Ellucian Banner Event Module Training

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ELLUCIAN Banner Event module summary and training

Data on events and the individuals who have attended those events has historically been stored in a variety of ways using MSAccess tables and MSExcel spreadsheets.

- *Using the Banner Event module will ensure* that this information is housed in Banner.
- You will be able to open an individual's record in Banner and see all of the events that a particular person actually attended.
- An event can be viewed to see minimal details about the event and who attended the event.

1. <u>Event creation in Banner</u>, pgs. 3-5

- Minimal event information will be entered manually into Banner.
  - Name of event
  - System – Choose according to Module you are using
  - Type of event – i.e. Banquet
  - Agency contact name – This should be main departmental contact who is responsible for the overall project - i.e. or department - i.e. Adrienne Bass, Director of OUAR
  - Department contact name –contact person or event coordinator– i.e. an Administrative Assistant; assistant director; other; or the director may be the event coordinator as well.
  - Event location
  - Event division sponsor – i.e. Academic Affairs; Finance and Administration; Student Affairs; or University Relations
  - Event department sponsor – i.e. Alumni or Art History, Meadow Brook Hall or other
  - Event date and time
  - Event function – i.e. Dinner, Banquet, Reception, Cultivation, etc.
  - Financial org that is used to pay for the event (not necessary).
- Other free-form entered comments, if needed.

2. <u>Event creation in Banner</u>, pgs. 6-7

  - Once the event data is in Banner, individual attendance at an event can be coded in Banner
    - Attendance can be added manually for small events.
    - Or there are some macro tools that can be used with training and approval.

> ***Additional event attendee information may be entered in Banner.***
> *For more information about coding invitees and other detail before the event occurs, review* ***Sections 3 - 4, pgs 8 – 11***.

5. <u>View event attendance on individual records</u>, pgs. 12-13

- The benefit of having this in Banner is individual records show which events the constituent has actually attended, i.e.
  - ***Leo Bowman***   ***Event Description***
    - A0018   CarvilleMatalinLecture9/29/04
    - A0004   Charter Class Reunion Weekend
    - A0003   OUAA Banquet
  - This data can be pulled into Access reports, just as is being done with all Banner data
  - **Attendance information will be universally available through the shared Banner Events Module**, instead of only available to those who know where to look or who have access to their "separate silo" Access databases or Excel spreadsheets.

<u>Events will show a record of who attended</u>, once the event attendance data is in Banner, i.e.

- ***A0020 OUAA Banquet – November 2005***

• Leo Bowman	• Adrienne Bass
• Susan Evans	• Sue Goepp

1. **Event creation**

Open Banner form SLAEVNT.
To add a new event, begin by typing **ADD** in the blank **Event:** field. Or click on the Create: button.

From the toolbar, choose Next Block to roll down into the form.

Complete all fields. Please review the appendix, pg. 14, for standards regarding **Description name** and definitions related to **Event Type**.

1. **Description** should reflect the event name. The name should be easy to identify later and indicate a date. *Follow description standards in the appendix*.

2. **System** – Choose according to Module you are using, i.e. Alumni department would choose Advancement, Admissions would choose Student.

3. **Event Type** – Indicate event type from underlying table. *Review definitions in the appendix.*

4. **Agency ID** – Indicate departmental individual who is ultimately responsible for the event.

5. **Contact ID** – Indicate individual who is the main contact, or who is coordinating the event.

6. **Address Type** - Drop-down arrow will bring up address choices. Choose OF or BU type. This information refers to Contact ID individual. Phone number will populate as a result.

7. **Campus** – Double click and make an appropriate choice from the table.

