

Events Tool Documentation

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TABLE OF CONTENTS

INTRODUCTION TO THE EVENTS TOOL	3
THE PROCESS	4
ADD/EDIT LOCATION.....	5
ADD A LOCATION	6
EDIT A LOCATION.....	7
DELETE A LOCATION	7
ADD/EDIT TYPE OF EVENT	8
ADD A TYPE OF EVENT	9
EDIT A TYPE OF EVENT	10
DELETE A TYPE OF EVENT	11
ADD EVENT	12
VIEWING ARCHIVED EVENTS.....	16
FUTURE EVENTS	16
REGISTRATION	17
MANDATORY PAYMENT REGISTRATION.....	17
OPTIONAL PAYMENT REGISTRATION.....	17
BASIC REGISTRATION	17
ALLOW MULTIPLE REGISTRANTS PER ORDER	18
REGISTRATION CLOSES	18
VIEWING REGISTRATIONS	19

Introduction to the Events Tool

The events tool is a module that works within the Content Management System (CMS). Please refer to your CMS manual for system requirements and login instructions.

The events tool will allow you to add, edit and remove events items from your web site. Events will post to your web site and automatically archive themselves when the date of the event has past.

This events tool allows you to post events, have people register for them and even collect payment if the event has a cost attached to it. These options would have been discussed with your developer and the appropriate set up has been implemented. In this manual you will be walked through how the events tool works.

The Process

To access the events tool you will log into your web site CMS and then visit the Events page within your web site. This will show your current events already posted to the site but there are extra administration tools and icons viewable to you now that you have logged in.


In the screen shot below you will see at the bottom you have the ability to Add Event, Add/Edit Location and Add/Edit Type.


An Event Location is where the event will be taking place and would include details such as name, address and Google map link. An Event Type is the type of event it is. Examples would include Seminar, Tradeshow, Workshop, etc.

We recommend that before you click on the Add Event link, that you quickly check the Add/Edit Location and Add/Edit Type to ensure that the location and type are in these lists. If not then add them in as necessary and continue to Add Event.


Upcoming Events [View Archived Events](#)


February 20, 2009 [Meeting](#)

 [Details](#)





February 25, 2009 [Conference](#)



ACME Event [Details](#)



February 27, 2009 [Meeting](#)

 [Details](#)

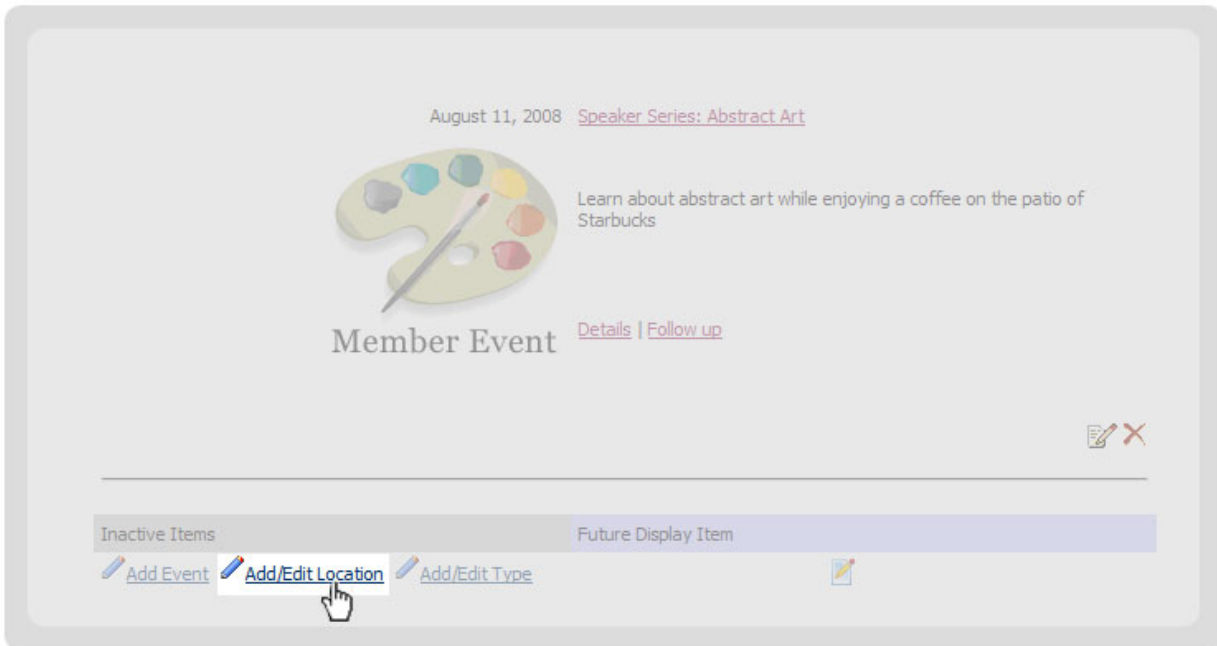
[View Registrations](#) 

Inactive Items [Add Event](#) [Add/Edit Location](#) [Add/Edit Type](#)  Future Display Item



Add/Edit Location

As mentioned before an Event Location is where the event will be taking place.

