



User Guide

Chapter 17

Event Registration

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Introduction

SharpSchool's **Event Registration** is a powerful tool that will allow all users to view and register for upcoming events. This guide is intended for administrators, teachers, parents and students.

Accessing Event Registration

Event Registration can be accessed through the **Registration** link in the published links section of your website, a link placed manually on your website, or by entering in your website address and adding /ereg to the end. (e.g. <http://www.sharpschool.com/ereg>).

Your school or organization may require you to enter a username and password for security to be able to access the **Event Registration** pages. This username and password will be provided to you by your site administrator.

Event Center

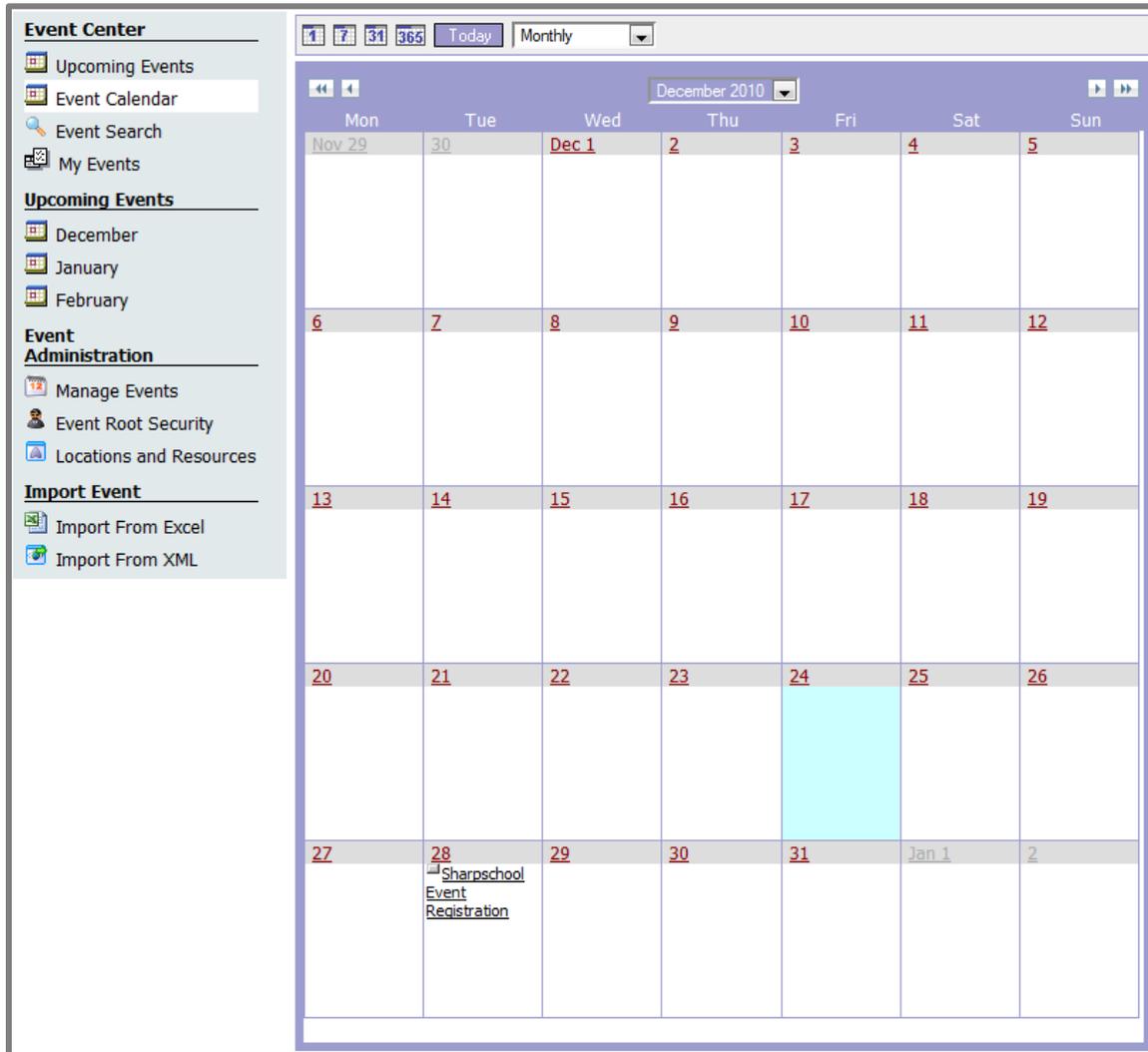
On the **Event Registration** page you will see the **Upcoming Events** section for searching events by title and a list of any events upcoming for the next 3 months..



The screenshot displays the 'Event Center' interface. On the left is a navigation sidebar with 'Event Center' at the top, followed by 'Upcoming Events', 'Event Calendar', and 'Event Search'. Below these are 'Upcoming Events' with sub-links for 'May', 'June', and 'July'. The main content area is titled 'Search Events' and includes an 'Event Title' search box, a dropdown menu set to 'In 6 Months', and 'Search' and 'View All' buttons. Below the search area is an 'Upcoming Events' section with the text 'No events available.'

Event Calendar

The **Event Calendar** that is part of the **Event Center** will provide you with a calendar view of the events. When you click on the event you will see the event information as well as the registration link.



Event Search

The **Event Search** option allows you to search for all events whether they are active or closed. You can search by **Language, Title, Event Type, Event Summary, Status,** or even the **Event Schedule**. The search results will appear under **Event Search Results** where you can click on the **Event Title** for more information and to register.

