

Adding Fields to an Event (which ones do we use?)

iModules Training: <https://support.imodules.com/hc/en-us/articles/218261968-Fields-Event-Form>

When creating a new form, several fields will default to the form.

The screenshot shows the iModules interface for configuring an event form. The top navigation bar includes links for Dashboard, Content, Community, Email, Events, Donations, Memberships, Forms, and Memb. The user is logged in as William Babuka (1013690). The event being configured is 'Jacks B-Day'. The interface is currently in 'Build Form Mode'. The 'Main Registrant Step' is active, and the form includes the following fields:

Preferred First Name:	William	*
Preferred Last Name:	Babuka	*
Email:	wrb1@cornell.edu	*
	Confirm wrb1@cornell.edu	*

There is also a checkbox for 'Please do not show name on the attendee list' which is currently unchecked.

A yellow warning box at the bottom of the form states: "Please select Data Entry Mode to fill out this form." Below this warning is a "Save and Continue" button.

There are minimum fields that should be added that even if they don't provide value to the event, the information collected will be updated into PeopleSoft through interfaces.

Requested fields – Place of form please make required:

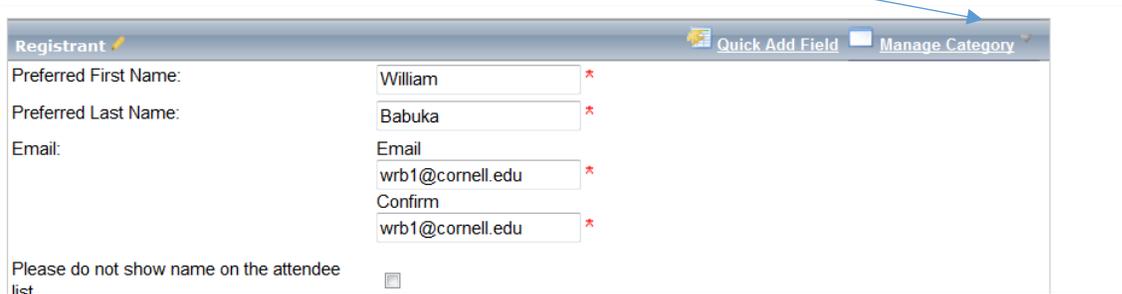
Preferred First Name, Preferred Last Name, Preferred Email

Requested fields – Place of form but does not need to be required:

Preferred Maiden/Middle Name, Preferred Prefix, Preferred Suffix, Preferred Address 1, Preferred City, Preferred State, Postal/ZIP

Existing Fields

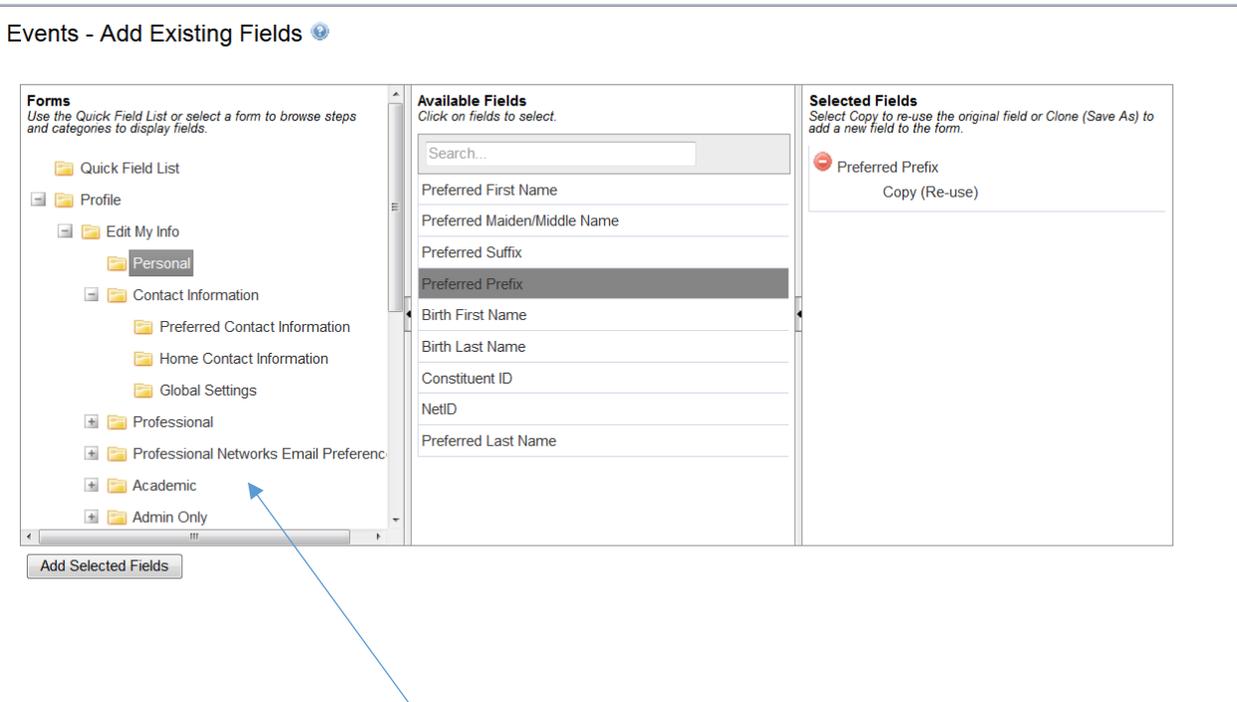
When inserting these fields onto the form, select “Manage Category” then “Add Existing Field”.



