

STATE OF NORTH DAKOTA

CAMPUS COMMUNITY CREATE AND MANAGE EVENTS TRAINING MANUAL

VERSION 8.0

Disclaimer

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CREATE AND MANAGE EVENTS

OVERVIEW

You can use your system to help plan and manage events. A set of meetings comprises one overall event and each meeting can have resources and staff assigned to it. For example, you could create an event called **Campus Visit Day**. Your template might include meetings such as a welcome reception, a general session, several workshops, and a tour of the campus. You can identify the required resources for each meeting (tables, chairs, brochures, banners, and so on), and assign and schedule the responsible staff.

Campus Visit Day, for example, is a recurring event, and each of the meetings might need the same resources and staff each time. You can create a Campus Visit Day event template to make it easier to regularly plan and manage this event. You can also use the template to plan similar events.

The person managing events needs security access to events and the areas with which events are associated.

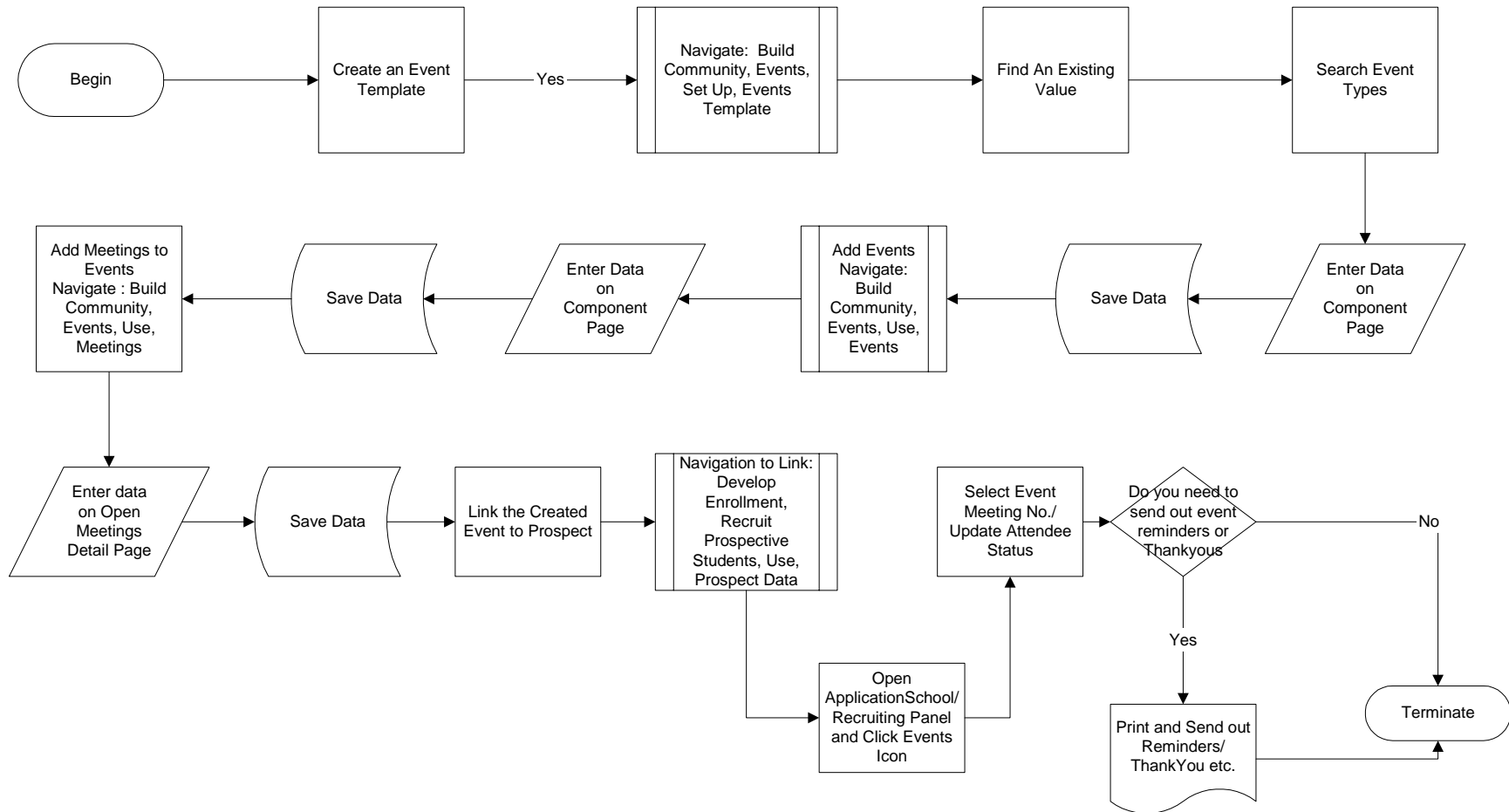
OBJECTIVES

After completing this section, you will be able to:

1. Create an event
2. Create an event meeting template
3. View a meeting summary

CREATE AND MANAGE EVENTS BUSINESS PROCESS FLOW

This business process helps to plan and manage events as needed throughout the year.

