Rice Event Registration System

Powered by Web Services

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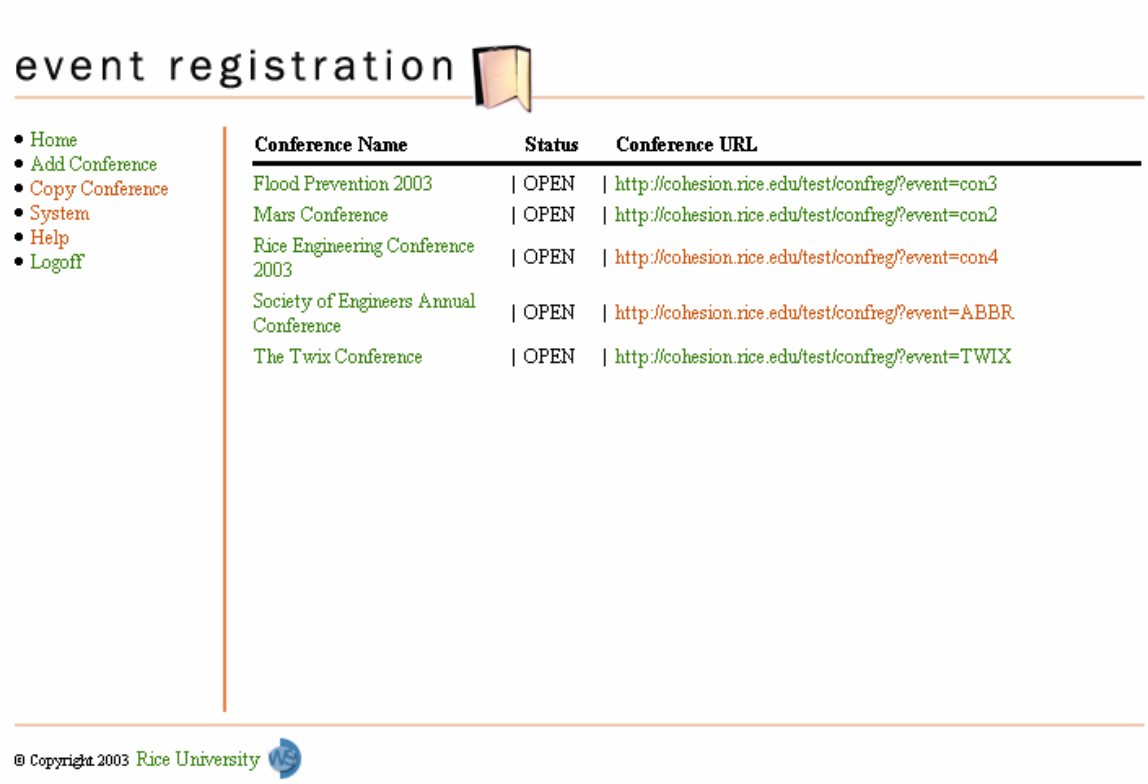
Rice Event Registration System

The Rice Event Registration System (RERS) is designed to facilitate the creation of an online registration web page for potential conference attendees to fill out contact information, select from a user configured set of activities and packages and make payment for the conference. This dynamic web page is accessed from the conference sponsor's web site and can easily be customized to match logos, colors, etc. The conference registrants' contact information, financial details, abstract submissions and special requests can be managed online with a variety of reporting features and a data download. All registrants and co-sponsors will stay informed of schedule changes, additions or other news with built in communications tools.

Accessing the Rice Event Registration System

Each user will be provided with a username and password from Web Services that will allow multiple conferences to be added and managed during the one-year subscription.

Visit http://cohesion.rice.edu/unifiedadmin and enter the username and password to access the Event Registration Admin Home Page.



The Event Registration Admin Home Page will display all the conferences that a given user is allowed to see or edit along with status of the conference and the URL of the registration page. If the user is a Co-Sponsor, the shared conference will be displayed in a read-only mode.

If there are no conferences listed, you can click on the **Add Conference** link to begin configuring a new conference.

To edit existing conference details click on the name of the conference in the list. To work with the Registrants, Reports or Abstracts of a conference, first select the conference name from the list and click on the corresponding link from that particular conference's menu.

Each conference has a navigation menu along the left side of the screen of the following functions:

Menu of Functions

Link:	**Function:**
Home	returns to the main conference admin home pages
Add Conference	configure a new conference to be added to the list
Copy Conference	makes a copy of the selected conference configuration for ease in creating similar conferences at later dates
System	displays system functions such as maintaining department, downloading data, changing password and sending bulk mail
Help	displays an online help window
Logoff	exits the system
The Conference Options	
Conference Details	configure the dates, status and general information of a conference
Sponsors	enter information for the sponsor and co-sponsors of a conference
Fees	settings for accepting different methods of payment, parking fees and handling fees
Registrants	configure the special needs and options that registrants may choose from on the online registration form
Activities	lets you set the different types of registrants and add, edit and manage activities for each registrant type in the conference
Abstracts	displays a list of current, submitted abstracts for the selected conference
Conference Reports	
Registrant Search & Edit	search, display and edit registrants for the selected conference based on name, status or invoice number
Activity Enrollment	search and print a roster of registrants that are enrolled and the enrollment limit for the individual activities of the conference
Enrollment Summary	displays a summary of the actual enrollment and enrollment limits for the conference and all activities
Process Registration	displays all of the pending credit cards and credit card refunds that need to be processed
Reconciliation	search for all completed transactions between admin provided dates