To add or edit an Event Location click on the 'Add/Edit Location' button at the bottom of the module.



This page will display all of your current locations.

Add Location	Title	Back	Active?
 	Guelph Chamber of Commerce		<input checked="" type="checkbox"/>
 	Platypi Designs		<input checked="" type="checkbox"/>
 	Platypi Designs		<input checked="" type="checkbox"/>
 	Starbucks - Clair/Gordon		<input checked="" type="checkbox"/>

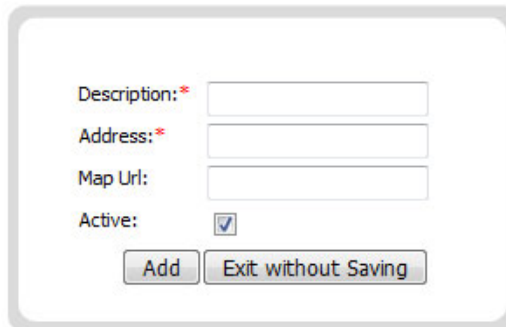
Add a Location

To add a new location, click on the 'Add Location' button at the top of the module.



Add Location		Back
	Title	Active?
 	Guelph Chamber of Commerce	<input checked="" type="checkbox"/>
 	Platypi Designs	<input checked="" type="checkbox"/>
 	Platypi Designs	<input checked="" type="checkbox"/>
 	Starbucks - Clair/Gordon	<input checked="" type="checkbox"/>

This will bring up a form that will ask you for information about about the event location. The 'Description' field is the name of the location and the 'Address' field is the address of the location being added. You can also enter a URL of a map from any map website (ex. Google Maps, Mapquest, etc.).



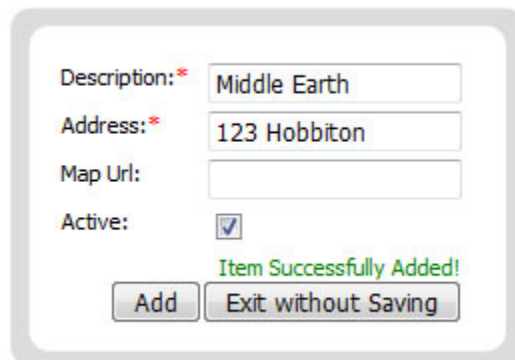
Description: *

Address: *

Map Url:

Active:

You will know when your event location has been added successfully when you see the screen below. At this point you can click the Exit without Saving button to return to the main Add/Edit Location screen.



Description: *

Address: *

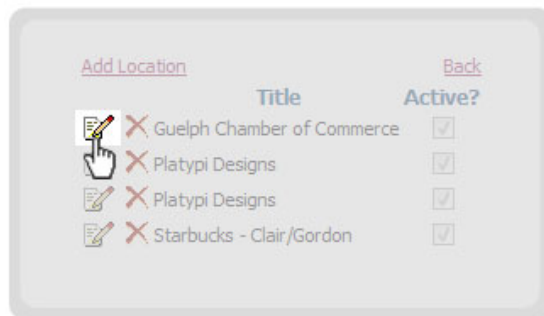
Map Url:

Active:

Item Successfully Added!

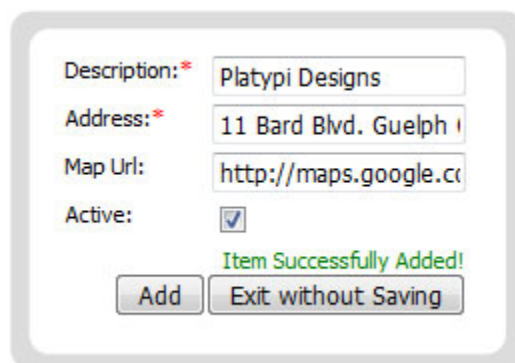
Edit a Location

To edit one of the already entered Locations, click on the 'Edit' icon for the desired location (pencil and paper icon). Edit the necessary fields and click 'Update'



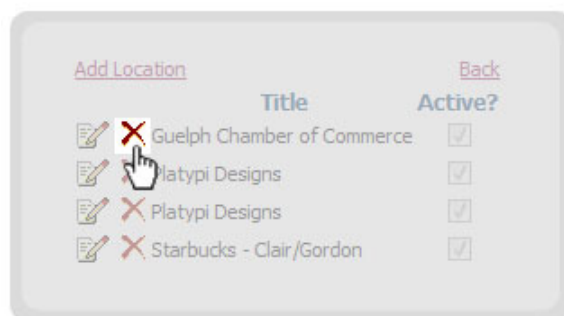
Edit the desired information and click the 'Update' button.

