ATTEND

Event Module for EPiServer

User Guide

Version 5.x for Episerver CMS 9.x

1 Table of contents

2 Welcome to Attend

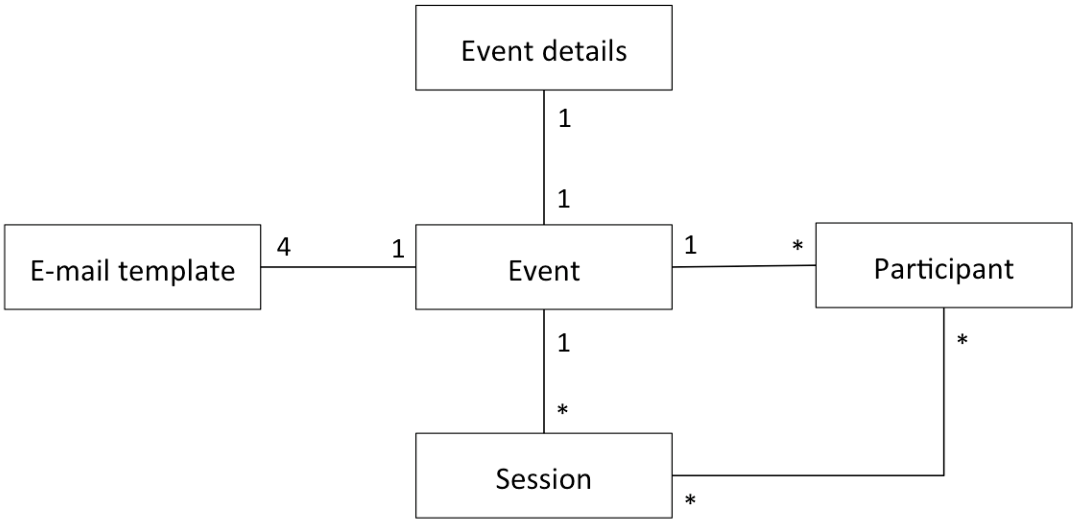
Attend is an event module for EPiServer 7 CMS. It enables you to create events, manage participants, send e-mail confirmation, set up tracks, and more.

3 Installing Attend

Attend is installed through the EPiServer NuGet feed.
http://nuget.episerver.com/

4 Basic concepts

An event is a page in EPiServer CMS of the page type Event. Every event consists of event details, defining event start, event end, location, etc. Every event can have an unlimited number of participants, and an unlimited number of sessions. Each participant can attend an unlimited number of sessions. A participation can only be assigned to one event, but can however be copied if the same attendee would like to attend multiple events. Each event can have multiple e-mail templates associated for communication with participants. Participants and sessions are created as shared blocks stored in the local block folder for each event page.

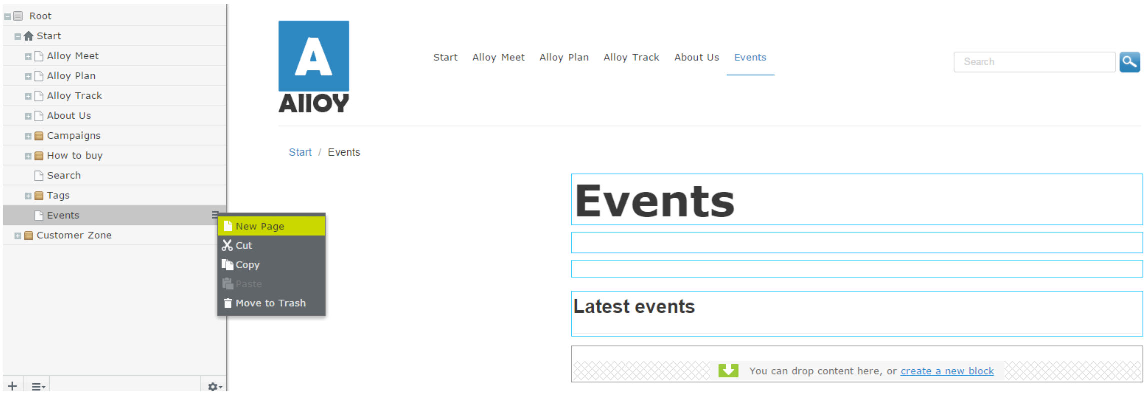


5 Creating a new event

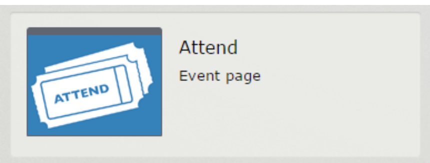
Events are created as pages in EPiServer. One page represents one event. You are free to place and organize event pages wherever you want in the page structure.

5.1 Add an event page

In this example we will create the page under Events on a standard Alloy demosite.

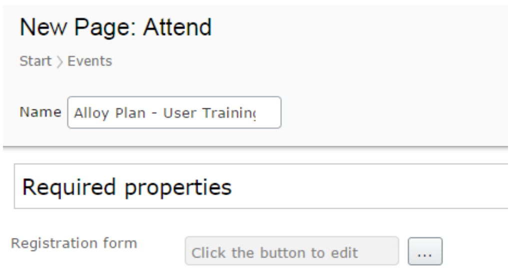


When installing Attend, a new page type called Event Page will be available.



If you don't see it in the list of page types, it is probably not available as a subpage for the parent page you have chosen. Choose another parent page, or see the EPiServer Administrator manual for more information.

When event is created, it will require a name and a registration form:

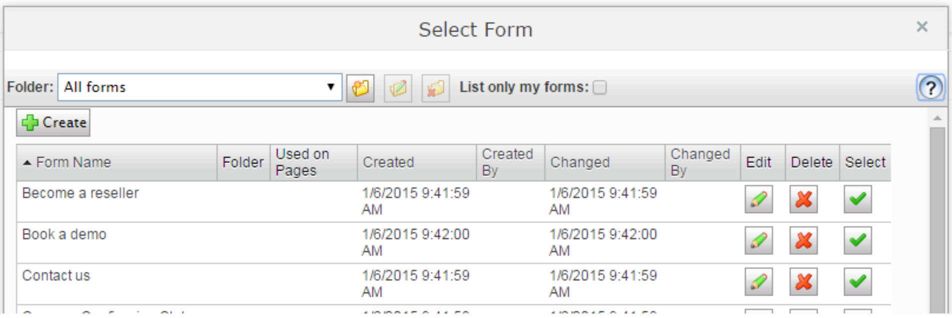


5.2 Select or create form

Attend is using the build in XForm functionality in EPiServer, making it possible to design your own form. The form is used to store information about participants, such as name, contact information, etc.