User Roles

Two roles can be created by Web Services to meet a department's needs. A Full Admin user will be able to add / edit / delete information as well as execute the Add Conference, Copy Conference and Bulk Mail functions. A Read-Only Admin user will only be able to search and display Registrant data, Abstracts and access the Help window.

Adding a Conference

It's always best to have as much information about the conference you are going to set up before starting the configuration process. From the Event Registration Admin Home Page, click on **Add Conference** to display the following screen:

event registration

- Home
- Add Conference
- Copy Conference
- System
- Help
- Logoff

Add Conference

Required fields are denoted with a * next to the name

Conference Name*

Conference URL http://

Conference Abbreviation*

Conference Start Date m d y Start Time

End Date m d y End Time

Location

Welcome Message

Conference Status*

Notify ☐ Rice Calendar ☐ Rice News ☐ Thresher

Dates

Registration

☐ Allow Early Registration m d y

Regular* m 6 d 13 y 2003

☐ Allow Late Registration m d y

Publish

Start m d y

End m d y

Parking

Instructions

Map URL http://

Audio/Visual Support ○ Yes ◉ No

Videotaping ○ Yes ◉ No

Webcast ○ Yes ◉ No

Approval of Speaker ○ Yes ◉ No

A/V Notes

Package Eligible ○ Yes ◉ No

Request Membership Number ○ Yes ◉ No

Notes

Confirm Reset

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Conference Details

The default screen that appears when Adding a Conference or Editing a Conference is the Conference Details screen. It holds all of the main details of the conference such as registrations dates, urls, status, parking details and options for A/V support.

Enter a **Conference Name**. Be specific, this name will be displayed in the list of conferences on the Administration Home Page as well as any subsequent forms and reports generated by the Event Registration System. You have the option of entering a **Conference URL** to direct registrants with additional questions. A four letter **Conference Abbreviation** is required for each conference for the creation of invoice numbers.

Enter the **Start** and **End Dates** for the conference. The **Time** and **Location** of the conference may vary during certain activities so please enter the initial starting time and place for everyone to gather. A **Welcome Message** can be displayed on the online registration page with additional information for prospective registrants.

Conference Status

The conference has an option of Cancelled, Closed, Open and Pending. If you need to cancel the conference choose the option of **Cancelled** and a note will be added to the online conference registration page notifying prospective registrants that the conference has been cancelled. Choose the option of **Closed** if you have reached a maximum number of registrants before the set closing date of the conference. The option of **Open** should be selected if the conference is ready to accept online registrations. **Pending** is the conference option you should keep selected while you are configuring the conference and do not want the online registration page to be created.

Notify

You have the option of notifying the Rice Calendar, Rice News and the Thresher of the upcoming conference by selecting the corresponding check boxes. Email will automatically be generated and sent to the media or be automatically entered into the Rice Calendar system.

Registration Dates

Setting the Registration Dates tells the system to begin accepting online registration forms on a specified date. The conference has the option of having an **Early Registration Date** and/or a **Late Registration Date**, each with options that appear later for different fees (**Note:** you must configure these fees under the Activities section if the conference is not free). If you would like to set either of these dates, you must check the box to allow for Early or Late Registration and then set the date. A **Regular Registration Date** is required for adding a conference.

Publish

The **Publish Start Date** and **End Date** can be set to create the online registration form on the start date and take the online registration form down on the end date. If you do not choose any Publish dates the online registration form will be created immediately but will not accept registrations until the **Regular Registration Date**.

Parking

You may enter in any specific instructions for parking such as location, cost, obtaining free parking passes from campus police and shuttle services. If you have the URL for a map that shows the location of the preferred parking lot for the attendees you may type in the full address (i.e. http://www.dacnet.rice.edu/maps/space/) in the **Map URL** field.

Audio/Visual Support

Should your conference need to be broadcast, videotaped or require special A/V support, select **Yes** for Audio/Visual support. You may then choose from the options of Webcast, Videotaping and Approval of Speaker that will be emailed as a request to the IT A/V Support Services team. Be sure to include special instructions or questions in the notes field as this is also sent to the A/V team. You may also contact them at avs@rice.edu or visit their website at http://cts.rice.edu/avs/

Package Eligible

Package Eligibility will determine whether an activity package can be defined for this conference and whether it will appear in the online registration form.

Request Membership Number

Requesting Membership Number will allow you to further enhance registrations by allowing you to match up your membership information with specific registrants. It will also allow you to restrict registration to members in your organization.

