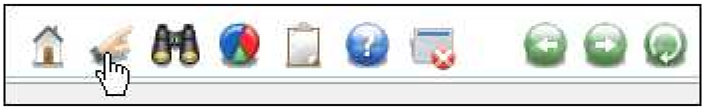
Event Maintenance

Creating A New Event

1. Click on the Admin tab.



2. Type "EVTNEW" in the text box next to Go To Application.

Note: Do not include the quotation marks when you type EVTNEW.

3. Click on Go.

Adding Event Details

1. (required) Type the name of the event in the text box next to Event Name.

Note: The recommended format for naming is "Unit Abbreviation: event name (date or year)". Example: Booth: Economic Stimulation Lecture (2008).

2. (required) Click on the drop-down arrow next to Type and select the event type.
3. (required) Click on the drop-down arrow next to Unit and select the unit or department that is holding the event.
4. (required) Click on the drop-down arrow next to Status and select Open.
5. (required) Click on the drop-down arrow next to Purpose and select the purpose of the event.
6. (conditional requirement) Click on the drop-down arrow next to Account Number if there will be fees associated with the event and select the account the fees will be applied to.
7. (required) Click on the drop-down arrow next to Venue Code and select the appropriate venue location.
8. (required) Type the actual location of the event in the text box next to Venue.
9. (required) Click on the drop-down arrow next to Venue State/Prov if the venue is off campus and select the appropriate state or province.
10. (required) Click on the drop-down arrow next to Metro Code and select the Metro Code of the event venue.

Note: For foreign events, use Metro Code 99. For domestic events, look up the zip code of the venue to identify the best selection from existing metro codes.

11. (required) Click on the drop-down arrow next to Country and select the country of the event venue
12. (optional) Type a percentage value in the text box next to Warning % to get a warning when you are at that amount away from reaching capacity of the venue.
13. (optional) Type the maximum capacity of the venue location in the text box next to Capacity.
14. (required) Click on the drop-down arrow next to Start Date and select the day the event begins OR type the date the event begins in the text box in the following format: MM/DD/YYYY.
15. (required) Click on the drop-down arrow next to Start Time and select the time the event starts OR type the time the event begins in the text box in the following format: HH:MM AM/PM.

Note: If the event spans multiple days, enter the time the first event begins on the first day of the event.

16. (required) Click on the drop-down arrow next to Stop Date and select the day the event ends OR type the date the event ends in the text box in the following format: MM/DD/YYYY.
17. (required) Click on the drop-down arrow next to Stop Time and select the time the event ends OR type the time the event ends in the text box in the following format: HH:MM AM/PM.

Note: If the event spans multiple days, enter the time the last event ends on the last day of the event.

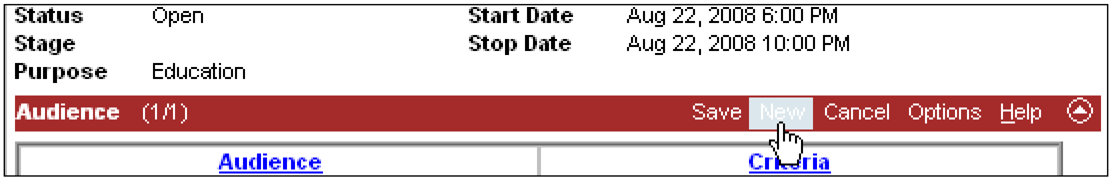
18. (required) Leave the check box checked next to Active
19. (required) Click on the drop-down arrow next to Planning Start and select the day the event planning begins (either today's date or previous) OR type the date the event planning begins in the text box in the following format: MM/DD/YYYY.
20. (optional) Type any additional notes in the text box next to Note.
21. Click on Save.

Event Maintenance

Adding an Audience

Note: You must first have the event displayed in the application frame.

1. Click on Audience in the Navigation tree.
2. Click on New.



3. Click on the drop-down arrow next to Audience and select the type of audience the event is geared toward.

Note: You can add as many audience types as you need by repeating these steps.

4. Type the criteria used to determine the audience in the text box next to Criteria.

Note: A tip is to perform your GrifFind and copy the criteria into this field.

5. Click on Save.

Adding Staff and Volunteers

Note: You must first have the event displayed in the application frame.

1. Click on Vol/Staff in the Navigation tree.
2. Click on New.
3. Type in your Entity ID in the text box next to Staff ID OR click in the text box and press F2, complete a GrifFind for yourself, display and click on the elliptical button next to your record.
4. (optional) Click on the drop-down arrow next to Role and select the role you will have in the event.
5. (optional) Type any notes in the text box next to Note.
6. Click on Save.
7. Repeat for each event volunteer or staff member.

Adding Fees

Note: You must first have the event displayed in the application frame.

