District and Club database

DaCdb Event Registration
End User Documentation

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Revision History

Date	Issue	Description
09/04/2007	1.0	Preliminary Draft / Outline Created
09/20-21/2007	1.1	Descriptions of all functionality created
2/2010	1.2	Updated Screen Shots, updated information for "New" features

Contents

Event Registration

1. Introduction

1.1 Overview

The purpose of this document is to describe the overall end-to end process of creating a new calendar event all the way through the on-line registration process including using one of the available payment gateways.

This document is primarily written for new users of the system. However, the more advanced user or users with prior event experience may find some additional insights in customizing the event in the Advanced User section and/or Frequently Asked Questions (FAQ).

1.2 Scope

This document covers:

- Adding a new Calendar Event
- Editing the Event – turning on Registration
- Payment Gateway Processing
- Event Question development
- Registration "Back Room"

1.3 Audience / Affected Groups

The target audience for this document is:

- New Users
- Existing Users looking for tips, tricks and techniques

2. Event Registration Overview

Creating an event that has a registration capability is a multi-step process. It starts with creating a normal calendar event. Once the calendar event is created, the event can be edited and changed into an event with registrations. Defining the Registration capabilities of an event involves many steps. Registration questions, rooms, and a payment gateway are just a few of the items that need to be defined. Once the registration module is defined additional data entry fields and access to the Registration summary (BackRoom) where registration information is summarized is enabled.

Note: Creating an event with registration capabilities takes time and some experimentation – especially the first time. Please plan accordingly.

3. Calendar Events

3.1 Overview

The Calendar lists all events that have been created for your account/district and/or club. To view the calendar from the home page click on the Calendar tab on the menu bar or scroll down to the bottom of Section 1. Double click on either the club or district calendar link.

By selecting items in the Event Calendar Parameter section of the window you can select the Calendar View, Search for a specific event, select the event types to be shown, export the calendar to Word, or display the calendar in printer format for printing. To select an item, click on the check box.

Two calendar viewing formats are available: List or Block. Calendar events are viewed in standard calendar format when viewed in the Block format. Information about the event can be viewed by double clicking on the event name as seen on the calendar.

When viewing the calendar in the List format, as displayed above, events are sorted by date, starting with the most current date. Events prior to the current day are not listed by default, but can be viewed by using the search options.

Columns indicate the date and time of the event, event name and location, as well as the club name associated with the event (if any). If an event has been set up to accept registrations, the "Register NOW" link it will be shown in the Action column. The Action column will display additional options depending on the security level of the user.

Club events are only visible to members of that club.

Account/district events are visible to everyone in the district.

3.2 Security Levels

Some where we need to discuss the different security levels and what that means.

3.3 Adding an Event

An event may be added by selecting an event type from the **Select Event Type** drop down menu within the Calendar view.

| | FIND | Accts | Users | All Clubs | CL2 | Members | M2 | Committees | CO2 | Calendar | DUES | Reports | R2 | District uPAGES | Club uPAGES | DR | AT |
| | Admin | Setup | | | | | | | | | | | | | | | |

Calendar of Events
Rotary District 7710

Event Calendar Parameters:

Calendar: [● List ○ Block]   Search Events: [   ]   (Search Now)   (To Word) (Printer Format)

Include Events: ☑   ☑ District Event   ☑ District Reminder   ☑ District GOV Official Visit
                 ☐ Club Meeting   ☑ Club Event   ☑ Club FundRaiser   ☑ Multi-District Event

Jan 2010 - Jul 2011   **Add to District Calendar:**   (<< PREV) (NEXT >>)   Go To: (January ▾) (2010 ▾) (Go
                          [Select Event Type ▾]

DATE	TIME	ACTION	CLUB	EVENT NAME	LOCATIO
				January - Rotary Awareness Month	
Mon Jan 25, 10	05:30P	Edit Form		District Committee Chair Meeting	Cary Chamber of Commerce 307 N. Academy St. Cary, NC 27513 919-467-1016
Sat Jan 30, 10	08:30A	Edit Form	**RI Zone 33**	Rotary Leadership Institute RLI- Raleigh NC	**Rotary Leadership Institute RLI- Raleig**

If viewing events at the Club Level only club events can be added. If viewing events at the District Level only district events can be added.

Add to Club Calendar:

Select Event Type ▾

Select Event Type

Club Meeting
Club Event
Club FundRaiser

Add to District Calendar:

Select Event Type ▾

Select Event Type

District Event
District Reminder
District GOV Official Visit
Multi-District Event

The Add District/Club Event screen will display after one of the above actions is taken.

The Add District/Club Event screen is divided into two sections:

Section 1 – Event information – where information about the event not relating to schedule is entered.

Section 2 – Event Schedule – where the date and time of the event, as well as any repetition options are entered.

Cancel button – Closes the Add District/Club Event screen without creating the Event.

Add button – creates the Event and adds it to the Calendar

Event Status pull-down– Allows the user to make the event active or inactive. Registration will not be visible to the members unless the event is active. The event status default is active. Registrations will be accepted as soon as the event is added to the calendar. Change the event status to inactive until the event is built in its entirety and ready for registrations. Events in the inactive status will appear highlighted in yellow when the calendar is viewed.

3.3.1   Section 1 – Event Information
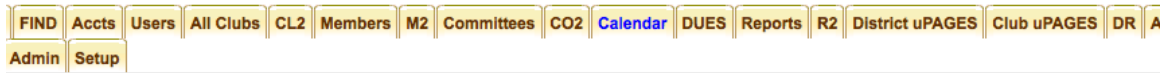
Event Name (required) – The name of the event should be entered here. It will be the name displayed in the Event Name column on the Calendar.

Enable Registration – The choices determine whether users can register for the event.

- No – The registration is not active, the **Register NOW** link will not be displayed on the Calendar screen and no users will be able to register for the event.