Notes

This is where you can add any additional information, details and restrictions, etc. to the online registration page.

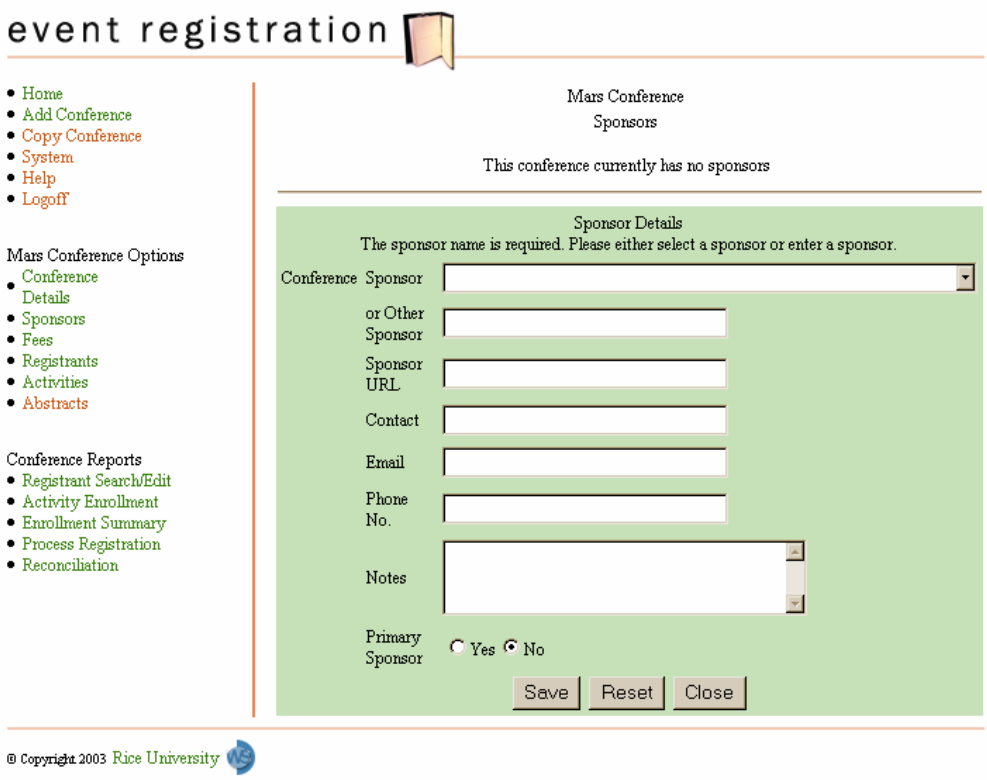
Confirm the Conference

In order for the conference to be saved into the system and an online registration form created, you must click on the **Confirm** button to thoroughly review the information you have entered before clicking on the **Save** button. The URL will then be listed on the main admin page .If you need to change some conference details, click on the **Go Back** button. If you decide that you want to completely clear out the form, click on **Reset**.

Sponsor Configuration

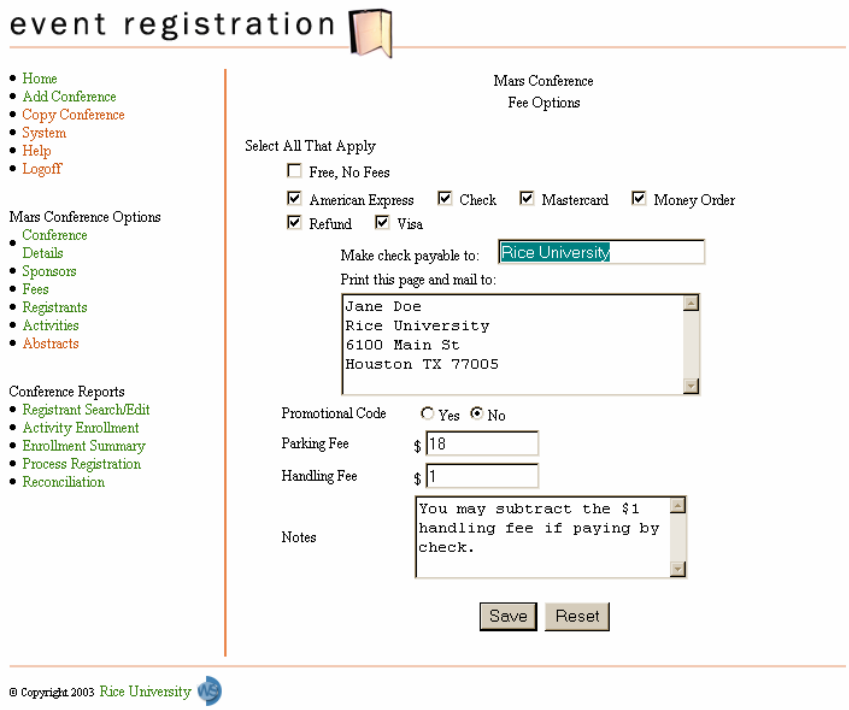
If you wish to add a Co-Sponsor to your conference click on the **Sponsors** link under ***[Conference Name]* Options**, you will be presented with the following screen that will allow you to enter all relevant information for each Co-Sponsor. If you select a Rice Department from the **Conference Sponsor** drop-down menu, it will populate the rest of the form and you may edit or add to that information. If the sponsor is not a Rice Department, you will need to enter the contact information for the **Other Sponsor**. Making a sponsor a **Primary Sponsor** will place their name first in the list of sponsors.

