

USER MANUAL – HOW TO CREATE A TEMPLATE

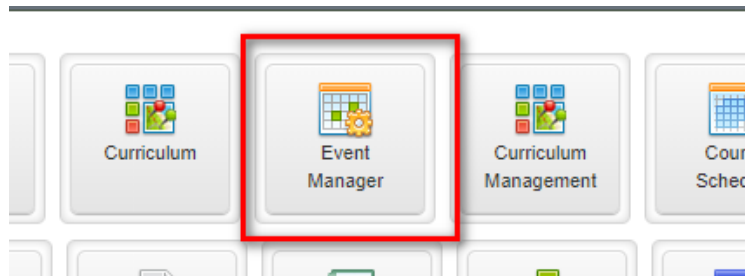
TARGET AUDIENCE: ADMINISTRATORS

Updated September 13, 2019

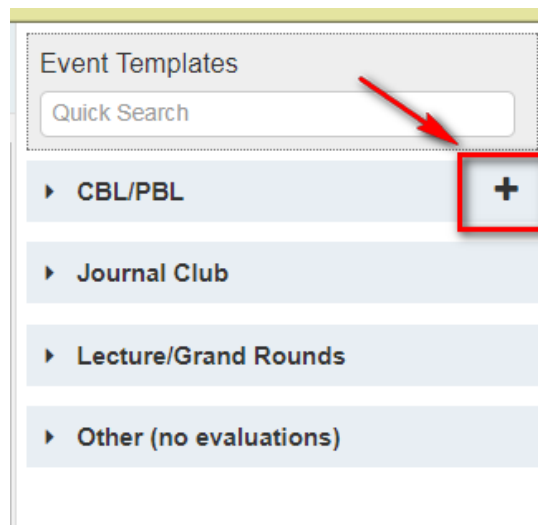
EVENT MANAGER – CREATE A TEMPLATE

Events are created based on an event template. All details entered in the template will be transferred into the events created using the template.

To create an event template, choose the event manager module:



Click on the plus sign (+) at the top right of the event type you wish to choose. Hover over the name of the template in order for the Plus sign to appear:



Template Options:

- **CBL/PBL** - used for regular Academic Half Days
- **Journal Club** – used for Journal Club Half Days
- **Lecture/Grand Rounds** – used for large lectures and Grand Rounds
- **Other** – used for events where evaluations are not required

Note: Each event type has a specific evaluation form that is used by all programs.

EVENT TEMPLATE DETAILS

Fill in all details required for the event template:

Title: Title of template (this is not the topic of the individual event, but the title of the overall event. Ex. FM AHD)

Description: info about the overall event (if necessary)

Location: Enter location if it is the same for all events created by this template. If the location will change, do not add.

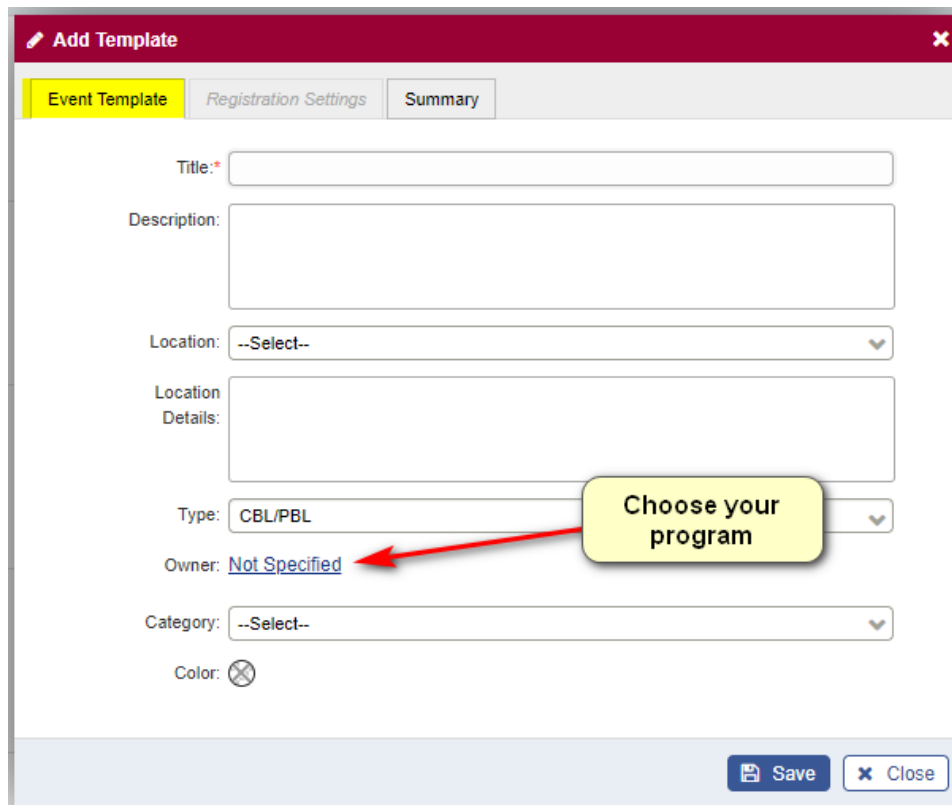
Locations Details: If the location is added and will be in the same room, you can enter room details here.

