

Objective: Selecting People from multiple Registration Rosters to make a List

Scenario: There is an upcoming Event and there are past Events that are similar. You would like to compile a Mailing List of all previous Attendees that may want to attend the upcoming Event.

Step 1: Click on the Events tab. Click on the Dropdown to find the first Event to get the names for your List. (Fig. A)

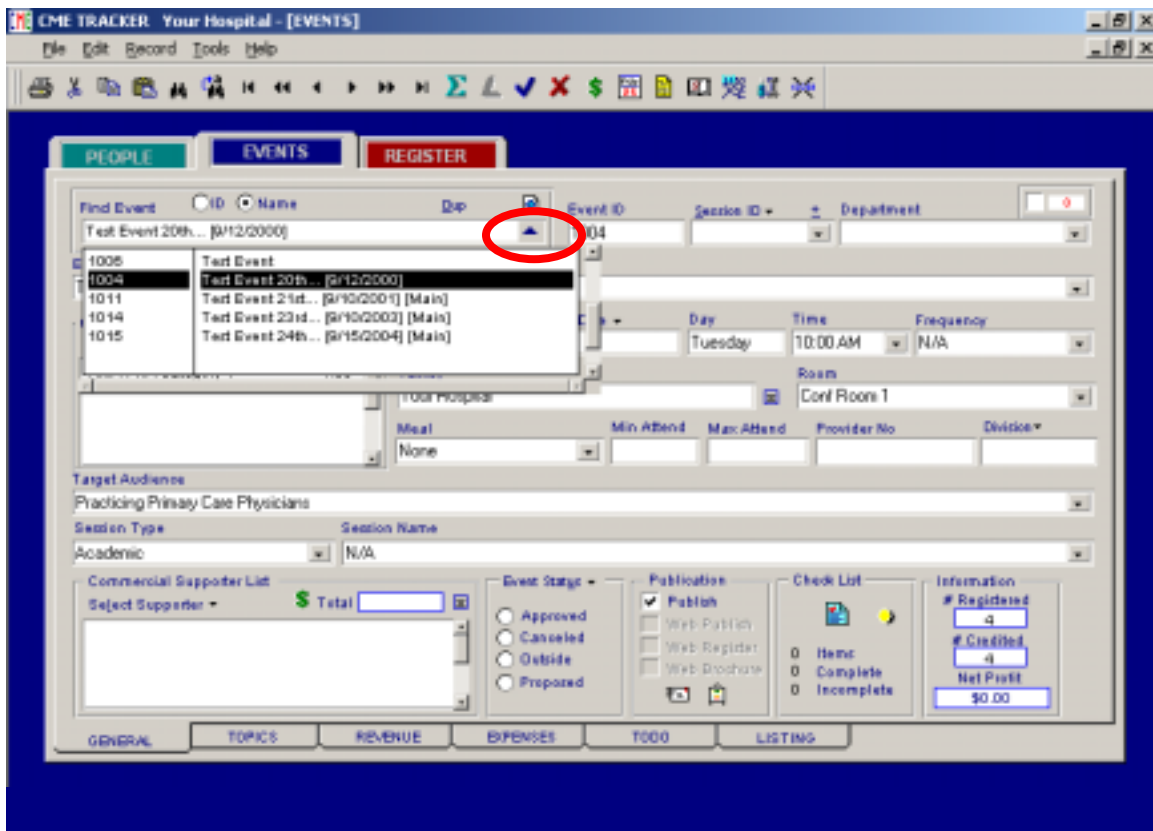


Fig. A

Step 2: Click on the Register tab. Click on Roster tab. Click on the yellow List Manager icon. The List Management popup appears. Click on the + sign icon. (Fig. B)