Click on **Save** to add the Co-Sponsor details to the conference. All of the co-sponsors will be listed above the Sponsor Details form and you may edit or delete the details by clicking on the Organization name. Click on **Reset** to clear the form and start over again. Select **Close** to leave a sponsor's details untouched.



Fee Configuration

By default your conference is set to be free of charge. If you need to charge for activities, parking and other items, you will need to configure the methods of payment and basic fees for your conference by click on the **Fees** link under ***[Conference Name]*** **Options**. You will be presented with the following screen that will allow you to set the payment options for the conference. If you choose **Free, No Fees**, all other payment options will be unavailable. You may choose any combination of the other payment types and fees for parking or handling fee.



Check or Money Order

If you choose the option of **Check or Money Order** you will need to fill out the **Make check payable to:** along with the address to **Print this page and mail to:** sections.

Credit Cards and Refund

Select the types of credit you would accept from the list. And you may decide if the registration fee is refundable by checking the **Refund** box.

Promotional Code

If you are distributing a Promotional Code with your advertisement of the conference, registrants may enter that code and receive a dollar amount discount from the total fees of the conference.

Parking Fee

Set the fee for parking, you will be issuing parking passes to attendees either through the their conference packet or orientation session, that will be valid for the dates and times of the conference. You will need to set up the parking situation with the Rice Campus Police.

Handling Fee

A Handling Fee may be charged to the registrants to cover credit card processing costs or any other Handling Costs, such as expedited delivery of conference information or dispersal of other media during the conference.

Notes

The Notes section will allow you to write in any special notes for the registrants that will appear on the online registration page.

Completing the Fee Configuration

Click on **Save** to save your changes or **Reset** to clear the form.

Registrant Options

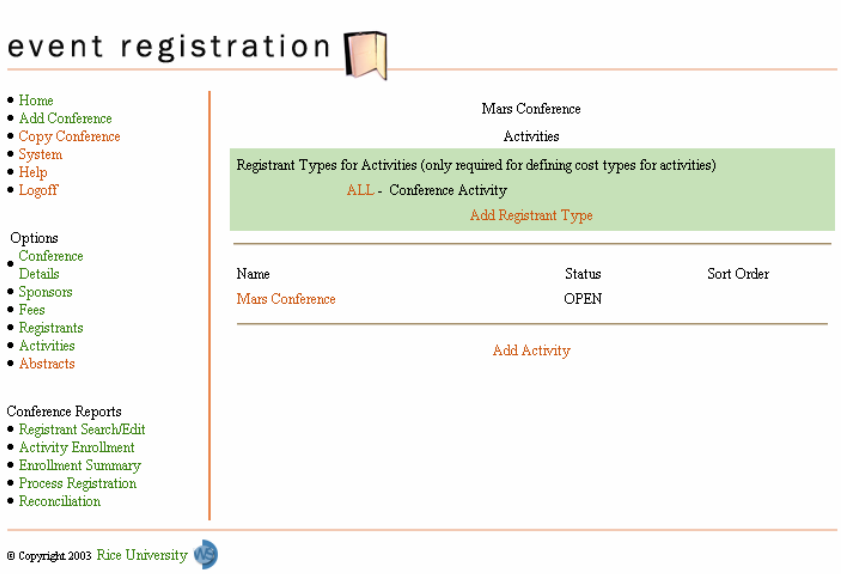
If you wish to offer special options or choices for the registrants of your conference click on the **Registrants** link under ***[Conference Name]*** **Options**. A list of options will be displayed and the options that you check will appear on the online registration form.

These Special Request options are for information gathering purposes only. They will be noted in each registration but it will be up to the Conference Organizers to manually find roommates, cars rides and take care of dietary needs, hotel reservations, etc.

Activities Configuration

The Conference Registration System can configure multiple activities with date, time, costs, descriptions and enrollment limits for a conference as well as manage enrollment for all activities through the **Activities** Conference Option. Since some conferences may have different types of registrants (students, grad student, faculty, public, etc.) with different types of activities and different costs associated, the Conference Registration System will also allow for defining multiple types of registrants and create unique lists of activities available for each.

Note: If you have configured the Fees Option to be free, you will not have an option for setting costs in the Activities Configuration.