- Yes – The registration is active, the **Register NOW** link will be displayed on the Calendar screen and users will be able to register for the event if the event status is active. If the event status is inactive the **Register NOW** link will only be displayed on the moderator's calendar view.
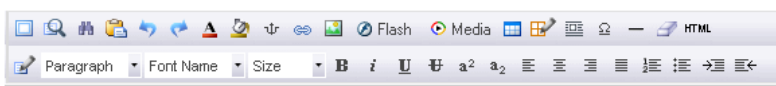
Display in the Multi-Districts Specified -

- No – The registration is active only in the club or district under which it is entered

- Yes – The registration is active in the domain that is selected

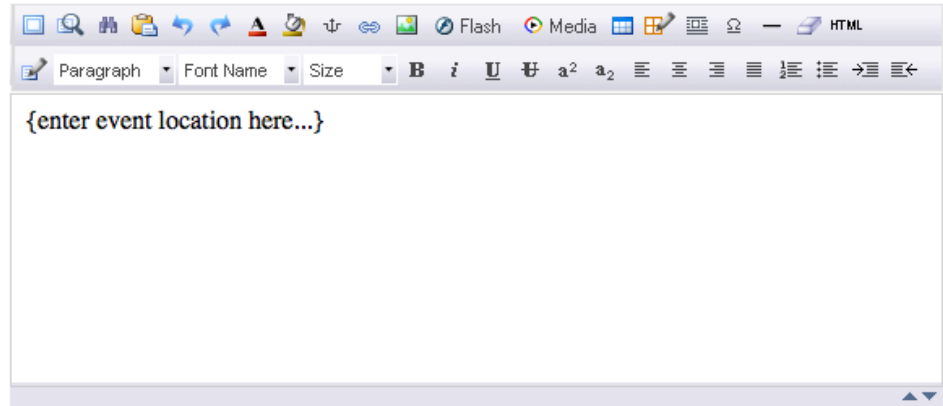

Short Description – A description of the event may be added in this field. There are many editing options available to make the information as simple, or as complex, as needed.

Location – The event location may be added in this field. There are many editing options available to make the information as simple, or as complex, as needed. Links to maps may also be added in this section.
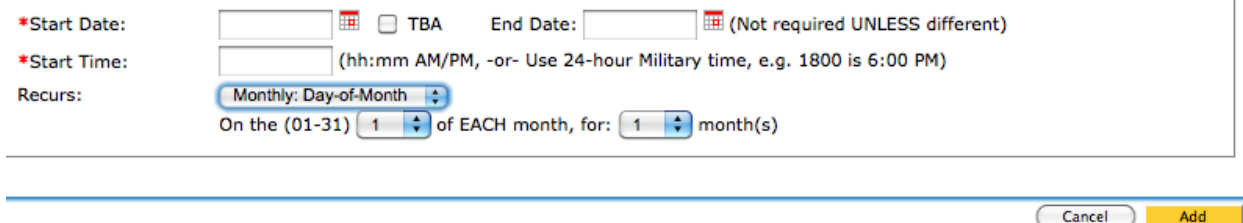
Location / Comments:

{enter event location here...}

3.3.2 Section 2 – Event Schedule

Section 2 - Event Schedule

*Start Date: ☐ TBA End Date: (Not required UNLESS different)

*Start Time: (hh:mm AM/PM, -or- Use 24-hour Military time, e.g. 1800 is 6:00 PM)

Recurs: Monthly: Day-of-Month
On the (01-31) 1 of EACH month, for: 1 month(s)

Cancel Add

Start Date (required) – This is the date that the event will start. It will also determine when it will display on the Calendar screen. The date can either be typed in the field in mm/dd/yyyy format, or it can be selected by clicking on the red calendar button to the right of the field.

TBA – To Be Announced – Selecting this checkbox will enter the event as TBA. The dates and times can be added at a later date.

End Date - This is the date that the event will end. If it is left blank, this field will be automatically set to the same value as the Start Date when the event is created. It will also determine when the event will display on the Calendar screen. The date can either be typed in the field in mm/dd/yyyy format, or it can be selected by clicking on the red calendar button to the right of the field.

Start Time (required) – The time of day that the event will begin is entered in this field. It can be entered in either standard AM/PM format, or in military time.

Recurs – determines whether the event only happens once or recurs, and if so, how often. There are four choices:

- One-Time (default) – The event only happens once. It will only be displayed in the Calendar one time for the dates specified.

- Weekly – The event will occur for the number of weeks entered in the **For __ Week(s)** field which is displayed when this option is chosen.

- Monthly: Day-of-Month – The event will recur on the selected day, for the number of months selected in the **On the (01-31) __ of EACH month, for: __ month(s)** fields which are displayed if this option is selected.

- Monthly: Day-of-Week - The event will recur on the selected day, for the number of months selected in the **On the __ __ of the month, for: __ month(s)** fields which are displayed if this option is selected.

3.3.3   Add Event

Click on the Add button to add the event. When the event has been scheduled the confirmation window will be displayed. Click on the **Go To Calendar** button to go to the main calendar screen.

3.4 Updating ("Editing") an Event

Once an event has been created and added to the calendar it may be edited to enable registrations. An event may be edited by clicking on the **Edit Form** link in the Action column on Calendar screen. The event moderator, the club leaders (if the event is a club event), and the district administrators can edit or change an event.

The Edit District/Club Event screen will display when the link is clicked.

The Edit District/Club Event screen is divided into four sections:

Section 1 – Event information – where information about the event not relating to schedule is entered.

Section 2 – Event Schedule – where the date and time of the event, as well as any repetition options are entered. (This section is covered above in the Adding an Event area.)

Section 3 - Registration Options – where registration parameters are set for the event. Such as, what displays on the Event View and online payment options.

Section 4 – Event Moderators – where moderators can be chosen from the available list

Cancel button – Closes the Add District Event screen without creating the Event.

