

## 4HONLINE

# Setup a Registration Event

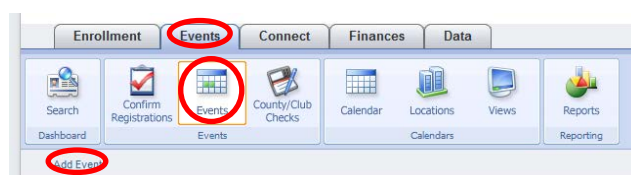
Created: January 29, 2015

## OVERVIEW

The following instructions are for setting up State or County events with registrations.

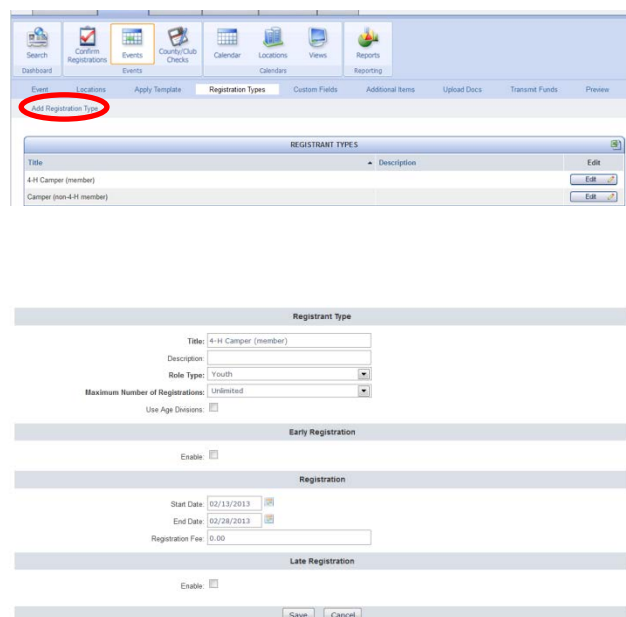
## CONFIGURE EVENT

1. Click on the “Events” tab.
2. Click the “Events” icon.
3. Click “Add Event”.
4. Enter the Event Information



- **Event Title:** the name of the event
- **Account:** Financial account to which the fees should go
- **Type:** Standard
- **Calendar:** the Calendar on which the event should appear
- **Date Closed:** This is the date the event will be over.
- **Enable Administrative/Cost Recovery Fee:** A fee added to the registration fee.
- **Enable Deposits:** Allows members to make multiple payments for the event.
- **Entry Based Registrations:** Check if registrants may submit more than one entry (Example: several entries in a Horse Show).
- **Final Approval By Members Unit:** used for County created events when the member’s County should approve the registration rather than the host County.
- **Manager Only Registration:** Only managers may register participants. Registration is not open to families, but members may view events for which they have been registered.
- **Not Visible to Members:** Only managers may register participants. Registration is not open to families and members may not view events for which they have been registered.
- **Normal Hierarchy Restriction:** Only members in the county, district or state that created the event may register.
- **Restrict by County Selection:** Opens the event to members in other selected counties.
- **Unrestricted:** All members in the state may register for the event regardless of their County (applies to County or District created events)
- **Restrict Event by Project:** Only members enrolled in selected projects may register.
- **Restrict Event by School Grade:** Only members in the selected grades may register.
- **Levels Certifying Registrations:** Requires the state manager and/or county manager to review and confirm registrations before they become active. If the option is not checked, registrations are active upon submission.
- **Age Validation:** Only allows members of certain ages to register.
- **Beginning Birthdate:** Birthdate for oldest possible participant

- **Ending Birthdate:** Birthdate for youngest possible participant.
  - **Validate Gender Max:** turns on Gender Validation
  - **Female/Male Max:** Allows a maximum number of males and/or females to register (helpful for camp registrations if dormitory space is limited). A setting of “0” means unlimited.
  - **Select Date & Time for Event:** Enter the Start and End Dates and times for the event. Setup & Cleanup are optional.
  - **Repeat Option:** Check for events that are repeated (monthly, weekly, etc); only applies to calendar items.
  - **Event Invoice Instructions:** Enter instructions for where registrants should send payment or check “Use County Invoice Instructions” to use instructions set up in the County Options. If both options are blank, the invoice instructions will default to the address in the State Admin Options.
  - **Comments:** Enter any specific event instructions, directions, etc.
  - **Contact information:** Enter the information for the person registrants should contact if they have questions about the event.
5. Click “Save.” This adds the event to the Calendar.
  6. Scroll to the bottom of the page again and click “Add Registration” to begin building the registration portion of the event.
  7. Locations are optional. In order to set up a location, click the “Locations” icon. The locations added from the “Locations” icon will appear in the list of locations.
  8. If there is another State or County event that has a registration form similar to the form needed for the event, select and apply a template from another event.
  9. Click “Apply Template.”
  10. If a similar template is not available, continue to the “Registration Types” button.
  11. Click “Add Registration Type” to add registration types and registration deadlines. Members must be Active to register for events.
  12. Click “Edit” next to existing registration types to set the registration deadlines.
  13. Enter the registration information.  
NOTE: “Maximum Number of Registrations” applies to how many total registrations are accepted for that registration type in the event.
  14. Check “Use Age Divisions” to turn off some registration questions for certain age divisions.
  15. Enter the Registration Start Date and End Date.  
Registration closes at 11:59 p.m. CT on the end date.
  16. Enable Early or Late registration only if a different Registration Fee applies to Early or Late registration. If using Early and Late registration be sure the dates do not overlap.
  17. Click “Save.”
  18. Click on “Custom Fields.”