8. **Site, District, College & Dept** – Make an appropriate choice for each field from the tables.
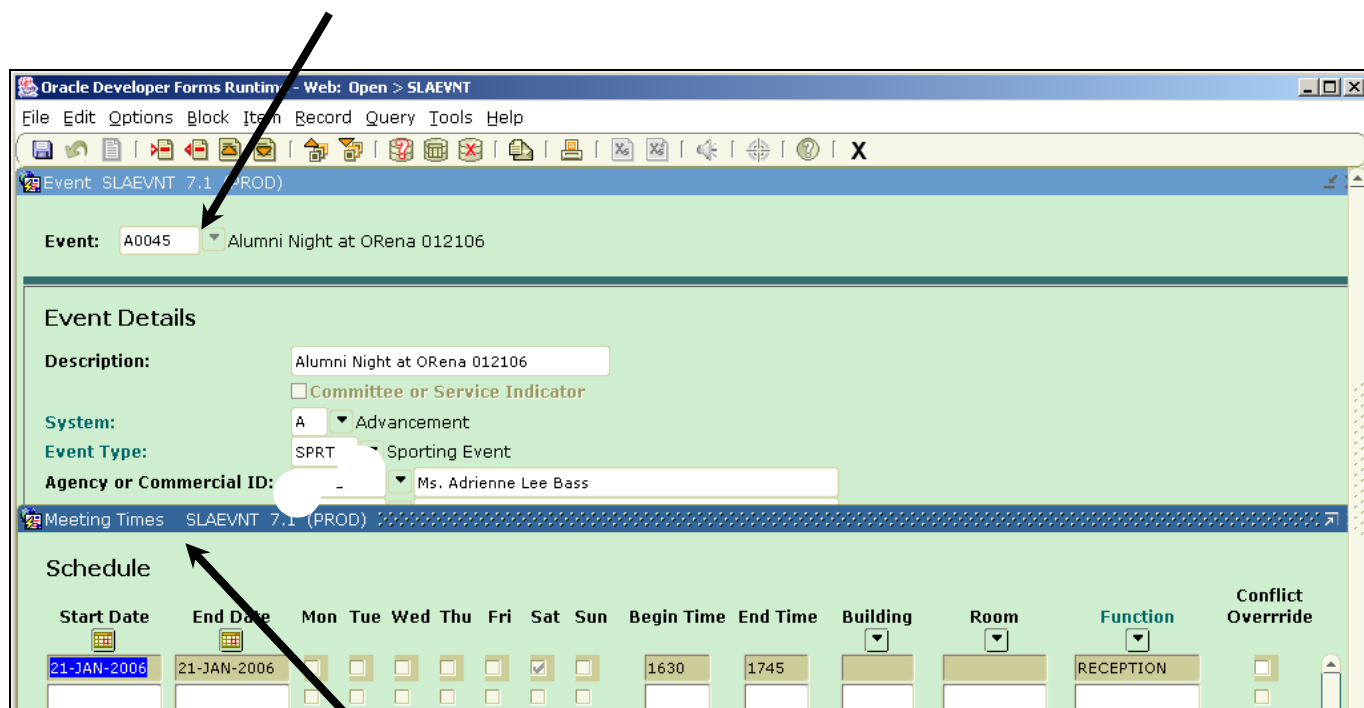
9. **Note** – If event is combined between two departments a choice must be made as to which department's information is used on this form. Only one can be entered. A reference to the combined departmental event can be made on the comment form – see pg 5.

10. **Save and Next Block** down
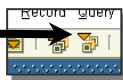
Saving will cause a number to be assigned to the event.

Next block will bring up the Meeting Times form.

1. Enter **Start date and End date** (format DD-MON-YYYY). If event is only a one day event, the start and end date will be the same.

2. Enter **Begin time and End time** (range 0000 to 2359).

3. Enter **function code** from the table.

4. These **three sections are required** if you want to enter attendees to your event.

5. **Save and Next Block** down.