Note: You always begin with one Fee type of No Fee.

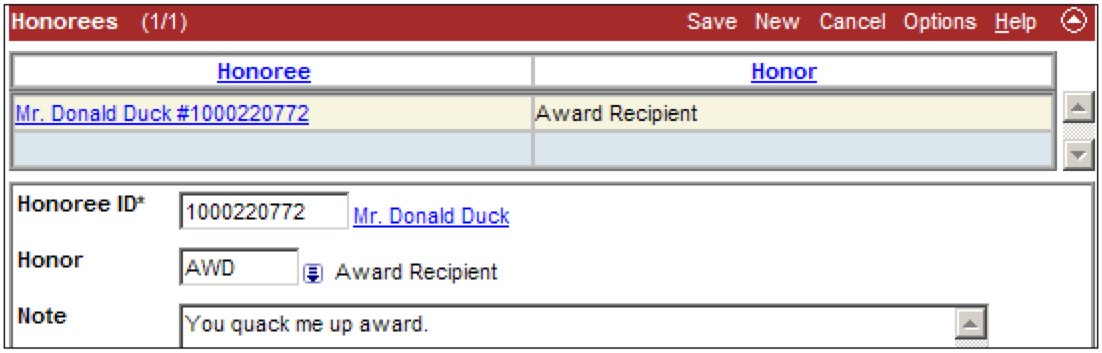
1. Click on Fees in the Navigation tree.
2. Click on New.
3. Type a description of the fee in the text box next to Short Desc.
4. (optional) Type a thorough description of the fee in the text box next to Long Desc.
5. Click on the drop-down arrow next to Fee Code and select the type of fee you are creating.
6. Type the amount of the fee in the text box next to Fee Amount.
7. (optional) Click on the check-box next to default to make this the fee that will automatically be displayed on each registration.

Note: There can only be one Default fee type per event.

8. (optional) Type any notes regarding the fee in the text box next to Note.
9. Click on Save.
10. Repeat for each fee type.

Event Maintenance

Adding Honorees



Note: You must first have the event displayed in the application frame.

1. Click on Honorees in the Navigation tree.
2. Click on New.
3. Type in the Entity ID of the entity that is being honored at the event in the text box next to Honoree ID OR click in the text box and press F2, complete a GrifFind for the invitee, display and click on the elliptical button next to their record.
4. (optional) Click on the drop-down arrow next to Honor and select the type of honor that is being designated or given.
5. (optional) Type any notes regarding the honoree or honor in the text box next to Note.
6. Click on Save.

Adding Sponsors

Note: You must first have the event displayed in the application frame.

1. Click on Sponsors in the Navigation tree.
2. Click on New.
3. Type in the Entity ID of the entity that is sponsoring the event in the text box next to Sponsor ID OR click in the text box and press F2, complete a GrifFind for the invitee, display and click on the elliptical button next to their record.
4. (optional) Click on the drop-down arrow next to Sponsorship and select the type of sponsorship that is being provided.
5. (optional) Type in the dollar amount provided by the sponsor.
6. (optional) Type any notes regarding the sponsor or sponsorship in the text box next to Note.
7. Click on Save.

Event Maintenance

Generating an Invitation List

Note: You must first have the event displayed in the application frame.

1. Click on Invitations in the Navigation tree.
2. Click on New.
3. Click on the drop-down arrow next to Type and select the type of invitation you will be sending.
4. (optional) Type in the Entity ID of the entity that will be signing the invitation in the text box next to Signer ID OR click in the text box and press F2, complete a GrifFind for the signer, display and click on the elliptical button next to their record.
5. Type a description for the invitation in the text box next to Description.
6. (optional) Type any notes regarding the invitation in the text box next to Note.
7. (optional) Type the estimated number of invitations you will be sending out in the text box next to Invitation Estimate. (If a couple is invited, this will be counted as one invitation.)
8. (optional) Type the estimated number of people and/or organizations you will be inviting to the event in the text box next to Invitee Estimate. (If a couple is invited, this will be counted as two invitees.)
9. Click on Save.
10. Complete the steps below for doing a mass invitation or manual invitation list.
11. Repeat for each invitation type.

Generating a Manual Invitation List

Note: You must first have the event invitation displayed in the application frame.