Type: will automatically display based on the event type chosen.

Owner: Choose your program. If you own more than one program, choose the program this template will be used for.

Category: If you always want an event template to be sent out for this event, check off the box here. If you do not always want the event evaluations to be sent, do not check this box.

Colour: Choose a colour for your event.



Add Template

Event Template | Registration Settings | Summary

Title:*

Description:


Location: --Select--

Location Details:

Type: CBL/PBL

Owner: [Not Specified](#)

Category: --Select--

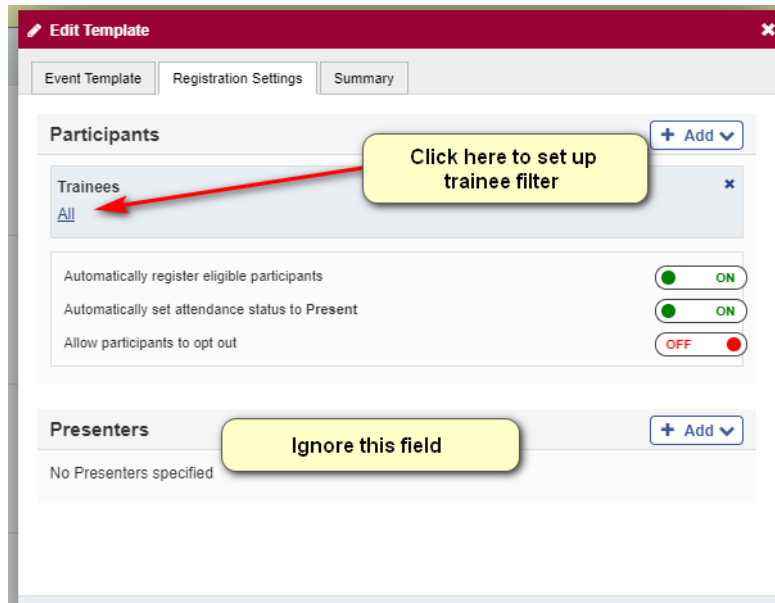
Color: 

