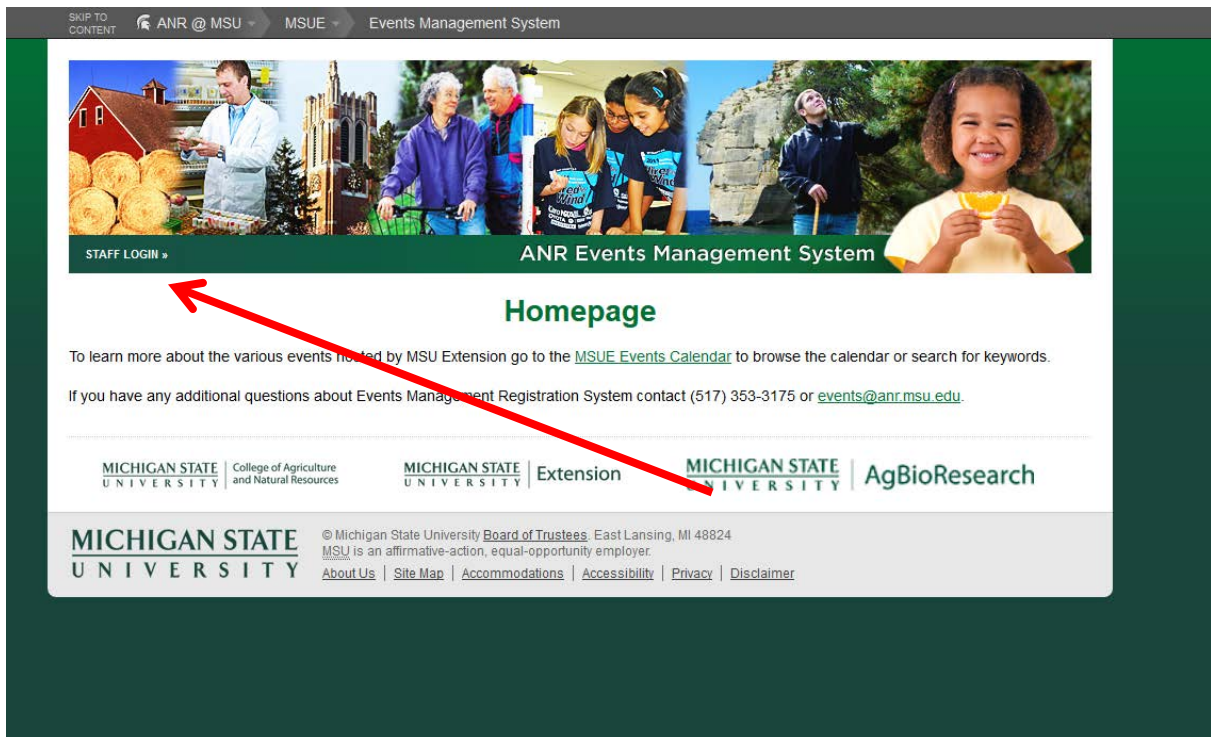


# How to Create Your Own Event

Step- By- Step Instructions

# Step 1: Logging In

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



The screenshot shows the homepage of the ANR Events Management System. At the top, there is a navigation bar with links for "SKIP TO CONTENT", "ANR @ MSU", "MSUE", and "Events Management System". Below this is a large banner image featuring various people and agricultural scenes. In the bottom left corner of the banner, there is a "STAFF LOGIN" link with a dropdown arrow. A red arrow points from the text "In left hand corner, click 'STAFF LOGIN':" to this link. The main content area is titled "Homepage" and contains text about the MSUE Events Calendar and contact information for the Events Management Registration System. The footer includes logos for Michigan State University College of Agriculture and Natural Resources, Extension, and AgBioResearch, along with copyright information and a list of links: About Us, Site Map, Accommodations, Accessibility, Privacy, and Disclaimer.