1. Click on Invitees.

2. Click on New.
3. Type in the Entity ID of the entity that will be invited in the text box next to Invited ID OR click in the text box and press F2, complete a GrifFind for the invitee, display and click on the elliptical button next to their record.
4. (optional) Click on the check box next to Couple if you want to couple this invitee with their spouse or partner.
5. (optional) Type in the Entity ID of the spouse or partner of the entity that will be invited in the text box next to Invited ID OR click in the text box and press F2, complete a GrifFind for the invitee, display and click on the elliptical button next to their record.
6. (optional) Type in the Entity ID of the entity that will be signing the invitation in the text box next to Signer ID OR click in the text box and press F2, complete a GrifFind for the signer, display and click on the elliptical button next to their record.
7. Click on the drop-down arrow next to Status and select Invited.
8. Click on the drop-down arrow next to Date and select the date the list will be sent invitations.
9. (optional) Type the salutation to use for this invitee in the text box next to Salutation.
10. (optional) Type any notes regarding the invitee in the text box next to Note.
11. Click on Save.
12. Repeat for each manual invitee.
13. Click on Close.

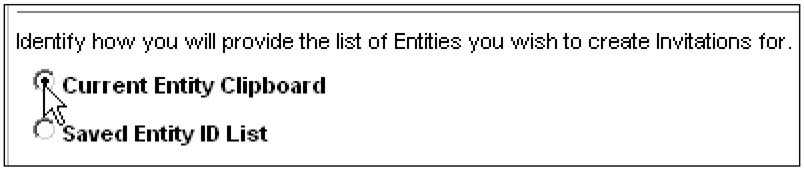
Event Maintenance

Generating a Mass Invitation List

Note: You must first have the event invitation displayed in the application frame.

Note: It is helpful to have the list of invitees displayed on the active clipboard.

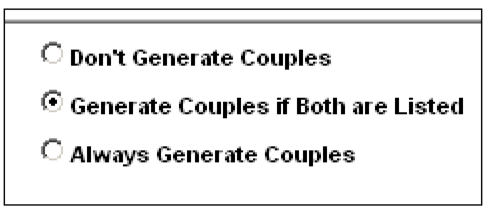
1. Click on Mass Invite.
2. Click on the desired radio button to choose the list to use, clipboard or saved ID list.



If you choose to use a Saved ID List:

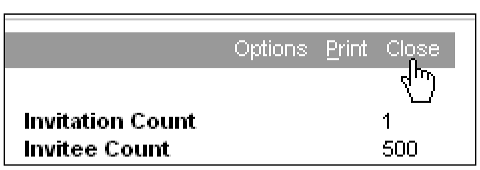
   a. Click on the radio button next to the list you want to invite, and then click on OK.

3. Click on the drop-down arrow next to Status and select Invited.
4. Click on the drop-down arrow next to Date and select the date the list will be sent invitations.
5. (optional) Type in the Entity ID of the entity that will be signing the invitation in the text box next to Signer ID OR click in the text box and press F2, complete a GrifFind for the signer, display and click on the elliptical button next to their record.
6. (optional) Type any notes regarding the invitation list in the text box next to Note.
7. Select the desired radio button regarding couples.



8. Click on Generate.
9. Click on OK.

10. Click on Close.



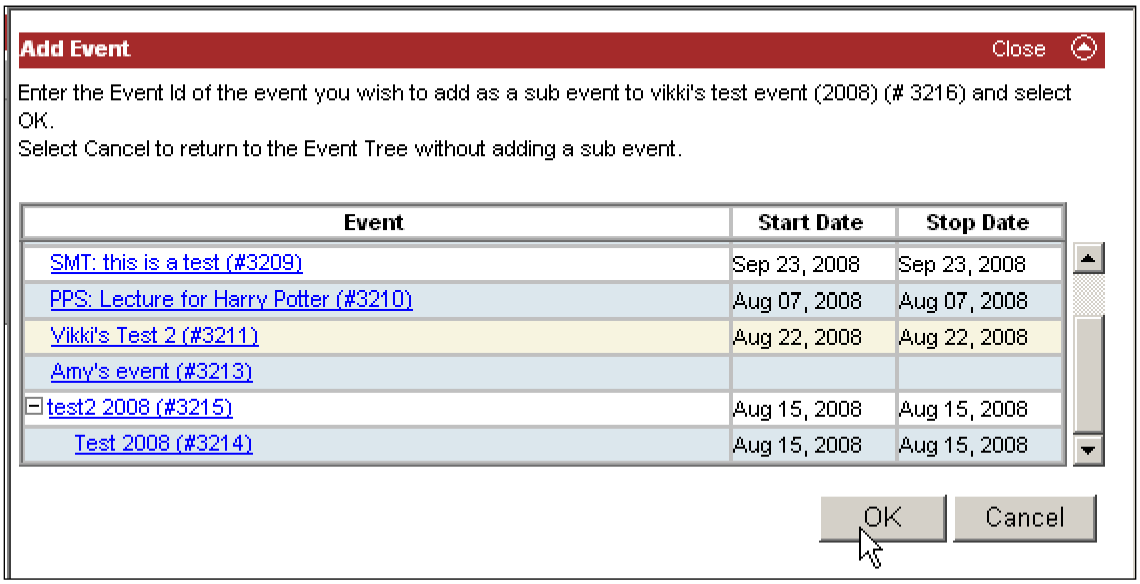
Event Maintenance

Linking Sub-events

Note: You must have the two events you are linking created prior to completing these instructions.

