4-H Online 2.0 Events and Registrations

Created May 2024

Background

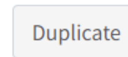
County Managers with permissions may setup and manage events. Additional Managers may be added to view registrations or to assist with the management of registrations.

Contents

Creating an Event

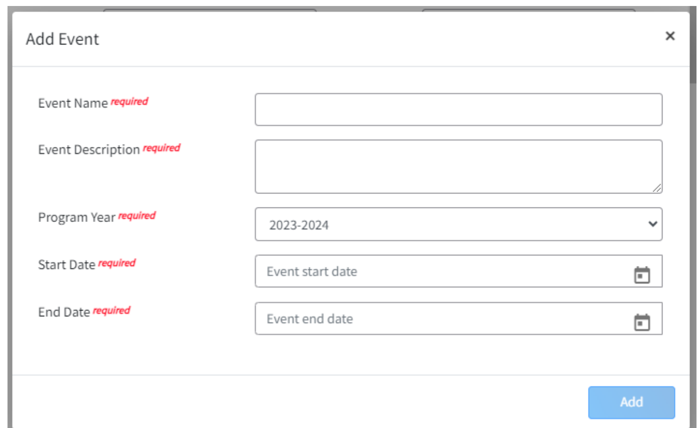
There are two ways to create an event. You can either create an event from scratch (instructions are below) or you can Duplicate an existing event.

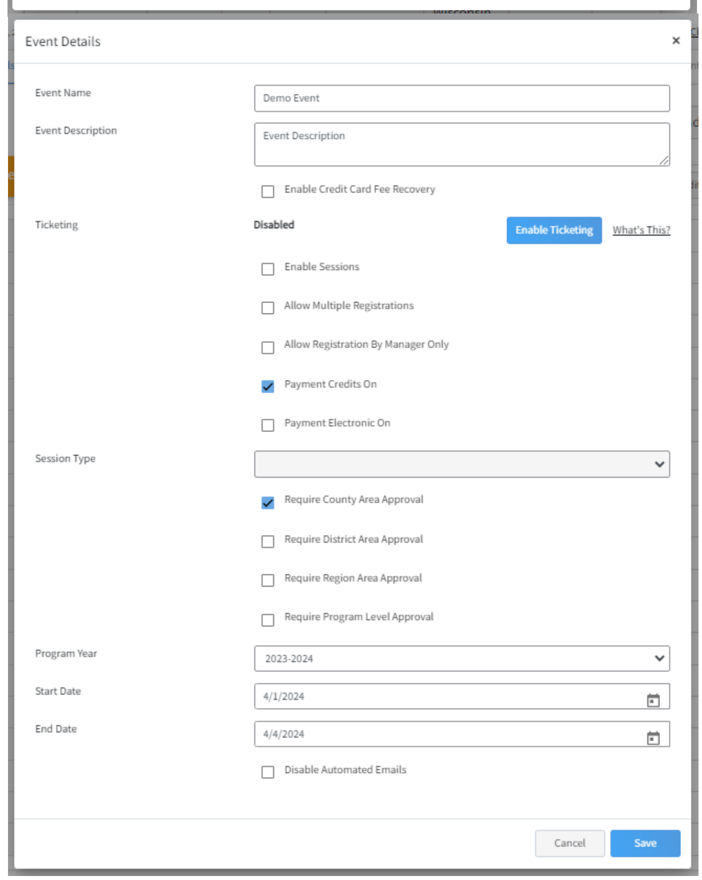
Duplicate an Existing Event



To duplicate an event, click on it from the list of events. On the next screen, click on the Duplicate button. You will then be at step 3 of the instructions below. All you need to do is change the existing information. **TIP**: ALL settings from the prior event will be duplicated, *including the registration dates*. Be sure to double check all dates and adjust as necessary.