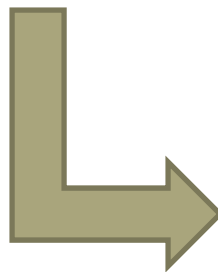
## Please Login to ANR Domain

Username:

Password:

Log On

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



ANR Events Management System | ADMINISTRATION

Events Home Events Staff Templates System Logout

### Events Listing

Filter events:

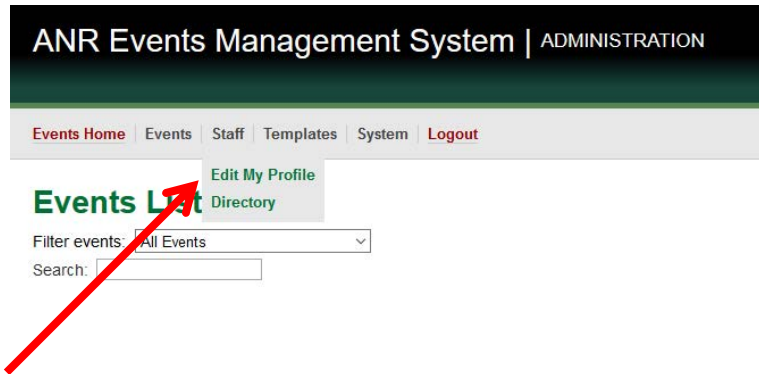
Search:

#### All Events

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 Rereadth 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, brja
2302	Bob DonoD Test	12/31/2015	12/31/2015	No	12/06/2017
4196	Jims 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	07/06/2017	07/07/2018	Yes	03/14/2018
5197	Jim Lester	07/31/2017	07/31/2017	No	07/28/2017, brja
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.



## Edit Operator Properties

Username:

Required fields are indicated with an asterisk (\*)

**Operator Information**

\* First Name:

\* Last Name:

Job Title:

Department:

**Address**

Address:

Address 2:

Address 3:

City:

State:  Zip Code:

**Contact Information**

\* E-mail:

\* Phone:

Mobile Phone:

Fax:

**Account Permissions**

User account is:  Active  Disabled

**Operator Roles:**

Fiscal Officer

Fiscal Officer (System-wide)

Event Organizer

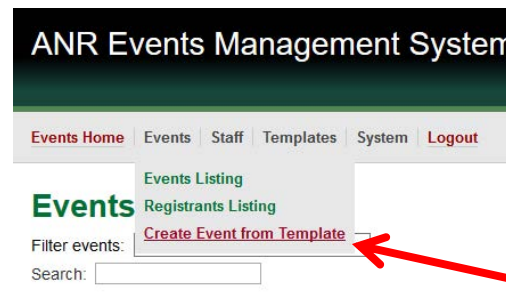
Unit Organizer

System Organizer

Event Services Staff

# 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	<a href="#">Preview</a> <a href="#">Create Event</a>
Basic Event with Simple Charge	Short Description Here	<a href="#">Preview</a> <a href="#">Create Event</a>
Registration with multiple pricing options	short description here	<a href="#">Preview</a> <a href="#">Create Event</a>
Multiple Pricing and Multiple Registration Processes	short description	<a href="#">Preview</a> <a href="#">Create Event</a>
Signup Sheet	This template is used for a simple signup sheet or RSVP. No fees are involved.	<a href="#">Preview</a> <a href="#">Create Event</a>

# 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

Event Summary   Finances   Descriptive Information   Look & Feel

### Event Summary

\* Event Title:

\* Event Start Date:

\* Event End Date:

\* Event Folder:

Each event has a unique folder where uploaded files are stored. Blank spaces or special characters (e.g., \, @, #, \$, %, ^, & \* etc.) are not allowed in folder names.

You can preview your event here: [Event Preview](#)  
Do not use the preview URL to promote your event as it will not save registration data. Use the public URL displayed in the event dashboard to promote the event.

Event is:  Active  Disabled  
Set event to ACTIVE to create the public folder clients will use to access the event. To hide the event from the public DISABLE the event.

### Event Affiliation

This information is used for high level business reporting, not for event promotion. If you have additional affiliations please enter those in the 'Other' section below. Note that Major Funding Line and Department must be entered to activate an event.

Funding Line:

Department/Institute:

Enter CANR department/institute/center or MSUE Institute or business unit.