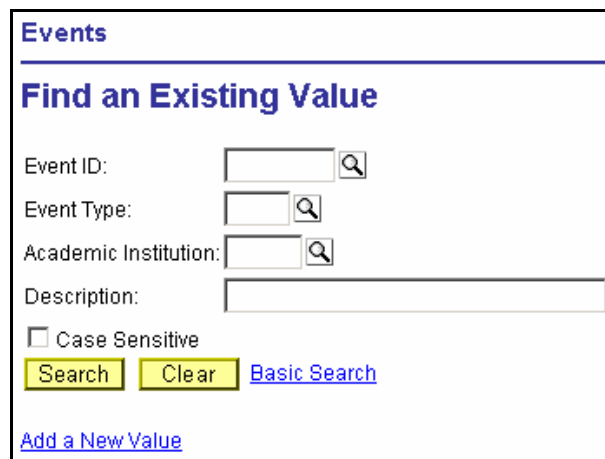


WALKTHROUGH – CREATE AN EVENT

Before creating events, the types of events, staff, and resources must be defined. You might also find it helpful to set up general event templates from which to copy when creating specific events.

Internal departments and organization departments and contacts must be set up before designating event managers, sponsors, and contacts. Facilities must also be set up before you can designate event locations.

1. **Navigation:** Home > Build Community > Events > Use > Events
2. The **Events, Find an Existing Value** page is displayed.



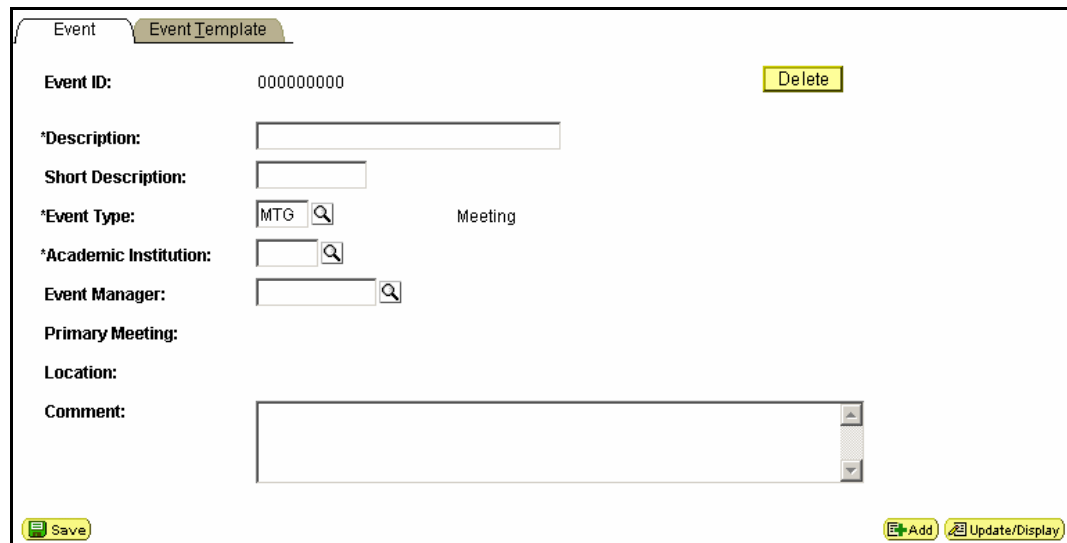
3. Find an Existing Value.
 - a. Enter an existing ID or click **Search**.
 - b. A list of values that meet your search criteria will be displayed.
 - c. Click on the ID that you wish to process.
4. **OR** click [Add a New Value](#).
5. The **Events, Add a New Value** page is displayed.