Note: You must first have the main event displayed in the application frame.

1. Click on Event Tree in the Navigation tree.
2. Click on the row, not the hyperlink, of the main event to highlight it.
3. Click on Options -> Add Event.
4. Click on the row, not the hyperlink, of the event you want to place as a sub-event to highlight it.
5. Click on OK.



6. Repeat for each sub-event.

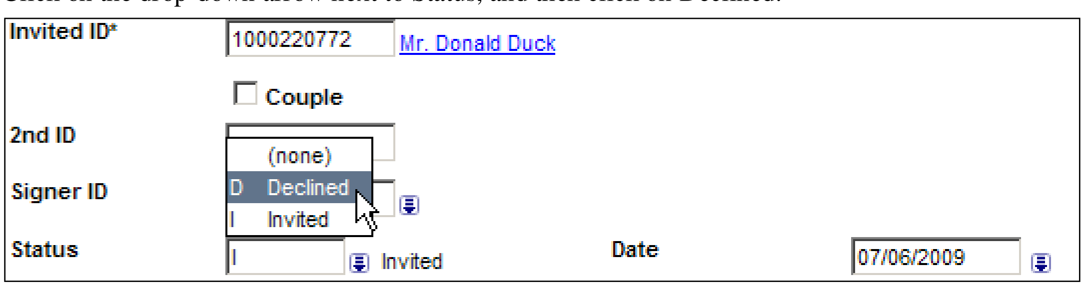
Labeling Declined Invitations

Note: You must first have the event displayed in the application frame.

1. Click on Invitations in the Navigation tree.
2. Click on the elliptical button next to the invitation the invitee is located on.

Note: If you are unsure of which invitation the invitee is on, go to their record and choose Events -> Invitations -> and click on the elliptical button next to the event you are registering them for.

3. Select the row of the Entity.
4. Scroll to the form on the bottom of the page.
5. Click on the drop-down arrow next to Status, and then click on Declined.



6. Click on Save on the Invitees form header bar.

Event Maintenance

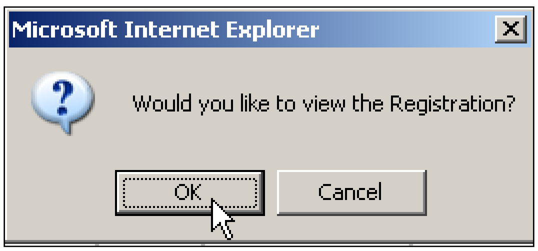
Registering Invitees

Note: You must first have the event displayed in the application frame.

1. Click on Invitations in the Navigation tree.
2. Click on the elliptical button next to the invitation the invitee is located on.

Note: If you are unsure of which invitation the invitee is on, go to their record and choose Events -> Invitations -> and click on the elliptical button next to the event you are registering them for.

3. Select the row of the Entity.
4. Click on Options -> Register.
5. Click on OK to view the registration.



6. Scroll to the bottom.
7. Click on the row, not the hyperlink of the event you want to register the entity for.
   Note: The event fee maintenance form will display in a form under the participant events list.
8. (optional) Click on the drop-down arrow next to Fee and change the fee type if needed. This will change the value in the text box next to Amt.
9. (optional) Type the number of tickets purchased in the text box next to Tickets.
   Note: DO NOT increase the number of tickets if there are guests, they are entered as participants and assigned their own tickets.
10. Click on the drop-down arrow next to Status and select Attended.
11. (optional) Type any notes regarding the fee for the invitee in the text box next to Note.
12. Click on Save.
13. Scroll up to the Participant form header and click on Save.

Event Maintenance

Registering Uninvited Participants (Walk-up)

Note: You must first have the event displayed in the application frame.

Note: The new registrant MUST be an Entity in Griffin before they can be registered.

1. Click on Registration in the Navigation tree.
2. Click on the New.
3. Type in the Entity ID of the entity that has registered in the text box next to Registrant OR click in the text box and press F2, complete a GrifFind for the invitee, display and click on the elliptical button next to their record.
4. (required) Click on the drop-down arrow next to Status and click on Walk-In.
5. (optional) Click on the drop-down arrow next to Resp Date and select the date the registrant registered.
6. (optional) Click on the drop-down arrow next to Pay Type and select the method of payment.

Note: Depending on the payment type indicated various fields will be available for text input.

Note: We DO NOT store credit card numbers in Griffin under ANY circumstance.

7. Click on Save.
8. Click on Registration Detail.
9. Scroll to the bottom of the page under the Participant Events form header and select the event.
10. Click on the row, not the hyperlink of the event you want to register this entity for.