You will know when your location has been updated successfully when you see the screen below. At this point you can click the Exit without Saving button to return to the main Add/Edit Location screen.



Delete a Location

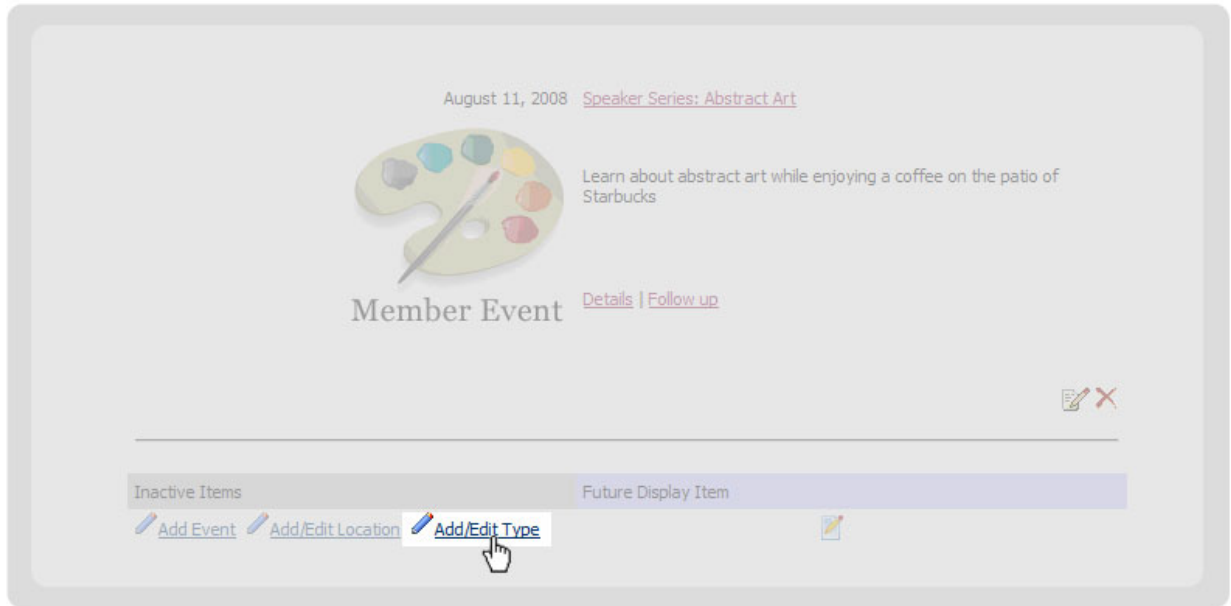
To delete a Location, click on the red 'X' next to the Location listing. A prompt message will appear for confirmation of deleting the source; select 'Ok' to delete.



Add/Edit Type of Event

As mentioned before, an Event Type is the type of event it is. Examples would include Seminar, Tradeshow, Workshop, etc

To add or edit the Type of Event, click on the 'Add/Edit Type' button at the bottom of the module.

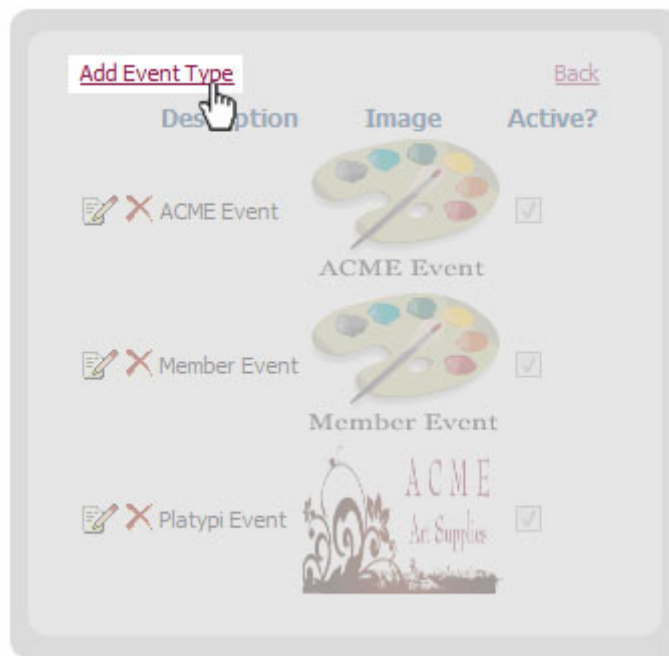


This page will display all of your current Event Types.