6. Click **Add**.

EVENT

1. The **Event** page is displayed.



2. **Event ID:** When you create a new event, the event ID is all zeros until you save the page. After you save the page, the system assigns the next available event ID.
3. **Description:** Enter the description of the event (up to 30 characters are allowed).
4. **Short Description:** Enter the short description of the event (up to 10 characters are allowed).
5. **Event Type:** MTG is the default event type. To change the event type, select the type from the lookup table.
6. **Academic Institution:** The academic institution responsible for this event.
7. **Event Manager:** The individual at your institution who is managing this event.
8. **Primary Meeting:** After you identify a primary meeting for this event on the Event Template page and save that page, the system displays the number of that meeting here.
9. **Location:** The system displays the location for the meeting in the *Location* field.
10. **Comment:** Comments to further identify or describe this event.

11. Click **SAVE** to commit your changes to the database or go to the **Event Template** page.

DELETE AN EVENT

1. Click **Delete** to delete this event from your database.
2. Click **SAVE** to commit your changes to the database.

EVENT TEMPLATE

1. Click the **Event Template** tab.
2. The **Event Template** page is displayed.

COPY FROM TEMPLATE

1. If meetings, resources, and staff templates exist for the selected event type (from the meeting Template page, Meeting Resource Templates page, and Meeting Staff Template page), the system displays that data here. You can click either **Copy** or **Copy All** to copy the information from those templates to this event. If no template exists, no data appears here, and you must add the meetings and assign the resources and staff for this event.
2. Click **Copy**. This will copy all the relevant information about the event type that has been selected with its resources and staff. You can manually change any of the copied information.

- Click **Copy All** to copy all the meetings with their resources and staff. You can manually change any of the copied information. The Copy All button is especially helpful if, for example, you have the same event each year. Instead of entering the information each time, you can click this button to copy all information from the template, and update the information for the current year's event.

To MEETINGS

To Meetings					View All	First	1 of 3	Last
*Event Mtg	*Description	Short Desc	*Campus Meeting Type		+ -			
1	Information Session	Info	Meeting	<input type="checkbox"/> Primary Mtg				

- Event Meeting:** Enter the meeting number.
- Campus Meeting Type:** Select the meeting type from the drop list. Options to select from are: Class Examination, Course, Discussion, Fair, Information Session, Interview, Meeting, Reception, Seminar, Tour, or Workshop.
- Primary Meeting:** When selected, indicates that this is the primary meeting for this event.
- Select **+** to add additional meetings.
- Select **-** to remove meetings.

To RESOURCES

To Resources					View All	First	1 of 4	Last
*Rsrce Nbr	Quantity	*Resource Code			+ -			
1	50	CHAIRS	Chairs					
Description: Fifty chairs (theatre style)								

- Resource Number:** Enter the resource number.
- Quantity:** Add the quantity that you need for this meeting.
- Resource Code:** Enter the resource code or select the code from the lookup table.
- Description:** Add a brief description if desired.
- Select **+** to add additional resources.
- Select **-** to remove resources.

To STAFF



1. **Staff Number:** Enter the staff number.
2. **ID:** Enter the ID of the individual responsible for this task or select the ID from the lookup table.
3. **Name:** The name of the individual responsible for this task will be populated when the ID is selected.
4. **Staff Code:** Enter the staff code or select the code from the lookup table.
5. **Task Description:** Enter a brief description if desired.
6. **Hours Required:** The number of hours that the assigned individual is required to perform or participate in this task.
7. Select **+** to add additional staff.
8. Select **-** to remove staff.
9. Click **SAVE** to commit your changes to the database.

WALKTHROUGH – CREATE AN EVENT MEETING TEMPLATE

1. **Navigation:** Home > Build Community > Events > Set Up > Event Template



2. **Find an Existing Value**
 - a. Enter the values by which you would like to search. Event Type or Description.

- b. Click **Search**. A list of values that meet your search criteria will be displayed.
- c. Click on the event you wish to update.

MEETING TEMPLATE

1. The **Meeting Template** page is displayed.

*Event Mtg	*Description	Short Desc	*Campus Meeting Type	
1	Welcome Registration	Welcome Re	Reception	+ -
2	Welcome General Session	Gen Sessio	Info Sess	+ -
3	Campus Tour	Campus Tou	Tour	+ -
4	Academic Appointments	Acad Appts	Meeting	+ -
5	Thank You	Thank You	Info Sess	+ -
6	Social Gathering	SocialGath	Reception	+ -

[Save](#)
[Return to Search](#)
[Next in List](#)
[Previous in List](#)

[Meeting Template](#) | [Meeting Resource Template](#) | [Meeting Staff Template](#)