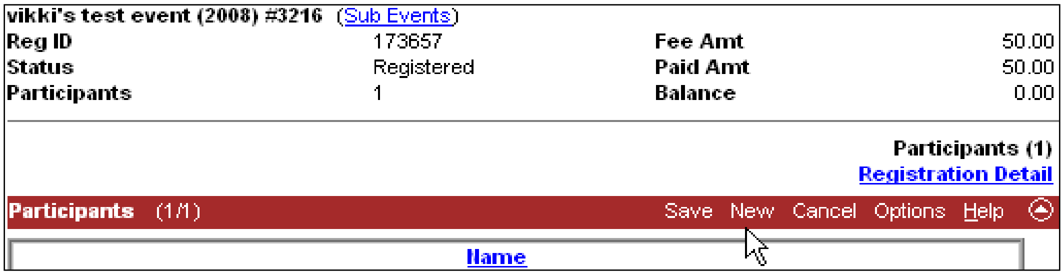
    Note: The event fee maintenance form will display in a form under the participant events list.
11. (optional) Click on the drop-down arrow next to Fee and change the fee type if needed. This will change the value in the text box next to Amt.
12. (optional) Type the number of tickets purchased in the text box next to Tickets.

    Note: DO NOT increase the number of tickets if there are guests, they are entered as participants and assigned their own tickets.
13. Click on the drop-down arrow next to Status and select Accepted.
14. (optional) Type any notes regarding the fee for the invitee in the text box next to Note.
15. Click on Save.
16. Scroll up to the Participant form header and click on Save.

Event Maintenance

Adding Participants to a Registration

Note: You must first have the registration of the participant within the event displayed in the application frame.



1. Click on New.
2. (optional) Type in the Entity ID of the additional participant that will be attending in the text box next to Participant ID OR click in the text box and press F2, complete a GrifFind for the participant, display and click on the elliptical button next to their record.
3. Type the additional participant’s name in the text box next to Participant Name.
4. Type the additional participant’s last name in the text box next to Last.
5. (optional) Click on the drop-down arrow next to Prefix and select the additional participant’s name prefix.
6. Type the additional participant’s first name in the text box next to First.
7. (optional) Click on the drop-down arrow next to Suffix and select the additional participant’s name suffix.
8. (optional) Type the additional participant’s middle name in the text box next to Middle.
9. (optional) Type the additional participant’s nickname in the text box next to Nickname.
10. (optional) Type the salutation to use for the additional participant in the text box next to Salutation.
11. (optional) Type the name to be displayed on the additional participant’s name tag in the text box next to Name Tag.
12. (optional) Type the name to be displayed on the additional participant’s tent card in the text box next to Tent Card.
13. (optional) Click on the check box next to Guest.
14. (optional) Click on the drop-down arrow next to Guest and select that the additional participant is a guest of.
15. (optional) Click on the drop-down arrow next to Guest Relation and select the relationship between the original participant and the additional participant.
16. Click on Save.

Note: You can then edit the original participant’s registration with the guest and relationship information.

17. **Scroll to the bottom and click on the check box next to the event(s) the additional participant is being registered for.**
18. Click on the row, not the hyperlink of the event you want to review/assign fees for.
    Note: The event fee maintenance form will display in a form under the participant events list.
19. (optional) Click on the drop-down arrow next to Fee and change the fee type if needed. This will change the value in the text box next to Amt.
20. (optional) Type the number of tickets purchased in the text box next to Tickets.
    Note: DO NOT increase the number of tickets if there are guests, they are entered as participants and assigned their own tickets.
21. Click on the drop-down arrow next to Status and select Accepted.
22. (optional) Type any notes regarding the fee for the invitee in the text box next to Note.
23. Click on Save.
24. Scroll up to the Participant form header and click on Save.

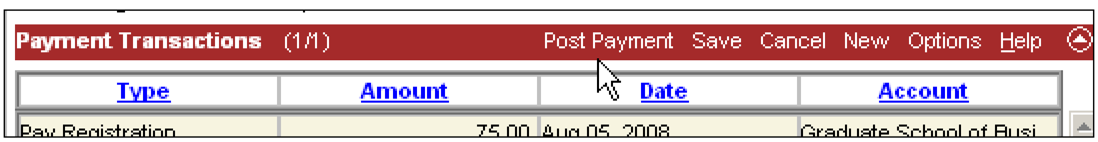
Making Payments

Note: You must first have the event displayed in the application frame.