Clone button – Displays the Event Clone screen, which allow the chosen event to be cloned – either within the same district, or elsewhere.

View button – Displays the Event View screen for the event

Delete button – Deletes the event from the calendar. This can only be done if no one has registered for the event. If there are registrations they must be deleted before the event can be deleted.

Update button – Saves all changes made to the Event and returns to the Calendar screen.

3.4.1 Section 1 – Event Information

In addition to the fields described above, there are three additional fields that can now be defined.

Enter Event URL to upload – If there is a webpage associated with the event, it may be added here.

Enter a filename to upload – documents and photos may be added either by typing the location of the file on your computer into the field, or using the Browse button to locate them on your computer.

Confirmation Footer – This field is located beneath the location. An email confirmation is sent to each registrant when their registration is received. The confirmation email will be added to the canned registration message.

3.4.2 Section 3 – Registration Options

Section 3 - Registration Options

Use Committee: No ▾ (Limit to committee)

Use Payment Gateway: No ▾

Use CATegory Code: No ▾ (Puts CAT code on BADGE for Breakouts, Meals, etc.)

Use Rooms:
NEW
No ▾ (Enables the break-out 'Rooms' module for this event)

Public Registration:
NEW
No ▾ (Enables registration for this event by people NOT logged into DaCdb)

Registration Roster: Include the following fields on Event Roster:
(All ON | OFF)
☐ Member Name ☐ Member Picture ☐ District ☐ Address Information
☐ Home/Office Phone ☐ Cell Phone ☐ Fax Number ☐ Toll Free
☐ Email Address ☐ Club Name ☐ Member Since ☐ Birth Date
☐ Anniversary Date ☐ Classification ☐ Business Info ☐ Degrees, Hobbies
☐ Description ☐ Moderator Information

Email Reply-To: [_____] NEW Reply-To Address on EMailed
confirmations

Email notifications: None ▾

Registration Information: [Registration Questions] There are **NO** Registration Questions Setup

Use Committee – Limits registration for the event to members of the chosen committee. Choices are No and Yes.

- No (default) – does not limit the registration to a specific committee.

- Yes – will limit registration to the event to members of the selected committee. A Committee drop down menu will display when this option is selected, listing committees from the current district.

Use Payment Gateway – determines whether registrants can pay online with a credit card for fees associated with registering for the event. There are multiple choices:

- No (default) – No online payment option will be available for the event. If there is a registration fee, the User will be prompted to pay by check or another means.

- Yes – a payment gateway will be available for event fees. If yes is selected the payment gateway must be configured.

Use Payment Gateway: Yes ▾ (Payment GW Options) (On-line payment processing options)

To set up the payment gateway click on the Payment GW Options button. A new window will open.

Event Gateway Admin

Click the Add button to begin.

Event Gateway Admin

From the Gateway pull down select the desired gateway.
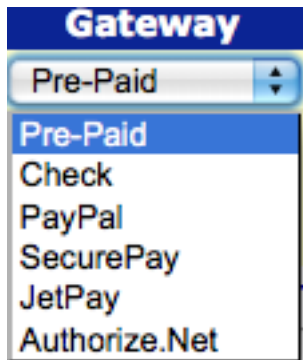
On Line Payment GW Parameters – parameters for the payment gateway chosen above are entered in this field. These entries determine how the payment gateway will process event registration charges.

Test GW Parameters - parameters for the test payment gateway chosen above are entered in this field. These entries determine how the payment gateway test process will run for event registration charges.

Use CATegory Code – determines whether the CAT code(s) (defined in Event Question Admin for the event) will be displayed on badges for the event. Choices are No and Yes.

- No (default) – will not display the CAT code on badges

- Yes – will display the CAT code(s) on badges for the event – for breakouts, meals, etc.

> **IMPORTANT: Space for CAT codes is limited to five (5) printable characters on the badge. Appropriate planning is therefore required. If more than five (5) CAT Codes are defined, only the first will be used.**

Use Rooms –

- No (default) – will not activate the break-out 'Rooms" Module

- Yes – The break-out 'Rooms' Module will be active, allowing the user to set up a variety of break-out sessions.   Refer to the Event Registrations – Rooms document for a full description of the break-out 'Rooms' Module.

Public Registration –

- No (default) – only the member logged into DaCdb can register

- Yes – Enables event registrations by people NOT logged into DaCdb

Registration Roster – has multiple checkboxes that determine what will be displayed on the Event View screen. Checking a box will display that information.

- Member Name – will display the names of members registered for the event

- Member Picture – will display the photo of members registered for the event

- District/AccountID – will display the District/AccountID of members registered for the event

- Address Information – will display the address of members registered for the event

- Home/Office Phone – will display the home/office phone numbers of members registered for the event

- Cell Number – will display the cell phone number of members registered for the event

- Fax Number – will display the fax number of members registered for the event

- Toll Free – will display the toll free number of members registered for the event

- Email Address – will display the email address of members registered for the event

- Club Name – will display the club name of members registered for the event

- Member Since – will display the member since date of members registered for the event

- Birth Date – will display the birth date of members registered for the event

- Anniversary Date – will display the anniversary date of members registered for the event

- Classification – will display the classification of members registered for the event

- Business Info – will display the business information of members registered for the event

- Degrees – will display the degrees of members registered for the event

- Description -

- Moderator Information – will display the information for the event moderator(s)

Email Reply-To – adds a return email address to confirmations

Email notifications – determines if, and to whom, emails are sent to when a registration occurs for the event.. There are four options:

- None – No emails will be sent when a member registers for the event.

- Registrant only – An email will be sent to the member when they confirm their registration for the event.

- Moderator only – An email will be sent to the moderator of the event when a member registers for the event.

- Moderator and Registrant – Emails will be sent to both the moderator and the member when the member registers for the event.