6. Next block brings up the optional comment form. Any information that is free form text can be entered. Each line only allows for 60 characters of text.
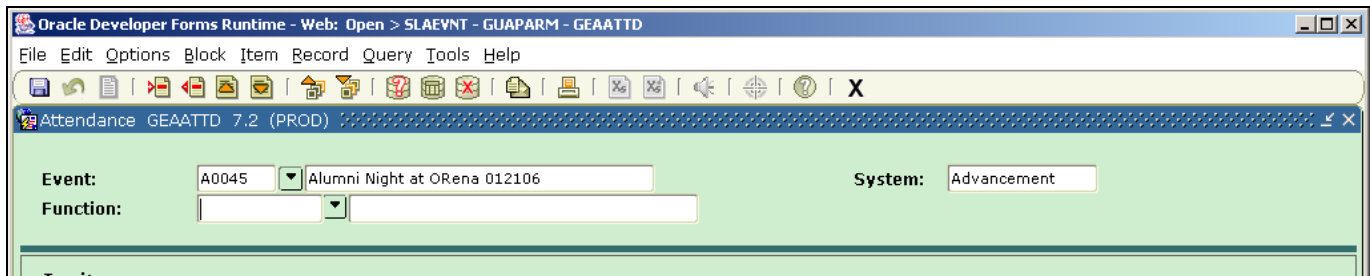

Please Note: *The OU Executive Events department uses this Event Comment form to indicate if an event has been canceled - for historical reference.*

Save and close this form.

2. __Coding Event attendees__

To code event attendees, open form GEAATTD.

Enter event number or search for the event.
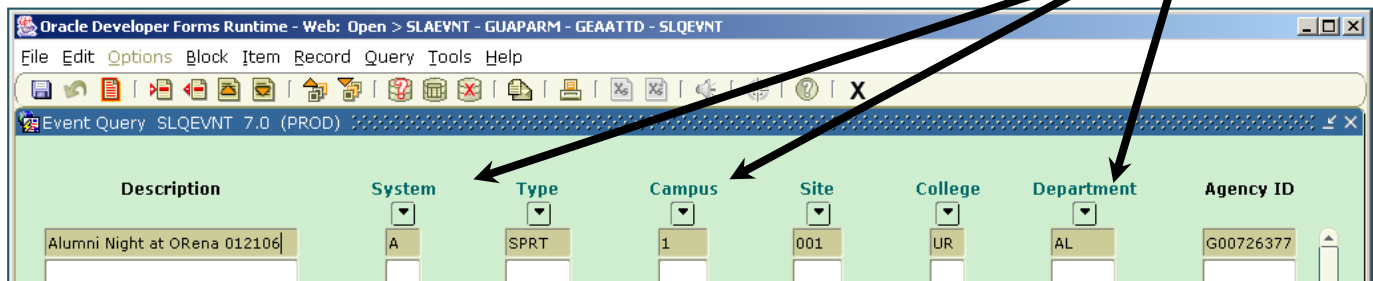
A search query can be **narrowed by using the drop-down boxes** and making selections.
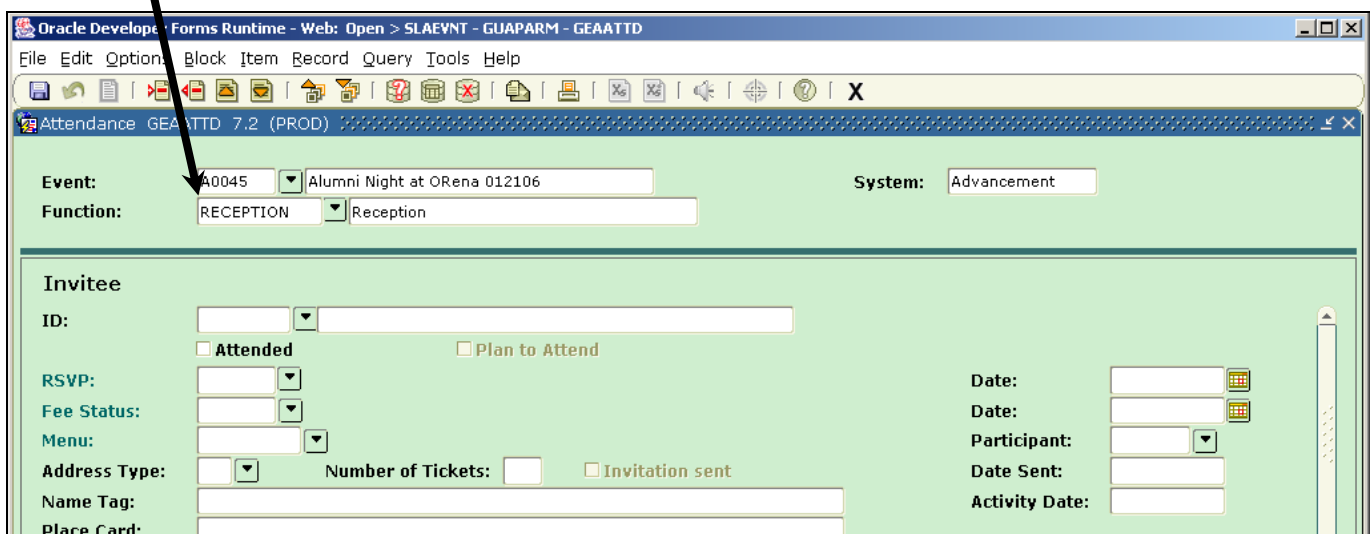
F8 will run the query and produce results to choose from:

Using this query will become increasingly important as the events table grows. Double click to bring your choice forward.

Choose a function and block down.

__Please Note:__ The OU Executive Events department uses the function code Cultivation, if that is appropriate for the event.

Enter first event attendee's ID number. If you are only entering individuals who actually attended the event, **check attended button** as you enter the person.

Choose F6 to insert the next record.

Repeat this step as many times as necessary to enter all attendees. **Save** after each record, after a group of records, or when you have entered all records. It is optional when you save.

> **This completes the event module training for the simple method of**
> 1) **creating an** event in Banner and
> 2) entering event attendees.

> **Please Note:** The OU Executive Events department usually **creates an event before** it occurs and will code all of the invitees. As the planning progresses, these invitees will be further coded. Pages 8 - 11 references further steps that may be used for coding.

IF you have good reason to add a record for someone who is not in Banner, you can use the drop-down box in the ID field which will bring up other options.

Choose Create New ID ((APAIDEN)), which will take you to the APAIDEN form.

Do a thorough search to make sure that the attendee doesn't already have a record in Banner.

Follow the Advancement Services manual standards to add the event attendee to Banner. At a minimum, you must have an address for the event attendee if you are creating a new record.

Additional Information

Contact the event module owner, if the **underlying tables do not include something** that you may need.

Review the Banner Documentation, if you are interested in **using the Event module to track more event information**. **The event module is capable of tracking much more information.**

- You can enter all invitees and then track whether they have RSVP'd, declined, attended, etc.
- You can enter meal information, name tag, guest names (if they have a record in Banner), table place cards, etc.

Additionally, there is an optional macro that may be used to enter the attendees, if your **event is large and has many attendees**. Your supervisor and the module owner should approve your use of the macro before it is used.

The macro can be a useful tool, but needs to be used training and with **much caution**.

3. **Coding Event *invitees* and their response**

To track Event invitees and whether they have **accepted, declined, did not respond** and who **finally attended**, use GEAATTD and include the following additional information.

The event would be created in the same way as shown on page 3 of this manual.

Before the event occurs, the **invitees are added** to GEAATTD.

The **Attended indicator is not checked** until after the event has occurred.

Invitees may be coded whether they will be attending the event or not based on this table.

Please Note: *Executive Events only uses   ACCEPT;   DECLNE;   and NO_RSP.*

After the event, if the response shows ACCEPT and the attended box remains unchecked, it means that the individual was a "no show".

Important for Access queries: If you accidentally *check the attended box* and *then "uncheck" it*, it will show up in your Access query as N instead of null.
Build your queries to accommodate for Y – box is checked that they attended;
Or field shows N – no they didn't attend or null – they didn't attend.