The screenshot shows the 'Event Search' interface. On the left is a navigation menu with sections: 'Event Center' (Upcoming Events, Event Calendar, Event Search), 'Upcoming Events' (May, June, July), 'Event Administration' (Manage Events, Event Root Security, Locations and Resources), and 'Import Event' (Import From Excel, Import From XML). The main area is titled 'Search Events' and contains the following fields: 'Language' (All Languages), 'Location' (text input with a search icon), 'Event Title' (text input), 'Event Type' (All), 'Event Summary' (text input), 'Status' (All Active Events), and 'Event Schedule' (two date pickers with 'To' in between). 'Search' and 'Reset' buttons are at the bottom right.

My Events

My Events shows you which events you have registered for. You can cancel your registration under the **Actions** section by selecting the **Cancel** option. You can edit your registration by selecting the **Edit** option from the **Actions** section.

The screenshot shows the 'My Registrations' interface. The left navigation menu is the same as in the previous screenshot, but 'My Events' is highlighted. The main area is titled 'My Registrations' and displays 'No events available.' in a text box.

Registering for an Event

When you are registering for an event you will first see the **Event Information** which will include a description, the language of delivery, and the date and time.

[Summary](#) [Agenda](#) [Policy](#) [Register Now](#)

Sharpschool Event Registration Workshop

Sharpschool Event Registration Workshop

Event Information

Language of Delivery	English
Time	Thu, May 06, 2010
Address	SharpSchool 201 Autumnview Road, Suite 200 Williamsville 14221

Contact Information

1# Name	Joseph Mate
Email	joseph.mate@sharpschool.com

When you click on the **Agenda** tab, this will show you a schedule of items or topics of discussion that are associated with this event.

[Summary](#) [Agenda](#) [Policy](#) [Register Now](#)

Schedule

Thursday, May 06, 2010

Introduction to Event Registration 9:00 AM - 11:00 AM Location: To be announced Introduction to Event Registration
Event Registration Hands On Practice 11:00 AM - 12:00 PM Location: To be announced To allow participants the opportunity to practice using the Event Registration
Question Period 12:00 PM - 1:00 PM Location: To be announced Question Period

The **Policy** tab will show you any policies that are associated with the event.

[Summary](#) [Agenda](#) [Policy](#) [Register Now](#)

Event Policies

No policies available.

When you click on the **Register Now** button you will be presented with the registration information that you will need to select.

First you will see the **Registration Type**. You will be presented with a range of registration types that are applicable to your account. Choose a type and click **Next**.

The screenshot shows the 'Registration for SharpSchool Event Registration Workshop' interface. At the top, a progress bar indicates the current step is 'Registration Type', with other steps being 'Personal Information', 'Agenda', 'Lodging', 'Transportation & Travel', and 'Confirmation'. Below the progress bar are 'Next' and 'Cancel' buttons. The main section is titled 'Registration Type' and contains a label 'Your Registration Type' followed by a radio button selected for 'Teachers'. At the bottom, there are 'Next' and 'Cancel' buttons.

You will now be asked for your information. Fill out the form completely and then click **Next**.

The screenshot shows the 'Registration for SharpSchool Event Registration Workshop' interface at the 'Personal Information' step. The progress bar shows 'Personal Information' as the active step. Below the progress bar are 'Previous', 'Next', and 'Cancel' buttons. The form is divided into two sections: 'Personal Information' and 'Business Address'. The 'Personal Information' section includes radio buttons for 'Mr.', 'Mrs.', 'Ms.', and 'Dr.', and text input fields for 'First Name' and 'Last Name', both marked as 'Required'. The 'Business Address' section includes text input fields for 'Street', 'City', 'Zip/Postal Code', 'Phone', 'Fax', and 'Email', and dropdown menus for 'State/Province' (set to 'Ontario') and 'Country' (set to 'CANADA'). The 'Phone', 'Fax', and 'Email' fields are marked with an asterisk (*). At the bottom, there are 'Previous', 'Next', and 'Cancel' buttons.

If there is an **Agenda** it will have sessions that you will be able to sign up for; select the sessions you wish to attend and click **Next**.

Packages

During the registration process there are three different packages that you may select from. There is a Basic Package, Complete Package and a Custom Package.

Basic Package - Includes all sessions in the **Agenda** that are categorized as **Mandatory** or **Regular**

Complete Package – Includes all sessions that are part of the **Agenda**

Customized Package – Includes all **Mandatory** sessions and allows you to pick and choose the **Regular** and **Optional** sessions you would like to attend



Note: The **Customized Package** option is only available if you have enabled partial registrations when creating the event.

Select Sessions:	
<input checked="" type="radio"/> Basic Package	Price: 0 NA
<input type="radio"/> Complete Package	Price: 0 NA
<input type="radio"/> Customized Package. (Please select the sessions you wish to attend.)	
Saturday, May 29, 2010	
<input checked="" type="checkbox"/> Introduction (9+ seats available)	
12:00 PM - 1:00 PM	
Introduction	
Location: [To be announced]	
<input type="checkbox"/> Hands on learning (9+ seats available)	
1:00 PM - 2:00 PM	
Hands on learning	
Location: [To be announced]	
<input type="checkbox"/> Q & A (9+ seats available)	
3:00 PM - 4:00 PM	
Q & A	
Location: [To be announced]	
Your total selection is:	
0 NA	
Total Price:	
0 NA	
<input type="button" value="Calculate Price"/>	
<input type="button" value="Previous"/> <input type="button" value="Next"/> <input type="button" value="Cancel"/>	

If your event contains a **Lodging** preference section, select the options for **Accommodation, Room Preference, Smoking Preference, Meal Preferences** and **Parking Requirements** and then click **Next**.