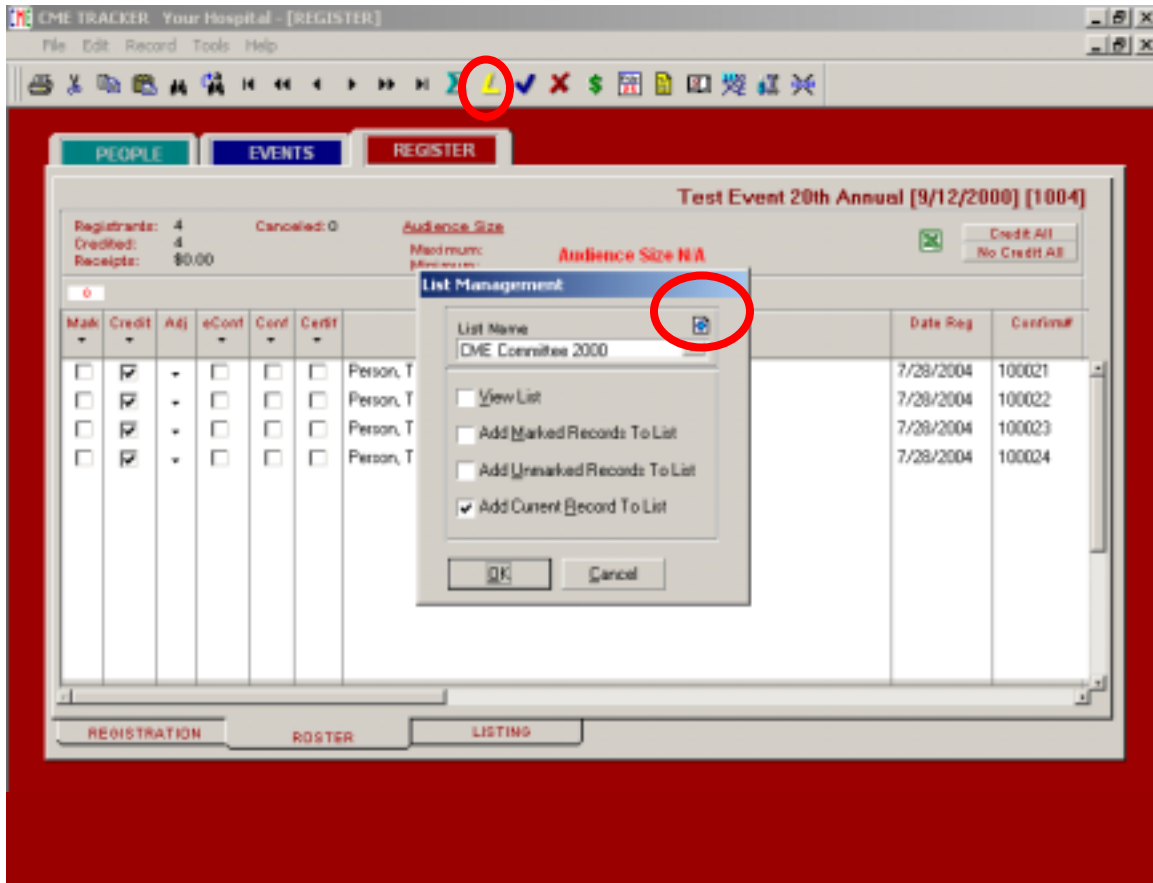
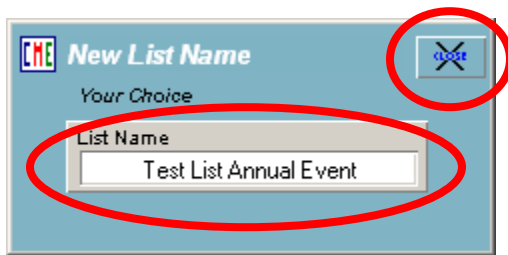


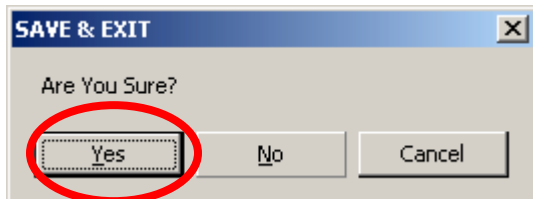
Fig. B

Step 3: The New List Name popup appears. Type in what you want the List to be named. Click on Close. ([Fig. C](#))