Program:

Other:

# 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

The screenshot shows a web application interface with a navigation bar at the top containing four tabs: 'Event Summary', 'Finances', 'Descriptive Information', and 'Look & Feel'. The 'Finances' tab is active. Below the navigation bar, there are two main sections: 'Event Finances' and 'Event Budget'.  
**Event Finances**  
- 'Is this a free event?' with radio buttons for 'Yes' and 'No' (selected).  
- 'Is this event associated with a state or federal grant?' with radio buttons for 'Yes' and 'No' (selected). A note below reads: 'If your program is associated with a state or federal grant someone from ANR Event Services will be in contact to discuss pricing regulations prior to activation of your event.'  
- 'Payment types accepted:' with checkboxes for 'Cash', 'Check', 'Credit Card', 'MSU Account', 'Wire Transfer', and 'Credit Card Swipe' (checked).  
- 'MSU Account that will be used for event fees/revenue sharing:' with fields for 'Chart' (MS), 'Account' (DN100031), 'Sub-Account', and 'Project Code'. A note below says: 'If a sub-account is used, enter either sub-account number or sub-account name.'  
- 'Store Name' and 'Item Code' dropdown menus.  
- 'MSU Account associated with credit card swipe machine fees/revenue:' with fields for '\* Chart' (MS), '\* Account' (DN100059), 'Sub-Account Number', and 'Project Code'. A note below says: 'If a sub-account is used, enter sub-account number.'  
**Event Budget**  
- 'Budget summary file for this event is [xism Budget](#) [xism \(xism\)](#) [Delete](#)'  
- 'Event budget file:' with a 'Browse...' button and the text 'No file selected.'  
- A note below reads: 'Upload event budget in MS Word, MS Excel or PDF file formats.'  
At the bottom of the form are two buttons: 'Update Event' and 'Cancel'.



# 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"

Event Summary Finances Descriptive Information Look & Feel

**Descriptive Information**

Keywords:

Keywords provide a comma separated list of words and phrases that are used by search engines to categorize the event.

\* Short Description:

Provide a brief 1-2 sentence description (175 characters max) for use in short event listings, calendars, search engines, etc.

\* Description:

Provide a complete event description that appears on the main web page for the event.

\* Flyer download link caption:

This text is used to label the link used by the public to download the event flyer or other file download.

Flyer file:  No file selected.

Upload a promotional flyer in MS Word or PDF file formats.

\* Contact Information:

Provide name(s) and contact information for event organizers who will be fielding client questions and resolving issues. Contact information is displayed on the event summary page, registration pages, invoices and reports.

- 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

### Event Invoice

These fields define event specific information displayed on all customer invoices.

\* Business Address:

MSU ANR Event Services / EVENT TITLE  
Justin S. Morrill Hall of Agriculture  
446 W. Circle Drive, Room 11  
East Lansing, MI 48824

*This is the address displayed upper left corner of an invoice.*

\* Payment Information:

If paying by check, please make check payable to Michigan State University within 10 business days. Mail checks to address above.

*Use this field for payment information and address for registrants to send checks to.*

# 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

Event Summary Finances Descriptive Information Look & Feel

### Event Visual Look & Feel

Visual Theme: **Blue Sky Theme**

Each theme provides screen and print cascading style sheets that set the visual look & feel of event pages.

Banner image file is [CP\\_banner.JPG](#) [Delete](#)

Banner Image file: [Browse...](#) No file selected.

Upload a banner image for the event in gif, jpeg or png format. Complete banner size is 960 X 200 pixels.

Alternate Text:

If your banner image contains text, for accessibility please provide alternate text for the image.

Display banner on Invoice

Title Banner:

The title banner text will appear below the banner image.

[Update Event](#) [Cancel](#)

The title banner text will appear below the banner image.

### Affiliation Links

CANR  MSUE  AgBioResearch

Check the college affiliate links that should be displayed for this event.