Registration for SharpSchool Event Registration Workshop

Registration Type Personal Information Agenda Lodging Transportation & Travel Confirmation

Lodging (Hotel) Preference

Accommodation	<input checked="" type="radio"/> I do not need accommodations <input type="radio"/> I need accommodation.
Room Preference	No preference ▾ <input type="checkbox"/> I would like to share room with <input style="width: 150px;" type="text"/>
Smoking Preference	No preference ▾
Meal Preference	<input checked="" type="radio"/> No Preference <input type="radio"/> Select a preference <input style="width: 50px;" type="text" value="Breakfast"/> ▾ <input type="radio"/> Other Preference <input style="width: 100px;" type="text"/>
Parking Requirement	<input checked="" type="radio"/> I do not need parking space <input type="radio"/> I need parking space

If your event contains a **Transportation & Travel** section, simply fill out the **Travel Preference** including **Arrival** and **Departure** sections with the **Airline**, **Flight Number**, **Airport**, and **Date**. For **Transportation Requirement** you will see the dates of your event; check the boxes for the days you will need transportation **To Event** or **Back from Event**. If you have any other special or **Additional Registration Requirements** you can fill them out in the final space and then click **Next**.

The screenshot shows a multi-step registration process for a SharpSchool event. The current step is 'Transportation & Travel', which is highlighted in the progress bar at the top. The form is divided into several sections:

- Travel Preference:** This section is split into 'Arrival' and 'Departure'. Each has input fields for 'Airline', 'Flight Number', 'Airport', and 'Date'. The 'Date' fields include a calendar icon.
- Transportation Requirement:** A table with columns for 'Event Date', 'To Event', and 'Back From Event'. The 'Event Date' is 'Thursday, May 06, 2010'. There are checkboxes under 'To Event' and 'Back From Event'. Above the table are links for '+ Select All' and 'Clear All Selections'.
- Additional Registration Requirements:** A large empty text area for providing special requirements.

Navigation buttons 'Previous', 'Next', and 'Cancel' are located at the top and bottom of the form.

The final screen you will see is the **Registration Confirmation** screen which will summarize your selections as well as any charges associated with your registration and gives you the option to **Print**, **Cancel** or **Finish Registration**.

Registration for SharpSchool Event Registration Workshop

Registration Type Personal Information Agenda Lodging Transportation & Travel Confirmation

Previous Finish Registration Cancel Print

Registration Confirmation

Personal Information

Name Johnny Fever
Email johnny.fever@wkrp.com
Registration Type Teachers

Contact Information

Home Address , N/A
 N/A

Registered Session

You have selected Complete Package \$5.00 USD

Show Session Information

Previous Finish Registration Cancel Print

You can click on the **Show Session Information** which will show the **Agenda** for the event.

Registration Confirmation

Personal Information

Name Johnny Fever
Email johnny.fever@wkrp.com
Registration Type Teachers

Contact Information

Home Address , N/A
 N/A

Registered Session

You have selected Complete Package \$5.00 USD

Hide Session Information

Select Sessions:

Thursday, May 06, 2010

Introduction to Event Registration
 9:00 AM - 11:00 AM
 Introduction to Event Registration
 Location: [To be announced]

Event Registration Hands On Practice
 11:00 AM - 12:00 PM
 To allow participants the opportunity to practice using the Event Registration
 Location: [To be announced]

Question Period
 12:00 PM - 1:00 PM
 Question Period
 Location: [To be announced]

Your total selection is: 5 US

Total Price: 5 US

Previous Finish Registration Cancel Print

When you click **Finish Registration** you will see a message confirming your current registration status for the event and you will receive a confirmation email.

Summary	Agenda	Policy
<p>! Your registration information for this event has been received and is waiting to be approved</p> <p>Thank you for registering! Please print this page for your records.</p>		
<h3>Sharpschool Event Registration Workshop</h3> <p>Sharpschool Event Registration Workshop</p>		
<h4>Event Information</h4> <p>Language of Delivery English</p> <p>Time Thu, May 06, 2010</p> <p>Address SharpSchool 201 Autumnview Road, Suite 200 Williamsville 14221</p>		
<h4>Contact Information</h4> <p>1# Name Joseph Mate</p> <p>Email joseph.mate@sharpschool.com</p>		

Event Administration

The **Event Administration** is only available to users who have administrative access or who have been assigned the rights to access the various aspects of **Event Registration**.



Manage Events

When you open the **Manage Events** screen you will see the **Search Events** and a listing of the events created below. You are able to view the **Title of the Event**, **Date(s)** of the event, the number of **Registrants**, **Status** and **Actions**. The **Add Event** option will allow you to create a new event.

The **Actions** section contains the following options:

- 1) **Close or Open Registration** – Allows the user to manually change the event registration to open or closed.
- 2) **Delete Event** – Deletes the event from the system.



Pitfall: Once you delete an event you will not be able to retrieve it.

- 3) **Cancel Event:** Allows you to cancel the event without deleting it from the system.
- 4) **Copy Event:** You can create a copy of the event to be used again.
- 5) **Export Event:** The event that you have created will be exported as an XML file which then can be imported into the SharpSchool system.
- 6) **Preview:** Allows you to preview your event.