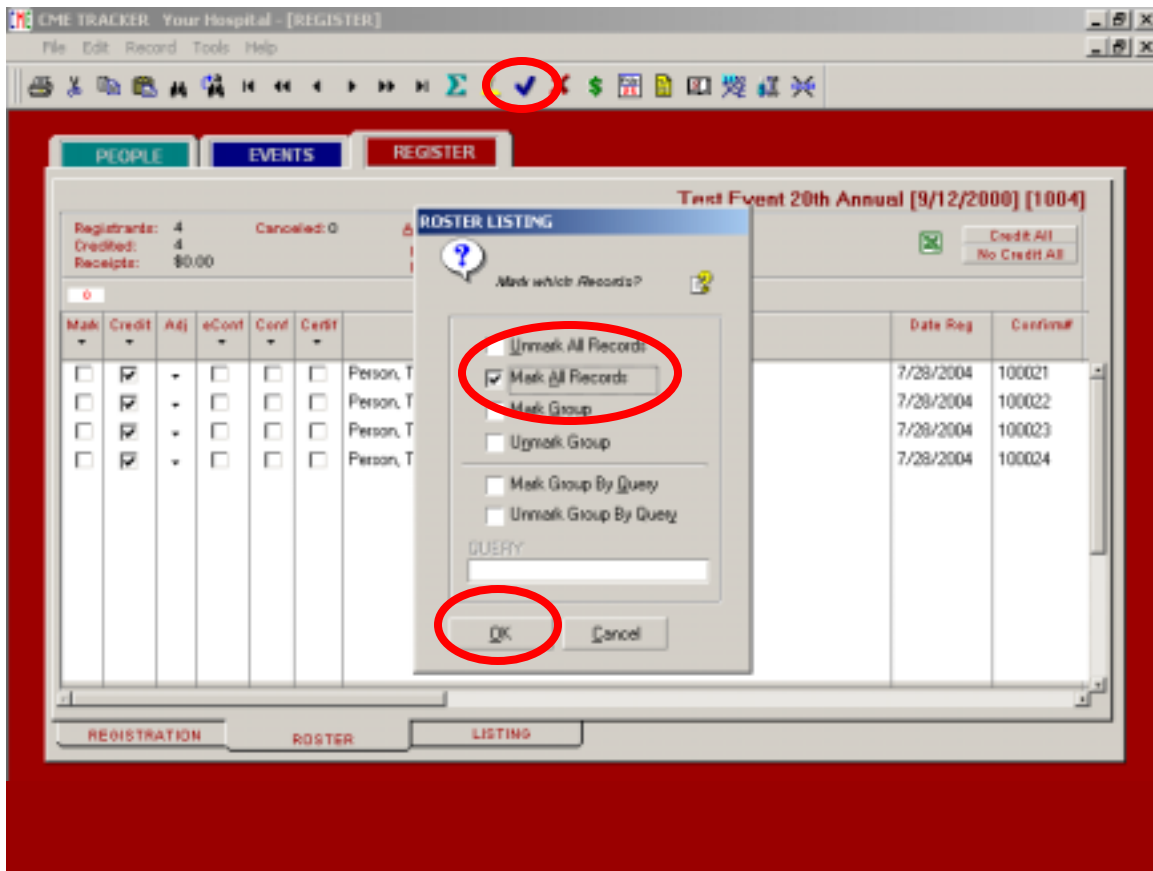
[Fig. C](#)

Step 4: The SAVE & EXIT popup appears. Click on Yes. You will return to the Register Roster tab. ([Fig. D](#))



[Fig. D](#)

Step 5: Click on the Blue Checkmark. The ROSTER LISTING popup appears. Click to check the box next to Mark All Records. Click on OK. ([Fig. E](#))



[Fig. E](#)

Step 6: Click on the yellow List Manager icon. The List Management popup appears. The name of your new list is displayed. Click to check the box next to Add Marked Records To List. Click on OK. (Fig. F)