The screenshot shows a form titled "Registrant" with the following fields and values:

Preferred First Name:	William
Preferred Last Name:	Babuka
Email:	wrb1@cornell.edu
Confirm:	wrb1@cornell.edu

At the bottom left, there is a checkbox labeled "Please do not show name on the attendee list" which is currently unchecked. In the top right corner, there are two buttons: "Quick Add Field" and "Manage Category". A blue arrow points from the text above to the "Manage Category" button.



The screenshot shows the "Events - Add Existing Fields" interface with three main panes:

- Forms:** A tree view on the left showing categories like "Profile", "Edit My Info", "Personal", "Contact Information", "Professional", "Academic", and "Admin Only".
- Available Fields:** A central pane with a search bar and a list of fields including "Preferred First Name", "Preferred Maiden/Middle Name", "Preferred Suffix", "Preferred Prefix", "Birth First Name", "Birth Last Name", "Constituent ID", "NetID", and "Preferred Last Name".
- Selected Fields:** A right pane showing "Preferred Prefix" has been added to the form, with the option "Copy (Re-use)".

At the bottom left, there is a button labeled "Add Selected Fields". A blue arrow points from the "Academic" category in the left pane to this button.

Navigate on the left pane to open folders. The profile folders include fields that if changed by the alumni, will be fed to PeopleSoft to also be updated.

Events - Add Existing Fields

The screenshot displays the 'Events - Add Existing Fields' interface, which is divided into three main sections:

- Forms:** A tree view on the left showing categories like 'Quick Field List', 'Profile', 'Edit My Info', 'Personal', 'Contact Information', 'Professional', 'Academic', and 'Admin Only'. A 'Personal' folder is expanded, showing sub-items like 'Preferred Contact Information', 'Home Contact Information', and 'Global Settings'. A scroll bar is visible at the bottom of this section.
- Available Fields:** A central list of fields with a search bar at the top. The fields listed are: Preferred First Name, Preferred Maiden/Middle Name, Preferred Suffix, Preferred Prefix (highlighted in grey), Birth First Name, Birth Last Name, Constituent ID, NetID, and Preferred Last Name.
- Selected Fields:** A rightmost list containing one field: Preferred Prefix, with the option 'Copy (Re-use)' below it. A red circle with a minus sign is positioned to the left of the field name.

At the bottom of the interface, there is a button labeled 'Add Selected Fields'. Two blue arrows point from the text below to the 'Preferred Prefix' field in the 'Available Fields' column and the red circle in the 'Selected Fields' column.

Select the field in the middle column. All selected columns will appear in the right most column.

Selecting the red circle will remove them from the list. Select the "Add Selected Fields" button to insert the fields to the bottom of the form.

[Find Member Record](#)

Profile | Notes | Forms | **Events** | Campaigns | Membership | Tasks | Communications | Tracking

Manage Events | Event History | Reports

Jacks B-Day

Registrant | Guests

Build Form Mode | Data Entry Mode

Jacks B-Day [Content Properties](#) [View Content](#) [Ma](#)

Registrant » Guests » Finish

Main Registrant Step

If you are collecting guest information, fields added here will be available for use on the Guest Information Step. Em

Registrant [Quick Add Field](#) [Mana](#)

Preferred First Name: *

Preferred Last Name: *

Email: *

Confirm: *

Please do not show name on the attendee list

Prefix:

Form Navigation

 Please select Data Entry Mode to fill out this form.

The Prefix field was added to the form and is able to be moved to the correct spot on the form.