Search Events

Language: All Languages ▾

Location:

Event Title:

Event Type: All ▾

Event Summary:

Status: All Active Events ▾

Event Schedule: Mon, May 03, 2010 To

Events (1-1 of 1) [+ Add Event](#)

Event Title	Date	Registrants	Status	Actions
Sharpschool Event Registration Workshop	Thu, May 06, 2010	0	Normal	

Adding an Event

In order to add an event, please follow the steps below:

Basic Information

Event Details

Event Title:

Sharpschool Event Registration Workshop

Design <> HTML Preview

Event Type:

Event Code:

Hotel/Location: Select Existing Location Input Location

Address Name: Concord
 Street1: 245 Learner Dr
 Street2:
 City: Tulsa
 Province: Oklahoma

Maximum Capacity:

Event Date: From Ignore the time
 To

Time Zone:

Registration Contact(s):

Online Pay Account:

Internal Memo:

Additional Options:

- Disable online registration
- Enable waiting list
- Manually move registrants on waiting list when there are available spaces
- Users can register after the event has started
- Enable partial agenda sessions registration

- 1) Click on **Add Event**.
- 2) Enter in an **Event Title** (This is a mandatory field).
- 3) The **Event Summary** uses the rich text editor, allowing you to add photos, videos, links, and other items as needed.
- 4) Select your **Event Type** from the dropdown list.
- 5) If applicable you can enter in an **Event Code**.
- 6) Enter in the **Location** for the event. If you have defined a location click on the icon and select it from the list. To manually enter in the location select **Input Location** and fill out the information.

To define a location for the event you can follow the steps in the *Location and Resources* found on page 37.

- 7) Choose your **Language of Delivery** from the dropdown menu.
- 8) Set a maximum capacity limit by entering a number in the **Maximum Capacity** field.
- 9) Enter in the **Date(s)** and **Time** of your event. If this is an all day event you can select **Ignore the time**.
- 10) The **Time Zone** should be automatically selected; if it is incorrect you can select your correct **Time Zone** from the dropdown menu.
- 11) To select **Registration Contact(s)** click on the  icon at the end of the field. If the contact you want to add is not there, your website administrator will need to create an account for them.
- 12) If your registration requires payment select the **Online Pay Account** from the dropdown menu. The online payment needs to be configured from the **System Administration** section of your website. For more information on how to configure the **Online Pay Account** please see
- 13) Additional options that you can select:
 - a. **Disable online registration:** Do not allow online registrations. All registrations will have to be added manually by an **Event Administrator**.
 - b. **Enable waiting list:** This allows you to have a waiting list for the event. If the event has reached capacity, users who attempt to register will be placed on the waiting list.

- c. **Manually move registrants on waiting list when there are available spaces:** Will make administrators responsible for manually moving people from the waiting list to the approved list. If this is not checked, users will automatically be moved from the waiting list to the approved list as soon as space is made available.
 - d. **Users can register after the event has started:** This allows users to continue to register after the event has begun.
 - e. **Enable partial agenda session registration:** Enabling this option allows users to register for specific agenda items without needing to participate in the full agenda. This can be useful if you have an event like a multi-day conference where not all registrants will be attending every session or even every day of the conference.
- 14) When you have completed filling out the event information click **Add Event**. You will now see **Tabs** across the top and will be on the **Event Information Tab** inside the **Basic Information Tab**.

At anytime that you decide that you want to cancel, at the bottom of the form click on **Cancel**.



Registration Types

Registration Types		+ Add Registration Type		
Type Name	Description	Initial Status	Category	Available Actions
Teachers		Unapproved	Local	<input checked="" type="checkbox"/>

If there is no **Registration Type** then you will need to create one by clicking **Add Registration Type**.

- 1) Enter in a name for your **Registration Type**.
- 2) Create a **Description** which can include pictures, videos and links to resources.
- 3) Add the appropriate **Associated User Groups**.

This is a mandatory field and you need to choose the associated user groups that will be allowed to register for the event. The user groups are created under **Administration -> System Administration -> Manage Groups and Roles**. If a group of users that you want to add is not available, you will need to create the group or have your site administrator create the group for you.



Tip: If you would like to make registration type for all users, choose the **Registered Users** group.

- 4) Select an **Initial Registration Status** from the dropdown menu.

The **Initial Registration Status** of a registrant can be set as the following:

Approved: The user or registrant will automatically be approved and registered for the event unless there is a wait list. If there is a wait list then the user or registrant will be unapproved until there is a spot open.

Unapproved: Registrant will need to be approved by the registration contact that was defined earlier in the basic information tab or a site administrator.

Unapproved until payment received: You can select this option if you want your users or registrants to not be approved until payment has been received.

- 5) Click on **Add Registration Type** to save and complete.

Registration Type Details

Type Name: Teachers

Description: [Empty text area with rich text editor toolbar]

Associated User Groups: Global Administrators, Translators, Registered Users

Initial Registration Status: Approved
Attention: The changed status will only affect new registrants.

[Update] [Cancel]

Agenda

The agenda allows you to add event sessions as part of your event. You can create multiple sessions for your event. This is optional when creating your event.

Find Event Sessions: <input type="text"/> <input type="button" value="Search"/> <input type="button" value="View All"/>							
Event Sessions							 Add Session
Session	Date	Time	Location	Availability	Registrable	Capacity	Action
Introduction to Event Registration	Thu, May 06, 2010	09:00 AM-11:00 AM	To be announced	Mandatory	Yes	20	
Event Registration Hands On Practice	Thu, May 06, 2010	11:00 AM-12:00 PM	To be announced	Regular	Yes	20	
Question Period	Thu, May 06, 2010	12:00 PM-01:00 PM	To be announced	Optional	Yes	20	

- 1) To create an event session click on **Add Session**.
- 2) Enter in a **Title** for the session.
- 3) Select the **Type** from the dropdown menu.

The type of registration you can select will organize your agenda sessions and when you are using the reports will be able to use the search function for type.
- 4) Enter in a **Description**.
- 5) For the **Session Availability** select what you feel is appropriate for your event. You can make your session available to all registration types or only selected registration types by clicking **Select Registration Types**, selecting the **Registration Type**, clicking on **Add Selected** and then clicking **OK**.
- 6) For the **Place/Room** click on the button to select an available room.
- 7) The **Capacity** is the number of registrants who may sign up for a particular session.
- 8) Enter in a **Message For Full** session message.
- 9) Select the date for your session from the **Schedule On** dropdown menu.
- 10) If a **parent** session is available, select it from the dropdown menu.