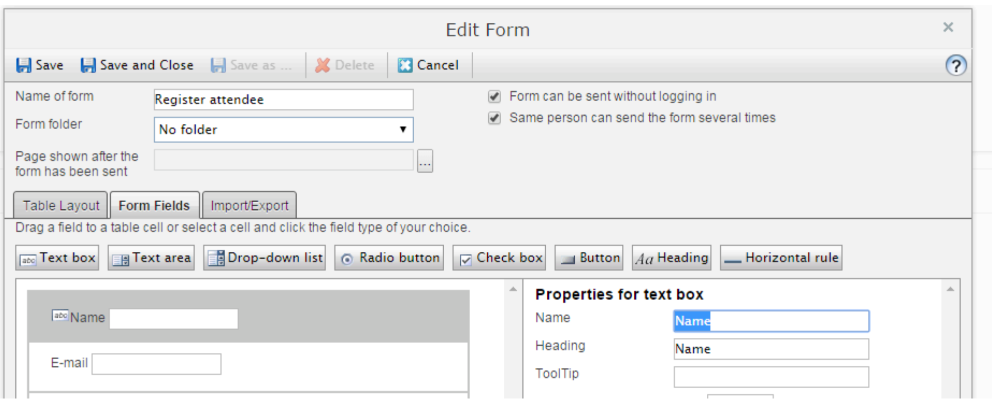
Click the button ... to select form.

In form selector you can use an existing form, adapt an existing form, or create a new one.



- Select form by clicking select button
- Edit form by clicking edit button
- Create a new form by clicking create button Create

Important!
To be able to create participants, a form field with the **Name** "**email**" or "**epost**" is required! This field will be used to fetch the participant e-mail address when registering the participant with Attend. **If e-mail is missing, the participants cannot be created!**



Tips!
More information

Guidelines for building forms can be found in the EPiServer 7 CMS Editor User Guide:
http://world.episerver.com/documentation/Items/user-guides/

5.3 The Event Editor

When form is selected and event page is created, the Event Editor will show.

The editor consists of six main tabs:

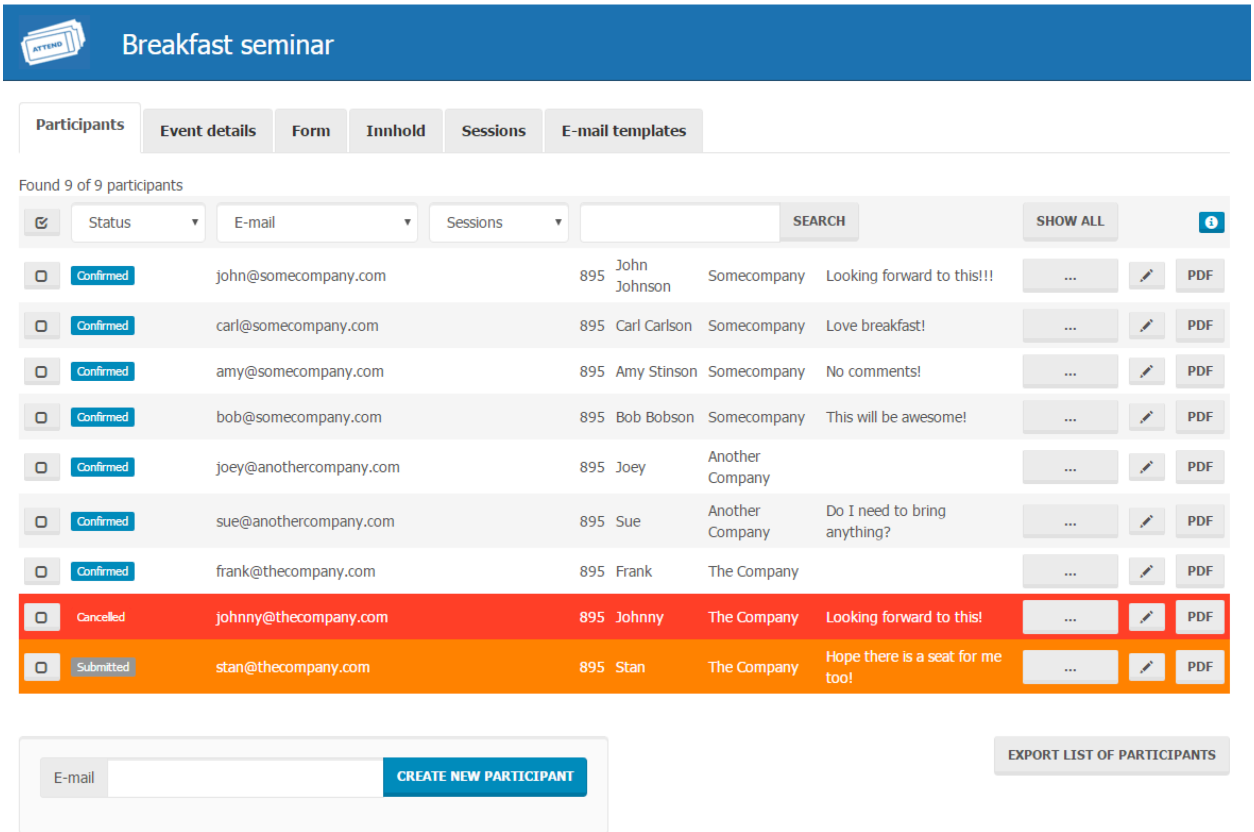
1. Participants
    - Participant overview
    - Filter participants
    - Search participants
    - Select participants
    - Moving or deleting participants
    - Export participant list
    - Create new participants
2. Event details
    - Event dates
    - Registration dates
    - All event details
    - Number of seats, price etc
    - Registration status
3. Form
    - XForm selection
4. Content
    - Content to show when registration is
        - Open
        - Closed
        - Full (no seats available)
    - Content to show when form is submitted:
        - When registration is confirmed
        - When registration is registered without available seats
5. Sessions
    - Session list
    - Edit sessions

- Create new sessions

6. E-mail templates
   - E-mail templates to use when registration is
     - Confirmed
     - Submitted
     - Cancelled
   - Notification e-mail template
   - Send notification e-mail
   - Global templates can be selected

5.3.1 Viewing participants

The first tab of the event editor will display all participants associated to the event. Colored rows makes it easy to distinguish between participants of different statuses. Cancelled are red, and submitted (no seat reserved yet) are orange:



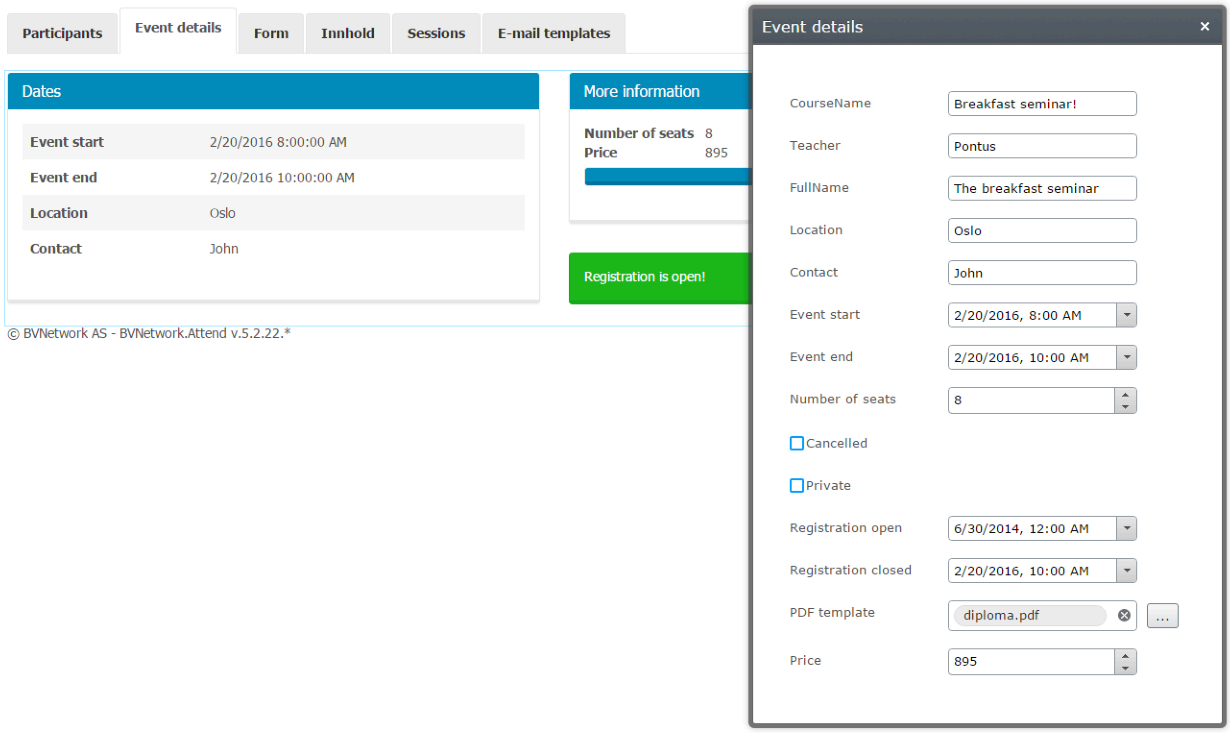
In the editor it is possible to filter the participants on status, e-mail-address and sessions by using the drop down lists in the participant table header. It is also possible to search for participants using the free text search box.

6 Edit event

The first step for creating a new event is adding event details to the event. This is important, because the event will need a time period both for the event itself and for the registration period.

6.1 Event details

The event details block has multiple properties. Click inside the "Event details"-area to edit the properties side by side:



Add values to event details. Required properties in bold:

- Location
  - Location of the event.
  - Can be used in confirmation e-mail.
- Contact
  - Contact person for the event.
  - Can be used in confirmation e-mail.
- Event start
  - Start of the event. Time and date.

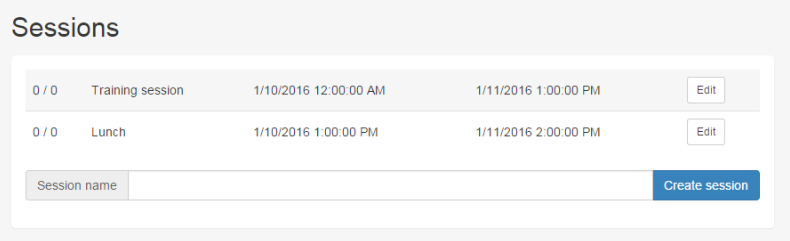
    - Can be used in templates for filtering or sorting of events.
- Event end
    - When the event is finished. Time and date.
    - Used to calculate event duration etc.
- Number of seats
    - Number of totally available seats.
    - Used together with number of participants to set registration status for an attendee.
- Cancelled
    - True / false
    - If event should be considered cancelled.
    - Registration not possible.
    - Can also be used in templates to hide event or mark as cancelled.
- Private
    - True / false
    - If the event should be considered private.
    - Used to hide form listings.
- Registration open
    - Date and time
    - Registration is possible later than this timestamp.
- Registration closed
    - Date and time
    - Registration is possible prior to this timestamp.
- PDF template
    - PDF template to print badges or diplomas
- Price
    - Number
    - Price for participants

6.2 Sessions

Sessions in Attend represents sections of different tracks. When the participant is submitting the form, all sessions are listed. If some sessions are overlapping, they will be listed with radio buttons preventing the participant to attend both.

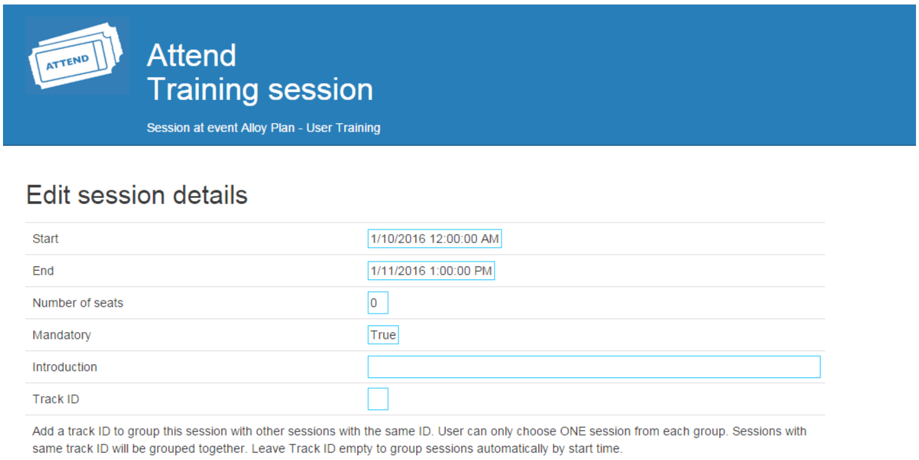
6.2.1 Creating new sessions

Add sessions by typing session name and click “Create session”.



6.2.2 Edit sessions

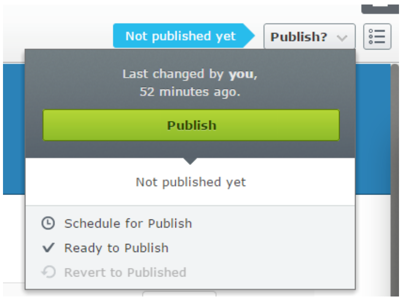
Edit existing sessions clicking the "Edit”-button next to the session.



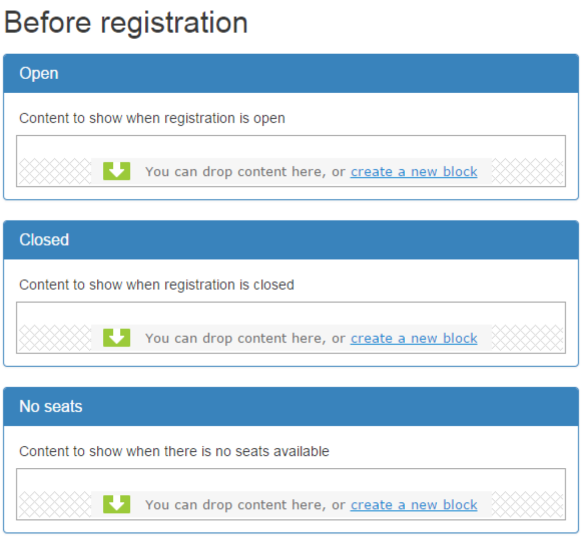
Sessions consists of the following properties:

- Start
  - Date and time when the session starts
- End
  - Date and time when the session ends
- Number of seats
  - Number of seats available for this session
  - Session will be disabled in the form if it is full
- Mandatory
  - If true, the session is preselected and disabled in the form
  - If false, the session is enabled, but not preselected in the form
- Introduction
  - Optional text describing the event.
- Track ID
  - If left empty, the session will be sorted in the list according to the start time.
  - Add value to group session with other sessions independent of start time.