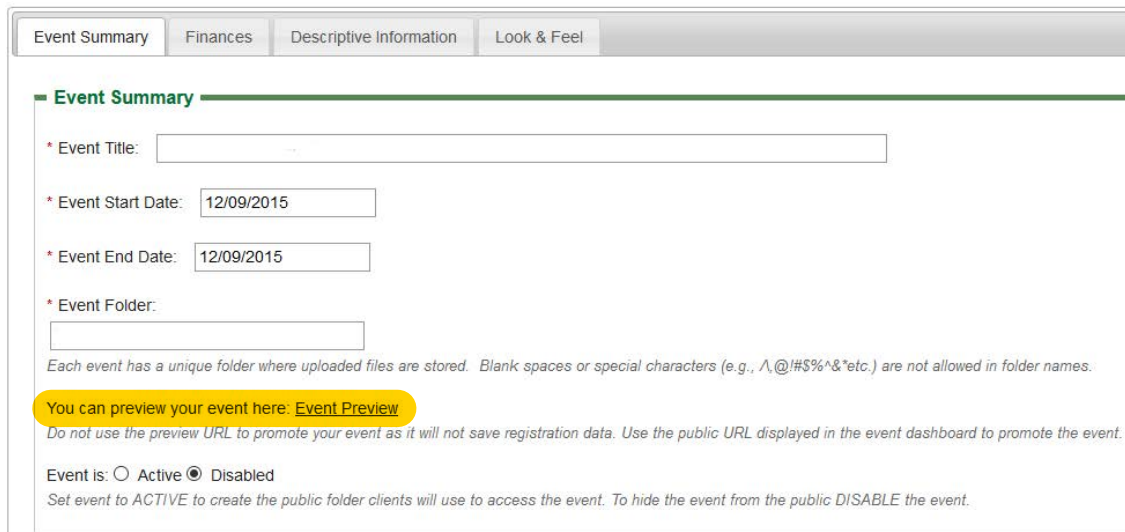
Other Affiliation Links:

Source Bold Italic Underline Text Color Background Color Bulleted List Numbered List Indent Outdent Link Unlink Help

Style Format Font Size

# 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.



The screenshot shows a web application interface for updating an event. At the top, there are four tabs: "Event Summary", "Finances", "Descriptive Information", and "Look & Feel". The "Event Summary" tab is selected and highlighted in green. Below the tabs, the form contains the following fields and instructions:

- \* Event Title: [Text input field]
- \* Event Start Date: [Date input field with value 12/09/2015]
- \* Event End Date: [Date input field with value 12/09/2015]
- \* Event Folder: [Text input field]

Each event has a unique folder where uploaded files are stored. Blank spaces or special characters (e.g., \, @, #, %, ^, & \* etc.) are not allowed in folder names.

You can preview your event here: [Event Preview](#)

Do not use the preview URL to promote your event as it will not save registration data. Use the public URL displayed in the event dashboard to promote the event.

Event is:  Active  Disabled

Set event to ACTIVE to create the public folder clients will use to access the event. To hide the event from the public DISABLE the event.

- You can review your event using "Event Preview".
- To activate your event, email [events@anr.msu.edu](mailto: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.

Add organizers who should be part of your event, and delete organizers who should not be part of the event.  
Only staff in the events system who are listed here can see and participate in managing this event.

Add Event Organizer

Last Name	First Name	Username	E-mail	Phone	Mobile	Fax	Role	Status	Actions
							organizer		<a href="#">Delete</a>

**Add Event Organizer**

Required inputs are indicated with an asterisk (\*)

\* Staff Member to Add:

Add Organizer

Cancel

**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

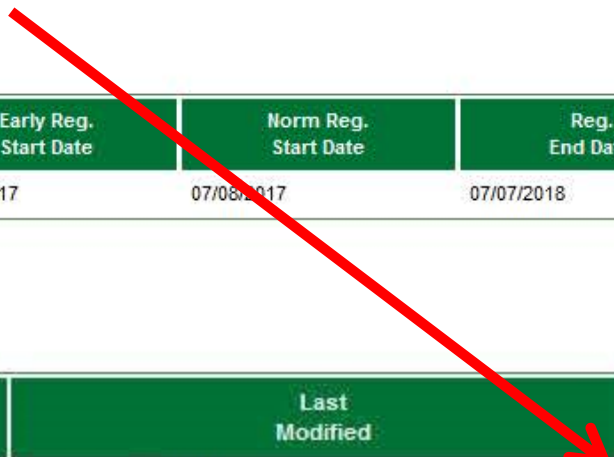
- [Registrant Roster](#)
- [Invoices/Receipts](#)
- [Attendance](#)
- [Notes](#)
- [Download Registrants](#)
- [Export File Uploads](#)
- [Quotas Report](#)
- [Special Needs Report](#)
- [Custom Reports](#)
- [MiPRS Report](#)
- [Communications Report](#)

## 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	<a href="#">Edit</a> <a href="#">Registration Forms</a> <a href="#">Pricing Rules</a> <a href="#">Duplicate</a> <a href="#">Cancel</a>