Registration Information – provides a Registration Questions button, which will open the Event Question Admin screen for the event. For details in building questions see section 3.6 of this document.

Include Fields -– has multiple checkboxes that determine what will be displayed in the back room following a registration. Checking a box will display that information. Using the **All ON | OFF** toggle will check or uncheck all boxes.

Custom Fields – enable the display of customized data in additional columns in the Registration Summary (Back Room) for the event. Field labels can be entered in the Field Label 1 – 4 fields. Custom fields are displayed only in the back room and are used to collect additional information on each registered user (e.g., class year, past president year)

3.4.3 Section 4 – Event Moderators

Available Moderators – a list of members that from either the club or the district depending on the event with a security level of 3 or higher. These members can be selected and moved over to the Selected Moderators area by using the ">>>" button.

Selected Moderators – a list of members defined as a moderator for the event. Members on this list will have their information displayed if the Moderator Information checkbox is checked in Section 3 above. Members can selectively be removed from the list by using the "<<<" button, or can all be removed by using the "<<< All" button.

3.5 Deleting an Event

An event can be deleted by clicking the **Delete** button from the Edit District/Club Event screen. An event may only be deleted if there are no registrations for it. Delete the registrations first, if the event needs to be deleted.

Clicking the Delete button will display a confirmation dialog box.

- **OK** button – will delete the event and remove it from the calendar.

- **Cancel** button – will cancel the deletion and display a confirmation dialog stating that the event record was not deleted.

3.6 Defining Registration Questions

It is often necessary to present the member registering for an event questions pertaining to the event. Questions define how the registration will look to the user. The questions that are to be displayed to users during registration are defined on the Event Question Admin screen.

The Event Question Admin screen can be accessed from the Calendar screen by clicking the

Edit Form link for the event. On the Edit District Event screen scroll down to Section 3 – Registration Options, and click the Registration Questions button.

Once the Event Question Admin screen has been accessed for a particular event, it will remain available by clicking on the Event Questions link in the Calendar menu bar until the Edit District Event screen has been accessed for a different event.

3.6.1   Event Question Admin

The name of the event is displayed at the top of the screen. Questions can be added and edited as long as there are no registrations present for the event.

Questions for the event are listed in the order that they were created, with the oldest first. This order may be changed, using the Up and Down arrow buttons, as long as there are no registrations present for the event.

Columns show the Question Label, the actual Event Question, as well as administration Actions that may be performed on the question.

Individual questions may be Copied, Edited, Deleted, and have their position in the list changed by clicking on the links or buttons to the right of each question.

- **Copy** link – Creates a copy of the selected question at the bottom of the question list.

- **Edit** link – Opens the Edit Question screen for the selected question.

- **Delete** link – Opens the Delete Question screen for the selected question. (Once there are registrations on the event, this link will only display for the last question in the list.)

- **Up** button – Moves the selected question up one position in the list. (This button is not available once there are registrations on the event.)

- **Down** button – Moves the selected question down one position in the list. (This button is not available once there are registrations on the event.)

View button – Opens the View Event Questions dialog window

Done button – Closes the Event Question Admin screen and returns to the Edit District Event screen.

Add button – opens the Add new question screen.

If there are any registrations for the event, it will be displayed in red just below the event name. When registrations are present the order of event questions may no longer be changed, and any deletions must be performed sequentially from the bottom of the list.

3.6.2   Add New Question

To add a new question click on the **Add** button to open the Add new question screen.

The Add New Question screen allows the creation of new questions to be displayed on the Registration Form for an event.
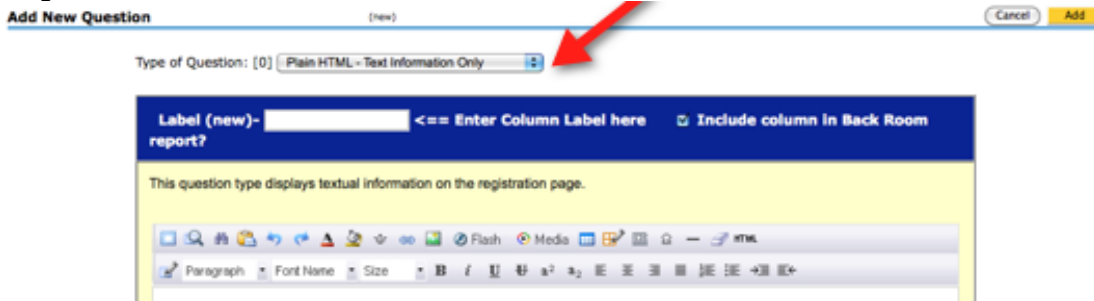
Type of Question – This field determines the type of question that will be added. Select the question type from the drop-down box. Once the question type is chosen different options and fields specific to that question type can be defined. There are ten different types of questions that may be chosen. Each question type and its associated fields are covered below:
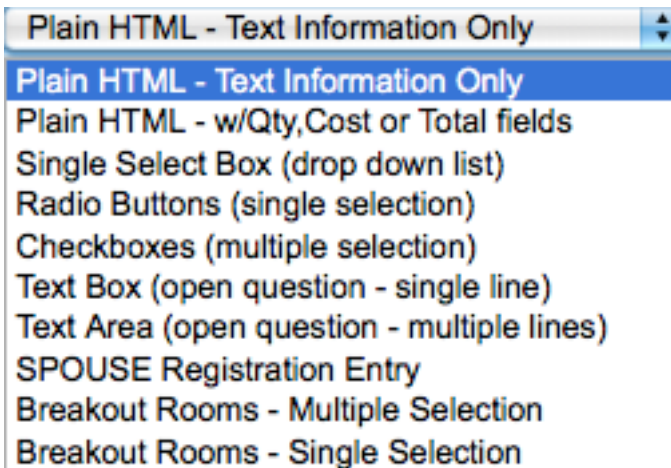
Section and Field descriptions are given below. Not all Sections and Fields are displayed for every question type.