Create Event from Scratch





1. Click on the Events tab in the navigation menu.
2. Click the Add Event button to create a new event.
3. Enter the name of the event.
4. Enter the Event Description.
5. Select the program year in which the event will occur.
6. Enter the Event Start Date.
7. Enter the Event End Date.
8. Click Add.
9. Review the Event details.
10. Click the Edit button to modify the event details if needed.

a. Enable Credit Card Fee Recovery – Add the credit card fee to the invoices paid by credit card
b. Ticketing – This is a future feature that will allow tickets with QR codes.
c. Enable Sessions – used when there are multiple dates or options for overall registration
d. Allow Multiple Registrations – allows a member to register more than once.
e. Allow Registrations by Manager Only – only a manager can start a registration for the event. Families cannot self-register, but can complete an incomplete registration.
f. Payment Credits On – checks accepted for payment.
g. Payment Electronic On – Credit card payments accepted. Will only save as yes is Stripe and bank account is configured.
h. Session Type – If Enable Sessions is checked this can be set for Sessions or Contest.
i. Require County/District/Region/Program approval – If checked a level needs to approve the

registration. If nothing checked, registration is approved immediately upon submittal. If “Payment Electronic On” is enabled, at least one level of approval must be used.

j. Program Year – which year is event taking place?
k. Start Date – Event start date. Not registration start date.
l. End Date – Event end date. Not registration end date.
m. Disable Automated Emails – Stops automated event registration related emails. Specific automated emails can be disabled on the Emails screen.

11. Click the save button when you are done making changes to the event details.
12. Public Facing Event – Allows families to find and register for the event without logging into 4-H Online first.

    a. Click on the Edit button.
    b. Enter a unique beginning for the Public URL. Since you cannot reuse the URL from year to year, it is recommended to include the year in the custom URL. For example, “wi4hartscamp2023”
    c. Click the Save button.

13. Open/Restrict Event by County. By default, the event is open to your county only. Click edit and add counties if you want members from additional counties to register.

14. You may upload Logo and Splash images for your event.

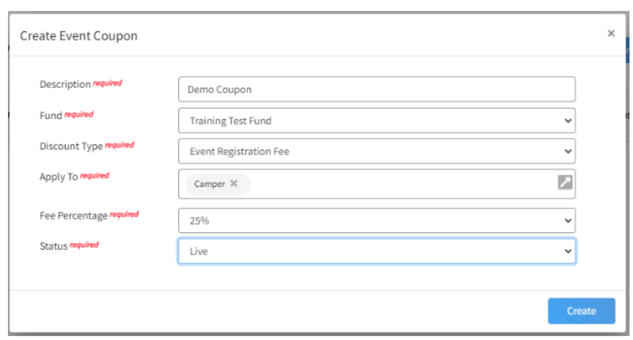
The logo and splash images appear for families when they select an event for which to register a member. The logo is in the upper left corner next to the name of the event. The splash image is the large photo located above the Register button.

15. Group Enrollment – Not used.

16. Delete Event – If there have not been any registrations, you can delete the event. Once there are any approved registrations, you can not longer delete the event.

Coupons

Coupons can be used to discount the registration for families. Coupons can be for 10%, 24%, 50%, or 100% and cover the Registration Fee. This is the fee charged by the registration type and does not include any additional fees charged in the custom questions.



Creating a Coupon

Before creating a coupon, you must contact the system administrator to setup a fund. County coupon funds can be unlimited. Once the fund has been created you can re-use it for any events you create. Multiple funds can be created if you wish.

1. To start a coupon, click on the + Add Coupon button.
2. Fill in the information requested.
    a. Description – only appears here and on reports. The family invoice reflects the fund name.
    b. The Discount Type will give the option of Event Total Fee, but that doesn’t work right now, so select Event Registration Fee.
    c. Apply to – Select all registration types that can use this coupon.

        d. Percentage – Select the amount of the discount.
        e. Status – select Live. You can change this to Inactive later if you want to turn off this coupon before the registration period is over.
3. Click the Create button.
4. The coupon code to share with families is shown in the list.

Description	Code	Fund	Restriction
Demo Coupon	VPMFFB	Training Test Fund	Training

Status of Coupon

You can check the status of the coupon by clicking on the Coupons tab. Ths number of times the coupon has been used, the amount used, and the amount remaining in the fund is listed.

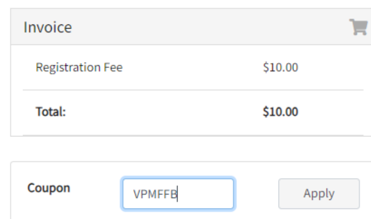
Description	Code	Fund	Restriction	Role	Type	Apply To	Percentage	Coupons Applied	Applied Amount	Remaining Amount	Status
Demo Coupon	VPMFFB	Training Test Fund	Training		CouponBased	Event Registration Fee	25%	0	0	84	Live

If you need to add to the fund, contact the system administrator to increase the amount in the fund.