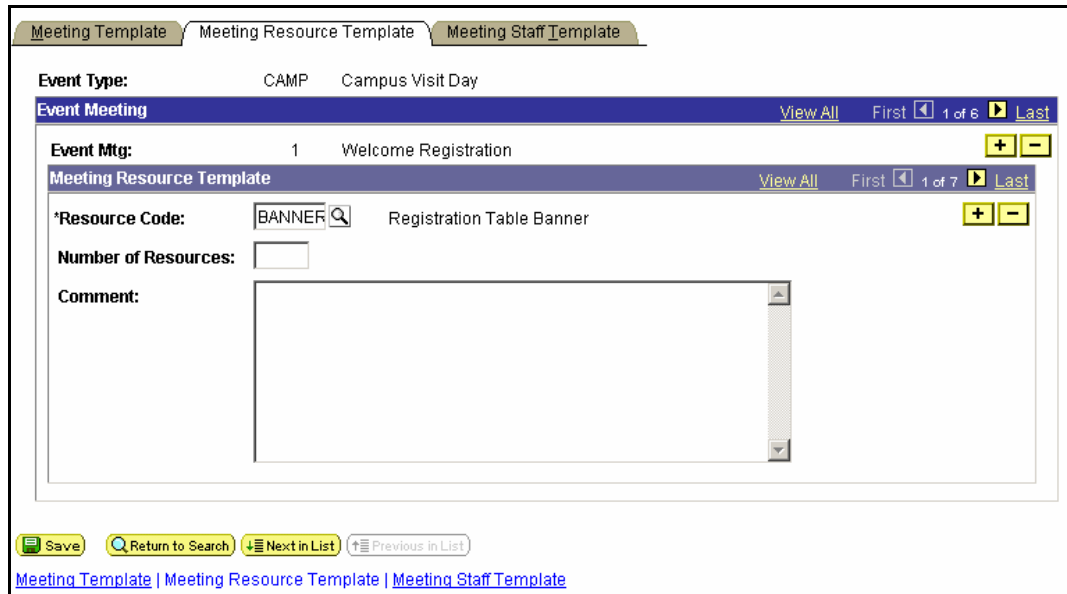
EVENT MEETINGS

1. **Event Meeting:** The system enters the next sequential number for each meeting that you add. You can override the number to reorder the list of meetings. When you return to the page, the meetings will be in the specified order.
2. **Description:** Enter the description of the meeting (up to 30 characters are allowed).
3. **Short Description:** Enter the short description of the meeting (up to 10 characters are allowed).
4. **Campus Meeting Type:** Select the meeting type from the drop list that best describes this meeting. The selections include: Class Examination, Course, Discussion, Fair, Information Session, Interview, Meeting, Reception, Seminar, Tour, or Workshop.
5. Select **+** to add additional event meetings.
6. Select **-** to remove event meetings.