- Label (new) – The column label for the question. This will be displayed on both the Event Question Admin screen (in the "#" column) and, if the "Include Column in Back Room report?" checkbox is checked, it will be displayed on the Registration Summary (Back Room) screen as its own named column.

Type of Question: [1] Plain HTML - w/Qty,Cost or Total fields

Label (new)- _____ **<== Enter Column Label here** ☑ **Include column in Back Room report?**

This question type has the option of having a **Quantity**, **Cost** or **Total** field displayed. In the selections below, turn on (or off) the fields. If Cost is selected, Total must also be included.

- Include Column in Back Room report? – If this checkbox is checked, the column will be displayed on the Registration Summary (Back Room) screen. If the checkbox is unchecked, the column will not be displayed.

- Text entry area – The question text is entered in this field. There are many editing options available to make the information as simple, or as complex, as needed

IMPORTANT: Use the Word Paste Icon to insert a Word created document or text.

- Selection Options – Defines what the pre-defined set of choices will be for the question.

Selection Options

The Select Box (drop down list), Checkbox or Radio button options allows the user to pick from a pre-defined set of choices.

For each entry configured below, enter:

D Indicates this entry is the default. This is an optional parameter. On a Select Box, this will be the default entry displayed. On a CheckBox, the item(s) will be pre-selected. On a Radio Button, the default value will be pre-selected. Multiple values can be pre-selected with a Checkbox; only one value can be pre-selected using a Radio Button.

Value Value - This is the value stored in the Back Office if this selection is made. **Value entries MUST be UNIQUE** for the registration system to differentiate between each item, otherwise multiple entires will be inadvertently selected during registration. If no Value is defined, no result will be posted to the back room and all options will be listed.

Label This is what the user sees in the Select drop down list or next to the Checkbox or Radio Button.

Cost This is the cost if the item selected (if any).
Note: The cost field is not available on a Checkbox or Radio Button entry.

CatCode This is a single character value that will print on the Name Badge if CatCode is enabled.

D	Option	Value	Label	Cost	CatCode
○	Option 1:			0.00	
○	Option 2:			0.00	
○	Option 3:			0.00	

- D – Indicates this entry is the default. This is an optional parameter and will be the default entry displayed. On a Checkbox, the item(s) will be pre-selected. On a Radio Button, the default value will be pre-selected. Multiple values can be pre-selected with a Checkbox; only one value can be pre-selected using a Radio Button.

- o Value – This is the value stored in the Back Office if this selection is made. Value entries MUST be UNIQUE for the registration system to differentiate between each item, otherwise multiple entries will be inadvertently selected during registration.

- o Label – This is what the user sees in the Select drop down list. The default value is Yes and No. This value can be edited to display something different.

- o Cost – This is the cost if the item selected (if any).

- o CatCode – This is a single character value that will print on the Name Badge if CatCode is enabled.

- Text Box Input Parameters – Define how a Text Box is displayed on the screen.

Text Box Input Parameters

You have selected a Text Box input. Define below how the Text Box is displayed on the screen by defining:
- Size – this is the width in characters the are visible on the screen (up to 80 characters)
- Max Length – this is the number of characters that can be entered (up to 256 characters)
- Default Value – the initial value you want to populate this field with

Size (Width): [15] (default is 15 characters wide, maximum value is 80)

Max Length: [32] (default is 32 characters entered, maximum value is 256)

Default Value: [   ]

- o Size (Width) – The width in characters visible on the screen. (default is 15 characters wide, maximum value is 80)

- o Max Length – The number of characters that can be entered. (default is 32 characters entered, maximum value is 256)

- o Default Value – The initial value the field is populated with.

- Optional Cost, Quantity, Total and Category Code Parameters – Allows the inclusion of Quantity, Cost/Total fields as well as the defaults for those fields.

Optional Cost, Quantity, Total and Category Code Parameters

This type of question that can include a Quantity and/or Cost/Total fields. If you have choosen a Select Box (drop down list) and have included costs for each item **you must** check include Cost/Total below. Select the fields that you would like to include with this question:

☐ Include **Quantity** field?   Show a default **Quantity** of: [   ]

Show A default **Cost** of: [0.00]

☐ Include **Cost/Total** fields?   Default "Select Box" value will override value entered here. If an initial Quantity and Cost are entered, the Total will be automatically calculated.

Category Code: [   ] (optional)

- o Include Quantity field? (default – checked) – If checked a Quantity field will be displayed for this question on the Registration Form.

- o Show a default Quantity of – The entered value will be displayed as the default quantity for the Quantity field (if displayed).

- o Include Cost/Total fields? (default – checked) – If checked, a Cost/Total field will be displayed for this question on the Registration Form.

- o Show A default Cost of –The entered value will be displayed as the default value for the Cost/Total field (if displayed).

- o Category Code – The value entered here will be used on badges if that option is selected for the event. ???

- Effective Dates – Effective dating a question controls when then question is included in the Registration Form. By default, each question is displayed throughout the registration period. However, some situations might call for a question to be displayed at a later date or be discontinued before the end of the registration (e.g., "Early Bird" discount or Late Fee)

Effective Dates

Effective dating a question controls when then question is included in the on-line registration display. By default, each question is displayed throughout the registration period. However, some situation might call for a question to a question to be displayed at a later date or be discontinued before the end of the registation.

For example:
- Early Bird Registration - Add an **"End Date"** to discontinue an "early bird" discount offered.
- Late Fee - Add a later **"Start Date"** to effect a "Late Fee" in the registration calculation.

Start Date: _____ (mm/dd/yyy - include if you want the question to start on a future date)

End Date: _____ (mm/dd/yyy - Leave blank if there is no effective end date to this question)

- o Start Date – The question will start to be displayed on the entered date. Format: mm/dd/yyyy. The system will default to the current date when the question is created.