Using a Coupon

Families can enter the coupon at the event payment screen.

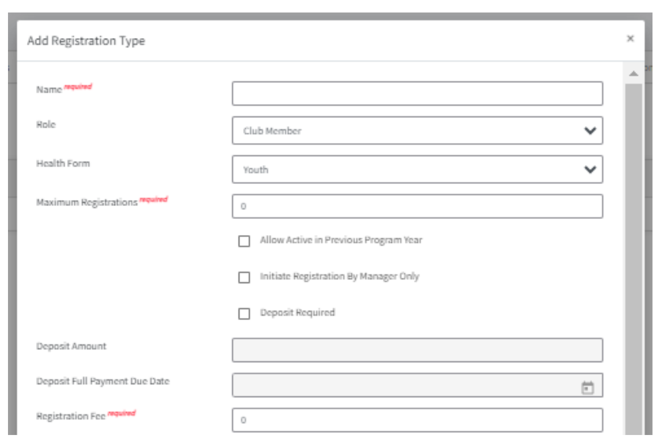
A manager can also enter the coupon before approving the registration by clicking on the Edit button in the Invoice Payment section and entering the coupon code.



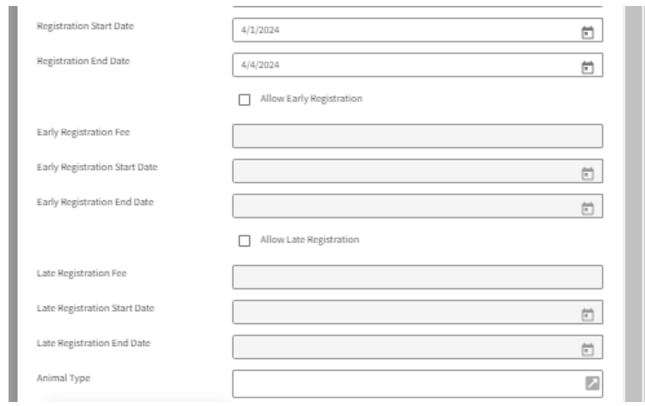
Creating Registration Types

Each member role that will be registering needs to have a Registration Type created. There can be multiple Registration Types for a role. For example, you may have campers and camp counselors. Both would be Club Member role, but you would ask different questions. (more on questions later)

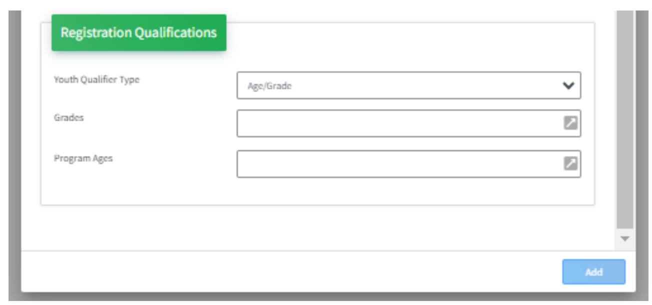
1. Click on the Types sub-tab.
2. Click the +Add Type button.
3. Enter in the name of the Registration Type.
4. Select the role from the drop-down menu that applies to the registration type.
5. Select the Health Form from the drop-down menu that applies to the event.
    a. Adult and Youth health forms are the same as during enrollment.
    b. Youth Extended is the full overnight health form including medications.
6. Set the maximum number of registrations for the registration type. 0 = unlimited.
7. Allow Active in Previous Program Year – allows an approved member from previous year to register. If not checked, member must be approved in current year to register.
8. Initiate Registration by Manager Only – Staff needs to start the registration before member can continue and submit.
9. Deposit Required – At this time, the deposit function is present, but not supported by Wisconsin. Use at own risk.