7. Click **SAVE** to commit your changes to the database or go to the **Meeting Resource Template** page.

MEETING RESOURCE TEMPLATE

1. Click the **Meeting Resource Template** tab.
2. The **Meeting Resource Template** page is displayed.

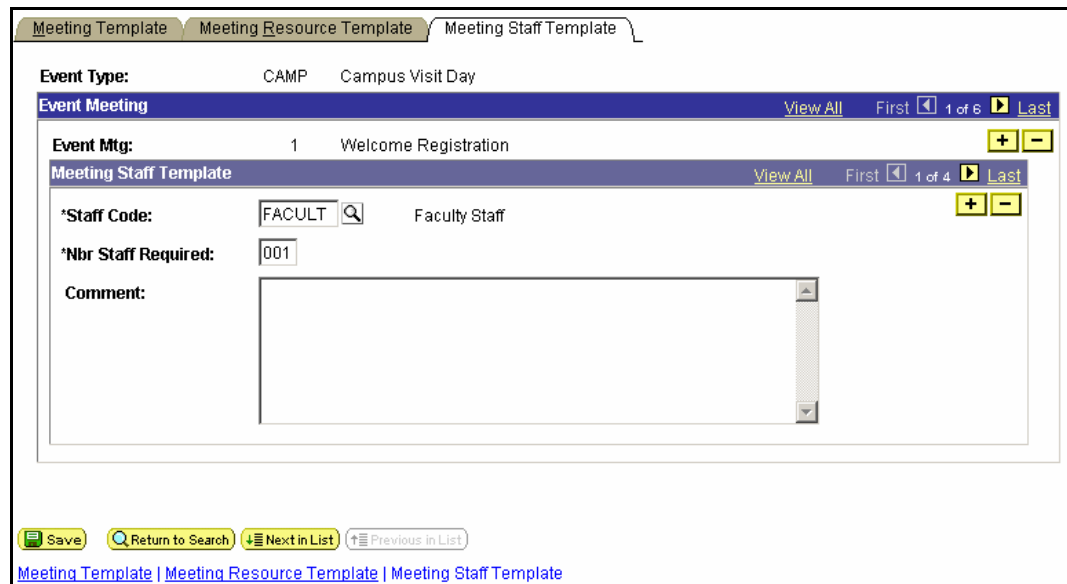


The screenshot shows a web application interface with three tabs: 'Meeting Template', 'Meeting Resource Template' (selected), and 'Meeting Staff Template'. The 'Event Meeting' section shows 'Event Type: CAMP Campus Visit Day' and 'Event Mtg: 1 Welcome Registration'. Below this is the 'Meeting Resource Template' section, which includes a search field for 'Resource Code' containing 'BANNER', a 'Number of Resources' input field, and a 'Comment' text area. Navigation buttons like 'View All', 'First', and 'Last' are visible. At the bottom, there are buttons for 'Save', 'Return to Search', 'Next in List', and 'Previous in List', along with a breadcrumb trail: 'Meeting Template | Meeting Resource Template | Meeting Staff Template'.

3. **Resource Code:** Enter the resource code or select the code from the lookup table that is required for this meeting.
4. **Number of Resources:** Enter the number or quantity of the resource required for this meeting.
5. **Comment:** Enter comments to further identify or describe this resource.
6. Click **View All** to view all meeting resources.
7. Select **+** to add additional meeting resources.
8. Select **-** to remove meeting resources.
9. Click **SAVE** to commit your changes to the database or go to the **Meeting Staff Template** page.

MEETING STAFF TEMPLATE

1. Click the **Meeting Staff Template** tab.
2. The **Meeting Staff Template** page is displayed.



The screenshot shows a web application interface with three tabs: 'Meeting Template', 'Meeting Resource Template', and 'Meeting Staff Template'. The 'Meeting Staff Template' tab is active. The form contains the following fields and controls:

- Event Type:** CAMP Campus Visit Day
- Event Meeting:** 1 Welcome Registration (with 'View All', 'First', '1 of 6', and 'Last' navigation links)
- Meeting Staff Template:** (with 'View All', 'First', '1 of 4', and 'Last' navigation links)
- *Staff Code:** FACULT (with a search icon and 'Faculty Staff' text)
- *Nbr Staff Required:** 001
- Comment:** (a large text area)

At the bottom of the form, there are buttons for 'Save', 'Return to Search', 'Next in List', and 'Previous in List'. Below the buttons are links for 'Meeting Template', 'Meeting Resource Template', and 'Meeting Staff Template'.

3. **Staff Code:** Enter the staff code or select the code from the lookup table that is required for this meeting.
4. **Number Staff Required:** Enter the number of this type of staff required for this meeting.
5. **Comment:** Enter comments to further describe or identify the staff required for the meeting.
6. Select **+** to add additional meeting staff.
7. Select **-** to remove meeting staff.
8. Click **SAVE** to commit your changes to the database.

SET UP MEETINGS FOR AN EVENT

1. **Navigation:** Home > Build Community > Events > Use > Meetings

2. **Find an Existing Value**

- a. Enter the values by which you would like to search. Event ID, Event Type, Academic Institution, or Description.
- b. Click **Search**. A list of values that meet your search criteria will be displayed.
- c. Click on the meeting you wish to update.