Registrant  [Quick Add Field](#) [Manage Category](#)

Prefix: 

Preferred First Name: 

Preferred Last Name: 

Email: 

Confirm 

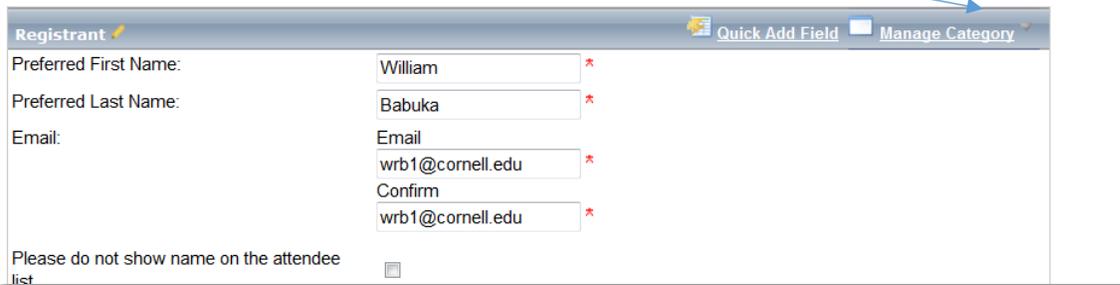
Please do not show name on the attendee

Prefix has been moved to the top of the list.

A spreadsheet of existing fields that 'feed' into Peoplesoft is located in the Training Portal.

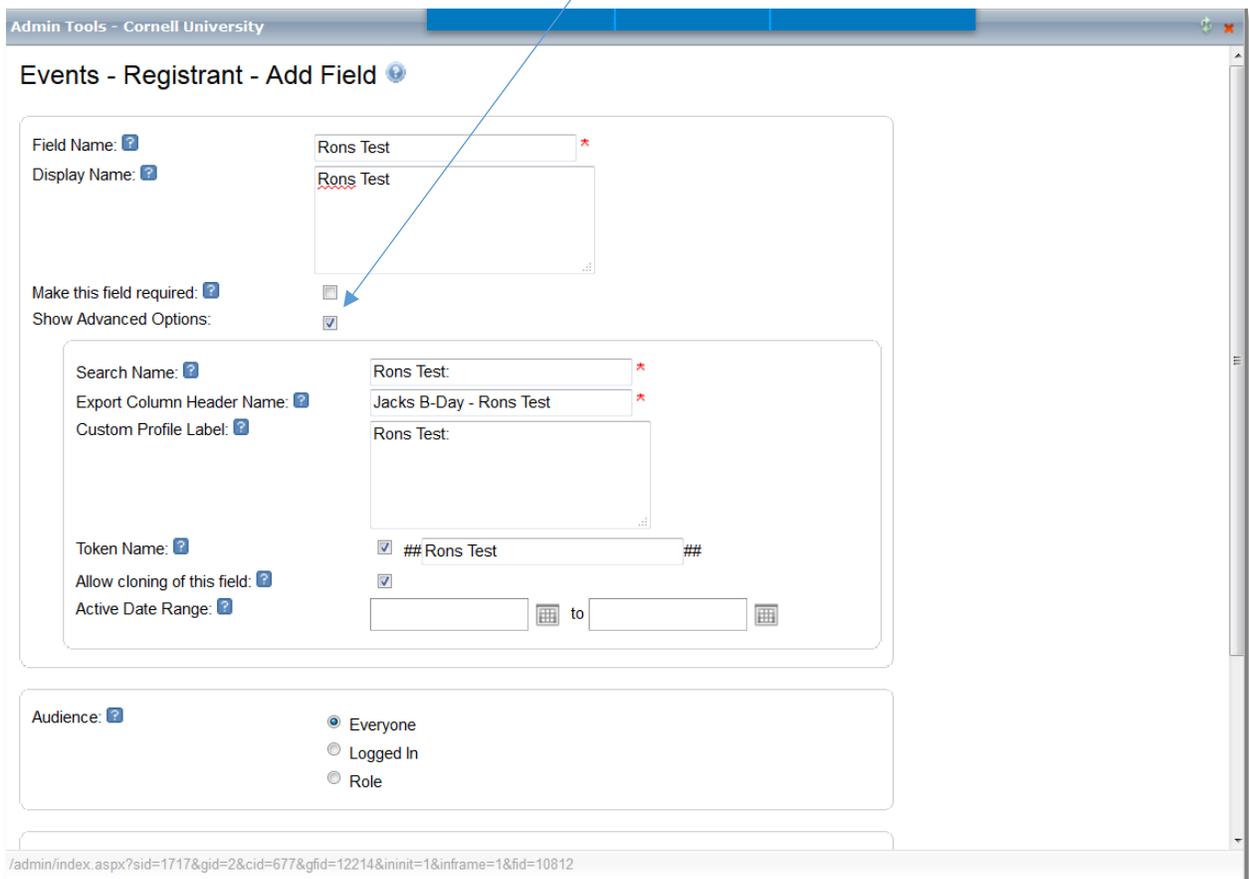
New Fields

When inserting these fields onto the form, select “Manage Category” then “Add New Field”.