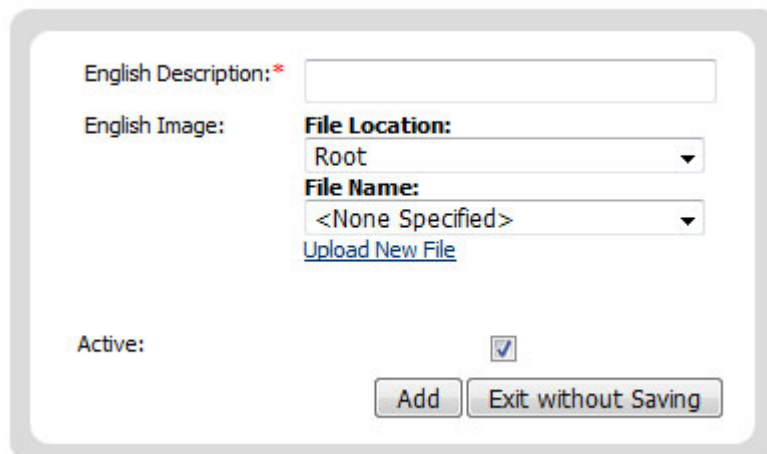


Add a Type of Event

Click on the 'Add Event Type' link at the top of the listing page.



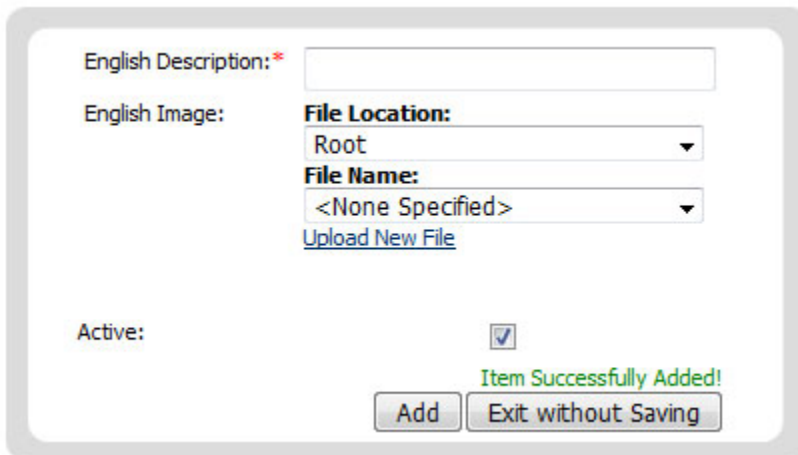
Fill out the fields of the form. The description is the type of event (i.e. Seminar, Workshop, Tradeshow, etc.). You can also assign an image to the type of event in this section. For example, you can add a specific image for all of you staff events, and add a different image to all of your public events.



The form contains the following fields and controls:

- English Description:** A text input field with an asterisk indicating it is required.
- English Image:** A section containing:
 - File Location:** A dropdown menu with 'Root' selected.
 - File Name:** A dropdown menu with '<None Specified>' selected.
 - [Upload New File](#) link.
- Active:** A checkbox that is currently checked.
- At the bottom right, there are two buttons: 'Add' and 'Exit without Saving'.

You will know when your event type has been added successfully when you see the screen below. At this point you can click the Exit without Saving button to return to the main Add/Edit Type screen.



English Description:*

English Image:

File Location:
Root

File Name:
<None Specified>

[Upload New File](#)

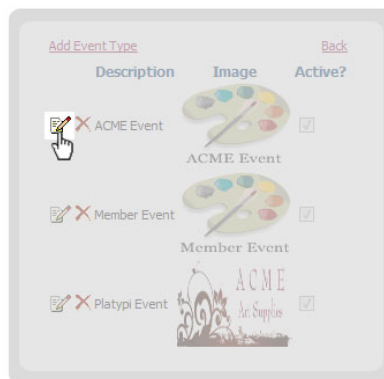
Active:

Item Successfully Added!

Add Exit without Saving

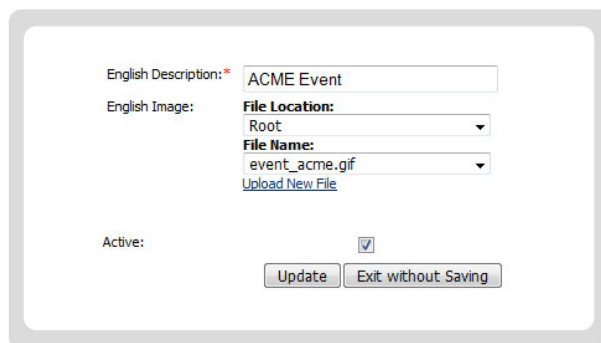
Edit a Type of Event

To edit an Event Type, click on the 'Edit' icon next to the location you wish to edit.



