To preview the event you have created, return to Event Configuration. Under the “Event Summary”, you can preview your event using "Event Preview"



- Your event URL will become live once the ANR Event Services team reviews and activates your event



Registration Payments

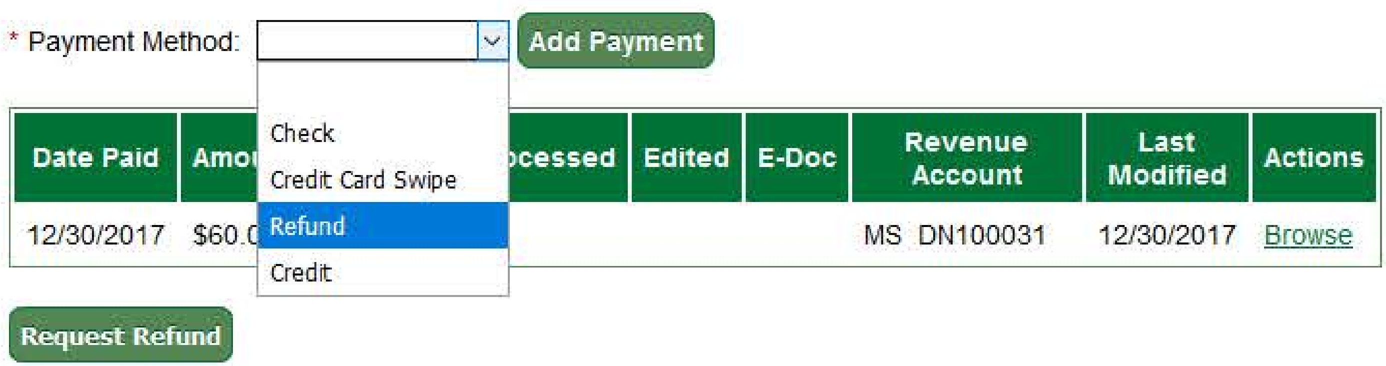
- If you need to register someone or and make their payment over the phone, input their information.
- Go the roster and click register online. You can register a participant.
- Complete the registration page.
- Choose the Payment Method
- Select how the registrant wants to pay (Cash, check, etc.)
- After entering the required information for the payment option, click “Next”

Payments

- You will not see the credit card option for payments when registering a participant. As an MSU employee, you are not allowed to pay with someone else's credit card online (PCI Compliance Policy). They have to do this themselves!
- "Send Invoice" - You can send registrants a reminder to pay if they have registered, that way they can then take the initiative and send in their payment, pay with their credit card through CashNet or call to pay over the phone.

Refund

- To issue a refund go to your Registrant Roster.
- Select Payments next to the individual you wish to refund.
- Select "Refund" as the payment method
- Type in the amount and the reasoning for the refund



Late Fee/ Cancel Registrant

- Return to event roster
- Choose either option
  - Late Fee: Type in the amount and the explanation
  - Cancel: Check Cancel Registration, the effective date, and the reasoning.

Total Registrants: 1
Registrants w/ Balance Due: 0
Registrants Cancelled: 0

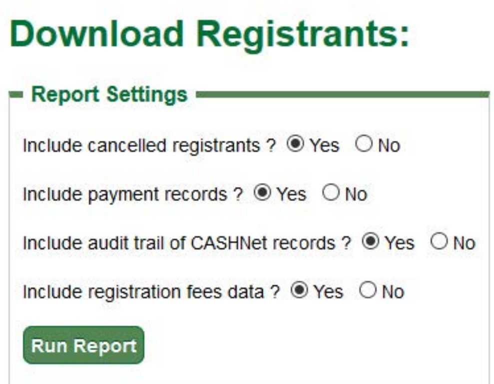
Register Online

Regis ID	Regis Config.	Last Name	First Name	Email	Date Registered	Cancelled	Pay Method	Event Cost	Cancel Fee	Late Fee	Total Cost	Amount Paid	Amount Credit	Balance Due	Actions
27	Participant	Braid	Betsy	braidbet@anr.msu.edu	03/27/2012			$250.00	$0.00	$0.00	$250.00	$250.00	$0.00	$0.00	Registration Payments Invoice Notes Cancel Late Fee