[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

The screenshot displays a web-based configuration interface for registration. At the top, there are four tabs: 'Configuration Details', 'Look & Feel', 'Group Registration', and 'Event Services Settings'. The 'Configuration Details' tab is active, showing the following fields and options:

- Process Name:** A text input field containing 'Registration'. Below it is a note: 'Registration process name is used in administrative reports to track which process was used to collect registrant data. All registration process names in an event must be unique. Use names such as attendee, speaker, sponsor, etc. to help track multiple types of registrations in a single event.'
- Registration Button Caption:** A text input field containing 'Register Here'. Below it is a note: 'This caption is used to label the button that launches the registration form for this process on the event summary page, and on an event roster.'
- Registration process:** Radio buttons for 'Active' (selected) and 'Disabled'. Below it is a note: 'The button that allows clients to register online only appears on an event summary page if the registration process is active and the current date is between the early registration start and registration end dates.'
- Will you be sharing the registrant roster with participants?** Radio buttons for 'Yes' and 'No' (selected). Below it is a note: 'If you answer yes, a communications opt-in question pertaining to this issue will be asked at the end of the last page of each registration process.'
- Only allow this process to be used for back office registrations:** A checkbox that is currently unchecked. Below it is a note: 'Back office only registrations do not appear on event summary page, and are not available for public use. They can only be accessed by event organizers from the event dashboard or roster pages.'

The 'Registration Dates' section is also visible, containing the following fields and notes:

- Early Registration Start Date:** A date input field containing '07/08/2017'. Note: 'First date for online registration with discounted, early bird pricing. Online registration opens at 12:01 AM on the Early Registration Start Date.'
- Normal Registration Start Date:** A date input field containing '07/08/2017'. Note: 'First date for online registration with normal pricing. Price change occurs at 12:01 AM on the Normal Registration Start Date.'
- Registration End Date:** A date input field containing '07/07/2018'. Note: 'Last date for online registration. Online registration closes at 11:59 p.m. on the Registration End Date.'

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.

The screenshot shows the 'Look & Feel' configuration tab for registration. It includes the following sections:

- Visual Look & Feel**
  - Label:** Registration
  - Title:** EVENT TITLE HERE
  - Registration String:** registration
  - Flyer download link caption:** Download Flyer
  - Flyer file:** Browse... No file selected.
  - Instructions:** A rich text editor containing the text: "Please click the button below to register." The path is shown as "p".
- Confirmation Message:** A rich text editor for a message shown at the end of the registration process. The path is shown as "p".

At the bottom of the window, there are two buttons: "Update Registration Process" and "Cancel".



# 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”

**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](#)

## Registration Forms:

Registration Process: Registration

Add Page

Page	# Sections	Actions
1	2	<a href="#">Edit</a>

Add Page Section

Registrant Information

\* First Name

\* Last Name

Organization

\* Address

Add'l Address

\* City

\* County

\* Zipcode

\* Phone Number

\* E-mail

*If you supply an e-mail address, a receipt for your registration will automatically be sent to that account.  
An e-mail address is required to pay using a credit card.*

[Edit Section](#) [Delete Section](#) [Move section Down](#) [Edit Fieldset](#) [Delete Fieldset](#)

\* E-mail

*If you supply an e-mail address, a receipt for your registration will automatically be sent to that account.  
An e-mail address is required to pay using a credit card.*

\* Country

\* Phone Number

[Edit Section](#) [Delete Section](#) [Move section UP](#) [Move section Down](#) [Edit Fieldset](#) [Delete Fieldset](#)

- 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.

Registration Process: Registration  
Page 1, Section 1

The screenshot shows a web interface for configuring a fieldset. At the top, there are two tabs: 'Configuration Details' and 'Fieldset Inputs', with the latter being active. Below the tabs, there are two dropdown menus: 'Input Type' set to 'All Input Types' and 'Input Templates' set to 'Address1-2'. To the right of these is a green 'Add Input' button. The main area is titled 'Fieldset Inputs' and contains a list of input fields, each with associated control buttons. The fields are: 'First Name' (required), 'Last Name', 'Organization', 'Address' (required), 'Add'l Address', 'City', 'County' (dropdown), 'Zipcode', 'Phone Number', and 'E-mail'. Each field has an 'Edit' button and 'Move Up'/'Move Down' buttons. At the bottom left of the fieldset area is a green 'Update Fieldset' button.