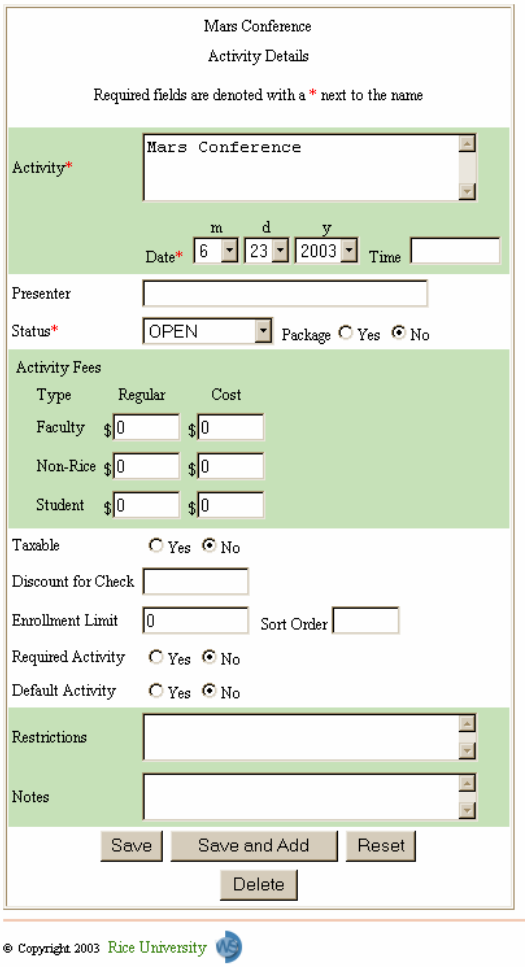
Define Registrant Types

By default, each conference added will have one Registrant Type – "**All"**, and one Activity – "**The Conference"**. The "**All"** Registrant Type will allow everyone to register for the same activities at the same prices. It is recommended to add all of your registrant types before adding activities and setting costs because if you add a new registrant type after configuring the activities you will need to edit each activity again, adding the cost for the new registrant type.

Click on **Add Registrant Type** to configure a new Registrant Type in addition to the "All" type (you may remove the "All" type by selecting it and clicking on the **Delete** button). A window will pop up asking you to name the **Registrant Type** and give a **Description**. Click **Save** to add the Registrant Type and return to the Activities page or **Reset** to clear the form. To close the form without making any changes, click on the close window button of the pop-up window. After you have added all of the different Registrant Types, you can edit or delete Registrant Types from the list by clicking their names.

Configure Activities

"The Conference" will be the only activity in the list. To configure the details of the activity, click on the name. A pop-up window will appear with required fields and options for the activity.



On the Activity Details form, you'll need to fill out the **Activity Name, Date** and **Time** of the activity. This information will show up on the online registration page. You will also need to set the **Status** of the activity to open/closed/pending/cancelled and note whether the activity is part of a **Package** by clicking Yes or No. You have the option of listing a **Presenter** or multiple Presenters.

The **Activity Fees** are an optional setting for each Activity. Depending on your previous settings of Early and/or Late Registration you will have a grid of fees that need to be set. The **Regular** column will hold the fees for each Registrant Type if they register on time (if you have configured your conference to have Early and/or Late Registration, you will also need to fill in the fees for each type of registration type). The **Cost** column is for the conference organizer to place the actual cost of the event to them. These optional figures will not be made public and are used in figuring out profits.

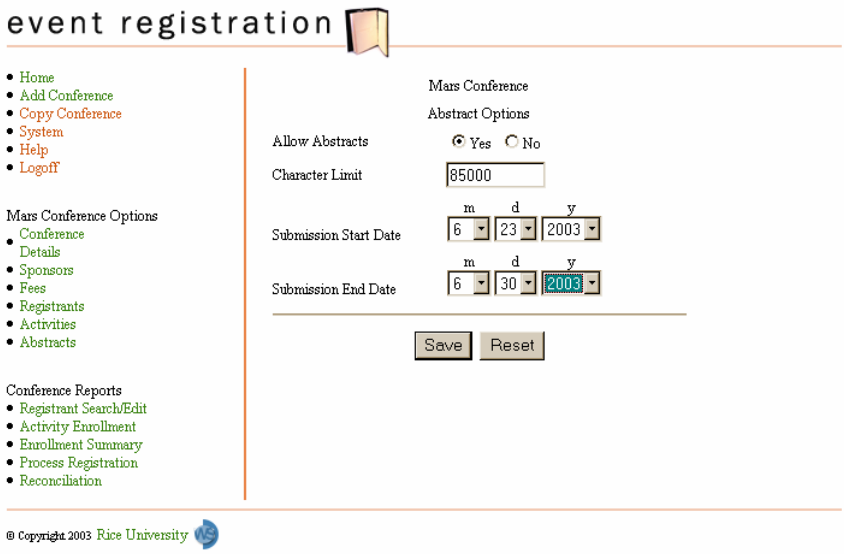
If the activity is **Taxable** you can select yes to remember to calculate taxes when doing the books for the conference. If you wish to give a discount to people for paying by check, enter the dollar amount in the **Discount for Check** field and the registrants can take that amount off of their bill.