A parent session is an existing session, that when selected, will allow the current session to occur concurrently with the parent session (and with any sibling sessions).
- 11) Select the **Time** for this session.
- 12) Click **Add Session** to save and complete.

Event Session Details

Title

Type If you select other for type, you can enter a new type.

ABC Font Name Size Real fc

Zoom

Design HTML Preview

Description

Session Availability

Mandatory session. All registrants must attend, such as check in and check out.

Regular session which is included in the basic package

Optional session which is excluded from the basic package

Available To

All registration types

Selected registration types

Place/Room

Capacity

Message For Full

Schedule On

Parent Session

From : : To : :

Policies

Policies Add Policy

No policies available.

If your event has any policies that registrants need to be aware of you can enter them on this tab. For example if your event needs to have a user or registrant agree to a privacy policy you would add it here.

To add a policy, follow the steps below:

- 1) Click on **Add Policy**.
- 2) Enter in the **Name** of the policy.
- 3) You can enter a **Category** if needed.
- 4) In the **Description**, enter in the policy information.
- 5) Check **Registrant must agree with the policy before he/she can continue to register** if the policy is mandatory.
- 6) To save the policy click **Add Policy**.

The screenshot shows the 'Policy Details' form. It includes the following elements:

- Name:** A text input field.
- Category:** A text input field.
- Description:** A large text area with a rich text editor toolbar. The toolbar includes icons for undo, redo, bold, italic, underline, font color, background color, text color, font name, size, and real font. Below the toolbar are icons for print, zoom, and other editing functions.
- Design/HTML/Preview:** A row of buttons for switching between design, HTML, and preview modes.
- Checkbox:** A checked checkbox with the text 'Registrant must agree with the policy before he/she can continue to register.'
- Buttons:** 'Add Policy' and 'Cancel' buttons at the bottom right.

Lodging

Hotels		+ Add Hotel
Hotel Name		Action
Comfort Inn (416-736-4700)		✖

Meal Types		+ Add Meal Type
Type Name		Action
Kosher		✖
Vegetarian		✖
Regular		✖

Some events that you create may require a registrant to select a meal plan or have a place to stay.

To add a hotel, click on **Add Hotel**. Select a hotel or multiple hotels from the list and then click on **Add Selected**. To save your choices click **OK**.

Search	<input type="text"/>	Search
Hotels		
<ul style="list-style-type: none"> Double Tree Hotel DoubleTree Hotel Dallas-Campbell Centre Hilton Dallas/Park Cities Holiday Inn (416-665-3500) Marriott Austin Airport South Northcross Suites Austin Northwest Omni La Mansion Del Rio Radisson Denver Stapleton Plaza hotel Ramada Inn Schulich Executive Centre On-Campus (416-650-8300) 		
		Add Selected
Selected Hotels		
		Remove
		OK Cancel

To add a meal type click **Add Meal Type**, enter in the **Meal Type** and then click **Add**.

Meal Type Details	
Meal Type	<input type="text"/>
Add Cancel	

Setting Prices

The screenshot shows the 'Payment Settings' window. At the top, 'Default Currency' is set to 'USD'. Below this is a rich text editor with a toolbar containing various icons for text formatting and editing. The text area is labeled 'Pay To'. At the bottom of the editor are 'Design', 'HTML', and 'Preview' tabs. A 'Save Settings' button is located at the bottom right of the editor area. Below the editor is a 'Price Information' section with a table:

Session	Registration Type	Price	Action
All Mandatory Sessions	All Registration Types	\$5.00 USD	

Prices are optional for your event. To configure the **Payment Settings** follow the steps below.

- 1) Select the default **Currency**. The default **Currency** is configured by your site administrator. To add a default Currency click on **Administration -> System Administration -> Manage Currencies** and click the radio button in the **Default column** beside the currency that is appropriate.



Note: The currency must be set to **Enable** in order to be the default currency.

List of the currencies							
Name	Code	Number	Symbol	Decimal	Default	Action	
Australian Dollar	AUD	36	\$	2	<input type="radio"/>	<input type="radio"/> Enable	<input checked="" type="radio"/> Disable
Belarussian Ruble	BYB	112		0	<input type="radio"/>	<input type="radio"/> Enable	<input checked="" type="radio"/> Disable
Belarussian Ruble	BYR	974		0	<input type="radio"/>	<input type="radio"/> Enable	<input checked="" type="radio"/> Disable
Cyprus Pound	CYP	196		2	<input type="radio"/>	<input type="radio"/> Enable	<input checked="" type="radio"/> Disable
Lithuanian Litus	LTL	440		2	<input type="radio"/>	<input type="radio"/> Enable	<input checked="" type="radio"/> Disable
Mauritius Rupee	MUR	480		2	<input type="radio"/>	<input type="radio"/> Enable	<input checked="" type="radio"/> Disable
Russian Ruble	RUB	643		2	<input type="radio"/>	<input type="radio"/> Enable	<input checked="" type="radio"/> Disable
Russian Ruble	RUR	810		2	<input type="radio"/>	<input type="radio"/> Enable	<input checked="" type="radio"/> Disable
US Dollar	USD	840	\$	2	<input checked="" type="radio"/>	<input type="radio"/> Enable	<input type="radio"/> Disable
US Dollar (Next day)	USN	997	\$	2	<input type="radio"/>	<input type="radio"/> Enable	<input checked="" type="radio"/> Disable
US Dollar (Same day)	USS	998	\$	2	<input type="radio"/>	<input type="radio"/> Enable	<input checked="" type="radio"/> Disable

- 2) Select a currency from the dropdown menu. Enter your organization's accounts receivable information in the **Pay To** field.
- 3)

If you want to charge for your event sessions under the **Agenda** click **Add Price**.