10. Deposit Amount – amount required for deposit.
11. Deposit Full Payment Due Date – Last date a deposit can be made.
12. Enter the registration fee if applicable. Leave at 0 if no fee.
13. Set the Registration Start Date.
14. Set the Registration End Date.
15. If Early Registration is available (i.e. discounted registration fee for early registrants), check the box to allow Early Registration. Otherwise, skip to Step 19.
16. Set the Early Registration Fee.
17. Set the Early Registration Start Date.
18. Set the Early Registration End Date. (NOTE: It should not overlap with the Registration Start Date in step 13)



19. If available, check the box to Allow Late Registration (i.e. a different registration fee applies to late registrations). Otherwise, skip to step 23.
20. Set the Late Registration Fee.
21. Set the Late Registration Start Date. (NOTE: It should not overlap with the Registration End Date in Step 12)
22. Set the Late Registration End Date.
23. To restrict registration by animal type, select one or more animal types.
24. To restrict this registration type by age or grade, select Youth Qualifier Type to Age Grade or Program Youth Division.
    a. If you chose Age Grade, add the ages (as of Jan 1 of program year) or add the Grades. With Age restriction, you can set a Participant type and restrict it to adults by selecting all ages over age 19.
    b. There are four Program Youth Divisions – Cloverbud (K-2), Intermediate (3-5), Junior (6-8), and Senior (9+). Depending on what grades you select, this might be quicker than Age Grade.
    c. If the registration type is Participant, the only restriction is age.

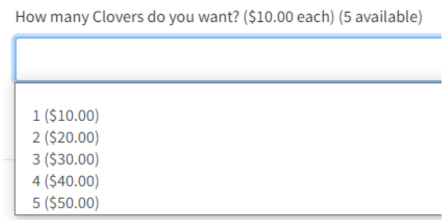


25. Click Add.
26. Repeat Steps 2 – 27 for each registration Type that you are setting up for the event.

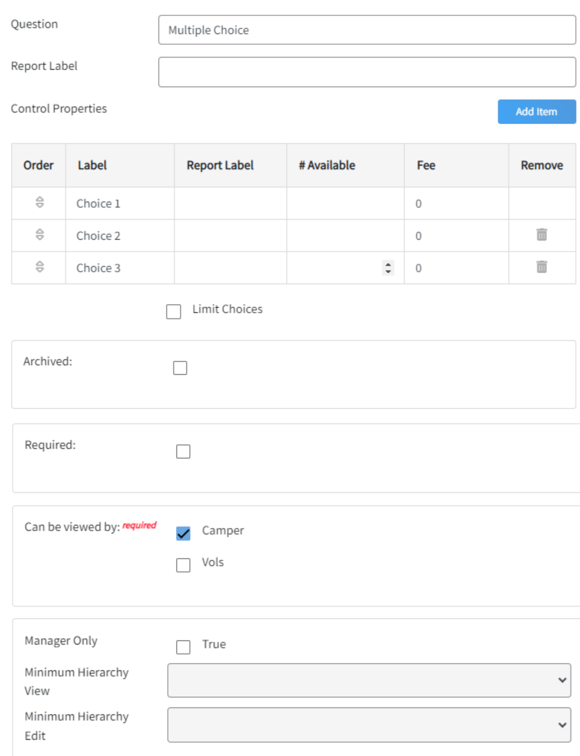
Creating Custom Event Questions

1. Click on the Questions sub-tab.
2. Click the + sign to create a question.
3. Select the type of question you would like to create from the list of options.
    a. Checkbox – A single checkbox. Option for a fee.
    b. Content Block – Text box for information.
    c. Date Picker – A field for the member to enter a date. A min and max date can be specified.
    d. Dropdown – Dropdown menu of selections. Fee can be associated with the options. Not recommended for important questions due to empty response possible.
    e. Multi-Line Text – Text box for a long text response. Setting for how many rows for box size.

f. Multiple Choice – Most versatile option. Multiple choices can be made or can be limited to one choice. Can be limit to number of registrants picking each option. Fee can be associated with each option.
g. Number Input – A field for the member to enter a number. A min and max number can be specified.
h. Radio Group – Similar to Dropdown except all options are shown radio button style.
i. Single-Line Text – Text box for short text response.
j. Quantity Control – select 1, 2, 3, etc. If fee is associated with this, then total fee is Fee X # selected. Sample of the Quantity Control question type is shown here.



4. Click the Add button.
5. In the edit window that appears enter your question in the top box. This is the text that will appear on the screen to the registrant.
6. Optionally, in Report Label, enter a shorter version of the question. If you leave this blank, the Question will be the column header in Excel and PDF reports.
7. Setup your Options. These are the answers available for the registrants to choose from.
8. Optionally, in Report Label, enter a shorter version of the answer.
9. If there is a limited number of registrants that can select each option label, enter the number in the # Available fields. (Only available with the Multiple Choice question type.)