Publish the session from the EPiServer publish menu to apply changes:

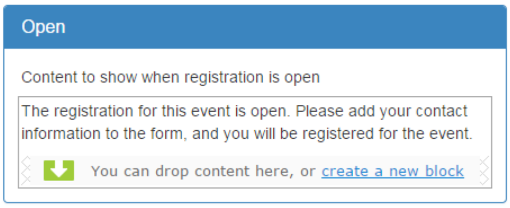


6.3 Before registration



Beneath the header Before registration, you can add content visible to the attendee before he submits the form. There are three content areas available, Open, Closed and No seats.

6.3.1 Registration open



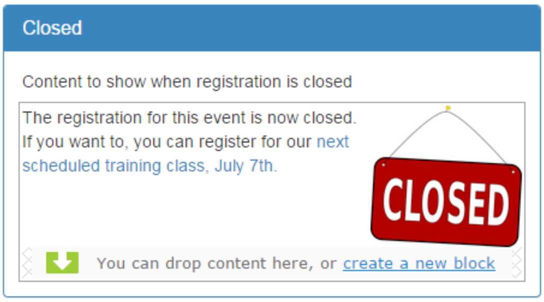
The content in this content area will be shown to the user when the registration is open, and there are available seats.

The registration is open between the time put in the "Registration open" and the time put in the "Registration closed".

Add content to the content area by dropping pages, blocks, media or other content items to the content area.

6.3.2 Registration closed

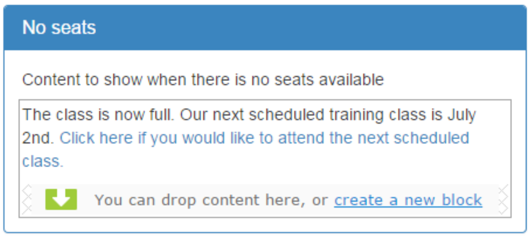
When the time is earlier than "Registration open" and later than "Registration closed", it will not be possible to register for the event. The content inside the "Closed" content area will be shown to the visitors.



Put information here to tell the visitor about other events, or simply add information telling the visitor the registration is closed.

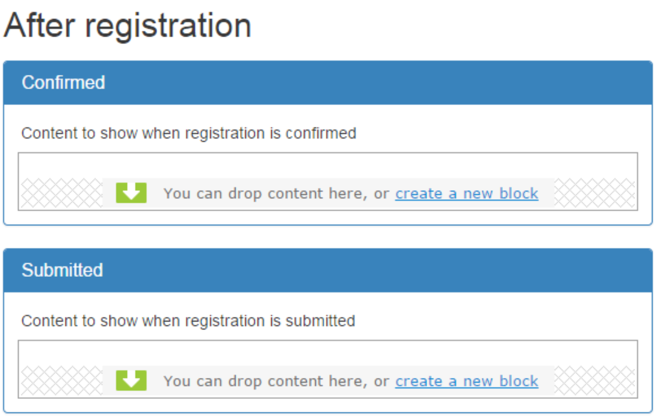
6.3.3 No seats

It is possible to add content to show when there are no seats available for the event. This will just be shown if the registration is still open and there are no seats left. If the registration is closed, the "Registration closed" content will show.



6.4 After registration

Content under After registration will be shown to the user when the form is submitted. There are two different content areas, Confirmed and Submitted. Only one of these will be shown to the participant (see below).



6.4.1 Confirmed

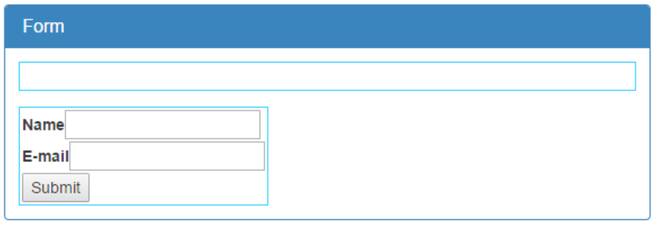
Add content to the *Confirmed* content area to notify the participant that his registration is confirmed. This content area will be shown to the user when there is seats available at the event when he submits the registration form.

6.4.2 Submitted

The *Submitted* content area will be shown when the user submits the registration when there are no seats available. Content here could typically describe that the user is on a waiting list for the event, and that he will be notified if any seat will become available at a later time.

6.5 Form

It is possible to change the rom used for registration. Click on the previewed form to create a new form, or to select another existing form.



Warning!
Changing to a form with a different form definition could result in registered form fields of existing participants not showing in the participant overview.

Be careful changing form definition for an event with participants.

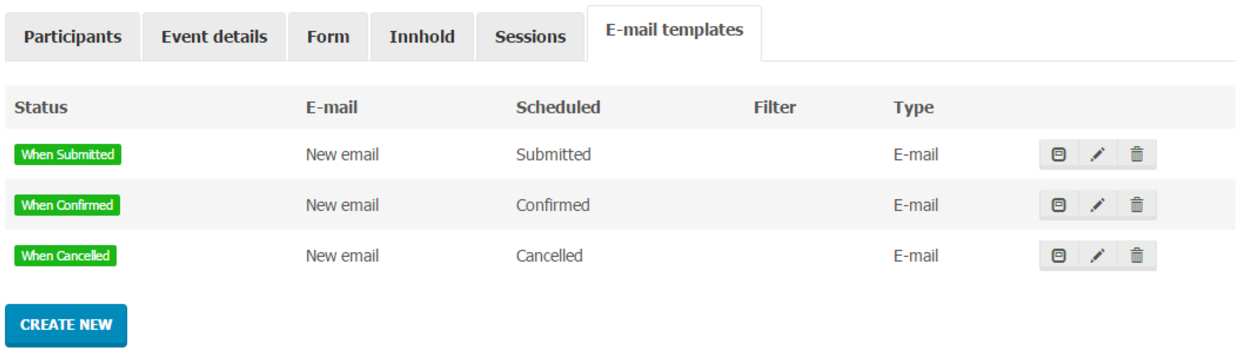
6.5.1 Seat availability

In the Form section, there is a property for adding seat availability texts. This makes it possible to add custom messages to visitors when there are one, two or three seats left.