Add Event Type Back

Description	Image	Active?
ACME Event		<input checked="" type="checkbox"/>
Member Event		<input checked="" type="checkbox"/>
Platypi Event		<input checked="" type="checkbox"/>



English Description:*

English Image:

File Location:
Root

File Name:
event_acme.gif

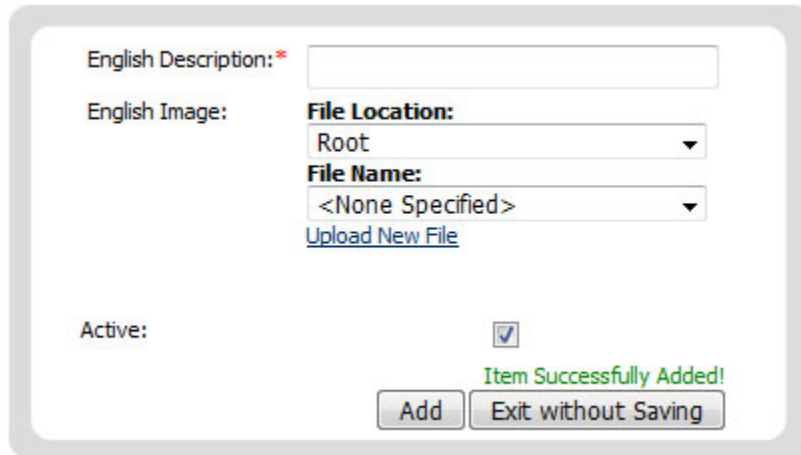
[Upload New File](#)

Active:

Update Exit without Saving

Edit the desired information and click the 'Update' button.

You will know when your event type has been updated successfully when you see the screen below. At this point you can click the Exit without Saving button to return to the main Add/Edit Type screen.



English Description:*

English Image:

File Location:
Root

File Name:
<None Specified>

[Upload New File](#)

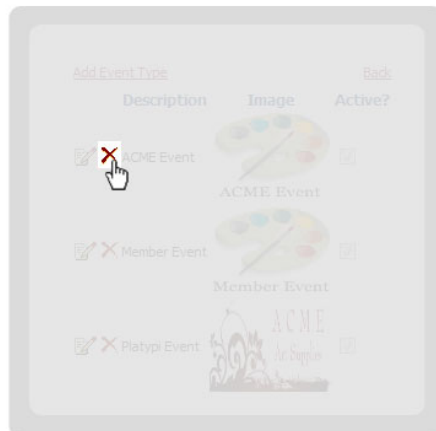
Active:

Item Successfully Added!

Add Exit without Saving

Delete a Type of Event

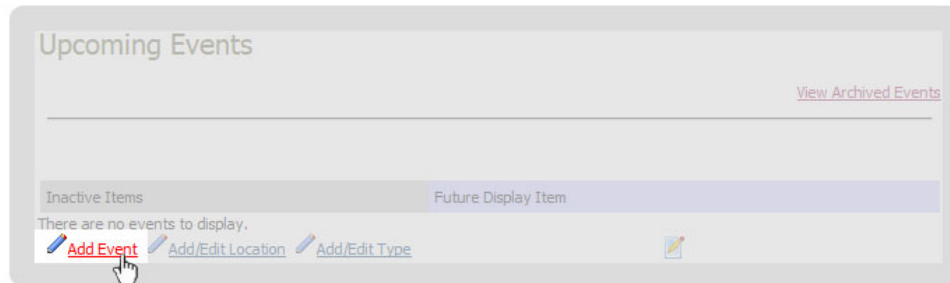
To delete an Event Type, click on the red 'X' next to the desired Event Type. A prompt message will appear for confirmation of deleting the source; select 'Ok' to delete.



Add Event

After you have ensured that your Event Location and Event Type are in the system you can then proceed to adding an event.

To add an Event, click on the 'Add Event' button at the bottom of the module.



In the screen shot of the following page you will see the form that you will fill out to create an event.

Add

Field marked with an asterisk (*) are mandatory.

Location:

Event Type:*

Display Date:*

Event Date:*

Event Time:

Days:

Allow Registration:

Contact Name:

Contact Phone:

Contact Email:

Speaker:

Info Url:

Cost:

Cost Description:

Photo: **File Location:**
Root
File Name:
<None Specified>
[Upload New File](#)

English Title:*

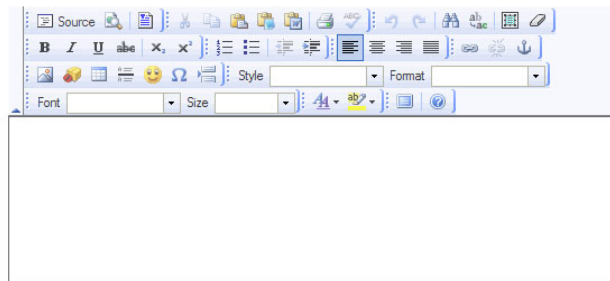
English Sub-Title:

English Agenda: **File Location:**
Root
File Name:
<None Specified>
[Upload New File](#)

English Short Description:

English Long Description:

Basic Text Box Rich Text Editor

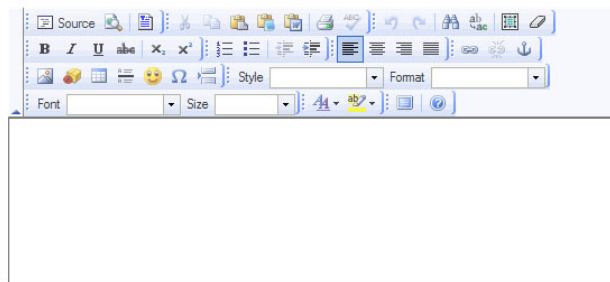


Rich Text Editor interface showing a toolbar with various formatting options (bold, italic, underline, text color, background color, bulleted list, numbered list, indent, outdent, link, unlink, image, table, source, undo, redo) and a large empty text area for content.

[Show custom editor options](#) | [Refresh Editor](#)

English Follow-up:

Basic Text Box Rich Text Editor



Rich Text Editor interface showing a toolbar with various formatting options (bold, italic, underline, text color, background color, bulleted list, numbered list, indent, outdent, link, unlink, image, table, source, undo, redo) and a large empty text area for content.

[Show custom editor options](#) | [Refresh Editor](#)

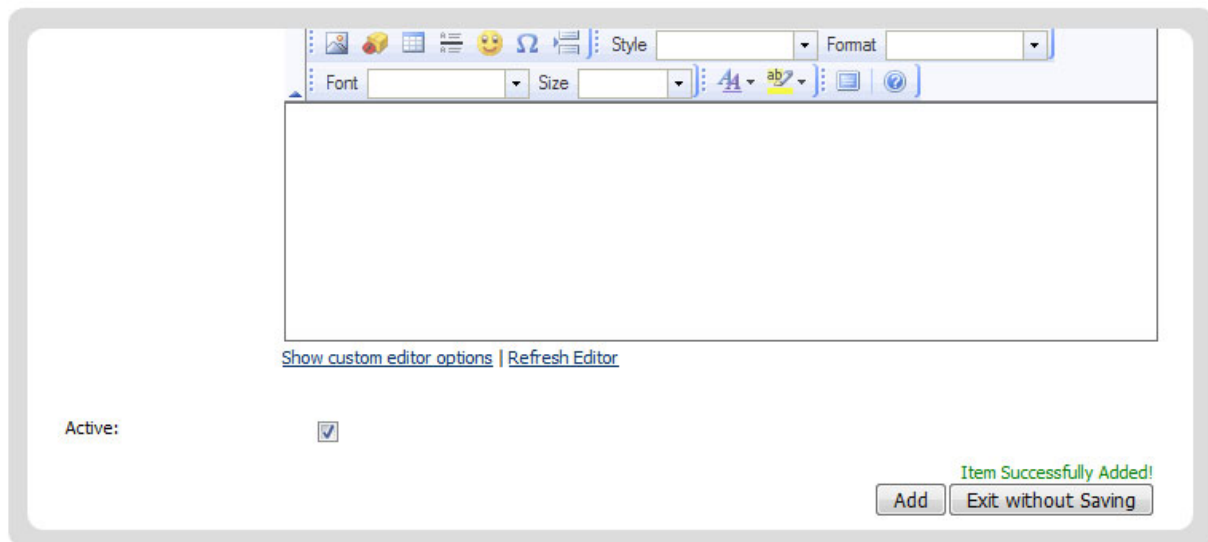
Active:

Please find below a brief overview of all the information you can include about your event. These details below mimic the screen shot from the previous page.

Location	Choose from the drop down list the event location. If the location is not in this list see this manual for Add a Location.
Event Type	Mandatory field. Choose from the drop down list the event type. If the event type is not in this list see this manual for Add a Type of Event.
Display Date	Mandatory field. This is the date that you want to have the Event display on your web site. You can prepare events in advance and have them automatically display in the future when you set this date.
Event Date	Mandatory field. This is the date of the actual event.
Event Time	You can enter in a time frame for your event (i.e. 9am – 4pm)
# of days	This is the number of days that your event will be taking place over.
Allow registration	If you want to receive registrations you will want to click this check box. When you do more options are available for you to fill in. See the Registration part of this manual for further details on this aspect of the events tool.
Contact Name	This is the contact name for the event.
Contact Phone	This is the contact phone number for the event.
Contact Email	This is the contact email for the event.
Speaker	If there is a specific speaker for this event you can put their name here.
Info URL	If there is a web site that is related to this specific event you would put the web site address here.
Cost	If the event has a single cost you would put it here. (i.e. 24.95)
Cost Description	If the event allows for multiple price points or requires further details other than a price this is where you would put it. Note: If you fill in the Cost AND Cost Description form fields the Cost Description will override Cost and this form field will display on the web site. (i.e. Adults: \$10.00, Students/Seniors: \$5.00, Children under 5: Free)
Photo	Your event can have an image attached to it. This could be a photo of the speaker or the event poster.
English Title	Mandatory field. This is the official title of the event. This text is what will be linked on the Events page to get further details.
English Sub-Title	The Event Subtitle is displayed under the Title in the Details page
English Agenda	If your event has an agenda you can upload the file and a link will be created to it.

