

HOW TO – Create an Event Form – Simple RSVP

Version: 1.0 - Date Last Updated: 9-Jul-14

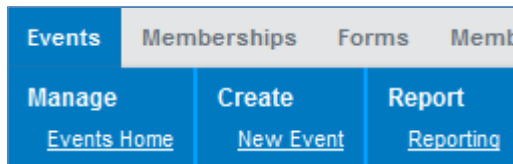


Introduction

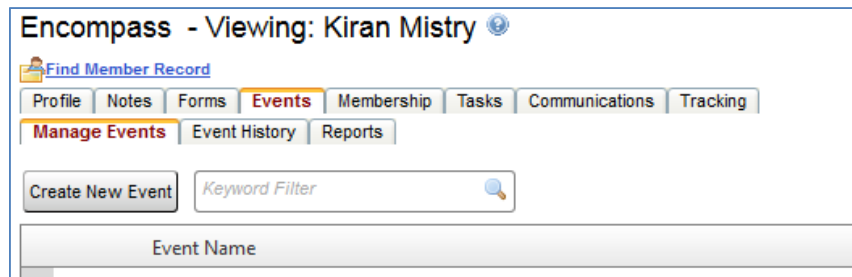
This document provides step by step instructions on how to create a simple RSVP event form. With this form users are required to RSVP for the event to be registered. Activities cannot be added to the event. In the example below we have created an event form for a Happy Hour.

Create an Event

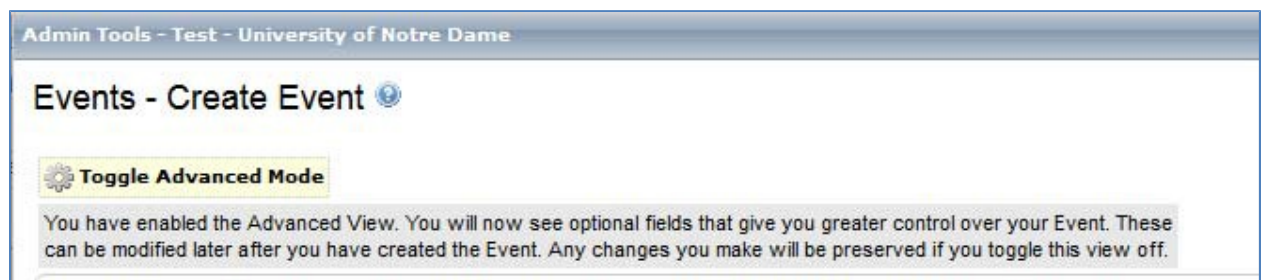
1. From the iModules toolbar click **Event, Event Home**.



2. Click the **Create New Event** button.



3. Click the **Toggle Advance Mode** button to see the advanced options.



4. Complete the required choices on the first section of the form:
 - a) Give your event a name.

- b) Create a **Custom URL** if required – this custom URL can be used in emails to advertise your event.
- c) Choose the calendars and event listings where you want this event displayed on your website. You can choose more than one calendar/event listing by holding down your <Ctrl> key when making your selections.
- d) Choose at least the **Enable Identity Checkpoint** option so that when users register they are matched with their record if their email matches one on myNotreDame. You also have the option to require the user to login to myNotreDame before they can complete the form.
- e) Choose whether you want users to be able to add comments about the event when they register.

Toggle Advanced Mode

You have enabled the Advanced View. You will now see optional fields that give you greater control over your Event. These can be modified later after you have created the Event. Any changes you make will be preserved if you toggle this view off.

Event Name: ?
Monthly Happy Hour July *

Event Listing / Calendar: ?

Event Homepage Listing
Event Listing

Use Ctrl or Shift keys to multi-select.

Custom URL: ?
http://und-test.imodules.com/ ho-july

☐ Allow publishing to Facebook with this form. ?
☒ Enable Identity Checkpoint for this form ?
☒ Do Not Save Form Data if the (non-logged in) user does not complete the form ?
☒ Display breadcrumbs ?
☐ Pre-populate user profile data from return link ?

Display Audience: ?