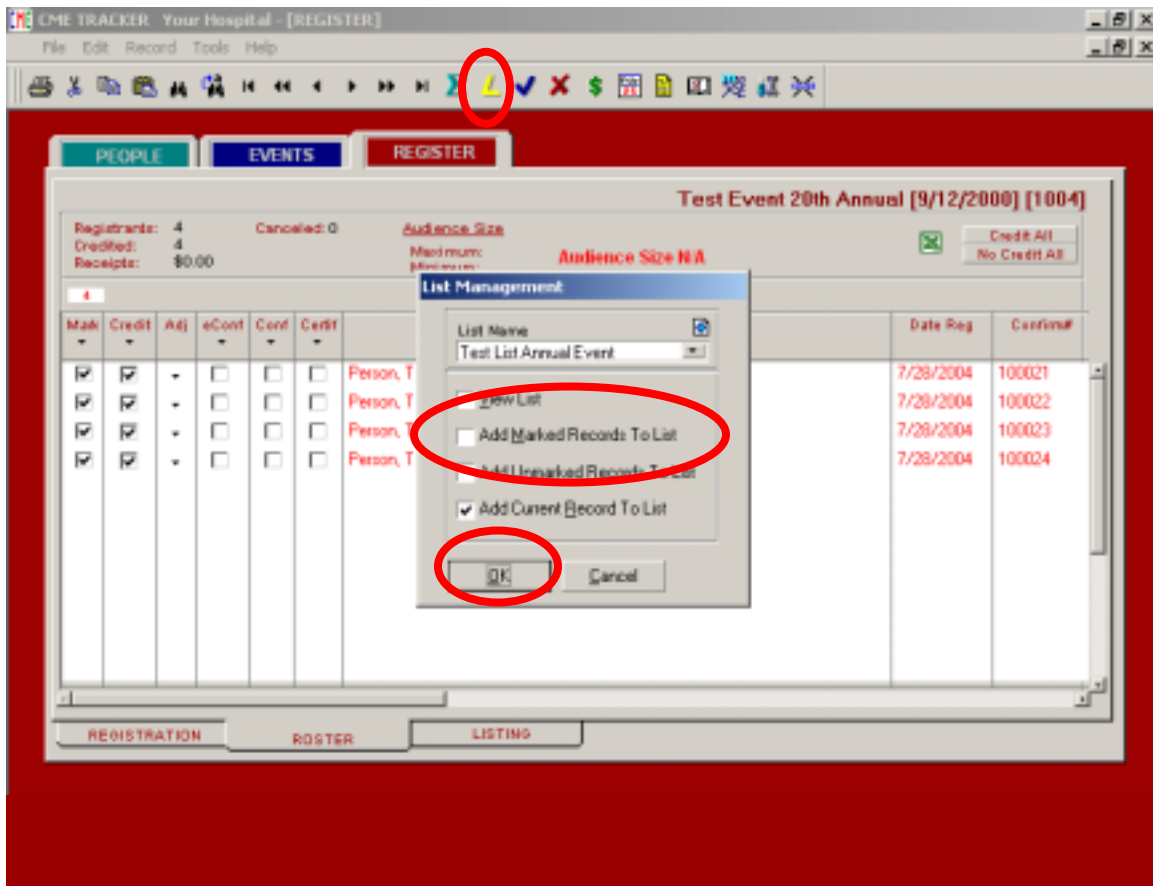


Fig. F

Step7: The CONFIRM ADD TO LIST popup appears. Click on Yes. (Fig. G)

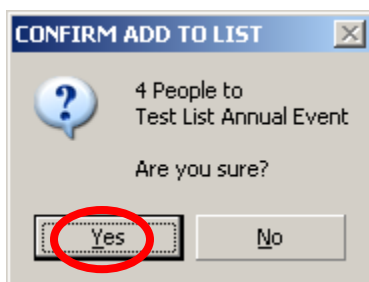


Fig. G

Note: To add more people to your List, locate your next Event. Repeat steps 1 thru 7.

Step 8: Now that you have a List compiled, you may want to view it. Click on the Register tab. Click on the Roster tab. Click on the yellow List Manager icon. The List Management popup appears. Click to check the box next to View List. Click on OK. (Fig. H)