Price Details	
Session(s)	All Mandatory Sessions
Registration Type	All Registration Types
Price	<input type="text"/> US
<input type="button" value="Add Price"/> <input type="button" value="Cancel"/>	

From the **Session(s)** dropdown menu choose which session or sessions you would like to apply the price to, and then select the **Registration Type** and enter your price below. Click **Add Price** to save your changes.

Sending Notifications

Email Notification and Reminder Settings	
Notification Settings	
<input checked="" type="checkbox"/>	Send email notification to registrant when registration succeeds.
<input checked="" type="checkbox"/>	Send email notification to registration contact(s) when a new registration is created.
<input checked="" type="checkbox"/>	Send email notification when an event is cancelled.
Reminder Settings	
<input checked="" type="checkbox"/>	Send email reminders to registrants prior to the event.
<input checked="" type="checkbox"/>	30 days prior
<input checked="" type="checkbox"/>	14 days prior
<input checked="" type="checkbox"/>	7 days prior
<input checked="" type="checkbox"/>	2 days prior
<input checked="" type="checkbox"/>	Send email reminders to registration contact(s) prior to the event.
<input type="checkbox"/>	30 days prior
<input type="checkbox"/>	14 days prior
<input type="checkbox"/>	7 days prior
<input checked="" type="checkbox"/>	2 days prior
<input type="button" value="Save Settings"/>	

You can have your event notify the **Registrant** as well as the **Registration Contact(s)** to send an email notification for the following situations:

- 1) Email notification to the registrants when registration succeeds.
- 2) Email notification if the event is cancelled.
- 3) Reminder to the registrant prior to the event at intervals of 30, 14, 7, and 2 days prior to the event.

Tabs/Sections

Settings for Event Information Pages

Event Information Display Style Multiple Tabs Save Settings

Please choose tab/sections which will be displayed on Event Website

Tab/Section	Display	Actions
Summary	Always	
Agenda	<input checked="" type="checkbox"/>	
Policy	<input checked="" type="checkbox"/>	

Customized Tab/Sections Add Customized Tab/Section

No item available.

You can use this section to configure the way **Event Registration** is presented when a **Registrant** fills out the form. On the **Event Information** page you can have a **Multiple Tab** view or **Multiple Sections on One Page** view. Click **Save Settings** to keep your changes.

Next you can decide if you want the **Agenda** or **Policy** sections to display by checking the boxes under **Display**. The **Actions** section will allow you to change the order of the tabs by using the arrows or you can edit the name of the tab. If you want to make a customized tab/section click on **Add Customized Tab/Section**, enter in a **Title** and fill in the **Page Body**, and then click **Add Customized Tab/Section** to save.

Custom Tab Details

Title

Page Body

Design
HTML
Preview

Add Customized Tab/Section
Cancel

Summary Tab/Section

This section will allow you to define which information will be displayed on the **Event Registration Summary** screen once the registrant gets to that point in the registration. You can also edit the name and change the order of the fields using the notepad icon  and the arrows in the **Actions** column.

Please choose information which will be displayed on Summary tab/section.		
Event Title	Display	Actions
Event Description	<input checked="" type="checkbox"/>	  
Event Information	<input checked="" type="checkbox"/>	  
Contact Information	<input checked="" type="checkbox"/>	  
Payment Information	<input checked="" type="checkbox"/>	  

Event Messages

The **Event Messages** section allows administrators to add messages that the registrant will see on the screen. In the **Messages of Price Package** section you can enter in the names and descriptions of each package. For **Messages of Registration Status and Payment**, enter in the message that you would like the registrant to see. To save all of your changes click **Submit**.

Event Informations	
Event Title	Sharpschool Event Registration Workshop
Event Summary	<p>Sharpschool Event Registration Workshop</p>
Event Date	Thu, May 06, 2010 - Thu, M
Messages of Price Package	
Basic Package Name	
Basic Package Description	
Complete Package Name	
Complete Package Description	
Customized Package Name	
Customized Package Description	
Messages of Registration Status and Payment	
Common Registration Status Message	
Registration Received and Waiting for Approval	
Registered and Approved	
Successfully Registered and Not Need Pay	
Registered and Pay Request	
Successfully Registered and Paid	
Event Registration Online Pay Failed	
<input type="button" value="Save"/> <input type="button" value="Submit"/> <input type="button" value="Cancel"/>	

Registration Form General Tab

You can choose which information is to be included on your **Event Registration Form**. If you do not want a section to be **Visible** uncheck the box. To edit the **Name**, click **Edit** and to change the order, use the blue arrows in the **Actions** column.

Information			
Information Sections	Description	Visible	Actions
Personal Information	Registrant's Personal Information	<input checked="" type="checkbox"/>	
Agenda	Registrants can choose any sessions which they would like to register to.	<input checked="" type="checkbox"/>	
Lodging	Lodging Preferences, Meal Preferences and Other Preferences.	<input checked="" type="checkbox"/>	
Transportation & Travel	Transportation Requirement and Travel Preferences	<input checked="" type="checkbox"/>	
Policy	Show up all policies applied to this event	<input checked="" type="checkbox"/>	

Registrant Info

You can use the **Registrant Info** tab to define what information is required to be filled out on the registration form. Simply check the box, under the **Visible** column, of the item(s) you want registrants to fill out. You can change the order by using the blue arrows in the **Order** column.