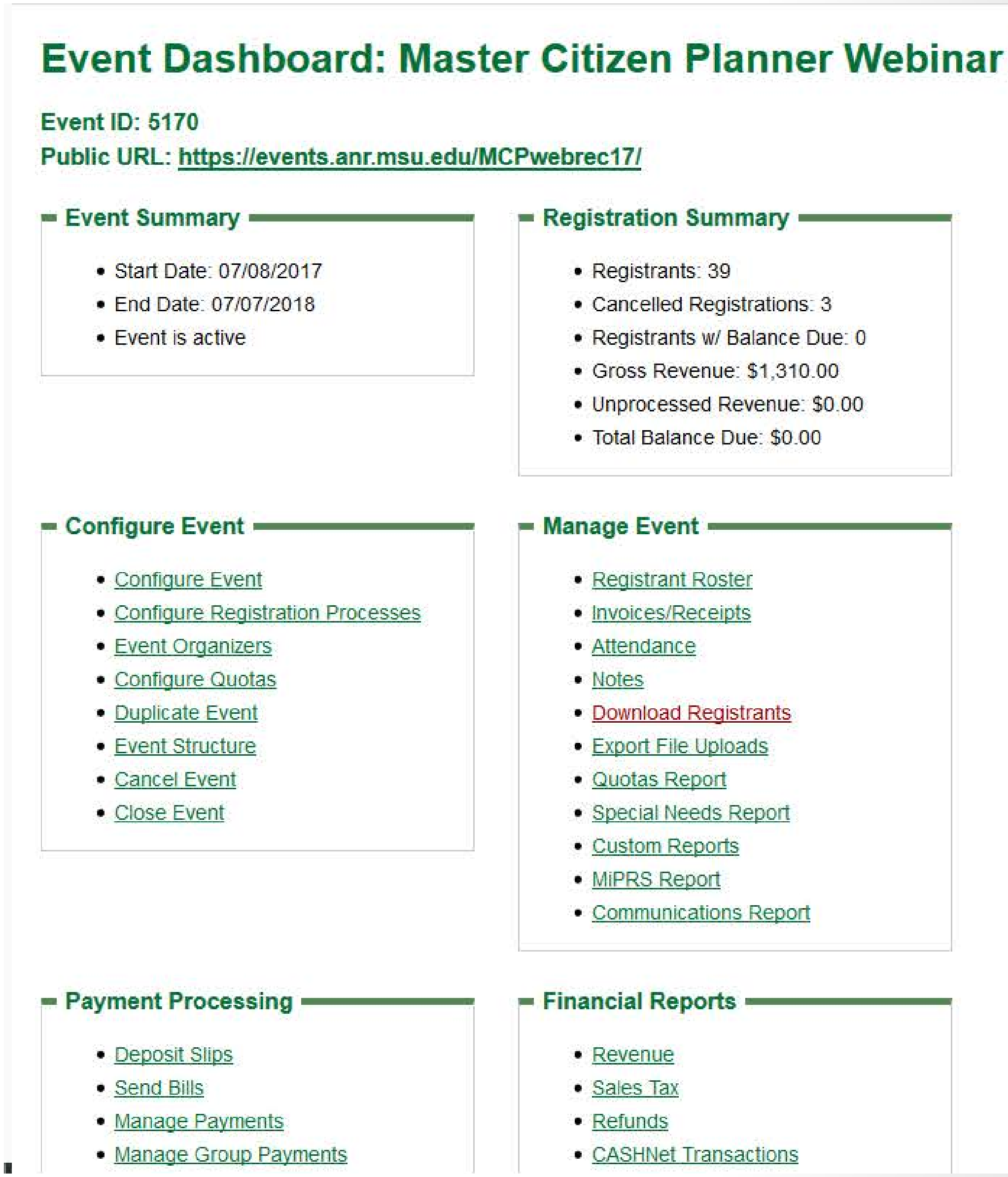
Return to Events Dashboard

Reports

- Return to the Dashboard
- Under Manage Events, click "Download Registrants"



- Click "Run Reports" after selecting the report settings
- An excel spread sheet of all your registrants and their information
- Notice the tabs-Participants, payments, CASHnet



ANR Events Management System
Duplicate Event

If you organize the same events regularly and need a registration system for each event, don't create a new event in EMS for each program. Instead, you can duplicate your past events – saving time and frustration. When duplicating events, make sure that you update all necessary information to reflect the new event's details. For example, the long description still contains your old date, time and location when you duplicate an event - so this information will need to be updated.

If you have an event that was **not** set up correctly the first time or you know has some reporting or tracking issues, **please do not duplicate this event**. Please work with ANR Event Services to build a new clean event for future duplication.

As requested, additional information will transfer forward in the duplicate event feature. All descriptive information, titles, registration forms, quotas, event organizers, confirmation message and registration processes will move forward in the duplicate process. You will need to enter your new dates, folder name and registration open/close dates to complete the first step of duplication.

Remember this will need a new unique folder name – not the same as your previous event.

Please always go back through your event from beginning to end to make any additional changes you have to the content, confirmation message, registration form or pricing.

Custom counts reports to not move forward. Quotes do move forward, but they are based on your old event; if you make changes, make sure to update your quotas.

If you abandon your event (leave the webpage) during the duplication process or creating event from template process, the system will track your progress and put a caution sign next to your event notifying you of an issue that will need to be resolved before you can move forward with the event.

If you need assistance with this duplication process, our office is willing and able to help.

Activation Checklist

Now that you have completed your event creation in the Events Management System, it is time to request activation by the ANR Event Services team. Please complete this checklist prior to requesting activation of your event to avoid possible delays in activating your event. Ensure the following:

- ❑ Event start and end dates are in the future.
- ❑ Short description is not cut off.
- ❑ Title banner is included, in either the field or the banner.
- ❑ Alternate text is provided if banner image is uploaded.
- ❑ Description includes the who, what, where, when, why and cancellation policy if relevant.
- ❑ Confirmation message gives the participant information related to the program, i.e. date, time, location, parking, etc.
- ❑ Registration dates are relevant.
- ❑ Flier is updated and links properly.
- ❑ Registration form(s) collect all the information you need.
- ❑ Any field that is collecting money has a pricing rule.
- ❑ You have previewed your event and tested the registration page.
- ❑ You have attached a budget if your event is not free - and included a taxable amount to be applied to pricing quotas.