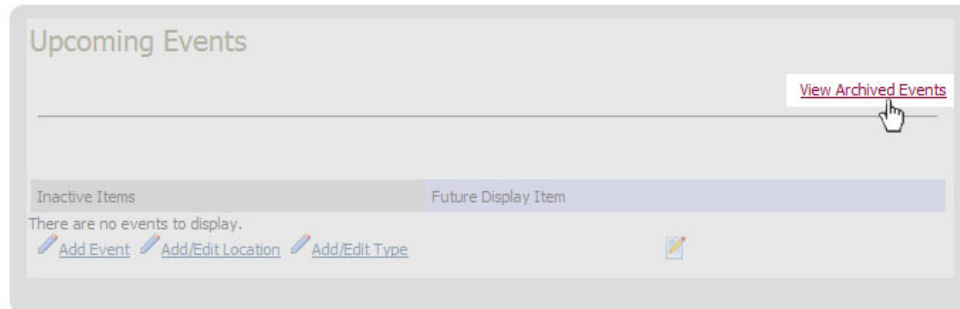
English Short Description	On the events page where all your current events are listed this text will display under the event title to give an abstract of the event.
English Long Description	This is the full event details. In this area you can insert images, links to web sites, pdfs, etc.
English Follow-up	When your event is over, you can use this area to write a follow up on how the event went. This area could be used to post meeting or presentation notes, testimonials about the event, etc.
Active	This check box is automatically checked off. This means that you want this event to display when the display date comes up. To remove an event from the event listings on your web site, you will want to uncheck this box.

You will know when your event has been added successfully when you see the screen below. At this point you can click the Exit without Saving button to return to the Events listing page.



Viewing Archived Events

After an Event passes its end date, the Event will automatically move to the 'Archived Events' section. To view the listing of Archived Events, click the 'View Archived Events' button at the top right side of the module. To return to the Current Event listing, click on the 'View Current Events' button.



Future Events

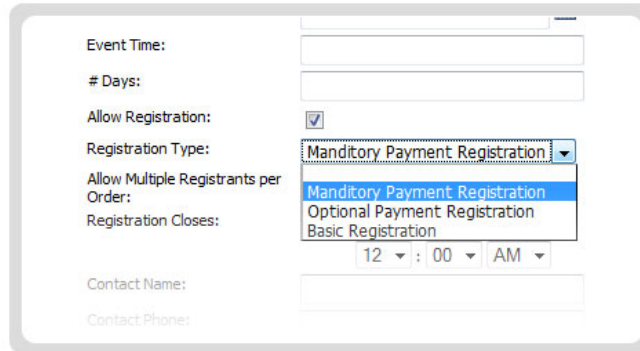
Events that are entered with a future display date will show up in the Current Events listing but will have a light violet background. Your web site visitors will not see this event at all. The reason you can see it is because you're logged in.

The Event will display on your site when the display date is reached.



Registration

If you would like people to be able to register and sign up for the event, select the 'Allow Registration' box when creating the Event. This will expand 3 additional fields to fill out. The first is the registration type. There are three types of Registration: Mandatory Payment Registration, Optional Payment Registration, and Basic Registration.



The screenshot shows a form with the following fields and options:

- Event Time: [Text Input]
- # Days: [Text Input]
- Allow Registration:
- Registration Type: [Dropdown Menu] (Options: Mandatory Payment Registration, Optional Payment Registration, Basic Registration)
- Allow Multiple Registrants per Order: [Text Input]
- Registration Closes: [Time Picker] (12 : 00 AM)
- Contact Name: [Text Input]
- Contact Phone: [Text Input]

Mandatory Payment Registration

The Mandatory payment option is when you would like every web site visitor that registers for the event to provide payment in order to register. Each event can have 1 cost associated with it. Payment is usually made by credit card. There are various options for credit card number collection or payment. Your developer will go over the option that was outlined in your contract.

Optional Payment Registration

The optional payment option allows for users to either enter in a credit card to provide payment or select another option such as 'Pay at the door' or 'Cheque'. When viewing the registration list of the registered users, it will display whether or not they have paid for the event.