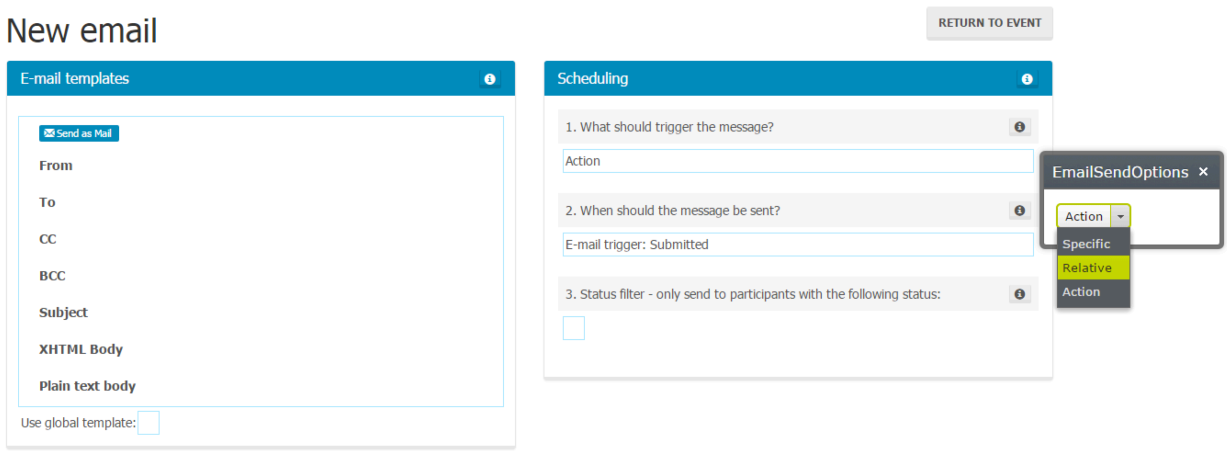
- One seat, Two seats, Three seats
    - Shown if there are one, two or three seats left, respectively.
    - If no text is added for any of these, the "More seats" text will be shown.
- More seats
    - Shown if there is more than three seats left, or if there is no custom text for one seat, two seats or three seats.
- Show availability
    - Enable or disable the messages above.

6.6 E-mail templates

E-mail templates are used for communicating to participants about the event. The content of the e-mail can be personalized by extracting content from the form and the event page and more.



The templates can be set up to be sent upon actions, such as participants registering for the event, cancelling the participation etc, or they can be scheduled to be sent at a specific time, or at a point in time relative to the event:



6.6.1 Editing templates

There are two ways of editing the e-mail templates. The template could be local to the event, fully editable just for this event. It could also be global, created as a shared block reused on multiple events.

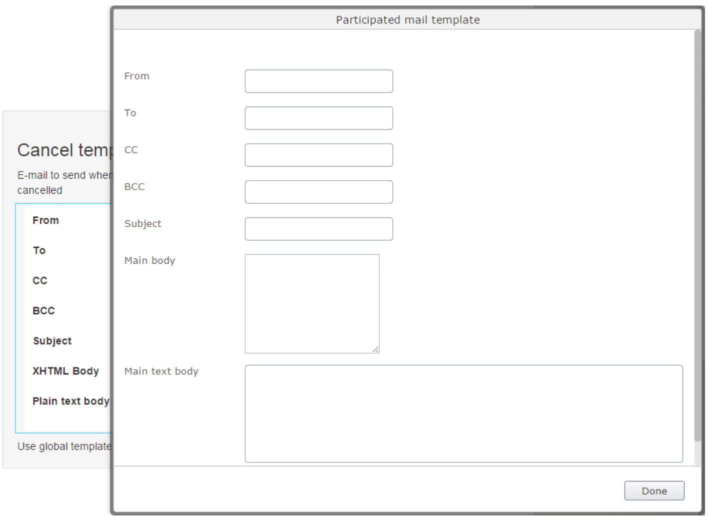
Each e-mail template consists of seven properties:

- From
  - E-mail sender.
  - Must be a valid e-mail. This property is required.

    - E.g. training@alloy.no
- To
    - E-mail recipient.
    - Should refer to the selected form for the event.
        - E.g. [CurrentRegistration.Email]
- CC
    - E-mail recipient (Carbon Copy)
    - Could refer to the form if the user has added multiple e-mail addresses, or refer to a specific recipient.
        - E.g. [CurrentRegistration.InvoiceEmail]
        - E.g. trainingteam@alloy.no
- BCC
    - E-mail recipient (Blind Carbon Copy)
    - If the e-mail should be sent to other recipients, for notification about the new registration, for archiving
        - E.g. archive@alloy.no
- Main body
    - The rich text content of the e-mail.
- Plain text body
    - The content of the e-mail if rich text is not visible.
    - This property is optional.

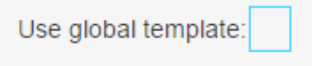
6.6.2 Local template

If the e-mail template should be custom to this event, it must be created as a local template. Simply click on the template to edit it. All properties for the e-mail will be shown side by side with the edit view:

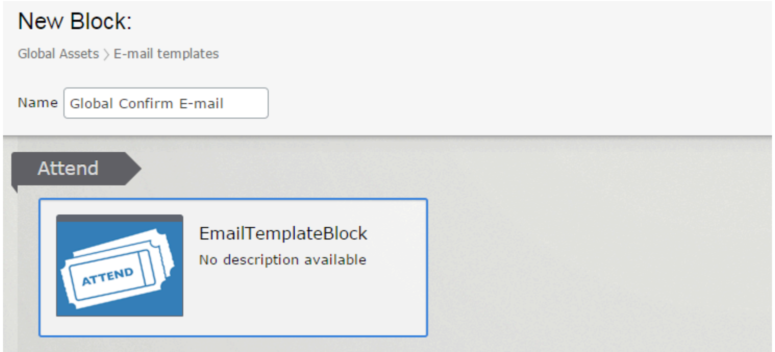


6.6.3 Global templates

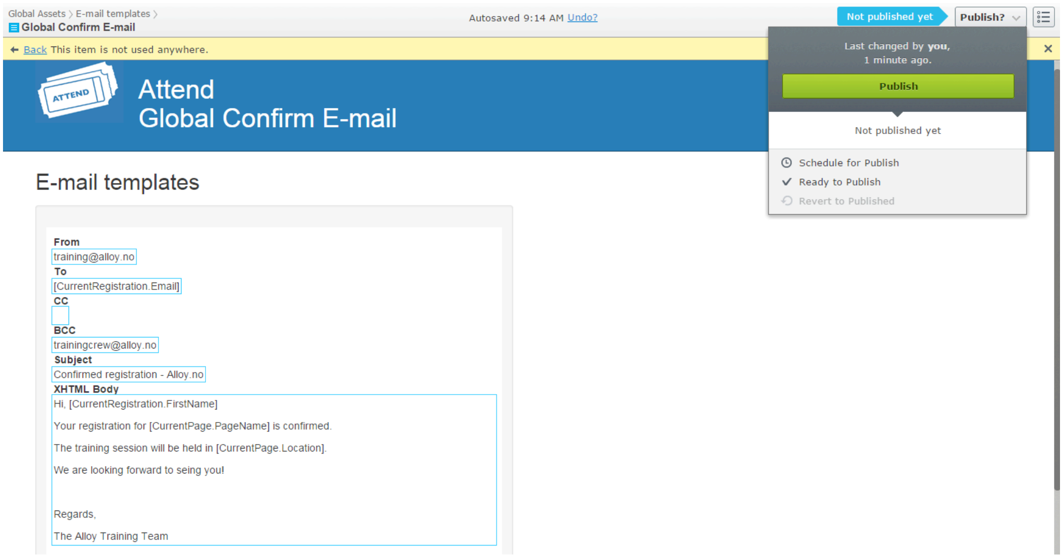
If the template does not have to be customized for the current event, select a global template:



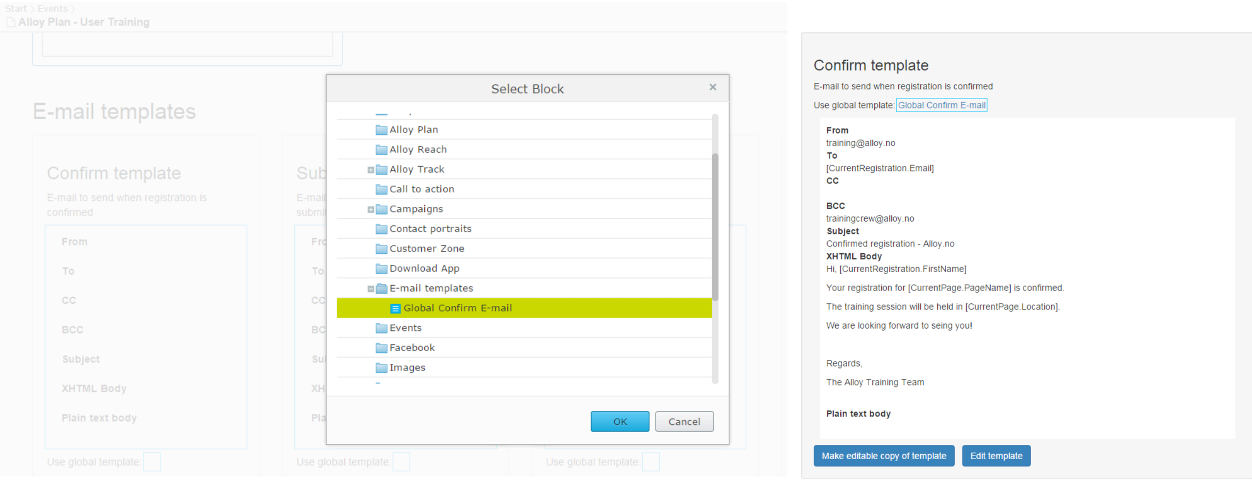
To be able to select a global template, it must be created by adding a new shared block. The block could be put anywhere in the assets pane folder structure.



In the shared Email Template Block, add the e-mail content, and publish the template.



When the shared block template is published, it can be selected by using global template:

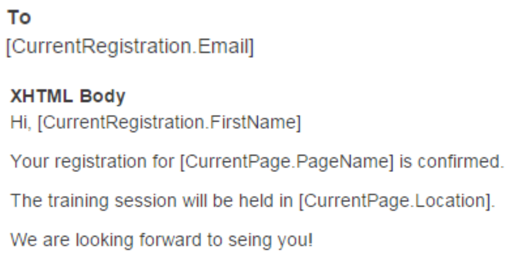


When the global template is selected, it will be previewed on the event. The template is read only in this context, but the global template can be changed by clicking the Edit template button. Changes to the global template will affect all events using this template.

Tips!
It is also possible to create a custom e-mail based on a global template, by simply clicking “Make editable copy of template”. All the properties from the global e-mail are added to the local e-mail template.

6.6.4 Fetching user data in e-mail

When working with the content, you can access form- and event properties by using brackets: []



Examples of use of brackets:

- CurrentRegistration
  - The form field firstname: [CurrentRegistration.FirstName]
  - The form field e-mail: [CurrentRegistration.Email]
- CurrentPage
  - The event property name: [CurrentPage.PageName]

    - The event details property location: [CurrentPage.Location]

For the CurrentRegistration there are also some “secret” properties that can be added:

- [CurrentRegistration.EditUrl] -> Url to the event page with e-mail and code included. Will work if the template supports participant editing.
- [CurrentRegistration.UserName] -> User name of the authenticated user. Nice feature e.g. on an intranet.
- [CurrentRegistration.RegistrationCode] -> The ID of the current registration.
- [CurrentRegistration.Price] -> The price given to the participant. If e-mail is sent out after initial registration it will reflect any discounts given to the participant.
- [CurrentRegistration.EventName] -> The name of the event.
- [CurrentRegistration.Submitted] -> Time of registration. (yy-mm-dd hh:mm)
- [CurrentRegistration.Status] -> Current status of participation.
- [CurrentRegistration.FullName] -> Combination of firstname and lastname (if used in registration form)
- [CurrentRegistration.DateString] -> Dates for the event. E.g. “July 3rd – July 4th 2016”.

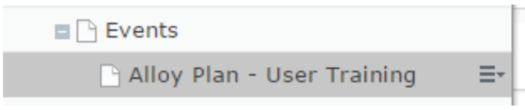
7 Showing events in EPiServer

There are two options of showing events to visitors with Attend.

1. Use Event page template
2. Use Event page as a block

7.1 Use Event with page template

This approach will require template coding. A template can be made by developers to show the event page as a regular page in EPiServer, displaying the registration form with sessions etc directly in the template.

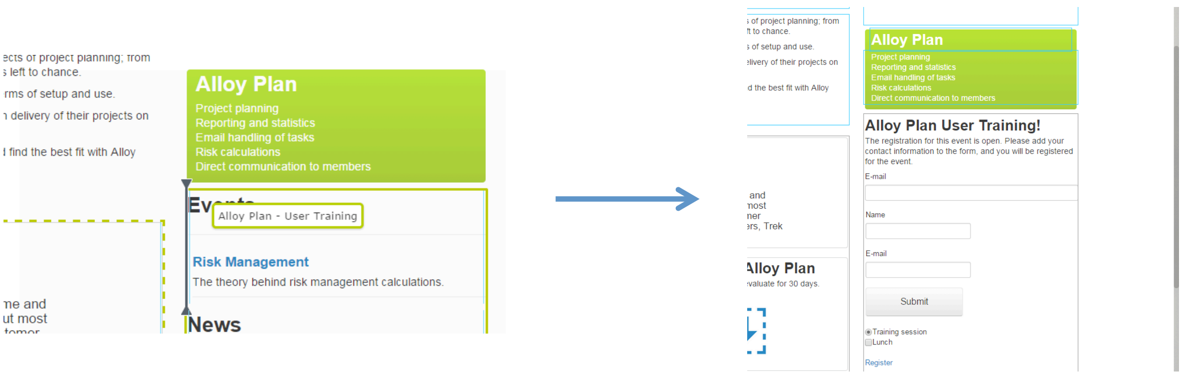


There are some advantages of using this approach:

- Full control of rendering
  - Event can be displayed with site specific design
  - Functionality can be added to the registration form
- Ease of use
  - The event will be visible to the visitor once published
  - Event will be part of the regular site navigation

7.2 Use Event as a block on other pages

This option is available out-of-the box with Attend, both for WebForms- and MVC-projects. Simply drag the event page into a content area of one of the regular pages on the site to show event registration form.