## Event: How to Test

Event Configuration | Event Organizers | Registration Configurations

Registration Configurations

Add Registration Configuration

Button Caption	Early Reg Start Date	Norm Reg Start Date	Reg End Date	Fees	# Pages	Active	Actions
Register Online	03/08/2012	03/08/2012	03/29/2012	Yes	1	Yes	<a href="#">Edit</a> <a href="#">Registration Forms</a> <a href="#">Pricing Rules</a>

### Pricing Rule Settings

#### \* Invoice Description:

(Description of what rule is for, i.e. t-shirt, registration payment, meal, etc.)

*This field is used as the description for the fee in the invoice.*

#### Individual Pricing

\* Early Registration Amount:

*This fee will be assessed during early registration.*

\* Normal Registration Amount:

*This fee will be assessed during normal registration.*

\* Onsite Registration Amount:

*This fee will be assessed after normal registration is closed.*

\* Taxable Amount:

*Taxable amount is the value of tangible goods subject to state sales tax associated with this input choice.*

Gift Amount:

*Gift amount is portion of fees that is a gift to MSU.*

Create Pricing Rule

Cancel

- 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"

The screenshot shows the 'Event Summary' tab of an event configuration interface. It includes a navigation bar with tabs for 'Event Summary', 'Finances', 'Descriptive Information', and 'Look & Feel'. The 'Event Summary' section contains several input fields: 'Event Title', 'Event Start Date' (12/09/2015), 'Event End Date' (12/09/2015), and 'Event Folder'. A note below the fields states: 'Each event has a unique folder where uploaded files are stored. Blank spaces or special characters (e.g., \, @, #, \$, %, ^, & \* etc.) are not allowed in folder names.' A yellow callout box highlights the text: 'You can preview your event here: [Event Preview](#)'. Below this, it says: 'Do not use the preview URL to promote your event as it will not save registration data. Use the public URL displayed in the event dashboard to promote the event.' At the bottom, there are radio buttons for 'Event is:  Active  Disabled' and a note: 'Set event to ACTIVE to create the public folder clients will use to access the event. To hide the event from the public DISABLE the event.'

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

## Event Dashboard:

Event ID:

Public URL: <https://events.anr.msu.edu/>

### Event Summary

- Start Date:
- End Date:
- Event is active

### Registration Summary

- Registrants:
- Cancelled Registrations:
- Registrants w/ Balance Due:
- Gross Revenue:
- Unprocessed Revenue:
- Total Balance Due:

# 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

\* Payment Method:  [Add Payment](#)

Date Paid	Amount	Processed	Edited	E-Doc	Revenue Account	Last Modified	Actions
12/30/2017	\$60.00				MS DN100031	12/30/2017	<a href="#">Browse</a>

[Request Refund](#)

Check  
Credit Card Swipe  
**Refund**  
Credit



# 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	<a href="mailto:braidbet@anr.msu.edu">braidbet@anr.msu.edu</a>	03/27/2012			\$250.00	\$0.00	\$0.00	\$250.00	\$250.00	\$0.00	\$0.00	<a href="#">Registration</a> <a href="#">Payments</a> <a href="#">Invoice</a> <a href="#">Notes</a> <a href="#">Cancel</a> <a href="#">Late Fee</a>

[Return to Events Dashboard](#)

# Reports

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

## Download Registrants:

**Report Settings**

Include cancelled registrants ?  Yes  No

Include payment records ?  Yes  No

Include audit trail of CASHNet records ?  Yes  No

Include registration fees data ?  Yes  No

[Run Report](#)

- 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

## Event Dashboard: Master Citizen Planner Webinar

Event ID: 5170

Public URL: <https://events.anr.msu.edu/MCPwebrec17/>

### Event Summary

- Start Date: 07/08/2017
- End Date: 07/07/2018
- Event is active

### Registration Summary

- Registrants: 39
- Cancelled Registrations: 3
- Registrants w/ Balance Due: 0
- Gross Revenue: \$1,310.00
- Unprocessed Revenue: \$0.00
- Total Balance Due: \$0.00

### 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](#)

### Payment Processing

- [Deposit Slips](#)
- [Send Bills](#)
- [Manage Payments](#)
- [Manage Group Payments](#)

### Financial Reports

- [Revenue](#)
- [Sales Tax](#)
- [Refunds](#)
- [CASHNet Transactions](#)

## **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.