The screenshot shows a web form titled "Registrant" with the following fields: Preferred First Name (William), Preferred Last Name (Babuka), Email (wrb1@cornell.edu), and Confirm (wrb1@cornell.edu). There are red asterisks next to the last name and email fields. At the bottom, there is a checkbox labeled "Please do not show name on the attendee list". In the top right corner, there are two buttons: "Quick Add Field" and "Manage Category". A blue arrow points from the text above to the "Manage Category" button.

Complete the fields as needed (also select “Show Advanced Options” to access all fields)



The screenshot shows the "Admin Tools - Cornell University" interface for "Events - Registrant - Add Field". The form is divided into several sections:

- Field Name:** Rons Test
- Display Name:** Rons Test
- Make this field required:**
- Show Advanced Options:**
- Search Name:** Rons Test
- Export Column Header Name:** Jacks B-Day - Rons Test
- Custom Profile Label:** Rons Test
- Token Name:** ## Rons Test ##
- Allow cloning of this field:**
- Active Date Range:** to
- Audience:** Everyone, Logged In, Role

A blue arrow points from the text above to the "Show Advanced Options" checkbox. At the bottom of the page, the URL is: /admin/index.aspx?sid=1717&gid=2&cid=677&gfid=12214&ininit=1&inframe=1&fid=10812

Field Name: This is the name visible to Admins when searching the database. It can be thought of as the more “technical” or shorthand name. It will default to being the Display Name as well if a different Display Name is not entered.

Display Name: The Display Name should be a more attractive/user friendly version of the Field Name. It can be thought of as the full question you want to ask or the piece of data you want to collect.

Check the **Make this Field Required** box to force users to fill in the information in the field.

Show Advanced Options:

Search Name box: The name entered here will be available to members via the Search area.

Export Column Header Name: The column name for the field that you will see in reports.

Custom Profile Label: Useful for putting in text that is more attractive to members when viewing the profile. This is often used for the Mentoring and Webcard area of the Profile

Token Name: The field can be set to be a Token, which is useful for personalizing communications.

Allow cloning of this field: The field can also be set to be “cloneable” in the future. (This may be an option based on the field type.)

Set the **Active Date Range** for the field.

Audience: Select the Audience for the field.

Everyone - Leave as delivered, Please access training on Roles before selecting any other value.

Token Name: ## Rons Test ##

Allow cloning of this field:

Active Date Range: to

Audience: Everyone
 Logged In
 Role

Data Field Type:

Data Storage Mode: Normal
 Instanced
 Reusable Instanced

Associate a Role with this Field:

<< Cancel Next

/admin/index.aspx?sid=1717&gid=2&cid=677&gfid=12214&ininit=1&inframe=1&fid=10812

Data Field Type: Select the type of data field you want to use, such as dropdown list, checkbox, etc. Depending on the type of data field you pick, you may have additional information to enter.

Data Storage Mode options (the options shown depend on the data field type):

Normal – Standard field creation that allows new data to overwrite old data (default setting)

Instanced – An instance field will save each change a member makes to a field as an "instance" and will not overwrite the previous data.

Reusable Instanced - Allows this data field to be re-used within the same form type

Associate a Role with this Field to create a role based on this field. Based on the value they choose for the field, users will be placed in a role. More information on Creating Roles

Click Next.

Build Form Mode | Data Entry Mode

Jacks B-Day [Content Properties](#) [View Content](#) [Manage Form](#)

Registrant » Guests » Finish

Main Registrant Step

If you are collecting guest information, fields added here will be available for use on the Guest Information Step. Email address must be on the fir

Registrant [Quick Add Field](#) [Manage Category](#)

Preferred First Name: *

Preferred Last Name: *

Email: *

Confirm: *

Please do not show name on the attendee list

Rons Test

Form Navigation

Please select Data Entry Mode to fill out this form.

Save and Continue