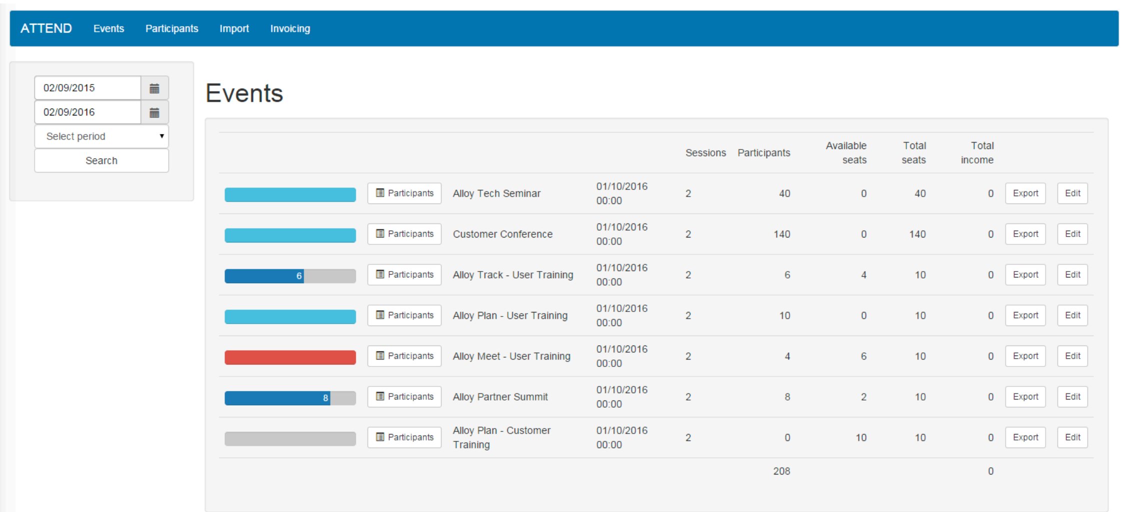
8 Event administration

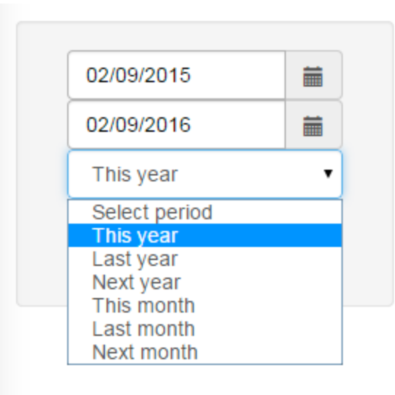
The global navigation in EPiServer will contain an Attend menu item when Attend is installed. The navigation will display four sub items:

- Events
    - List of all events with date filter.
- Participants
    - List of all participants. Date, status, e-mail and event filter.
- Import
    - Import events and participants from EventX or comma separated text.
- Invoicing
    - List of participants for invoicing export.

8.1 Events

The event list will display all upcoming events (one year ahead by default).



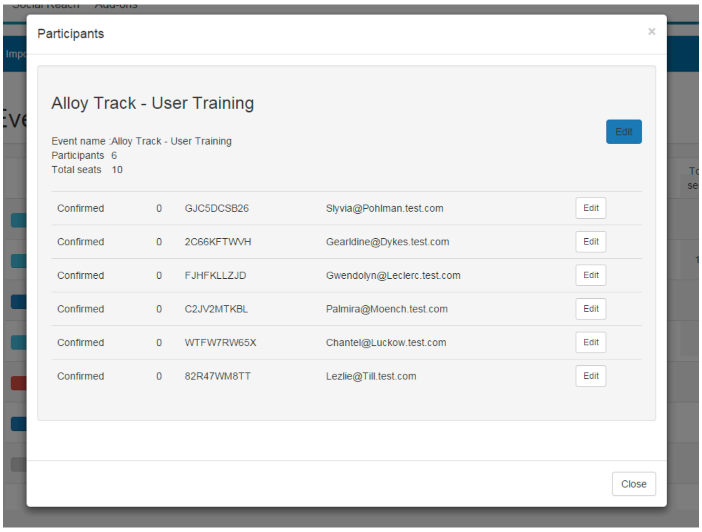


Add dates to the sidebar to select a different time period for the event list, or select a time period from the drop down menu.

Each event is displayed with a participant progress bar showing the number of participants versus the number of seats. Cancelled events are displayed in red, and full events are displayed with bright blue.

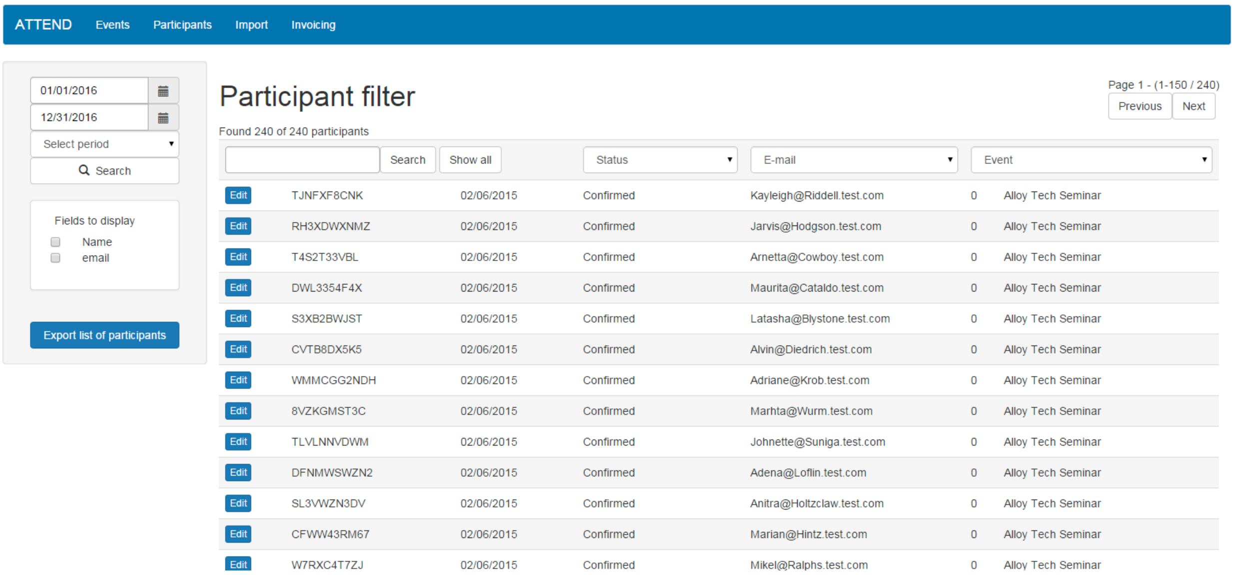
The “Participants” button gives easy access to the list of participants for the event. It is also possible to export the participant list by clicking “Export”.

To access edit view for a participant, click the “Edit” button.