☒ Everyone
☐ Logged In
☐ Role

Form Audience: ?

☒ Everyone
☐ Ask unregistered users to create a Non-Member account before continuing
☒ Allow unregistered users direct access to the form
☒ Log out non-members after form completion
☐ Logged In
☐ Role

User Comments:
☒ Allow users to comment ?

5. Complete the required choices on the second section of the form.

- a) Enter the start and end date for the event.
- b) Enter a start and end time for the event.
- c) You can change the time zone if required although it will default to your club location.
- d) Enter a display range for your event to control when the event should be displayed and when it should be removed from view from your website.

Start Date: 7/17/2014 * End Date: 7/17/2014 *

Start Time: 6:00 PM End Time: 8:00 PM

Time Zone: (GMT - 05:00) Eastern Time (US & Canada) (ET)

Display Range: ? 6/28/2014 to 7/18/2014

6. The upload image is not currently available in club communities.

Upload an image

Follow the directions below to add an image. The image must be less than 300KB in size, and in a JPEG or GIF format (file types .gif, .jpg, .jpe, or .jpeg).

- Click the **Browse** button.
- Locate the image file you want to upload on your local hard drive.

Thumbnail Image: No file selected.

7. In the **Create a new event** section choose the relevant options.
- a) Choose **Simple RSVP**.
 - b) Enter a registration start and end date to control when users can register for this event.
 - c) Decide whether registrants can bring guests by checking or unchecking this option.

Create a new event

Event Registration Model [?](#)

The registration model can be changed on an event until submissions have been received.

☐ **Form-Driven**
Users who complete the event form will be registered as attending. Fee and activity are not required. Activities can be added with or without fees.

☐ **Fee-Driven**
Users are required to pay a registration fee on the main event to register. Events with donations supported in this model. Activities with or without fees can be added.

☐ **Activity-Driven**
Users who register for any activity are registered for the event. Fees can be collected on activities.

☒ **Simple RSVP**
Users are required to RSVP for the event to be registered. Activities cannot be added to the event.

☐ **Legacy**
The legacy events option will allow admins to create events using the old RSVP and Ticket-Based registrations.

Registration Date Range

Start Date: End Date:

Guests

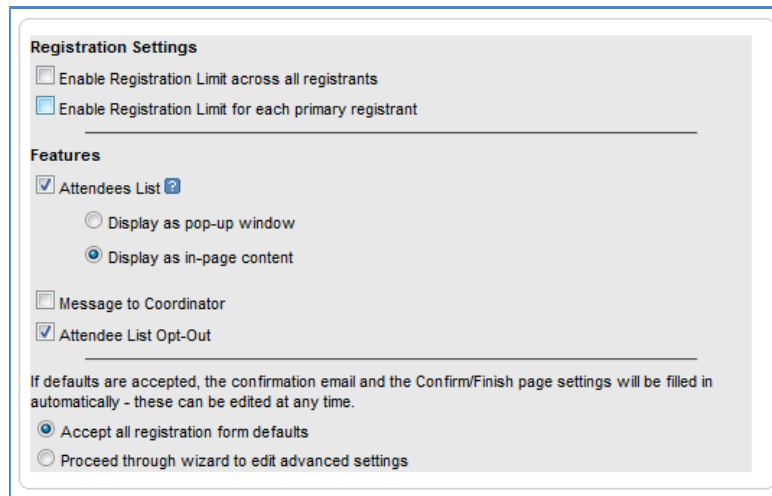
☒ Allow registrants to bring guests

Detail Page Layout [?](#)

* Standard Event Center

8. Select the required options under **Registration Settings** section of the form.
- a) Enter any limits on total registrants or limits per registration.
 - b) Decide how you want your **Attendees List** to be displayed.
 - c) Decide if you would like the registrant to be able to add a message to the coordinator.
 - d) Decide whether you want registrants to be able to opt-out of the attendee list.

- e) Leave the last option set to **Accept all registration form defaults**.