- o End Date: – The question will stop being displayed on the entered date. Format: mm/dd/yyyy. Leave blank if there is no effective end date to this question.

- Back Room Display Options – Provides options to select how the answer to the question is displayed on the Registration Summary (Back Room) screen. The value entered (text entry fields), quantity, cost or total can be displayed for each registration entered.

Back Room Display Options

For this question item, select how the answer to each question item is displayed in the Back Room registration list. Depending on the question being asked, the value entered (text entry fields), quantity, cost or total can be displayed for each registration entered.

Select Back Room display options:
- ☐ Display the **Value** of the text field entries
- ☐ Display the **Quantity** for the item
- ☐ Display the **Cost** for the item
- ☐ Display the **Total** for the item

Back Room Summary Options

For this question item, select the summary (totaling) options across all registration entries. Each question, which represented in the Back Room registration list as a column, can be totalled and summarized at the bottom.

Note: Not every question can *or should be* totaled. This is highly dependent on the type of question being asked and the data that is being collected. Some experimentation is recommended.

Select Back Room summary options:
- ☐ **Tally** each unique item (e.g, count the number of Yes's and No's)
- ☐ Sum the **Quantity** field (if present) -- totals the quantity of items ordered
- ☐ Sum the **Total** cost field (if present) -- accumulates the total dollars

- o Display the Value of the text field entries – if checked, will display the value entered by the user in the question text entry field during registration.

- o Display the Quantity for the item – if checked, will display the quantity value used for the question by the user during registration.

- o Display the Cost for the item – if checked, will display the cost value used for the question by the user during registration.

- o Display the Total for the item– if checked, will display the total amount for the user's registration, for the question.

- Back Room Summary Options – Determines the summary (totaling) options across all registration entries. Each question, which is represented in the Back Room registration list as a column, can be totaled and summarized at the bottom. Note: Not every question can or should be totaled. This is highly dependent on the type of question being asked and the data that is being collected.

  - Tally each unique item – totals each unique choice made by the user, for the question. (e.g. count the number of Yes's and No's)

  - Sum the Quantity field (if present) – Totals the quantity of items ordered

  - Sum the Total cost field (if present) – Accumulates the total dollars

3.6.3 Edit Question

All questions can be edited by clicking on the Edit link, to the right of the question, on the Event Question Admin screen.

When editing a question, make any changes necessary and click the Update button.

The Sections and Fields available to edit are the same as those described above in the *Add New Question* section.

Cancel button – Cancels the update of a question and returns to the Event Question Admin screen without making any changes.

Update button – Saves any updates made to the question and returns to the Event Question Admin screen.

3.6.4 Delete Question

A question may be deleted by clicking the Delete link, to the right of the question, on the Event Question Admin screen.

Any question can be deleted if there are no registrations for the event.

If there are registrations for the event, only the last question in the list may be deleted.

Cancel button – Cancels the deletion of a question and returns to the Event Question Admin screen without making any changes.

Delete button – Displays a deletion confirmation dialog box.

- Ok - The question is deleted and the Event Question Admin screen is displayed.

- Cancel – A confirmation dialog box is displayed noted in that the question was not deleted.

Note: After all questions and other options have been defined the event status flag must be set to active to allow for registrations.

Event View

3.7 Overview

The Event View gives members a way to quickly see important information about an event (and optional who is registered for the event) before registering for it. Clicking on the name of an event from the calendar screen brings up a pop-up window with the Event View.

Information displayed on the Event View is entered when the event is initially added and/or when the event is edited. See above sections on Adding and Updating events for more information on each topic.

Below is a typical Event View screen. This information will be displayed for every event in the calendar.

To Word button – allows the Event View to be saved as a Microsoft Word document.

Cancel button – Closes the Event View window

3.8 Roster Display

The Registration Roster plays an important role in displaying additional useful information to users. When options are chosen on the Edit event screen, the selected information is displayed on the Event View.

Shown above is a view of an event's Registration Roster. It has four options selected on it.

Shown below is an Event View screen for an event, with the Registration Roster information displayed.

See the above section titled "*Updating ("Editing") an Event*" for further information on how to use the Registration Roster.

3.8.1 Export Options

The back-room information can be exported to Excel. Select all members to export the entire list into Excel.

4. Registration

4.1 Overview

Members may register for events by clicking on the red **Register NOW** link in the Club column on the Calendar. Clicking on the link will open the Registration Form dialog window for the event. Each registration is uniquely defined by the person(s) that created the event.

Making a registration is three (3) step process:

1. The custom registration form is presented to the Member registering. The registration form is custom designed with one or more questions or data entry fields defined.

2. The verification form is displayed after the user completes the data entry on the registration form. The verification form also displays the payment options if there is a cost associated with this event.

📝 **Note:** Until the Verification Form is submitted, no registration record is created. The User has the option to cancel out or go back and change entries.

3. The confirmation screen is displayed confirming the registration. It is at this point, if the option is selected, and email will be sent to the user making the registration.

4.1.1 Registration Form

A Level-1/2 member registering for an event will have their name and contact information pre-populated into **Registration for** area.

The Level-5 Area Governor can enter registrations for all users within their Area.

The Level-6 District/Account Administrator or above can make a registration for any member within the district/account.

Once a member has been selected from the list, the member's contact information will be displayed in the **Registration for** area. See below if the event has multi-account registration options enabled.

Event Registration   (Cancel)

REGISTRATION FORM
Dinner/Talent Show For the Homeless Teens
March 15, 2010

Register Member: [Thacker, Michael W - Warrenton 7710   ⬍]

- or -   (Add Guest)   for non-Members that are attending that need to pay and/or need name badges (except spouses, who are processed in the Member's registration below).