Personal Information		
Attribute Name	Visible	Order
Salutation	<input type="checkbox"/>	
First Name	<input checked="" type="checkbox"/>	
Last Name	<input checked="" type="checkbox"/>	
Job Title	<input type="checkbox"/>	
From Sponsor	<input type="checkbox"/>	
Business Address	<input checked="" type="checkbox"/>	
Home Address	<input type="checkbox"/>	
Other Information		
Attribute Name	Visible	Order
Organization/District School Board	<input type="checkbox"/>	
Employer/School	<input type="checkbox"/>	
Emergency Contact Name	<input type="checkbox"/>	
Emergency Contact Phone	<input type="checkbox"/>	
Social Insurance Number	<input type="checkbox"/>	
Custom Attributes		Add Custom Attribute Delete All
No data available		

If you need to add a field or section to your form that is not already listed you can use the **Custom Attributes**. To add a **Custom Attribute**, click **Add Custom Attribute**, enter in the name of the attribute, select the **Data Type** and then click **Add**.

Attribute Details	
Attribute Name	<input type="text"/> *
Data type	String
<input type="button" value="Add"/> <input type="button" value="Cancel"/>	

Lodging

The **Lodging** tab will allow you to change the option to make the **Lodging Information Visible** on the registration form, as well as the **Order** the on the form by using the blue arrows to move the preferences up or down.

Lodging Information		
Information Name	Visible	Order
Accommodation Requirement	<input checked="" type="checkbox"/>	↓
Room Preference	<input checked="" type="checkbox"/>	↑ ↓
Smoking Preference	<input checked="" type="checkbox"/>	↑ ↓
Meal Preference	<input checked="" type="checkbox"/>	↑ ↓
Parking Requirement	<input checked="" type="checkbox"/>	↑

Travel

The **Travel** tab allows you to make the **Transportation Requirement, Arrival Information, and Departure Information** sections **Visible** on the registration form and change the **Order** in which they appear on the form.

Travel Information		
Pretty Name	Visible	Order
Transportation Requirement	<input checked="" type="checkbox"/>	↓
Arrival Information	<input checked="" type="checkbox"/>	↑ ↓
Departure Information	<input checked="" type="checkbox"/>	↑

Registrant Tab

Unapproved Registrants						
No item available.						
Unapproved Until Payment Registrants						
No item available.						
Approved Registrants						Available Spaces: 19
Screen Name	First Name	Last Name	Registered On	Type	On Waiting List	Action
johnny.fever	Johnny	Fever	Tue, May 04, 2010	Teachers		 

The **Registrant** tab of **Event Registration** allows you to view any **Unapproved Registrants, Unapproved Until Payment Received** and **Approved Registrants**.

The **Unapproved Registrants** can be approved by placing a check in the **Approved** space and cancelled by clicking on the **Cancel** under the **Actions** section. You can also get such information as when the registrant registered, **Screen Name**, **First** and **Last Name**, and the registration **Type**.

When you click the **Screen Name** you will see and be able to modify the registration form that the registrant has submitted.

You can resend the event notification messages to the registrant or cancel their registration under the **Actions** section.

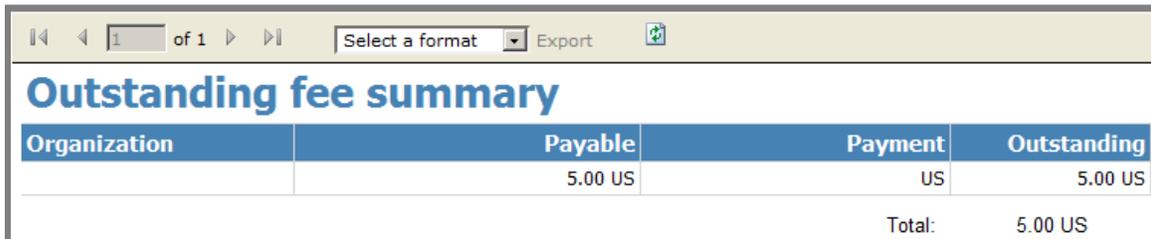
Available Spaces lets you know how many spaces are still open for registration for the event.

Reports

As an Administrator or Event Registration Author, you will have access to the following reports for the event. To view a report simply select the options that are presented to you when you select the type of report from the menu and click **View Report**.

You can export the reports as Excel or PDF files. Simply click the **Select a format** dropdown, choose your desired format and click **Export**.

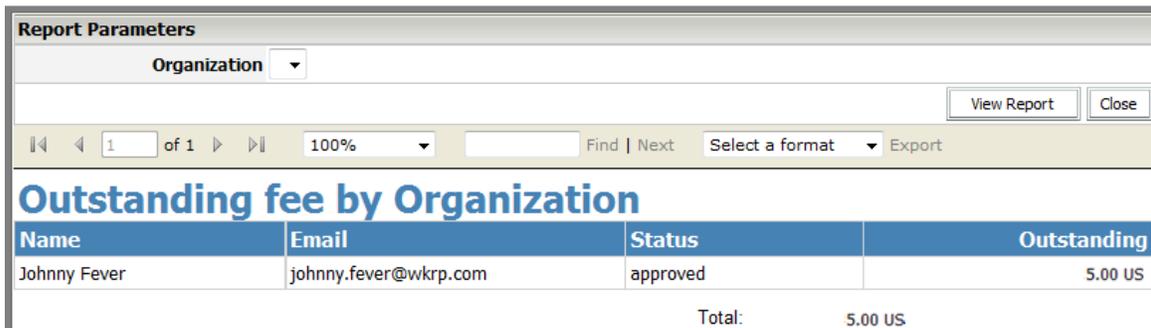
Outstanding Fee Summary: Shows outstanding fees for your sessions.