Choose your program

Save Close

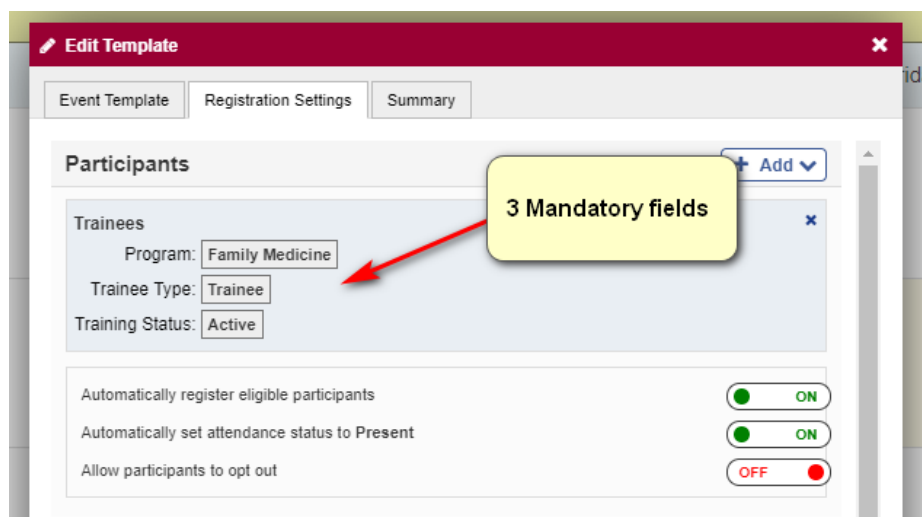
REGISTRATION SETTINGS

Double click on the filter field to set up your trainees. The filters chosen will determine which trainees will be registered into the events.



The three mandatory fields to choose:

1. **Program.** Choose your program. (You can also choose additional programs if all trainees from another program attend your event)
2. **Trainee Type:** Trainee
3. **Training Status:** Active



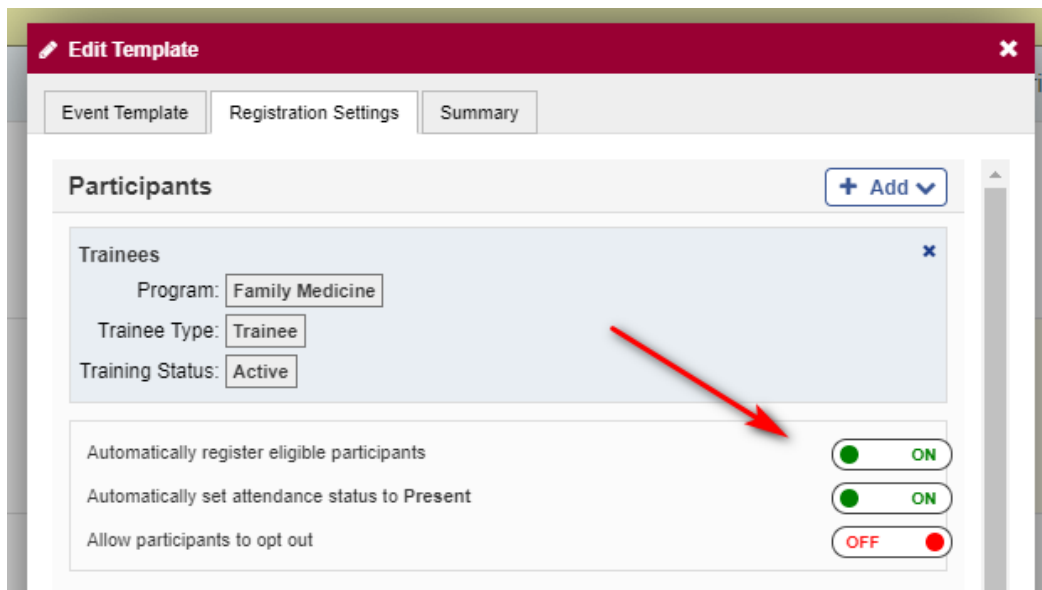
In addition, you can choose to filter on PGY levels, base locations of the trainees, etc.

NOTE: The eligible learners are based on the PG registration training lines, which are managed by the PGME office. Leaves and new additions will be factored in based on the date of the event.

Automatically Register Eligible Participants – this setting should be turned on. This is the ‘auto-register’ feature which will auto-register the learners into the event based on the filters chosen above.

Automatically Set Attendance Status to Present – this setting should be turned on. All participants that are present will receive the evaluations after the event takes place.

Allow Participants to Opt Out – this feature can be used based on program. It allows learners to “opt-out” of events prior to it taking place if they know they will be away. *Please see the opt out guide for more information on this feature.*



IMPORTANT: If you delete a template, you will delete ALL events created using that template (Including past events). Please email medsis@mcmaster.ca if you require a template to be deleted.

QUESTIONS?

If you have any questions or difficulties with this process, please contact MedSIS at medsis@mcmaster.ca