Registration for: **Thacker, Michael W (Mike & Connie)**   (edit)   (refresh)
Rt 1, Box 43
Cottage by the LakeOneida Lake
Bridgeport , NC   13057
H: 252-257-1401
O: 315-257-2563
E: Mike@MikeThacker.com
MemberType: Active (0)

If your data is incorrect, please make corrections **NOW** by clicking on the **EDIT** button. Then look at the screen **behind** this one, to see your personal data.

Scroll down for instructions to assist you in registering for this event.

Event Name:	**Dinner/Talent Show For the Homeless Teens**
Description:	Help us feed the teens at Socks Place and then share your talent to entertain them.
Event Date:	Monday Mar-15-2010 to Monday Mar-15-2010
Event Start Time:	6:00 PM

Would you like to participate in the talent portion of the evening? If so, please describe your talent. [   ]

What type of food will you be bringing? ☐ Main course

☐ Beverage
☐ Side Dish
☐ Dessert

TOTAL AMOUNT DUE: $ 0.00

To REGISTER and PAY for EVENT
Click on **Register NOW** button

(Cancel) [Register NOW]

The Event Name, Description, Location, Event Date, and Event Start Time will be displayed in the next section.

In the following section, any event questions that have been defined in the Event Question Admin area for the event will be displayed.

At the bottom of the screen there is a Total Amount Due field which tallies any fees in the above sections.

Cancel button – Cancels the registration and closes the Registration Form dialog window.

Register NOW button – Processes the chosen options for the member and displays the Verify Registration screen.

4.1.2 Verify Registration

On the Verify Registration screen all of the above information and user selections will be displayed in a read-only format. If any changes need to be made at this point the back button can be used to return to the Registration Form screen to make any changes.

Cancel button – Cancels the registration and closes the Verify Registration dialog window.

Back button – Displays the Registration Form screen

Save This Page button – Saves the Verify Registration page in HTML format

Print This Page button – Sends the Verify Registration page to the printer

CONFIRM REGISTRATION button – Actually creates the registration and adds the member to the list of people registered for the event. It will also cause any emails that have been defined on the Edit District Event screen to be sent. A thank you page will be displayed.

4.1.3   Thank you for Registering

If a member with a security role between 1 - ??? registered for the event, the registration process is complete.

If a member with a security role between ??? – 6 registered for the event, the registration process is complete for the selected member. Additional registrations can be made by clicking the **Register Another Person** button.

Register Another Person button – Returns to the Registration Form so that another member can be registered.

Close button – Closes the Thank you for Registering dialog window.

4.1.4   Multi-Account Options

If the event has the **Multi-Account** option set to **Yes** on the Edit District/Club Event screen, the **Register Member** drop down list will be replaced with a search field and button. This is to limit the number of users displayed as there are a very large number of users under the domain level.

Initially the Register Member search field will display the member's name who is logged in.

To use the Register Member search field, at least two characters must be entered and the "**...**" button clicked. This will display the Find Member dialog window.

The Find Member dialog window displays a list of members based on the search criteria provided within the domain defined on the Edit District Event screen. The list is ordered alphabetically by last name within each district, which are ordered from lowest to highest district number.

A member can be chosen by scrolling through the list of search results and selecting the radio button next to the member's name. Once this is done, the Find Member dialog window is closed.

Close button – Closes the Find Member dialog without making a selection.

After this point, the registration process is the same as listed above.

4.2 Registration Summary "Back Room"

4.2.1 Overview

The Registration Summary – or "Back Room" – is where all registrations for an event can be displayed, edited, deleted. They can also be exported into different file formats, and have badge reports created. All (or selected) registrants can also be emailed at once via one button.

To access the Registration Summary, click on the Backroom link in the Action column for an event from the Calendar screen.

A table is shown is displayed showing all members that have registered for the event. The columns in the table are determined by choices made in both the Edit District/Club Event screen and the Event Question Admin screen.

Columns that are displayed for all events are (from left to right):

- Select All (checkbox) – checking this checkbox checks all checkboxes below it – selecting all the registration entries.

- Edit – clicking on the button in this column displays the Registration Edit dialog window

- Del – clicking on the button in this column displays the Registration Edit dialog window with the delete button

- Paid? – shows whether or not the registrant has paid the registration fee

- Amt Paid – Shows the amount paid by the registrant.

- Amt Due – Shows the amount due for the registrant.

- Check No – displays the check number used to pay for the registration

- Member – displays the name of the registrant

- Include Partner? – Displays whether or not a partner was included on the registration

- Club – Displays the Club name of the registrant

- Badge Name – Displays the badge name of the registrant

- Badge Title (Guest Speaker) – Displays the badge title of the registrant ???

- Email – Displays the email address of the registrant

- Registered – Displays the date the registrant register for the event

- Business Position – Displays the Business Position of the registrant

- Business Name – Displays the Business Name of the registrant

- Address – Displays the Address of the registrant

- Home Phone – Displays the Home Phone of the registrant

- Office Phone – Displays the Office Phone of the registrant

Refresh button – Refreshes the Registration Summary page.

To Word button – allows the Registration Summary page to be saved as a Microsoft Word document.

To Excel button – allows the Registration Summary page to be saved as a Microsoft Excel spreadsheet.

Badge Report button – displays the Event Report screen so that badges can easily be generated for all registrants.

PMAIL button – Displays the EZ-Link dialog window so all registrants can easily be emailed at once.

Update/Apply Changes button – Certain fields (Amt Paid, Check No, Badge Title (Guest Speaker) can be edited directly from the Registration Summary screen. Those changes are saved when this button is clicked.

4.2.2 Search and Filter

The list of registrants for lager events can get very long, so the list can be both searched and filtered.

Last Name – Letters appear here representing the first initial of the last name of members that have registered. Clicking on the letter will return all members with a last name starting with that initial.

ALL – selecting this link will display all registrants for the event

Search – enter in search criteria into this field and click the Search button to search the Registration Summary for the event.