If you have a limited number of seats/space, you may set the **Enrollment Limit** and any **Restrictions** this activity may have. When you have more than one activity for the conference you may rank the order that the activities appear on the online registration form by putting the corresponding number in the **Sort Order** field. By default, all activities will appear as optional on the online registration form unless you choose to make them a **Required Activity** or you can have the suggested activities pre-selected by default by choosing **Default Activity.** If there are any other details or important notices that you would like to share on the online form, you can type them in the **Notes** field.

When you are satisfied with the activity, click on **Save** to save the activity and return to the Activities page or **Save and Add** to add that activity to the list open a new Activity Details form. If you would like to clear out the form and start over, click on **Reset**. If you would like to remove an Activity from the list, click on the **Delete** button.

Abstracts

This section of the Conference Options will allow you to determine whether Abstracts will be collected for this conference.



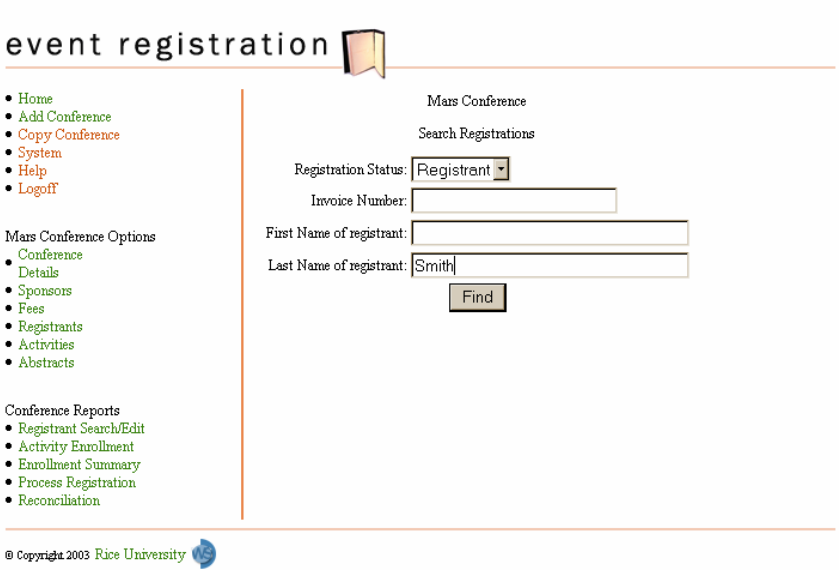
After choose **Yes** to allow Abstracts for the conference, you will need to set the **Character Limit** for the documents and the **Submission Start Date** and **Submission End Date**. The system will automatically allow Abstracts to be submitted between those dates.

Click on **Save** to set the Conference Options of allowing abstracts, or **Reset** to clear the Abstract Option form.

Conference Reports

Registrant Search/Edit

Selecting **Registrant Search/Edit** from the **Conference Reports** section of the Event Registration System will take you to a screen used to search for Registrants of the selected conference based on name, registration status or invoice number.



Search for a Registrant

To work with any Registrant's record you must first complete a search based on name, registration status or invoice number. You can enter as little or as much information in the fields, noting that this system is case sensitive. Entering nothing and clicking on **Find** will return a list of all of the registrants.

Edit a Registrant

After performing a search, you will select the name of the registrant that you wish to edit from the Results area. Their registration form will appear and you can add and edit their information as well as entering payment information and registrant status and refund information. After making changes to that Registrant's information, click on **Update** to save those changes or click on **Registrant Search/Edit** to perform another search without saving the changes.

Add a Registrant

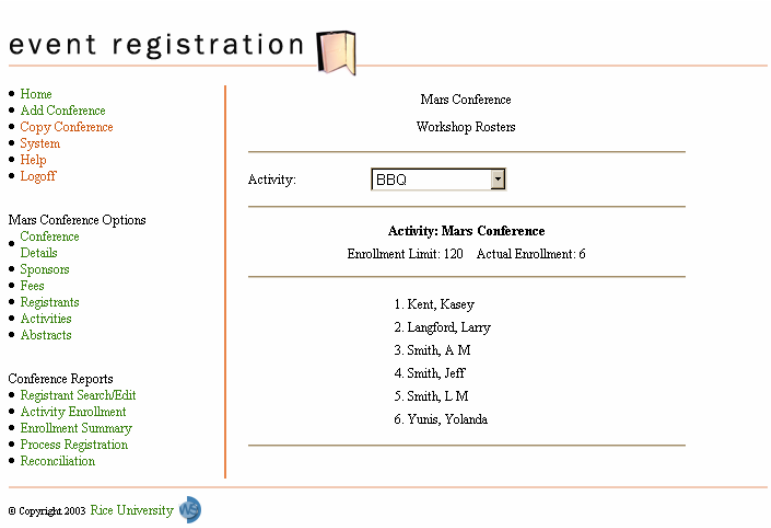
To manually add a new registrant to the conference, you must click on the **Conference URL** of the conference from the Event Registration **Home**. A blank online registration form will appear for you to fill out. When you are finished entering the registrant's personal information and payment information click on **Confirm** to add the registrant to the conference. On the final page you can click on **Register Another Person** to continue manually entering registrant data or **Home** to return to the conference admin pages.