4. **Adding additional event _invitee_ or attendee information**

Executive Events uses Comment field in GEAATTD to further identify attendance information.

- If both attendee and guest have a record in Banner, the comment field would read:
  "Attended with William ____" on Marjorie's record and
  "Attended with Marjorie____" on William's record.

- If guest does not have a record in Banner, the comment field would read:
  "Guest Shi____"

- The comment field on GEAATTD may also include other relevant comments as in the examples below.

The pencil ICON brings up a larger Comment screen for better viewing of the comments.

Executive Events department includes menus – especially for small gatherings - to ensure that we are not feeding special guests the same food over and over.
The menu is entered on GEAFCOM.

Function Comments GEAFCOM 7.1 (PROD)		
Event: A0... Breakfast Meeting 092807	**Subject:**	
Function: BREAKFAST ▼ Breakfast	**System:** Advancement	

Comment ✎	User
Egg, Spinach and Cheese Roll-upLink SausageFresh Fruit	VASCHULT

Event: A0... R Lunch Meeting 092807	**Subject:**	
Function: LUNCH ▼ Lunch	**System:** Advancement	

Comment ✎	User	Activity
Grolled Mandarin Chicken SaladFruit Cup	VASCHULT	19-OCT

Dietary restrictions are kept track of on an **individual's record in APACOMT.**
The subject is called DIETR to distinguish this comment from other comments on this form.

Advancement Individual/Organization Comments APACOMT 7.0 (PROD)		
	Name	Category	Cl
ID:		ALUM ▼	19
Spouse:	...a D...ey		
Subject: DIETR ▼ Dietary Restrictions		

Originator: VS ▼ Valerie Schultz	☐ Confidential	**User:** VASCHULT
Entry Date: 03-MAY-2007 📅		**Last Updated By:** VASCHULT

Comment: is - No red meat, chicken or fish only ... oes not eat salmon

Spouse: ...4 Mr. John N Miller		OTH
Subject: ▼		

Originator: VS ▼ Valerie Schultz	☐ Confidential	**User:** VASCH
Entry Date: 15-MAY-2008 📅		**Last Updated By:** VASCH

Comment: No Shellfish

5. __Viewing Event Information__

To __view information on an event and the event attendees__, open form GEIATTD.

Select the event and the event function. Use the radial buttons if you wish to narrow your selection. If you have used the simple method of entering attendees by checking attended, then do not narrow your selection.

Block down to see all event attendees that have been entered for the particular event.

You can further **navigate through this form to view detailed information** on specific event attendees by choosing Options from the menu bar at the top. This will take you back to the GEAATTD form.

6. Viewing event Information on a constituent record

To view information on an individual and the events they have attended, open form GEIIDFN.

The form **GEIIDFN can also be accessed from APASBIO in the Advancement module**, if the Events and Functions section is checked.

ELLUCIAN Banner Event Module appendix

Event Description:

On form **SLAEVNT,** the **Description** should follow the following name standards to assist in easier querying and searching as the table of actual events grows.

- Event name should **begin with alpha characters**, i.e. *Alumni Awards Banquet* or *Regina Carter with DSO* as opposed to *2005 Alumni Awards Banquet*.

- The date should always be included in the Event name in the format MMDDYY, so the Regina Carter event would be named: **Regina Carter with DSO 012904.**

- If the **event is a repeating event**, such as Alumni Awards Banquet, each event would be **created independently, ending with a date MMDDYY,**
  i.e. Alumni Awards Banquet 092101
     Alumni Awards Banquet 110406
     Alumni Awards Banquet 110505
  This will help to distinguish which year's event you want if you are in the query field of SLAEVNT since the date is not a field in the query.

- If a **new event is held, you may not realize that it will be repeated** the following year, the first event might be named *Corporate BB Game 012405*.
  When the event is repeated the following year, the new event would be:
  Corporate BB Game 012106.
  By adding the date at the end, you will be able to distinguish between events.