10. If a fee is associated with each selection, enter the fee amounts. This amount is in addition to the registration fee. (Only available with the Dropdown, Multiple Choice, and Radio Group question types.)
11. In the Multiple Choice question type, if the member may only select a certain number of options, check the Limit Choices box and enter the number of choices that may be selected.
12. Archived – This box is if you change the registration form during the registration period and decide to remove a question, but do not want to delete the previous responses.
13. Check the Required box if a response is required. NOTE: If a checkbox question is required, the member will be required to check the box(es).
14. Select the registration type that can view the question. You must check at least one box.
15. If the field should only be answered by a manager, check the True box for Manager Only.
16. Use the Minimum Hierarchy View menu to choose the lowest level of the hierarchy for Managers who may view the question and response. (Institution or County)
17. Use the Minimum Hierarchy Edit menu to choose the lowest level of the hierarchy for Managers who may edit the response.
18. Click the Save button.
19. Repeat steps 2 – 19 for each question you need to add.

20. You can drag the questions around to rearrange the order.
21. Use the Preview button to see what questions are visible to the different Registration Types.

Event Consents

1. Click on the Consents sub-tab.
2. Click on the + Associate Consent button.
3. Choose the consent title you want to associate with the event.
4. Choose the Registration Type that will need to complete the consent.
5. Click the Save button.
6. Repeat for each consent and each registration type that needs to complete the consent to participate in the event.

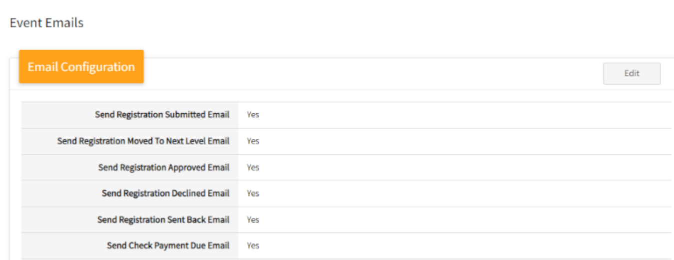
Event Custom Files

1. If your registrants should upload a file as part of their registration, click on the Custom Files sub-tab.
2. Click the + Add Custom File.
3. Enter the name of the custom file.
4. Enter a description of the file.
5. For each registration type, select if the file should be Not Visible, Visible, or Required.
6. Click the Add button.

Event Emails

There are default emails that are sent when certain steps are completed in the registration process. You can customize these for the event. You can turn these off individually.

Turn Off Event Emails

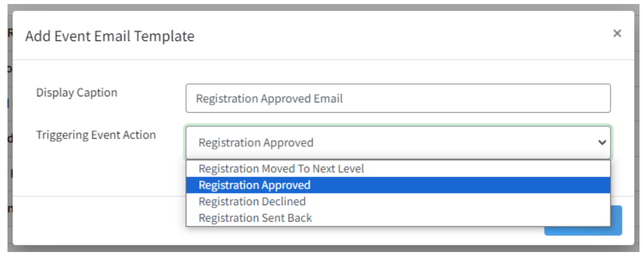


1. Click on the Email sub-tab.
2. Click on the Edit button in the Email Configuration section.
3. Uncheck the box for the system emails you do not want to be sent.
    a. Registration Submitted – Sent when the registration is submitted.
    b. Registration Moved to Next Level – Sent when the registration is approved at county and is ready for state approval.
    c. Registration Approved – Sent when the registration is approved.
    d. Registration Declined – Sent when the registration has been declined. This is when the event admin has blocked the registration.
    e. Registration Sent Back – Sent when the registration has been returned to the family either to fix an error or to delete the registration. Whatever was in the box above the Send Back button is included in the email message.

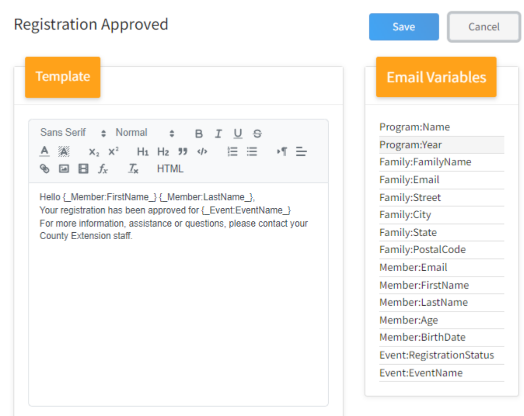
f. Check Payment Due – Sent immediately after the registration is approved if a check payment is due. Since payment cannot be recorded as received until the registration is approved, this email is always sent, even when staff has the payment in hand. **Recommend turning this email off**.