Remove a Registrant

To remove a registrant from the conference, you must search for the registrant and then edit their registration form. You need to change their **Registrant Status** to **Cancelled** and click **Update** to save that change or select Registrant Search / Edit to perform another search without changing the registrant's status.

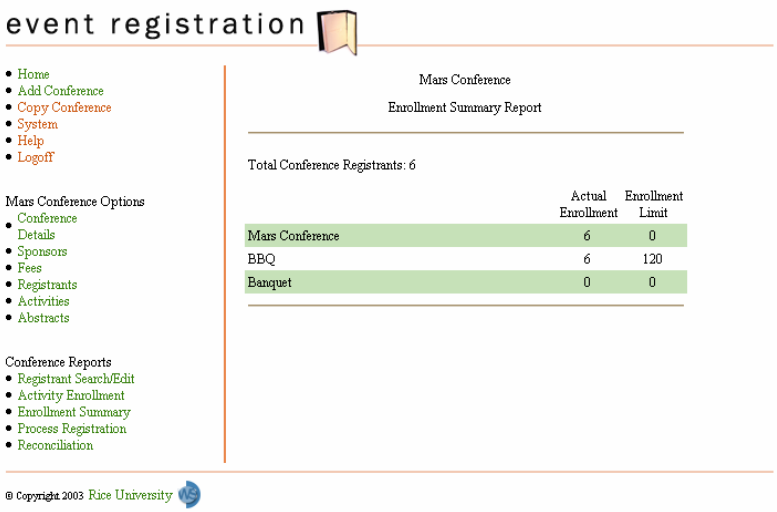
Activity Enrollment Report

Selecting Activity Enrollment will allow you to pick an individual activity from a drop-down list to display the Enrollment Limit, Actual Enrollment and a roster of all the registrants' names.



Enrollment Summary

Clicking on Enrollment Summary in the Conference Reports section of the side menu will give you a printable list of all the activities, the number of registrants and the limits for each activity.



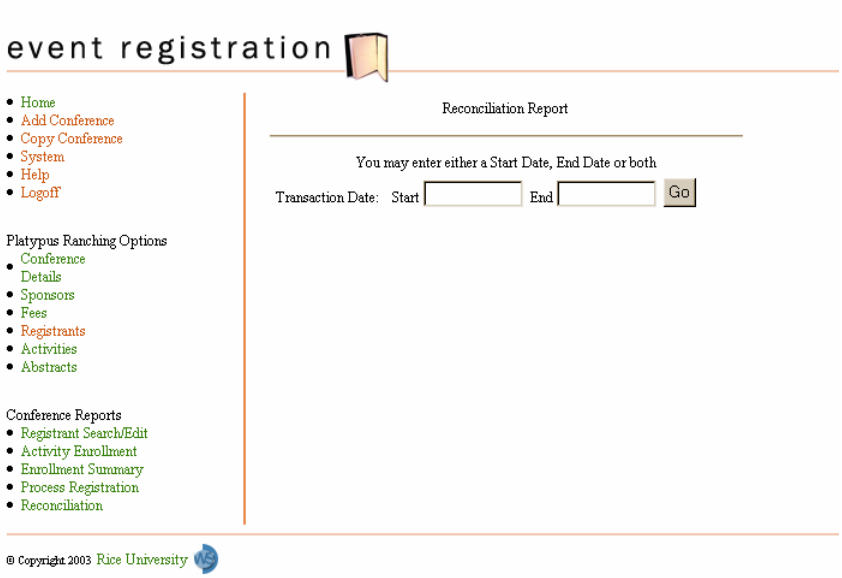
Process Registration

Selecting **Process Registration** from the Conference Reports menu will show all of the Pending Credit Cards and Pending Credit Card Refunds that are outstanding for the conference.

Reconciliation

This financial report can be generated at any time to reconcile the costs and income of the conference.

Selecting **Reconciliation** from the Conference Reports menu will present you with the following screen. You can enter the start date, the end date or both to extract the transactions that have been completed before after or during those dates.



Click on **Go** to submit the dates. You will see all of the Processed Credit Card Payments, Processed Refunds and Processed Check Payments within those dates.

Abstracts

Accepting and Rejecting Abstracts

Registrants will be submitting abstracts via the Online Registration Form. All abstracts will appear on the Abstract Summary page with the status of Pending. To read an abstract you will need to highlight it and click on **Edit**. When you have finished reading an abstract for consideration of inclusion in the conference, you can change the Status of the Abstract to **Accepted** or **Rejected** and click on **Save** to save the new Status and return to the Abstract Summary page or click **Return** to return to the Abstract Summary page without changing the status from **Pending**.