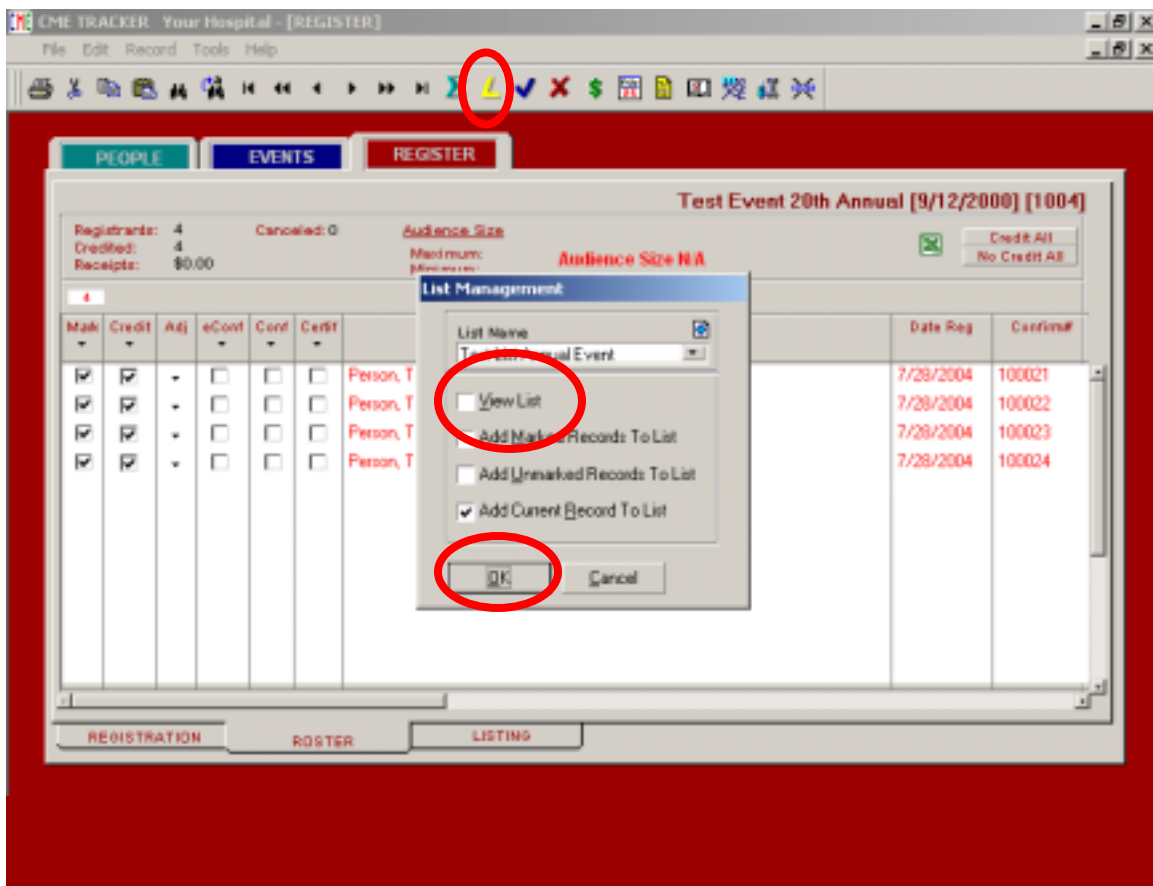


Fig. H

Step 9: The CONFIRM UPDATE popup appears. Click on No. (Fig. I)

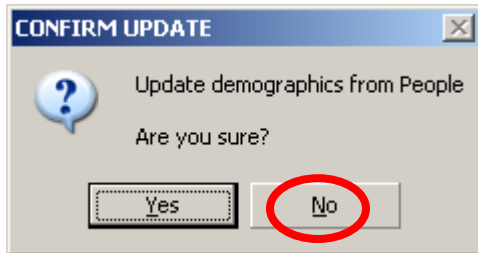


Fig. I

Result: There is now a list of unduplicated Attendees from several Events. Click on the Printer Icon to run reports for this list. (Fig. J)