4. Click the Save button to save the settings.

Customizing Event Emails



1. Click on the Email sub-tab.
2. Click the +Add Email Template button.
3. Enter in the Display Caption (subject).
4. Use the Type drop-down menu to select the type of action that will trigger the sending of the email.
   A) Registration Approved
   B) Registration Declined
   C) Registration Moved to the Next Level
   D) Registration Sent Back
   E) Registration Submitted
5. Click the Add button.
6. Click on Edit to update the text of the email template.
7. Click Edit to add or change the text of the message.
8. Enter the text of the message.
9. Click on an email variable to insert a form field to customize the message.
10. Click Save at the bottom of the message.
11. Repeat steps 2-10 for any other event emails you wish to customize.

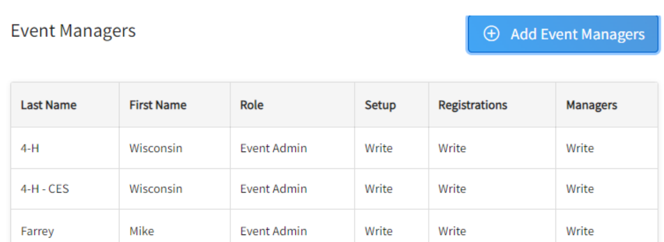


Event Managers

The manager creating the event will appear in this list by default as well as the primary admin for that area of the hierarchy. The Institution Admin is also automatically added.

Event Managers may be added to any event from any level of the hierarchy. County events may have Institution or County level Managers added to help manage the event, or they can be given read only access.

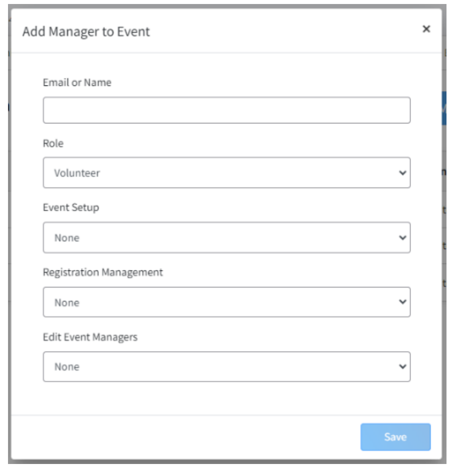
Event managers can only be 4-H Online manager accounts. Family accounts cannot be event managers.



Last Name	First Name	Role	Setup	Registrations	Managers
4-H	Wisconsin	Event Admin	Write	Write	Write
4-H - CES	Wisconsin	Event Admin	Write	Write	Write
Farrey	Mike	Event Admin	Write	Write	Write

1. Click on the Managers sub-tab to assign managers to the event.

2. Click the +Add Event Managers button.
3. Enter the Manager's Name or email address.
4. Use the Role drop-down menu to select the manager's role.
   A) Admin – Full access to the event
   B) Staff – permissions are individually assigned.
   C) Volunteer – permissions are individually assigned.
5. Use the Event Setup drop-down menu to select the manager's permission for setting up the event. (None, Read, Write)
6. Use the Registration Management drop-down menu to select the manager's permission to manage registrations. (None, Read, Write)
7. Use the Edit Event Managers drop-down menu to select the manager's permission to Edit (Add/Remove) Event Managers. (None, Read, Write)
8. Click the Save button.