Filter By – Will filter the Registration Summary table according to the radio button selected:

- Paid – Displays all paid registrants

- Unpaid – Displays all unpaid registrants

- All – Displays all registrants

4.2.3 Registration Edit

Once registrations have been created they may be edited by users with the sufficient security level. ???

A registration record can be edited by clicking on the "pencil" button in the Edit column of the Registration Summary (BackRoom).   Clicking the "pencil" button opens the Registration Edit window.

From the Registration Edit screen all fields from a member's registration can be edited. Including the selections that were made in any event questions and whether they have paid or not.

To edit any field, click in the field and type in the changes.

REGISTRATION EDIT
Rotary Institute at Myrtle Beach 2007
October 02 - 07, 2007

[Cancel] [Update]

Member Name:	Aitcheson, Andrew T. Dr. (TRACY & JUDY) 1595 Duke Rd Waynesboro , VA 22980 Home: 540-943-5194 Email: bethhill@cfw.com
Registered By:	Michael Thacker

Event Name:	Rotary Institute at Myrtle Beach 2007
Description:	Rotary Institute 2007 - Myrtle Beach "Move with the Rhythm of Rotary"
Location:	*Marriott Resort at Grand Dunes* Your room reservation must be confirmed directly with the hotel: (and ASK for the ROTARY rate) • Myrtle Beach Marriott® Resort at Grande Dunes • 8400 Costa Verde Drive • Myrtle Beach, South Carolina 29572 USA • Phone: 1-843-449-8880 And remember, you must CALL the MARRIOTT hotel to make your reservations. **Alternative Hotel Booking Opportunity** • Hampton Inn Myrtle Beach-Northwood 620 75th Avenue North, Myrtle Beach, SC 29572 Tel: +1-843-497-0077 Fax: +1-843-497-8845
Event Date:	Tuesday Oct-02-07 to Sunday Oct-07-2007
Event Start Time :	8:00 AM

Spouse Attending: [Yes ▼]

#	Description	Value or Text Entered	Qty	Cost	Total
1	DGE DG DGN PDG RI	DG &s	2	$ 560.00	$ 1,120.00
2	Jic Spouse Name		0	$ 0.00	$ 0.00
3	Restrictions		0	$ 0.00	$ 0.00
4	RLI	No	0	$ 0.00	$ 0.00
5	Golf	No	0	$ 0.00	$ 0.00
6	Ripley's		0	$ 0.00	$ 0.00
7	BoatTour		0	$ 0.00	$ 0.00
8	GardenTour		0	$ 0.00	$ 0.00
9	Shopping		0	$ 0.00	$ 0.00
10	Late FEEs		0	$ 0.00	$ 0.00

Custom Fields	Description/Value
Class Year	06

Paid: [Yes ▼] **Amount Paid:** $ 1120.00 **Amount Due:** $ 0.00 **TOTAL EVENT FEE:** $ 1,120.00

Payment Details: [CK - Check ▼] **Check No/Auth Code:** PP: 1055-1572-5565-01

Last updated on: 08/06/07 At: 07:25 AM By: Michael Thacker Created: 07/11/07 By: Michael Thacker

// the spouse attending field was removed and listed in the question items in the right position.

Cancel button – Cancels the edit and closes the Edit Registration dialog window without making changes.

Update button – Saves any changes made to the registration record and closes the Edit Registration dialog window.

4.2.4 Deleting a Registration

A registration record can be deleted by clicking on the red "X" button in the Del column of the Registration Summary.

Clicking red "X" button displays the Registration Edit dialog window with the delete button

Cancel button – Cancels the deletion and closes the Edit Registration dialog window without making changes.

Delete button – Deletes the registration record and returns to the Registration Summary display.

IMPORTANT: One a registration is deleted; the information is lost and cannot be recovered. If a registration entry inadvertently deleted, it must be reentered.

Note: The calendar event cannot be deleted until all the registrations are first deleted.

Note: The registration questions/entries displayed as part of the registration can not be repositioned if there are existing registrations. To reposition a question, ALL the existing registrations must be deleted.

5. Advanced User Techniques

6. Frequently Asked Question (FAQ)

APPENDIX A Definitions, Acronyms, and Abbreviations

- Component   Any software system or subsystem that can be factored out and used across multiple systems or applications.

- Database   A collection of information that is organized so that it can easily be accessed, managed, and updated.

- DBMS (Database Management System) - A database management system, sometimes just called a database manager, is a program that lets one or more computer users create and access data in a database.

- DDBMS   (Distributed Database Management System) – A Distributed Database management system is a centralized application that manages a distributed database as if it were all stored on the same computer. The DBMS synchronizes all the data periodically, and in cases where multiple users must access the same data, ensures that updates and deletes performed on the data at one location will be automatically reflected in the data stored elsewhere.

- HTTP (Hyper Text Transfer Protocol) - A transport protocol defining how messages should be formatted and what action servers have to take on them.

- JVM (Java Virtual Machine) – A runtime java interpreter implementation that allows the execution of Java applications, applets, Servlets, etc…
- Relational Database   A collection of data items organized as a set of formally-described tables from which data can be accessed or reassembled in many different ways without having to reorganize the database tables.

- RPC (Remote Procedure Call) - A protocol which allows a program running on one host to cause code to be executed on another host without the programmer needing to explicitly code for this.

- SOAP (Simple Object Access Protocol) - A lightweight, XML-based messaging protocol that contains an envelope, header, and body, designed to exchange information in a decentralized, distributed environment.

- XML (eXtensible Markup Language) - A language specialized for Web documents, enabling the creation of tags customized to the company's needs and business logic. It not only has data but also contains metadata. It uses a DTD or a SCHEMA to describe the data.

- XSD (XML Schema Definition) - Describes the syntax and grammar of a well-structured XML document.