The Registration Settings dialog box contains the following options:

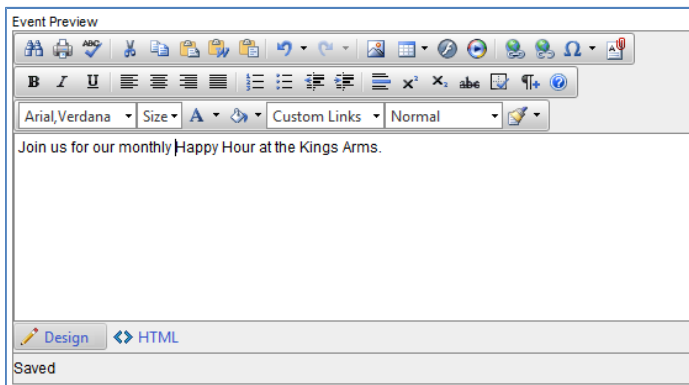
- Registration Settings**
 - ☐ Enable Registration Limit across all registrants
 - ☐ Enable Registration Limit for each primary registrant
- Features**
 - ☒ Attendees List
 - ☐ Display as pop-up window
 - ☒ Display as in-page content
 - ☐ Message to Coordinator
 - ☒ Attendee List Opt-Out
- At the bottom, a note states: "If defaults are accepted, the confirmation email and the Confirm/Finish page settings will be filled in automatically - these can be edited at any time."
- Two radio buttons at the bottom:
 - ☒ Accept all registration form defaults
 - ☐ Proceed through wizard to edit advanced settings

9. Click the **Create** button.

Event Center Content

In this this section of the form you will add your event details.

1. In the **Event Preview** editing box add a short teaser for your event. This is the text the registrant will see on the calendar or the event listing before they see the full details of your event.

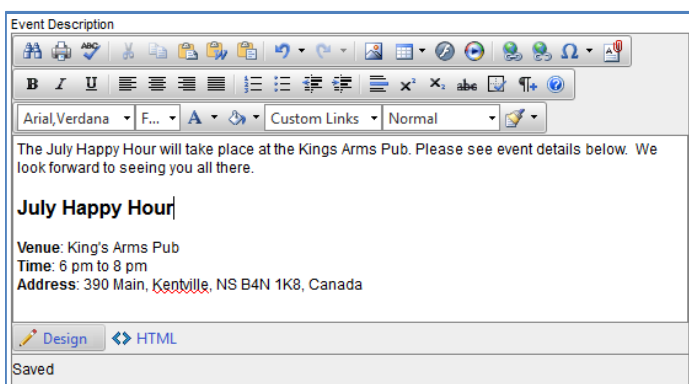


The Event Preview editing box shows a rich text editor with the following content:

Join us for our monthly Happy Hour at the Kings Arms.

At the bottom, there are tabs for "Design" (selected) and "HTML", and a "Saved" status indicator.

2. In the **Event Description** editing box add all the details for the event.



The Event Description editing box shows a rich text editor with the following content:

The July Happy Hour will take place at the Kings Arms Pub. Please see event details below. We look forward to seeing you all there.

July Happy Hour

Venue: King's Arms Pub
Time: 6 pm to 8 pm
Address: 390 Main, Kentville, NS B4N 1K8, Canada

At the bottom, there are tabs for "Design" (selected) and "HTML", and a "Saved" status indicator.

3. Add the contact information of the person registrants should contact if they have questions about the event.

Contact 1	Contact 2
First Name Bob	First Name
Last Name Anderson	Last Name
Title	Title
Address	Address
Address 2	Address 2
City	City
State	State
Postal Code	Postal Code
Phone	Phone
Fax	Fax
E-mail bob_anderson89@gmail.com	E-mail

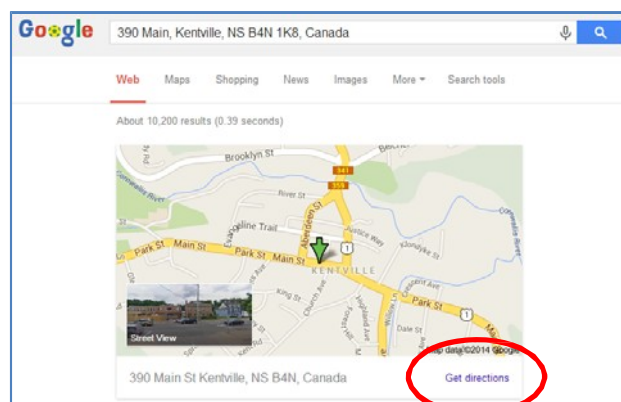
4. Enter the name of the event venue in the **Location Name** box.