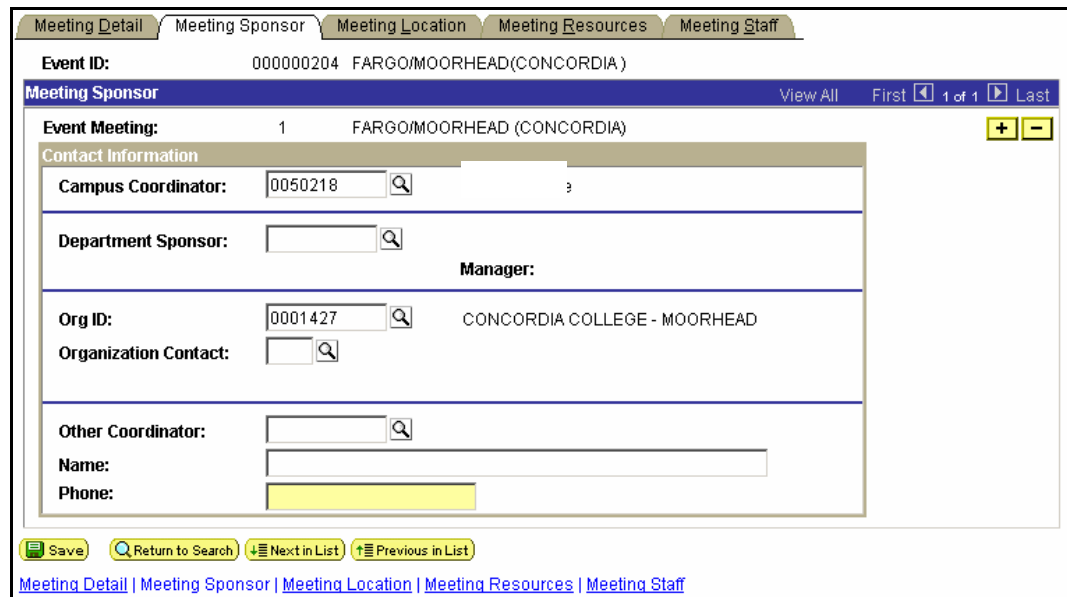
MEETING DETAIL

1. The **Meeting Detail** page is displayed.

2. At least one meeting is required to be set up for each event.
3. **Event Meeting:** The system automatically enters the next sequential number for each meeting that you add. You can override the number to reorder the list of meetings. When you return to the page, the meetings will be in the specified order.
4. **Primary Meeting:** When selected, indicates that this is the primary meeting for this event.
5. **Campus Meeting Type:** The meeting type that best describes this meeting. Values for this field are delivered with your system. You can modify these.
6. **Meeting Date:** The date when this meeting is scheduled to occur.
7. **Day of the Week:** The day of the week when this meeting is scheduled to occur. The system automatically displays the day of the week when you exit the *Meeting Date* field.
8. **Meeting Start Time:** The time when this meeting is scheduled to begin. The system assumes the time is *AM*. If not, you must enter *PM*.
9. **End Time:** The time when this meeting is scheduled to end. The system assumes the time is *AM*. If not, you must enter *PM*.
10. **Contact Minutes:** The length or duration of this meeting. The system calculates the contact time based on the meeting start and end times. The system recalculates the contact minutes each time that you change the start or end time. You can override the calculated minutes value.
11. **Expected Attendance:** The number of attendees expected at this meeting.
12. **Maximum Attendance:** The maximum number of attendees that can be accommodated for this meeting.
13. **Number of Attendees:** The number of attendees invited to this meeting. The system displays the number of invited attendees assigned to this meeting on the Event Attendees page.
14. **Comments:** Comments to further identify or describe this meeting.
15. Select to add additional meeting detail.
16. Select to remove meeting detail.
17. Click **SAVE** to commit your changes to the database or go to the **Meeting Sponsor** page.

MEETING SPONSOR

1. Click the **Meeting Sponsor** tab.
2. The **Meeting Sponsor** page is displayed.



Meeting Detail Meeting Sponsor Meeting Location Meeting Resources Meeting Staff

Event ID: 000000204 FARGO/MOORHEAD(CONCORDIA)

Meeting Sponsor View All First 1 of 1 Last

Event Meeting: 1 FARGO/MOORHEAD (CONCORDIA) + -

Contact Information

Campus Coordinator: 0050218

Department Sponsor: Manager:

Org ID: 0001427 CONCORDIA COLLEGE - MOORHEAD

Organization Contact:

Other Coordinator:

Name:

Phone:

Save Return to Search Next in List Previous in List

[Meeting Detail](#) | [Meeting Sponsor](#) | [Meeting Location](#) | [Meeting Resources](#) | [Meeting Staff](#)

3. **Campus Coordinator:** The default Campus Coordinator is displayed. To change the default, select the Campus Coordinator from the lookup table. This is the individual at your institution who is responsible for, or should be contacted regarding, this meeting.
4. **Department Sponsor:** Enter the Department Sponsor or select the department from the lookup table. This is the department at your institution that is responsible for this meeting.
5. **Organization ID:** The default Organization ID is displayed. To change the default, select the organization ID from the lookup table. This is the organization that is responsible for this meeting
6. **Organization Contact:** Enter the Organization Contact or select the contact person from the lookup table. This is the individual in the responsible organization whom your institution should contact regarding this meeting.
7. **Other Coordinator, Name, and Phone:** If desired, you can enter an additional individual at your institution who is responsible for, or can be contacted regarding, this meeting. Use the lookup table to select the individual, if necessary.