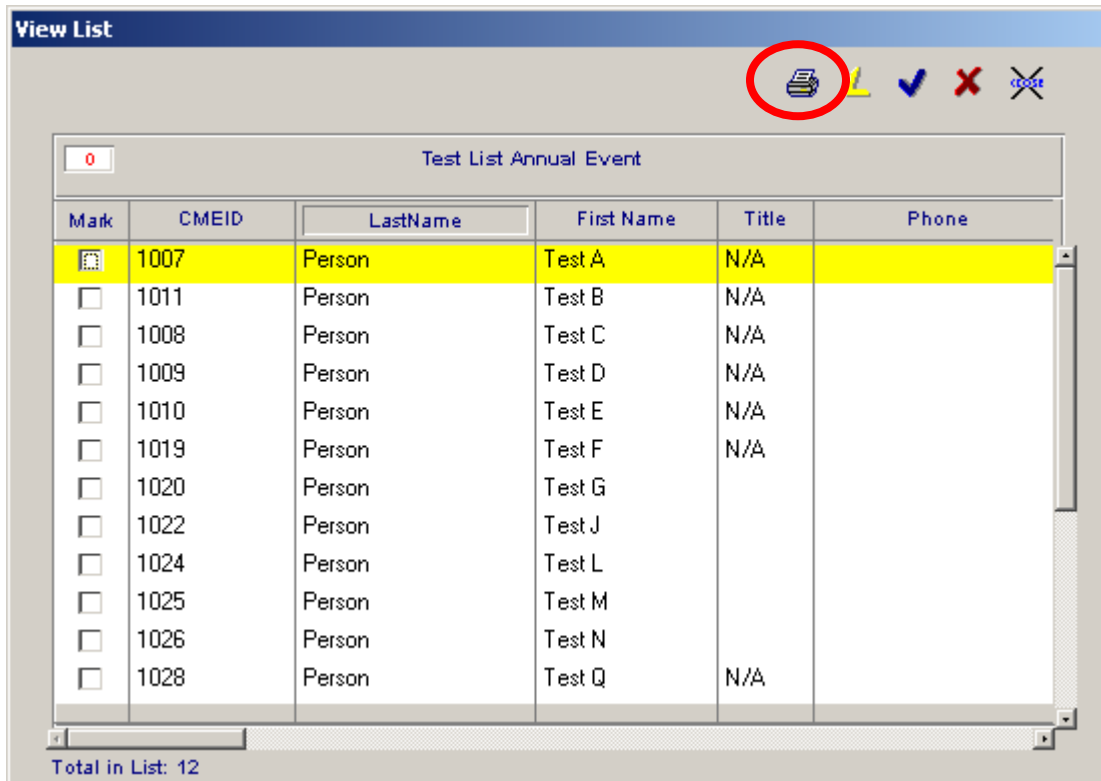


Fig. J

Step 10: One option is to export people to a spreadsheet to share with others. Click on “Export people for mail