Adding Abstracts

If a registrant submitted an abstract via email instead of using the Online Registration Form, you can manually add the abstract to the conference. Click on **Add**; a blank Abstract Details form will appear.

Fill in the required information, cutting and pasting the body of the abstract in the Abstract field. The number of characters you originally set in the conference setup will limit the amount of text you can paste into the Abstract field. Choose **Save** to save the data and return to the Abstract Summary page or click **Return** to return to the Abstract Summary page without saving any of the data.

Deleting Abstracts

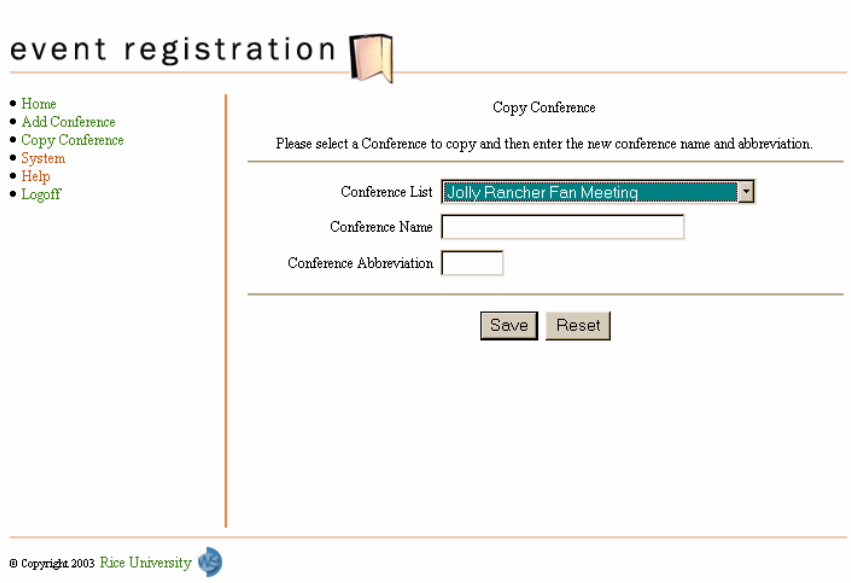
If you wish to remove an abstract from the Abstract Summary page, simply highlight the abstract and click on **Delete**.

Sorting Abstracts

You can sort the abstracts by Author, Title or Status simply by clicking on the column heading. The abstracts will be sorted in alphabetical order.

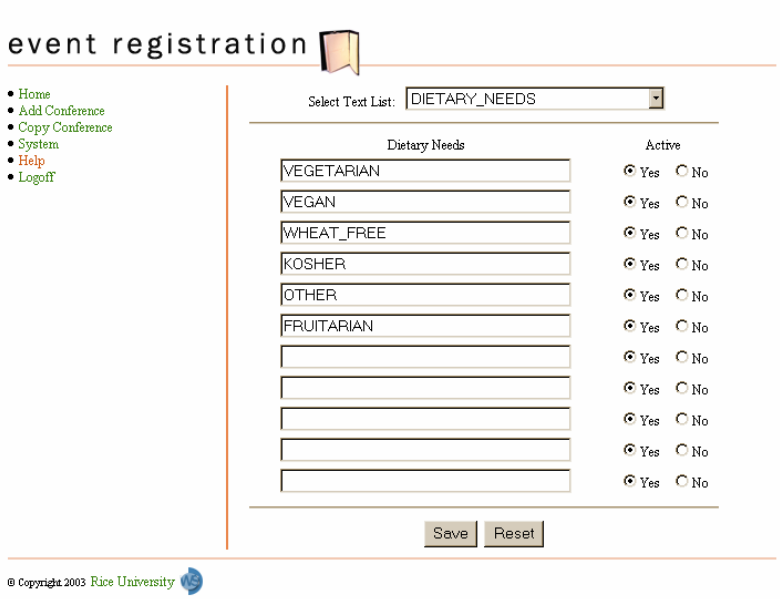
Copy Conference

Much time and energy goes into configuring a conference to meet specific needs. The Event Registration System has the Admin function of Copying a Conference that will save you time by duplicating the configuration of a previous conference. Choose **Copy Conference** from the menu. You will be given the choice of all your previous conferences to duplicate and fields for renaming the conference and giving a new four-letter conference abbreviation.



System

The drop down menus located on the event registration site and the online registration page contain Lists of Values (LOVs). The values can be changed on these drop down menus by selecting the **System** option from the menu bar. You will have the option of choosing the LOV and then editing the values in the list.



Help

The Event Registration System has an online Help Section to assist you in configuring Conferences as well as give the contact information for Web Services. To access the online Help Section, click on **Help** from the menu bar. For additional help, contact Web Services at **713-348-5184** or email at **webserv@rice.edu**.

Logoff

To maintain the security of credit card numbers and registrants' personal information, it is always wise to **Logoff** of the system when you leave your computer. Web Services cannot be held responsible for a breech of security that occurs when a user is logged into the system and leaves their computer.