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.**

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. Be sure the **Copy Sub Page Data** and 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 B**y 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**.