8. Select **+** to add additional meeting sponsors.
9. Select **-** to remove meeting sponsor.
10. Click **SAVE** to commit your changes to the database or go to the **Meeting Location** page.

MEETING LOCATION

1. Click the **Meeting Location** tab.
2. The **Meeting Location** page is displayed.

3. **Campus Facility:** When selected indicates that the location for this meeting is a campus facility.

4. **Facility ID:** When you select *Campus Facility*, the system provides the Facility ID field with a prompt list of facility IDs from the Facility Table page. Select the Facility ID from the lookup table.

- External Organization Facility:** When selected indicates that the location for this meeting is a facility at or arranged by an external organization. When you select External Org Facility option, the system displays the organization ID and description from the Meeting Sponsor page.

- External Org Location:** When you select *External Org Facility* option, the system provides the External Org Location field with a prompt list of locations for the organization from the Organization Locations page. When you select a location number, the system displays the address for that location.
- Other Facility:** When selected, indicates that the location for this meeting is a facility other than at your campus or at an external organization in your database.

- Country:** Select the Country from the lookup table and then the required fields to complete the address will be displayed. Enter the data as required.

9. Select **+** to add additional meeting locations.
10. Select **-** to remove meeting location.
11. Click **SAVE** to commit your changes to the database or go to the **Meeting Resources** page.

MEETING RESOURCES

1. Click the **Meeting Resources** tab.
2. The **Meeting Resources** page is displayed.

Meeting Detail Meeting Sponsor Meeting Location Meeting Resources Meeting Staff

Event ID: 00000204 FARGO/MOORHEAD(CONCORDIA)

Event Meeting View All First 1 of 1 Last

Event Mtg: 1 FARGO/MOORHEAD (CONCORDIA) + -


Meeting Resources View All First 1 of 1 Last

*Rsrce Nbr	Quantity	*Resource Code	Description
1	2	BANNER	Registration Table Banner

Save Return to Search Next in List Previous in List

Meeting Detail | Meeting Sponsor | Meeting Location | Meeting Resources | Meeting Staff

3. **Resource Number:** This is the number of this resource in the list of resources for this meeting. The system automatically enters the next sequential number for each resource that you add. You can override the number to reorder the list of resources. When you return to the page, the resources are in the specified order.
4. **Quantity:** Enter the number or quantity of the resource required for this meeting.
5. **Resource Code:** Enter the type of resource or select the code from the lookup table that is required for this meeting.
6. **Description:** Enter a brief description to further identify or describe this resource.
7. Select **+** to add additional meeting resources.

8. Select  to remove meeting resource.
9. Click **SAVE** to commit your changes to the database or go to the **Meeting Staff** page.

MEETING STAFF

1. Click the **Meeting Staff** tab.
2. The **Meeting Staff** page is displayed.

The screenshot shows the 'Meeting Staff' page for event ID 00000204. The 'Event Meeting' section shows '1 FARGO/MOORHEAD (CONCORDIA)'. The 'Meeting Staff' table contains one record:

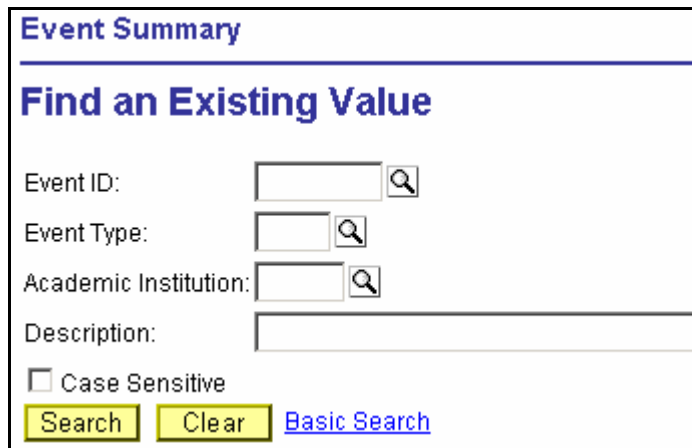
*Staff Nbr	ID	Name	Staff Code	Task Description	Hours Required
1	0050218				12.00

3. **Staff Number:** The system automatically assigns the next sequential number to each staff member that you add. You can override these numbers to rearrange the order of the staff. When you return to the page, the staff members are in the specified order.
4. **ID:** Enter the ID of the staff member responsible for this task.
5. **Name:** The system automatically displays the individual's name when you select the ID.
6. **Staff Code:** Enter the type of staff required for this meeting.
7. **Task Description:** Enter the task that the staff member is required to perform or participate in for this meeting.
8. **Hours Required:** Enter the number of hours that the responsible individual is required to perform or participate in this task.