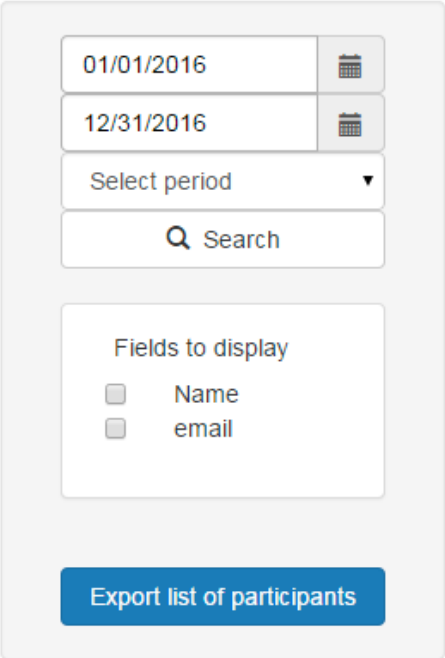


8.2 Participants

The participants filter will show all participant for future events (one year ahead by default).



Use date filter in the sidebar to select different time periods. Select a time period (This year, last year, next year, this month, last month, next month), or manually add your preferred date interval. Click Search to update the participant list.



It is possible to select what form fields (XForms) to show in the list. All available fields from selected participants can be selected. The form fields will be added as columns to the right on the participant list.

8.2.1 Export participants

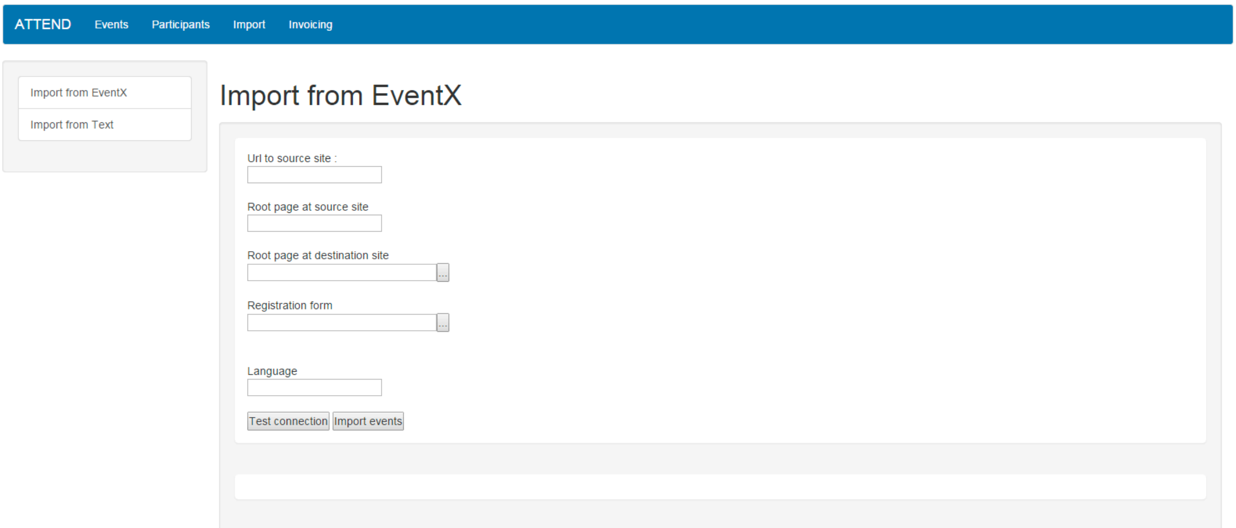
Click the "Export list of participants" button to create a comma separated file showing the same selection as the participant list.

Selected fields will also show up in the comma separated export file.

9 Import participants

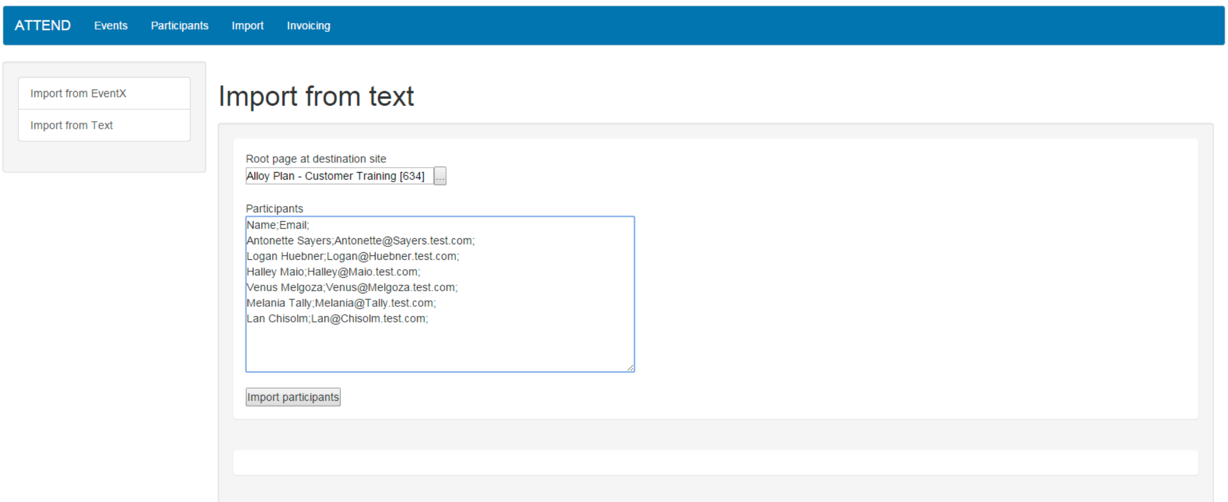
9.1 Import participants from EventX

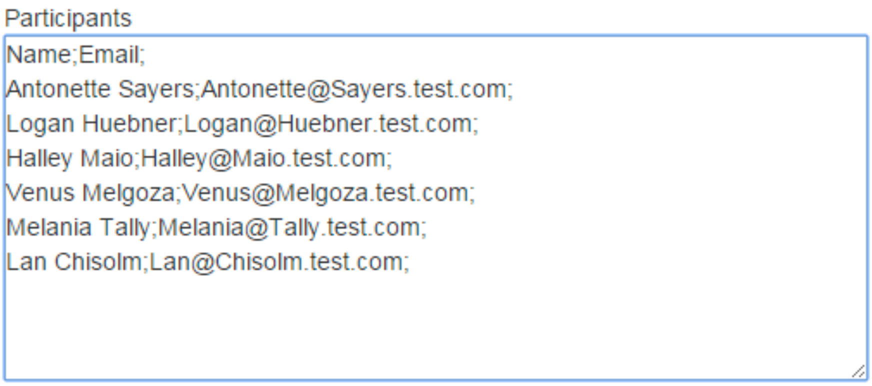
Participants can be imported form the event management system EventX for Episerver CMS 5 and 6. This procedure needs to be configured on the source page. Contact BV Network for more information.



9.2 Import participants form text

If you want to import participants form a semicolon separated file, paste the content to the text area, and add a header row, corresponding to the form field in the selected event.





9.2.1 Invoicing

A convenient list that can be used for invoicing purposes. It is possible to specify what XForm fields to be displayed in the report, by adding them in the “Fields to display” text box in the report.