Location
Location Name Kings Arms Pub

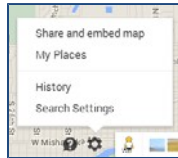
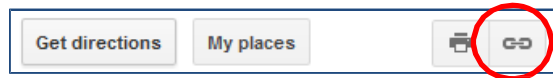
5. In the **Directions** box you can add written directions to the event venue or you can embed a Google map using the following instructions.
 - a) Open a new tab on your browser. Type in the address of your venue and hit the <Enter> key.

  390 Main, Kentville, NS B4N 1K8, Canada

- b) Click the result which allows you to get directions to the event venue.



- c) Click the link icon.



Note: With Google Chrome you will need to click the gear symbol on the bottom right of the page and choose **Share and embed map**. Then click the **Embed map** option to see the embed code

- d) Select and copy the HTML code from the box labelled **Paste HTML to embed in website**.

Paste link in email or IM ×

☐ Short URL [Learn more](#) [Send](#)

<https://maps.google.com/maps?q=390+Main,+Kent>

Paste HTML to embed in website

`<iframe width="425" height="350" frameborder="0" >`

By embedding this map, you agree to the [terms of service](#).

- e) Go back to your event form. Select the **HTML** view on the **Directions** editing box and paste the code you copied from the website into the box.

Directions

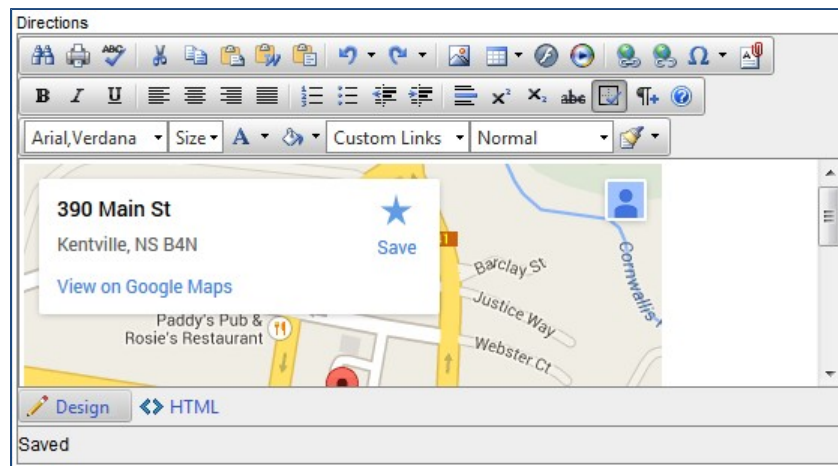
Toolbar: Print, Copy, Paste, Undo, Redo, Find, etc.

Font: Arial, Verdana | Size: 12 | Color: A | Custom Links | Normal

`&q=390+Main,+Kentville,+NS+B4N+1K8,+Canada&ie=UTF8&hq=&
&hnear=0x4b5857282bd52f33:0x96519e2b0a1beb18,390+Main+St,+Kentville,+NS+B4N,+Canada&
&gl=us&daddr=390+Main+St,+Kentville,+NS+B4N,+Canada&t=m&
&ll=45.077153,-64.495754&spn=0.006295,0.008915&output=embed"></iframe><br
</><small><a href="https://maps.google.com/maps?oe=utf-8&client=firefox-a&channel=fflb&
&q=390+Main,+Kentville,+NS+B4N+1K8,+Canada&ie=UTF8&hq=&
&hnear=0x4b5857282bd52f33:0x96519e2b0a1beb18,390+Main+St,+Kentville,+NS+B4N,+Canada&
&gl=us&daddr=390+Main+St,+Kentville,+NS+B4N,+Canada&t=m&
&ll=45.077153,-64.495754&spn=0.006295,0.008915&source=embed" style="color:#0000FF;
text-align:left">View Larger Map</small>`

[Design](#) [HTML](#)

- f) Click **Design** view to see your embedded map.