9. Select **+** to add additional meeting staff.
10. Select **-** to remove meeting staff.
11. Click **SAVE** to commit your changes to the database.


WALKTHROUGH – VIEW EVENT SUMMARY


1. **Navigation:** Home > Build Community > Events > Inquire > Event Summary
2. The **Event Summary – Find an Existing Value** page is displayed.




Event Summary

Find an Existing Value

Event ID: 

Event Type: 

Academic Institution: 

Description:

Case Sensitive

Search **Clear** [Basic Search](#)

3. **Find an Existing Value**
 - a. Enter the values by which you would like to search. Event ID, Event Type, Academic Institution, or Description.
 - b. Click **Search**. A list of values that meet your search criteria will be displayed.
 - c. Click on the meeting you wish to view.

EVENT MEETING

1. The **Event Meeting** page is displayed.

The screenshot shows a web application interface with four tabs: "Event Meeting", "Event Attendee", "Event Meeting Attendees", and "Event Attendee Meeting". The "Event Meeting" tab is active. Below the tabs, the "Event ID" is 000000205 and the "Event Type" is College Fa. A section titled "Event Meeting Info" contains a table with the following data:

Event Mtg	Description	Mtg Type	Mtg Dt	Day of the Week	Mtg Start
1	WADENA COLLEGE FAIR	Fair	09/24/2002	Tuesday	9:00AM

Navigation buttons include "Return to Search", "Next in List", and "Previous in List". A breadcrumb trail at the bottom reads: "Event Meeting | Event Attendee | Event Meeting Attendees | Event Attendee Meeting".

2. This page is for viewing purposes only. You cannot enter or modify data here.
3. Click on the **Event Attendee** tab.

EVENT ATTENDEE

1. The **Event Attendee** page is displayed.

The screenshot shows the same web application interface with the "Event Attendee" tab active. The "Event ID" is 000000205 and the "Event Type" is College Fa. A section titled "Event Attendee Info" contains a table with the following headers:

Attendee	Name	Guest of Attendee	Guest Relationship
----------	------	-------------------	--------------------

Navigation buttons include "Return to Search", "Next in List", and "Previous in List". A breadcrumb trail at the bottom reads: "Event Meeting | Event Attendee | Event Meeting Attendees | Event Attendee Meeting".

2. This page is for viewing purposes only. You cannot enter or modify data here.
3. Click on the **Event Meeting Attendees** tab.

EVENT MEETING ATTENDEES

1. The **Event Meeting Attendees** page is displayed.

2. **Event Meeting:** The number of the meeting whose attendees you want to review. An event meeting number is required.
3. **Sort By:** Click on the option that represents how you want the system to sort the results:
 - a. Attendee Number
 - b. Name
 - c. Country, State, City
 - d. Organization
 - e. Status
4. Click **Search** to launch the search based on the criteria that you selected.
5. The **Meeting Attendees Information** results are displayed.

Meeting Attendees Info				First	1-2 of 2	Last
Attendee Name	Cntry	St	City	Org Affiliation	Status	
00001	USA	CA	Glendale		Not Attn	
00002	USA	IL	Downers Grove		Will Attn	

6. Click on the **Event Attendee Meeting** tab.

EVENT ATTENDEE MEETING

1. The **Event Attendee Meeting** page is displayed.

2. **Attendee:** The attendee number of the attendee whose meetings you want to review. An attendee number is required.
3. **Sort By:** Click on the option that represents how you want the system to sort the results:
 - a. Campus Meeting Number
 - b. Meeting Description
 - c. Date/Time
 - d. Status
4. Click **Search** to launch the search based on the criteria that you selected.
5. The **Attendees Meeting Information** results are displayed.

Attendee Meeting Info							First	1-4 of 4	Last
Mtg Nbr	Description	Mtg Dt	Start	End	Location:	Status			
1	Friends of Library Reception	10/10/2002	4:00PM	6:00PM	Other Facility	Will Attnd			
2	Alumni Assoc Tailgate Party	10/12/2002	10:00AM	4:00PM	Other Facility	Invited			