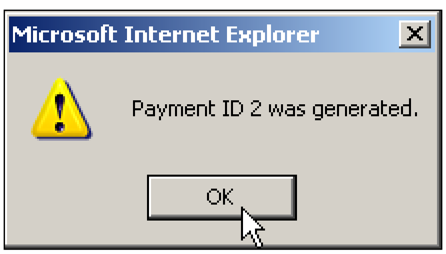
1. Click on Registration in the Navigation tree.
2. Click on the elliptical button next to the registrant you want to apply a payment to.
3. Click on Make Payment in the Navigation tree.
4. (optional) To change the date of payment, click on the drop-down arrow next to Pay Date and select the date of payment OR type the date of payment in the text box in the format MM/DD/YYYY.
5. (optional) To change the method of payment, click on the drop-down arrow next to Pay Type and select the method that payment was made with.

   Note: Depending on the payment type indicated various fields will be available for text input.
6. (optional) To change the amount of payment, click in the text box next to Amt and type the amount paid.
7. (optional) Input the various values for payment information in the appropriate text boxes. DO NOT input credit card number.
8. Click on Save.

   Note: The Payment Transactions window will open..
9. Click on Save.
10. Click on Post Payment.



11. Click on OK.



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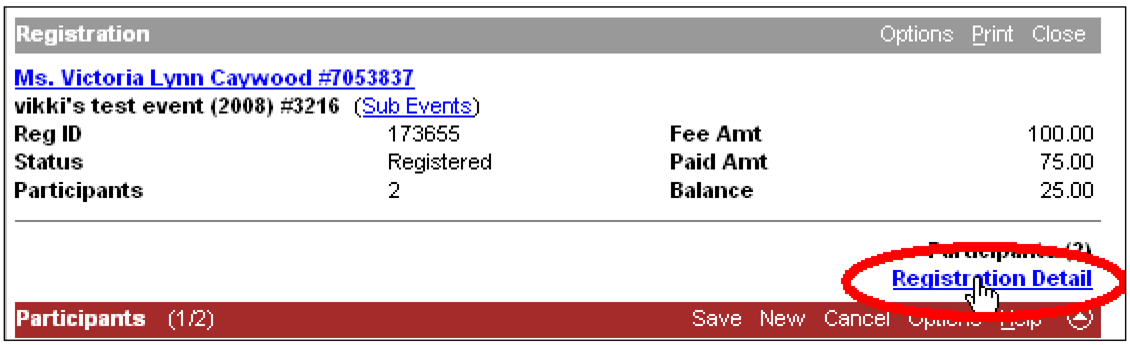
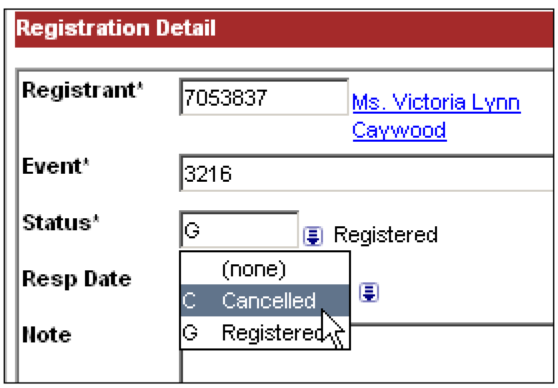
Cancelling a Registration

Note: You must first have the event displayed in the application frame.

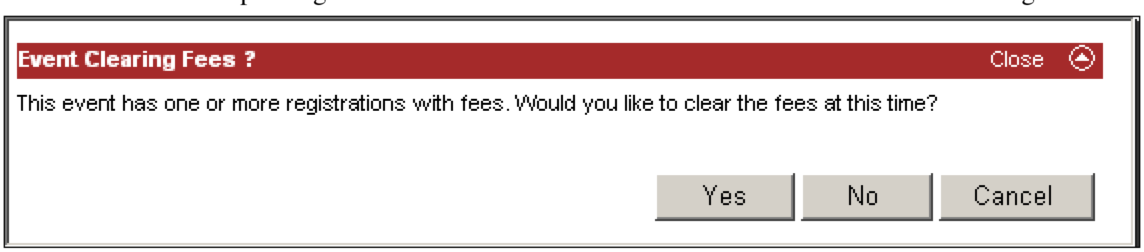
1. Click on Registrations in the Navigation tree.
2. Click on the elliptical button of the registrant that has cancelled.
3. Scroll to the bottom of the page, click on the drop-down arrow next to Status, and then click on Cancelled.
4. Click on Save on the Participant Events form header bar.
5. Repeat steps 3 and 4 for each event on this registration.
6. Repeat steps 3-5 for each guest on this registration.
7. Click on Registration Detail.



8. Click on the drop-down arrow next to Status and select Cancelled.



9. Click on Save.
10. Click on Yes or No depending on whether or not to refund the fees associated with this event registration.