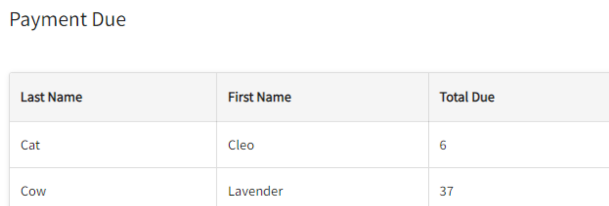
Payments

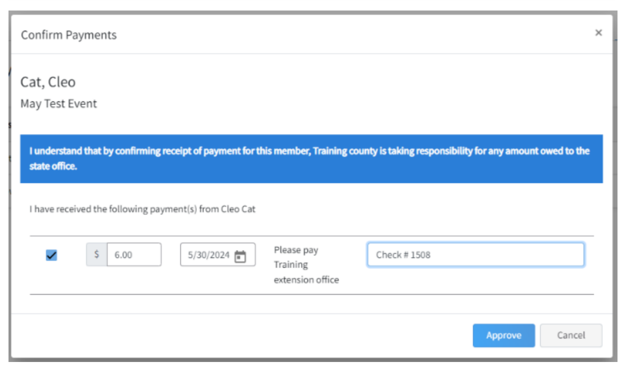
You can see all payments associated with the event on this screen.

Payment Due

Any payments due for approved registrations are listed here. Clicking on one of these payments allows you to record the check payment.

1. To record a payment, click on the line for the payment due.
2. Check the box and verify the amount of the payment.
   a. If the payment amount if different, change the amount.
3. Adjust the payment date if needed.
4. Enter a payment note if your office uses this. A good use for this note field is the check number.
5. Click the Approve button.





Awaiting Approval

Any submitted registrations that are awaiting approval at your level of the hierarchy are listed on this screen. Clicking on one will allow you to review the registration and process the approval. See the Reviewing Submitted Event Registrations section for more information.

Registrations

1. Click on the Registrations sub-tab.
2. Event managers with permissions may search and view registrations. Use keywords, and filters for Registration Status, Registration Type, Registration Dates and Approval Dates to search for specific registrations.
3. You may also send a broadcast email to the search results.

4. If you have permissions, you may approve registrations by clicking on them here. See Reviewing Submitted Event Registrations section for more information.

Report

Custom and Shared reports are found here. Any manager that can see the event can create a report. If they are not an event manager, they can only see results based on their hierarchy permissions.

Reports are created and ran here like Custom Reports in the Enrollment area. The difference is that some fields are not available, and some fields are specific to this event.

Making an Event Active

By default, the event is in Testing status during the setup process.

1. Click the Change Status link in the upper right corner of any of the Event sub-tabs.
2. Select the new status of the event.
    a. Active – open for members to register. Also needed to manage registrations and payments.
    b. Canceled
    c. Closed – all actions for this event are completed. Usually done after the year is done.
    d. Sold Out
    e. Testing – make changes to the set up.
3. Click Save.

If you need to make any changes to the setup of the event, you will first need to set the Event Status back to Testing.
If you change the status to Canceled, Closed, or Sold Out, you must change the status to Testing before changing it to Active.

Managers Registering A Member For An Event

1. Click on the Members tab in the navigation menu.
2. Search for the member you need to register for an event.
3. Click on the member's name in the search results.
4. Click Events in the navigation menu.
5. Click the + Register for a new event button.
6. Click on the name of the event the member is being registered for, and then click the next button.
7. Click on the Registration Type the member is being registered as, and then click the Start Registration button.
8. Complete the response for the Questions.
9. Enter the Health Form information (if applicable). As a Manager, you will enter your own name in the electronic signature field indicating that you have received the signed paper copy of the health form.
10. Click the Next button.
11. Complete the Consents. Manager will enter their own name in the electronic signature field certifying they have received the signed paper consent form.
12. Click the Next button.
13. If no payment is due, click the Finish button
14. If a coupon code is being used, enter the code in the Coupon box and click the apply button.
15. If payment is due, click the Pay By Check button and Confirm.
16. Click the Next button.
17. Click the Finish button.

Reviewing Submitted Event Registrations

When an event registration is approved, it moves on to the next level for approval or, if the approval is the final level and payment is via credit card, the card is charged.

1. Click on the Events tab in the navigation pane.
2. Click on the Submitted sub-tab.
3. Click on the name of a record to begin the review process.
4. Review the Registration Type Details, Other Questions, Health Form – Medical Release, Consents, and Invoice Information (if applicable).
5. Managers may edit the Other Questions responses and the Invoice to apply a coupon if applicable.
6. There are three options for processing the event registration:
    a. Approve – accept the registration.
    b. Send Back – enter comments and click Send Back to return the event registration to the member for corrections.
    c. Block – Rejects the registration and does not allow the member to register again.
7. If the registration is good, click the Approve button.

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