- The **ending date should always use a standard** of MMDDYY
- The **Description field is only 30 characters long**, including spaces. Be descriptive, but concise and always include a date.
- If you need to abbreviate for space, try to use standard abbreviations such as:

o Chrtr – Charter	o Dnr – Dinner
o BB - Basketball	o Lch – Lunch
o BSB – Base ball	o Bkfst – Breakfast
o Recpt – Reception	o Mtg – Meeting

Event Type:

Every Event must be assigned an Event Type. Review this list carefully, before selecting an Event Type. Each department knows which Event Type best describes their event, but you should **use these definitions as a guide**.
Remember someone else may be querying for information on specific event types.

Sometimes part of the Event Type may be in the Description of the Event for example, if guests have been invited to dinner followed by the play 'Driving Miss Daisy', your Event Description may be "Driving Miss Daisy Dinner" then the Event Type would be Theatre because that's the focus of the event.

The Event Types that are in Banner are defined as:

Event Type	Definitions
Art Exhibits	Attendance at an art presentation in a public exhibition or contest.
Banquet	Evening dinner event with more than 100 guests. May be business, semi-formal or formal and may or may not include other activities.
Breakfast	
Brunch	
Commencement Ceremony	Graduation
Conference	Purpose of the program is to obtain information and share ideas – typically from experts or specialists in their field. A meeting for consultation or discussion or to exchange ideas or views.
Dedication	A ceremony dedicating something, such as an art piece, room, building.
Dinner	
Entertainment	Generally a performance or show. Review other event types, they may be more descriptive.
Event	This type is used solely to tie to the GTVFUNC table. Use a more specific type to identify your event.
Forum	A public meeting or presentation involving a discussion usually among experts and often including audience participation.
Golf Outing	
Ground Breaking	Prior to construction on a room, department or new building, a ground breaking takes place; usually a short program precedes a shoveling of the first piece of ground.
Inaugural	An event occurring at or characteristic of a formal investiture or induction. A formal ceremony of conferring the authority and symbols of a high office.
Lecture	An exposition or talk given on a specific subject delivered before an audience or a class, for the purpose of instruction or providing new information.
Legislative	Primary guest(s) is a legislator, i.e. mayor, state representative, congress person, etc.
Lunch	
Meeting	This may or may not include food, lunch, dinner, etc. The main purpose of gathering is to meet, i.e. a board meeting.
Open House	An occasion when a school, department or office is open for visiting, observation or entertainment by internal or external guests.
Opening	After construction on a room, department or new building a grand opening may take place, usually a short program precedes a ceremonial ribbon cutting.
Orientation	Introductory instruction concerning a new situation: *orientation for incoming students.*
Presentation	A show or display; i.e. the presentation of new data; the act of presenting a proposal; a visual representation of something.
Reception	Gathering where food may be served & could precede a dinner, or other event, but does not have to. Guests typically stand for the entire event.
Recital	A public performance of music or dance, may be a solo performance or a group. This performance is usually a final presentation as part of a class, workshop or a series of lessons.
Recreational	Sporting event where guests are participants, a family fun day or picnic could be other examples.
Recruiting Activity	
Registration	
Reunion	A gathering of the members of a group who have been separated: *a high school reunion.*
Seminar	A small group of individuals engaged in study under the guidance of an instructor. A meeting for an exchange of ideas.
Social Gathering	An assembly of individuals engaged in a gathering for the purpose of promoting fellowship. A social affair.
Sporting Event	Sporting event where the guests are spectators.
Theatre Performance	Acting performance, dance, music, play, etc. at a building, room, or outdoor structure for the presentation of plays, films, or other dramatic performances.
Travel	Off-campus event
Unveiling	A gathering where something is put on display for the first time, i.e. the unveiling of a statue, logo, etc.
Volunteer / Community Service	Used for Volunteer projects, not Events.
Workshop	An educational seminar or series of meetings emphasizing interaction and exchange of information. Usually a small number of participants, i.e. *a creative writing workshop.*