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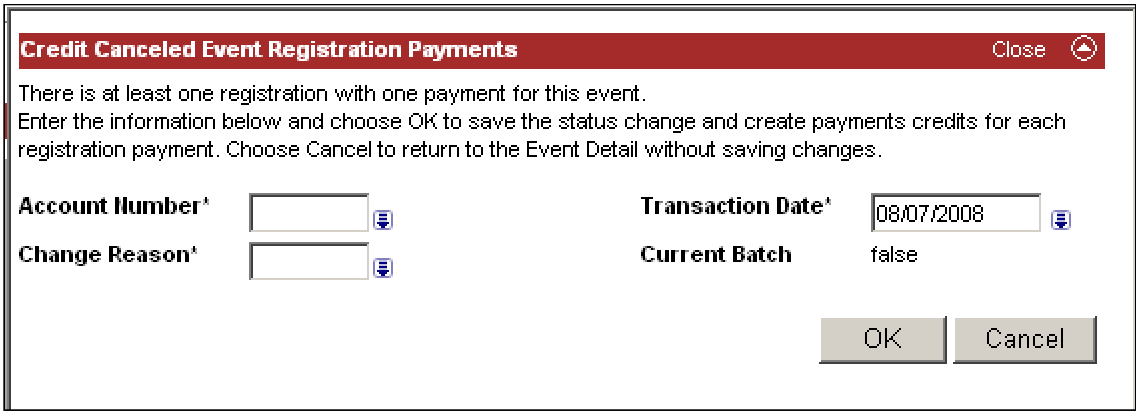
11. If No was selected, the registration is cancelled.
12. If Yes was selected, Click on the drop-down arrow next to Account Number and select the account the funds were originally credited toward.



13. Click on the drop-down arrow next to Change Reason and select the reason the fees are refunded or repurposed.
14. Click on the drop-down arrow next to Transaction Date and select the date the refund was issued or type the date in the text box.
15. Click on OK.
16. If you selected Yes, the fees will be reduced back to zero (0). If you selected No, the fees will remain.

Cancelling an Event from a Registration

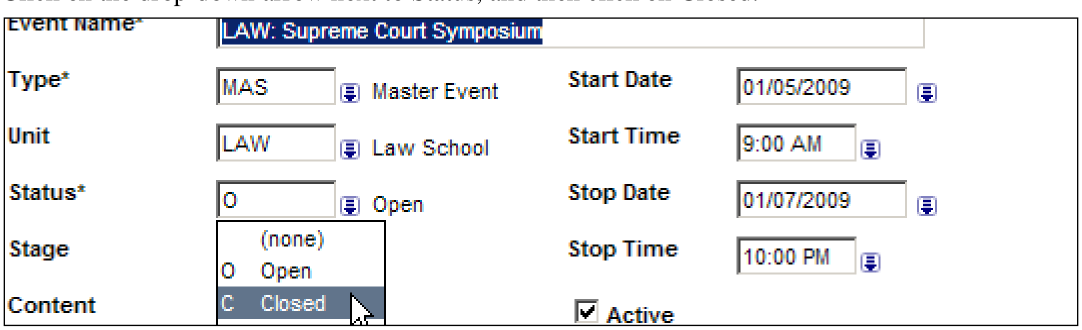
Note: You must first have the event displayed in the application frame.

1. Click on Registrations in the Navigation tree.
2. Click on the elliptical button of the registrant that has cancelled an event.
3. Scroll to the bottom.
4. Click on the row, not the hyperlink, of the event to be cancelled.
5. Click on the drop-down arrow next to Status and select Cancelled.
6. Click on Save.
7. Scroll back up to the top and click on Save.

Finalizing an Event

Note: You must first have the event displayed in the application frame.

1. Click on Detail in the Navigation tree.
2. Click on the drop-down arrow next to Status, and then click on Closed.



3. Type the total number of attendees in the text box next to Attended.
4. Type the total number of invitees in the text box next to Invited.
5. Click on Save.

Tracking No-Shows

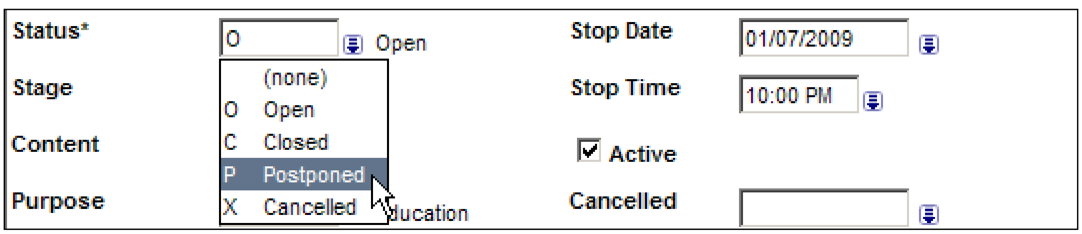
Note: You must first have the event displayed in the application frame.