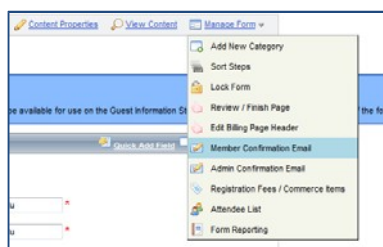
6. Click the **Next** button.

7. Your Event Form will be displayed.

Editing the Event Form Exit Settings

You can edit the event exit settings by making changes to the confirmation emails and exit pages of the event form.

1. Click the **Manage Form** link.



2. Click the **Member Confirmation Email**. This is the email confirmation message your members will receive after they register.

You have the option to change the **From name** and **From E-mail** to include your club name and email. You can also edit this message to personalize it for your members. Be sure not to remove the text in square bracket as these are markers that will pull data from the registration form.

3. Click the **Save** button.
4. You can edit the **Admin Confirmation Email** too. This is also located under the **Manage Form** link. You probably don't need to edit the message on this email but you may want to change who receives this email. Click the **Save** button if you make any changes
8. You may also want to make changes to the **Review and Finish** page which is also located under the **Manage Form** link. Here you can change messaging and buttons that the user will use as they complete the registration. You can also choose the URL the registrant is directed to after they complete the registration. Make the necessary changes and click the **Save** button.
9. Click the **Event Home** button to navigate the event registration page.

The screenshot shows the 'Event - Member Confirmation Email' configuration page. It includes fields for 'From Name' (Notre Dame Club of Toronto) and 'From E-mail' (ndtoronto@alumni.nd.edu). There is a checkbox for 'Check here to add others to receive copies of this email'. Below are tabs for 'Yes Confirmation' and 'No Confirmation'. The 'Yes' confirmation subject is 'Test - University of Notre Dame - Monthly Happy Hour July'. There is a 'Token List' dropdown and a rich text editor for the 'Yes' confirmation email body. The email body text is: 'Thank you for registering for this event. We look forward to seeing you soon. You have registered for [Form Name]. The details are below. [Event Summary]'. The editor has a toolbar with various formatting options and a font set to Verdana.

The screenshot shows the 'Monthly Happy Hour July' event registration page. At the top is a navigation bar with links: 'Form & Data', 'Content Properties', 'Route Layout', 'View Mode', and 'Save Changes'. The main heading is 'Monthly Happy Hour July' with a 'Registration' button. Below is the 'Event Description - Monthly Happy Hour July' section, which states: 'The July Happy Hour will take place at the Kings Arms Pub. Please see event details below. We look forward to seeing you all there.' The 'July Happy Hour' section lists: 'Venue: King's Arms Pub', 'Time: 6 pm to 8 pm', and 'Address: 390 Main, Kentville, NS B4N 1K3, Canada'. There are two side-by-side boxes: 'Contact Information' (Primary Contact: Bob Anderson, bob_anderson89@gmail.com) and 'Date & Location' (Date: 7/17/2014, Time: 6:00 PM to 8:00 PM, Location: Kings Arms Pub). Below these is a Google Map showing the location at 390 Main St, Kentville, NS B4N. The map includes a 'Save' button and a 'View on Google Maps' link. At the bottom is a comment section with a profile picture placeholder, a text input field 'Add a comment...', and a 'Comment' button. A Facebook social plugin is visible at the very bottom.

10. If you click the **Registration** button you will see the registration form.

Monthly Happy Hour July

Registrant → [Guests](#) → [Finish](#)

Registrant

First Name

Kiran

*

Last Name

Mistry

*

Preferred Email *

Email

kmistry@nd.edu

*

Confirm

kmistry@nd.edu

*

Are you attending?

☒ Yes

☐ No

*

Please do not show name on the attendee list

☐

Event Home

Next