



## Ministry Platform – Creating Basic Events



- Events are a specific time and place people meet -whether in-person or online.
- Events can be recurring or one-time.
- Events can be placeholders for events in the calendar such as mass.
- Events allow you to track attendance. (For example: Religious Education Grade 1)
- You can add individuals or entire groups to an event.
- Separate events are created for each day/time that meeting takes place.

### Creating the event

1. Click **Events** on the left menu and click the **New Event** button to create a new event.
2. Complete fields on the screen
  - a. **Event Title** (Formation: Formation Sunday Grade 1)
  - b. **Event type** from the pre-defined types. (Formation: Religious Education)
  - c. **Parish:** Select yours
  - d. **Program** (Formation: Faith Formation)
  - e. **Primary Contact** (Formation: Faith Formation Director)
  - f. **Members Expected:** Limits number of attendees. Can be left blank
  - g. **Event Start date:** Date and time of first instance of this event
  - h. **Event End date:** The date should ALWAYS be the same as the Start date.  
Be sure to change the end time to the time the class ends
  - i. **Minutes for Setup and cleanup:** Must be completed. Can be zero.
3. Click **Save**. (Do not close the event)
4. If there is a group associated with this event AND you want to take attendance using the Group Attendance Tool, Associate the Event with a group as follows.
  - a. Click **Room and Groups** link and click the **New Room Reservation** button.
  - b. Select the **Room** using the drop down menu or the magnifying glass.
  - c. Select the **Group** using the drop down menu or the magnifying glass.
  - d. **Save** and **close**. **This would be the LOWER close button NOT the Close in the upper right.**
  - e. Repeat for every group meeting on that date. If you have multi-age rooms AND have separate groups for each of those ages, you'll need to repeat step a for every group meeting in that room on that date.

5. If this group meets several times throughout the year you can copy this event. The copy function will create a separate event for each date the group meets. For example, if your Religious Education group meets every Sunday October – May.
  - a. Click the blue **General** tab.
  - b. Click the **Actions** button and choose **Copy**.
  - c. **IMPORTANT:** In the **Copy Sub Page Data** menu, check mark **Rooms & Groups**.
  - d. Click the button with **three dots**.

- e. Create the pattern.
  - Choose a **Recurrence Pattern** - shown in orange circle below. Most Formation classes occur weekly.
  - How often does the class meet? If it occurs every week, then enter 1 in **Recur every**. If it happens every 2 weeks, enter 2 in **Recur every**.
  - Checkmark the day on which the class occurs. For example, most Formation classes happen on Sunday, so Sunday is checked in the example below.
  - Click **Save**
- f. Set the Recurrence Options
  - Enter the date of the first event in the series in the **Start By** field.
  - Enter the last date of the series in the **End By** field
  - Check **Include and Update Current Record**.
- g. Click **Save**.
- h. Click **Copy Record**.

Note: If you created events that land on a holiday, your SPOC can delete them by placing a check mark next to them and clicking the **Actions** button and choosing **Delete**.