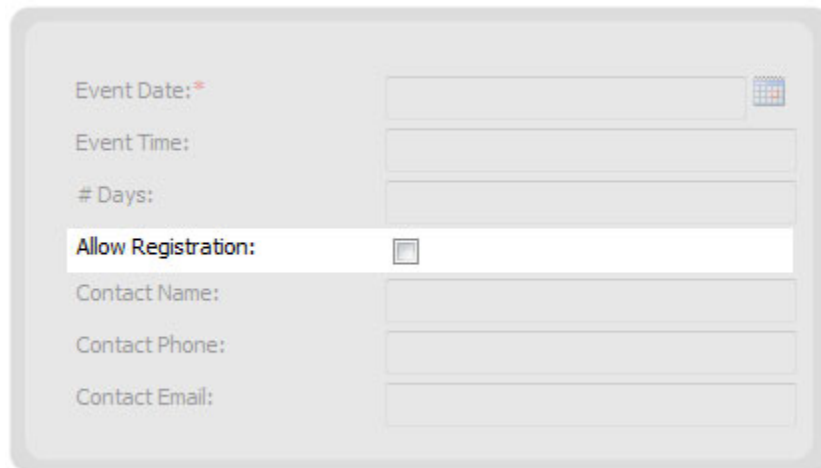
Basic Registration

The basic registration option does not collect any payment information for an event. Use this option if you have an event without a cost or if you will be collecting payment offline.

The other two fields that expand with the 'Allow Registration' box selected, are:

Allow Multiple Registrants per Order

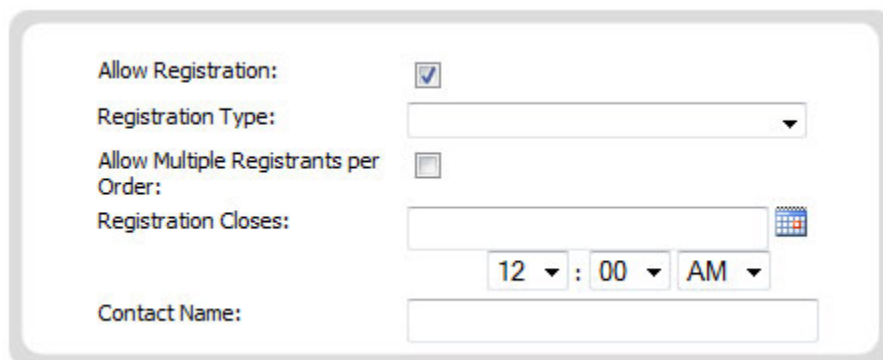
If this option is selected the user can register themselves as well as additional attendees to the event. If it is not selected, the user can only register themself.



A screenshot of a registration form. The form is light gray with rounded corners. It contains several input fields: 'Event Date:' with a calendar icon, 'Event Time:', '# Days:', 'Allow Registration:' with an unchecked checkbox, 'Contact Name:', 'Contact Phone:', and 'Contact Email:'. The 'Allow Registration:' field is highlighted with a white background.

Registration Closes

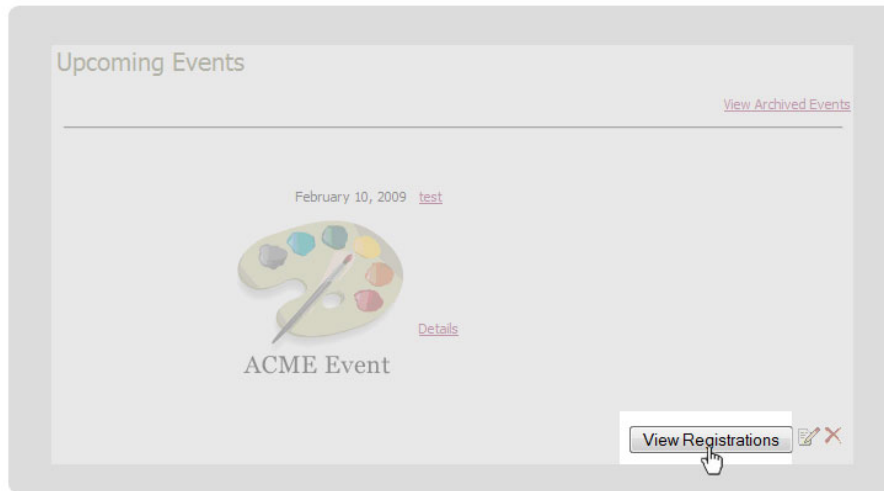
The 'Registration Closes' option will remove the 'Register' link on that event when the date has passed. So if you would like to only allow users to register for an event up to 1 week prior to the event, fill out the desired date in this field.



A screenshot of a registration form. The form is light gray with rounded corners. It contains several input fields: 'Allow Registration:' with a checked checkbox, 'Registration Type:' with a dropdown menu, 'Allow Multiple Registrants per Order:' with an unchecked checkbox, 'Registration Closes:' with a date field and a time field set to '12 : 00 AM', and 'Contact Name:' with an empty text field.

Viewing Registrations

If you have an Event that allows for people to register, you can view the current list of people registered by logging into the CMS, visiting the event on your Events page and clicking on the 'View Registrations' button.



You can also export the list to an Excel spreadsheet by clicking 'Export to Excel' within the 'View Registrations' page.