merge” to highlight. Click on the magnifying glass icon to view. (Fig. K)

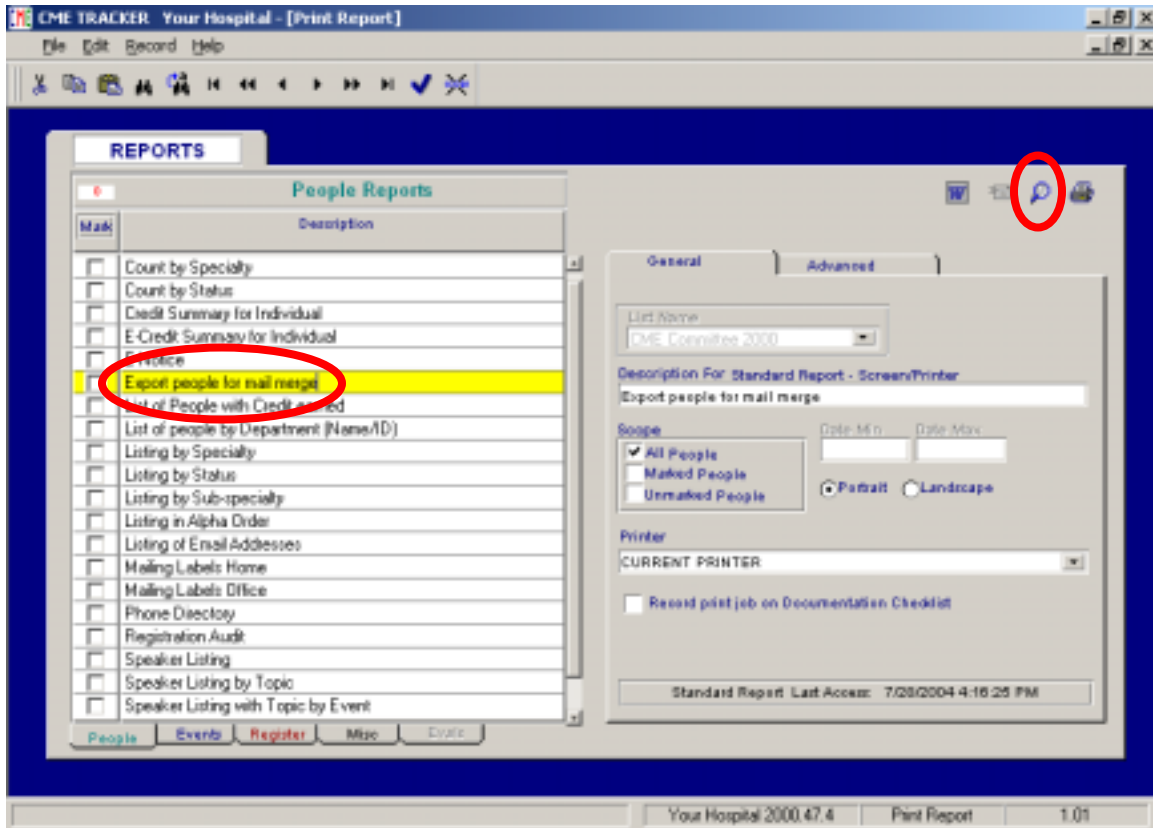
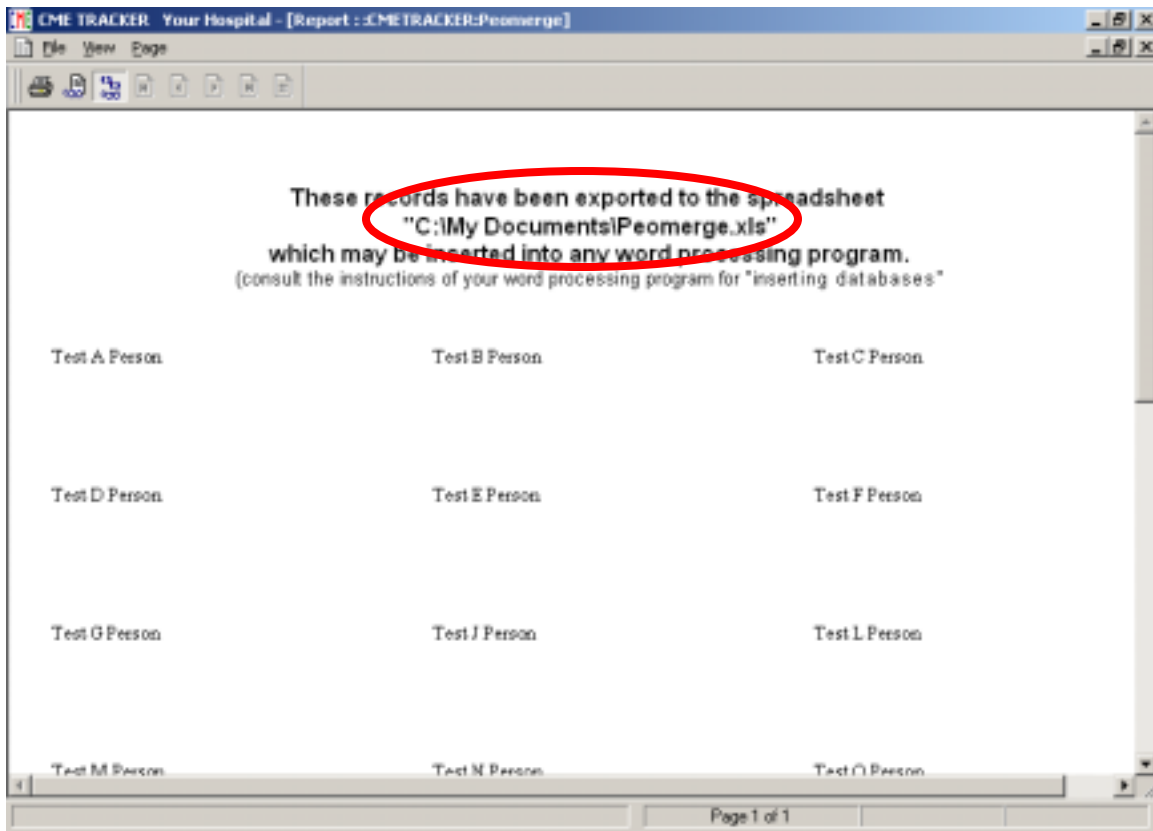