19. Click “Edit” to change an existing field. Fields in bold are headings (groups) on the registration form.

20. To change the order in which the fields appear on the form, change the priority number and click the green arrows for that group. To change the order in which groups appear, click the red arrow next to the group title.



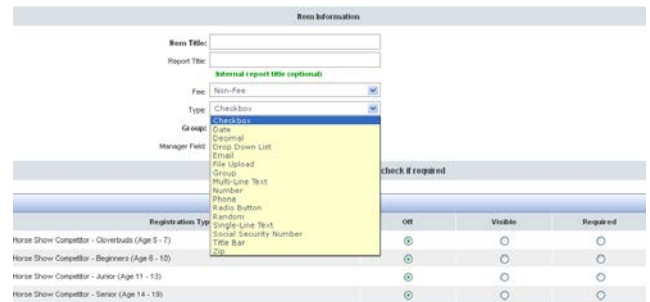
21. Click “Add Custom Field” to add a new form field to the registration form.

22. Enter Item Title.

23. Select whether or not a fee is charged for this field (most fields are non-fee fields). If the field is a fee field, the fee charged is in addition to any registration or entry fees already set.

24. Select the field type.

- **Checkbox:** allows registrants to choose multiple options. NOTE: If a checkbox is required, the system requires the registrant to check all available checkboxes.
- **Date:** date format
- **Decimal:** requires a decimal point
- **Drop Down List:** allows registrants to choose one option from a list
- **Email:** email address
- **File Upload:** allows registrants to upload a picture (.jpg) or document (.pdf)
- **Group:** a bolded heading on the registration form
- **Multi-Line Text:** text box with unlimited space
- **Number:** numbers
- **Phone:** phone number
- **Radio Button:** allows registrants to choose one of many options
- **Single-Line Text:** text box with only one line
- **Social Security Number:** DO NOT USE
- **Title Bar:** use to enter instructions
- **Zip:** zip code



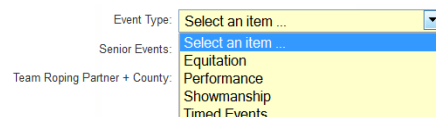
25. Choose to make the field Visible or Required for each Registration Type and Age Division. Members must enter the “Required” information in order to submit a registration. Items marked as “Visible” are optional.

26. Click “Save” to add options for Checkbox, Drop Down List and Radio Button fields. Click “Save and Close” to return to the Custom Fields List. Click “Save & Add a New Item” to add another Custom Field.

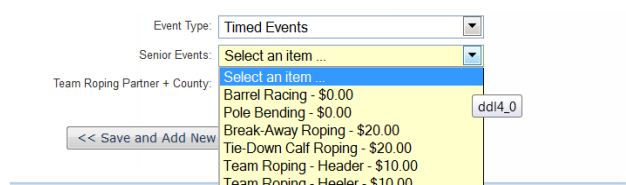
NOTE: Drop-down lists may have Parent Lists.

The right is an example of a Parent list from a Horse Show registration:

The member selects “Timed Events” from the



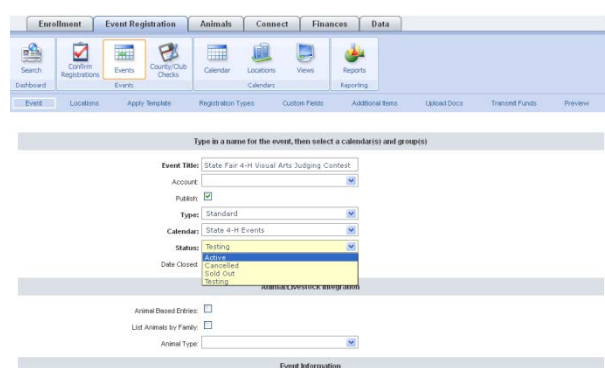
Event Type “Parent List” and then selects the specific Timed Event from a “child list.” Options available in the “child list” are dependent upon the “parent list” selection.



27. Click on “Additional Items.” If there is additional information needed for entry-based registrations that should only be asked one time, add Custom Fields to “Additional Items.”

NOTE: Only use Additional Items for events that have Entry-Based registrations.

28. Click “Upload Docs” to upload any documents a registrant should download before or after completing the registration process.
29. Click “Preview” at any point to preview the registration form.
30. Click “Worksheet” to view a printable registration form.
31. When the event is ready to open, click on “Event” and change the “Status” to “Active” and click “Save.”
32. To edit the registration form, registration dates or any other event information, change the status “Testing” and click “Save.” After the necessary changes have been made, change the status back to “Active” and click “Save” to re-open the event for registration.



## SPECIAL ITEMS TO NOTE:

- All Custom Fields on an Event Registration form are available for Custom Event Reports. Applying a template from another event copies over the Event Custom Reports for that event.
- All Enrollment fields may be included on Event reports. It is not necessary to add enrollment information (i.e., name, address, phone) to the Event Registration Form.
- When applying a template from a different event, be sure to edit the Registration Types to change the Registration Dates.
- Short-term youth members may register for events.
- Event Registrations do not count on the ES237.
- At least one registration form field must be set up on the registration form in order to register members for the event.

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