1. Click on Participants in the navigation tree.
2. Click on the Reg ID next to the entity that did not show up to the event.
3. Scroll to the bottom of the page, click on the drop-down arrow next to Status, and then click on No show.
4. Click on Save.
5. Repeat steps 3 and 4 for each event on this registration.
6. Repeat steps 3-5 for each guest on this registration.
7. Click on Registration Detail.
8. Click on the drop-down next to Status, and then click on No-Show.
9. Click on Save.

Postponing an Event

Note: You must first have the event displayed in the application frame.

1. Click on Detail in the Event navigation tree.
2. Click on the drop-down arrow next to Status, and then click on Postponed.



3. Click on Save on the Detail form header bar.
4. If there are no sub-events, the process is finished. Refer to the next section: Reinstating a Postponed Event when a new date is chosen. If there are sub-events attached to the master event, continue with the next step.
5. If the sub-events are postponed as well, click on the radio button next to All. Otherwise, click on the radio button next to None.
6. Click on OK.

Reinstating (Rescheduling) a Postponed Events

Note: You must first have the event displayed in the application frame.

1. Click on Detail in the Event navigation tree.
2. Click on the drop-down arrow next to Status, and then click on Open.
3. Click on the drop-down arrow next to Start Date and select the new beginning date for the event or type the new date in the text box in the MM/DD/YYYY format.
4. Click on the drop-down arrow next to Start Time and select the new beginning time for the event or type the start time in the text box.
5. Click on the drop-down arrow next to Stop Date and select the new ending date for the event or type the new date in the text box in the MM/DD/YYYY format.
6. Click on the drop-down arrow next to Stop Time and select the new ending time for the event or type the end time in the text box.
7. Click on Save on the Detail form header bar.
8. If there are no sub-events, the process is finished. If there are sub-events attached to the master event, continue with the next step.
9. If the sub-events are rescheduled as well, click on the radio button next to All for Status and Start Date. Otherwise, click on the radio button next to None.
10. Click on OK.

Cancelling an Event

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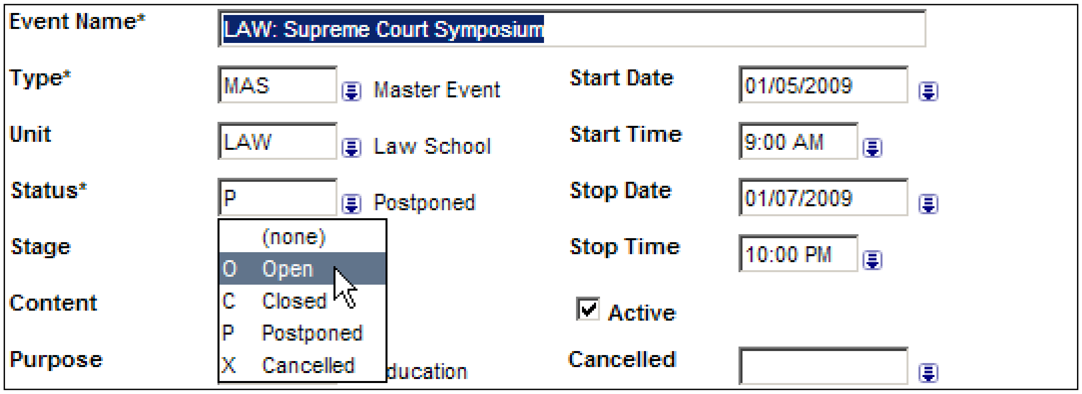
Note: You must first have the event displayed in the application frame.

1. Open the event you want to cancel.
2. Click on Detail in the Event navigation tree.
3. Click on the drop-down arrow next to Status, and then click on Cancelled.



4. Click on the drop-down arrow next to Cancelled and select the date the event was cancelled or type the date in the text box in the MM/DD/YYYY format.
5. Click on Save on the Detail form header bar.
6. If there are no registrants, skip step 13. If there are registrants, click on the drop-down arrow next to Registration Status Code, and then click on the status to update all registrant's status to.
7. Click on OK.
8. If there are fees associated with the event, click on the appropriate selection for clearing or not clearing fees.
9. If fees are not being cleared, skip step 13. If fees are being cleared, click on the drop-down arrow next to Account Number and select the account the fees were initially applied to.
10. Click on the drop-down arrow next to Change Reason and select the reason the fees were returned.
11. If needed, click on the drop-down arrow next to Transaction Date and select the date the fees were returned.
12. Click on OK.
13. If there are no sub-events, the process is finished. If there are sub-events attached to the master event, continue with the next step.
14. If the sub-events are cancelled as well, click on the radio button next to All for Status and Cancelled Date. Otherwise, click on the radio button next to None.
15. Click on OK.