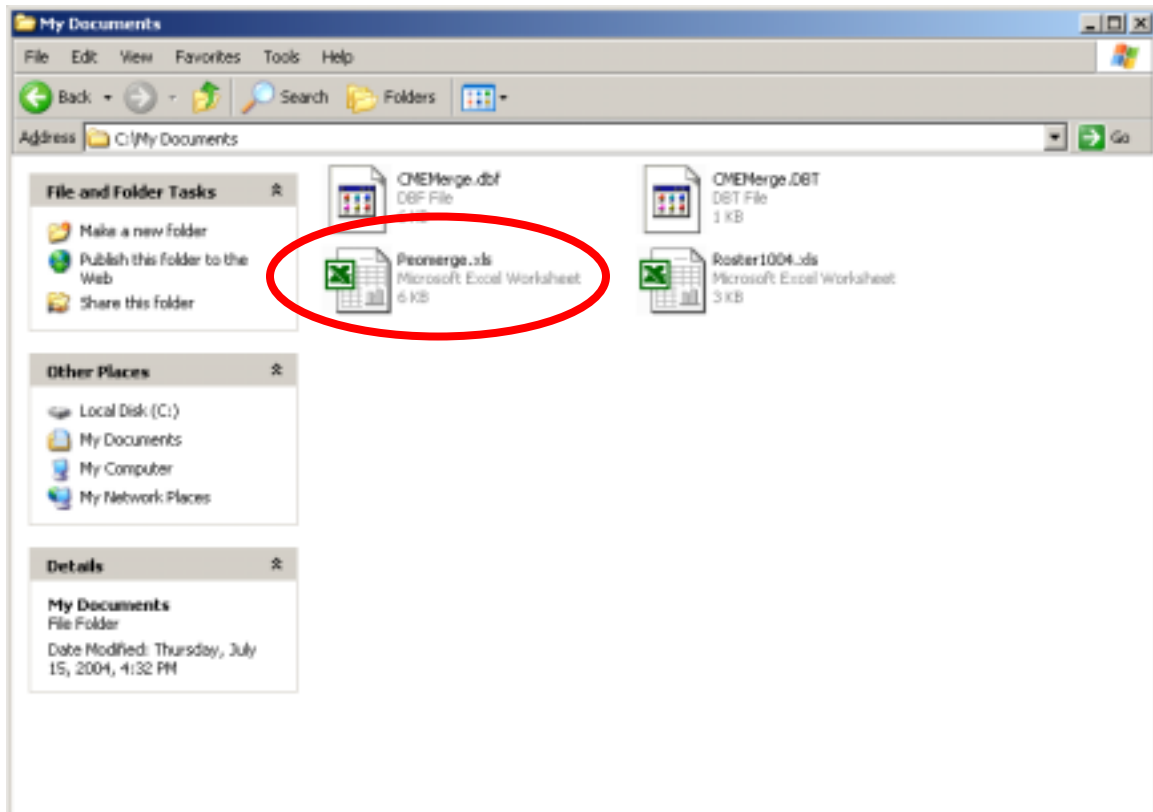
Fig. K

Result: You now have a List with the names of Attendees from several Events compiled into one. To view the spreadsheet, go to "C:\My Documents\Peomerge.xls". ([Fig. L](#))



[Fig. L](#)

Step 11: Click on Start on your desktop. Click on My Computer. Click twice on Local Disc "C". Click twice on My Documents. Click twice on Peomerge.xls. ([Fig. M](#))



[Fig. M](#)

Tutorial

Result: You now have a spreadsheet that lists Registrants combined from each of the different Events. ([Fig. N](#))

The screenshot shows a Microsoft Excel window with a spreadsheet titled 'Peomerge.xls'. The spreadsheet has the following columns: A (CMEI), B (Last Name), C (First Name), D (Affiliation), E (Specialty), F (Spec Det), G (Sub Specialty), H (Sub Spec De), I (Docn Title), and J (Salutation). The data is as follows:

| | A | B | C | D | E | F | G | H | I | J | K | L |
|----|---------|------|---------|-----------|-------------|-----------|---------|--------------|-----------|------------|---|---------------|
| 1 | PeopleD | CMEI | LastNam | FirstName | Affiliation | Specialty | SpecDet | SubSpecialty | SubSpecDe | Docn Title | | Salutation |
| 2 | 1007 | 1007 | Person | Test A | | | | | | | | Test 2 Person |
| 3 | 1011 | 1011 | Person | Test B | | | | | | | | Test 3 Person |
| 4 | 1008 | 1008 | Person | Test C | | | | | | | | Test 4 Person |
| 5 | 1009 | 1009 | Person | Test D | | | | | | | | Test 5 Person |
| 6 | 1010 | 1010 | Person | Test E | | | | | | | | Test F Person |
| 7 | 1019 | 1019 | Person | Test F | | | | | | | | |
| 8 | 1020 | 1020 | Person | Test G | | | | | | | | |
| 9 | 1022 | 1022 | Person | Test J | | | | | | | | |
| 10 | 1024 | 1024 | Person | Test L | | | | | | | | |
| 11 | 1025 | 1025 | Person | Test M | | | | | | | | |
| 12 | 1026 | 1026 | Person | Test N | | | | | | | | |
| 13 | 1028 | 1028 | Person | Test O | | | | | | | | Test O Person |
| 14 | | | | | | | | | | | | |
| 15 | | | | | | | | | | | | |
| 16 | | | | | | | | | | | | |
| 17 | | | | | | | | | | | | |
| 18 | | | | | | | | | | | | |
| 19 | | | | | | | | | | | | |
| 20 | | | | | | | | | | | | |
| 21 | | | | | | | | | | | | |
| 22 | | | | | | | | | | | | |
| 23 | | | | | | | | | | | | |

[Fig. N](#)