The screenshot shows a report interface with a title bar containing navigation icons, a page indicator '1 of 1', a dropdown menu 'Select a format', and an 'Export' button. The main content area has a title 'Outstanding fee summary' and a table with the following data:

Organization	Payable	Payment	Outstanding
	5.00 US	US	5.00 US
Total:			5.00 US

Outstanding Fee by Organization: Shows the outstanding fees by organization.



The screenshot shows a report interface with a 'Report Parameters' section containing a dropdown menu for 'Organization'. Below this are 'View Report' and 'Close' buttons. The title bar includes navigation icons, a page indicator '1 of 1', a '100%' dropdown, a search field, and 'Find | Next', 'Select a format', and 'Export' buttons. The main content area has a title 'Outstanding fee by Organization' and a table with the following data:

Name	Email	Status	Outstanding
Johnny Fever	johnny.fever@wkrp.com	approved	5.00 US
Total:			5.00 US

Registrant Summary: Shows by organization how many registrants have registered and by which **Registration Type**.

Organization	Employer	Teachers	Total
		1	1
	Total	1	1
Total		1	1

Registrant Detail: Details the registrants that are registered to your event

Report Parameters

Organization: All
 Employer: All
 Delegate: All

Registrant Detail

Organization	Employer	User Name	Registration Type	Email
		Johnny Fever	Teachers	johnny.fever@wkrp.com

Total Count: 1

Agenda Registration Detail: Shows which registrants are registered for which sessions for the event.

Search Conditions

Employer:
 Email:
 Registration Type:
 Paid: to
 Registration Time: to
 From Sponsor:
 User Name:

Sorting and Order

Optional Sorting Columns: First Name
 Selected Sorting Columns:

Optional Output Columns

Non-Output Columns: Home Email, Payable, Creation Date, From Sponsor, Paid, Payment Method, Payment Date, Payment Memo
 Output Columns:

Agenda Registration Detail							
Name	Organization	Employer	Registration Type	Email	Introduction To Event Registration	Event Registration Hands On Practice	Question Period
Johnny Fever			Teachers	johnny.fever@wkrp.com	Y	Y	Y
Total: 1							

Cancellation Report: Allows you to see who has cancelled the registration for your event either by the registrant or registration contact.

Cancelled Registrations Information			
Name	Email	Registration Type	Cancelled On
Total: 0			

Dietary Summary: Shows a summary of the preferences and how many registrants have **Dietary Restrictions** such as kosher or vegetarian.

Dietary	Registrants
No Preference	1
Count: 1	

Dietary Detail: Provides a more detailed report of the **Dietary Preference** of registrants.

Report Parameters		
Dietary Preference	All	
		View Report Close
Dietary Details		
Dietary Preference	Name	Email
No Preference	Johnny Fever	johnny.fever@wkrp.com

Parking Summary: Shows a summary of parking required for your event.

Date	Parking Space Needed
Total:	

Parking Detail: Allows you to see which registrants require parking on which days.

First Name	Last Name	Email	Parking Date From	Parking Date To
------------	-----------	-------	-------------------	-----------------

Lodging Summary: A summary report of registrants' lodging needs.

Accomodation Preference	Room preference	Registrant
No Preference	No preference	1
Total:		1

Lodging Details: A report listing the lodging that is required per registrant.

Name	Email	Accomodation Preference
Johnny Fever	johnny.fever@wkrp.com	No Preference

Registrant Payment: Shows the registrants' payment details.

Name	Organization	Employer	Registration Type	Payable	Paid	Payment Method
Johnny Fever			Teachers	\$ 5.00 USD		
Total:				1		

Session Registrant Detail: Shows the session and the registrants that are registered with full details.

Search Conditions
 Session

Sorting and Order
 Optional Sorting Columns Registrant
 Selected Sorting Columns

1 of 1 100% Find | Next Select a format Export

Session Registrant Detail

Name	Organization	Employer	Email	Home Email	Payable	Paid
Johnny Fever			johnny.fever@wkrp.com		5	
Johnny Fever			johnny.fever@wkrp.com		5	
Johnny Fever			johnny.fever@wkrp.com		5	

Total: 3

Session Registrant Summary: Provides a summary of how many registrants are registered for each session.

1 of 1 100% Find | Next

Select a format Export

Session Registrant Summary

Session Name	Sub-session Name	Registrants
Event Registration Hands On Practice		1
Introduction to Event Registration		1
Question Period		1

Total: 3

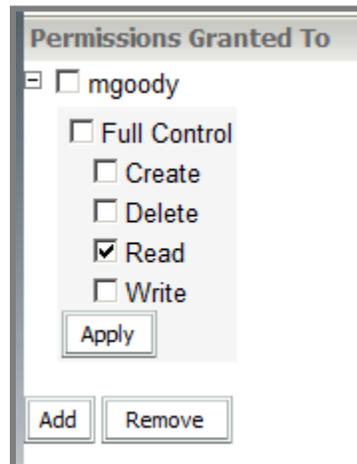
Configuring Event Security

Administrators or event creators have the ability to assign permissions to users to allow them to edit or modify the event or be granted access to the event registration. To make changes to the security of an event, click on the **Security** tab.

To assign a user click **Add**, select the username or group of users and then click **Add** and then **OK**. If you want to remove a user or group click **Remove**.

To assign permissions click the **+** icon next to the user or group and select any combination as required. **Read** allows the user to only read and register; **Write** allows the user to make changes to the event, however they are not able to create an event or change the registration form; **Create** allows the user to create events and make modifications to the registration form; and **Delete** allows the user to delete or cancel items on the event registration form or in the event details, agenda sessions, and registrants. **Full Control** gives the user all the

Read, Write, Create, and Delete permissions and also allows the user to assign these permissions to other users.

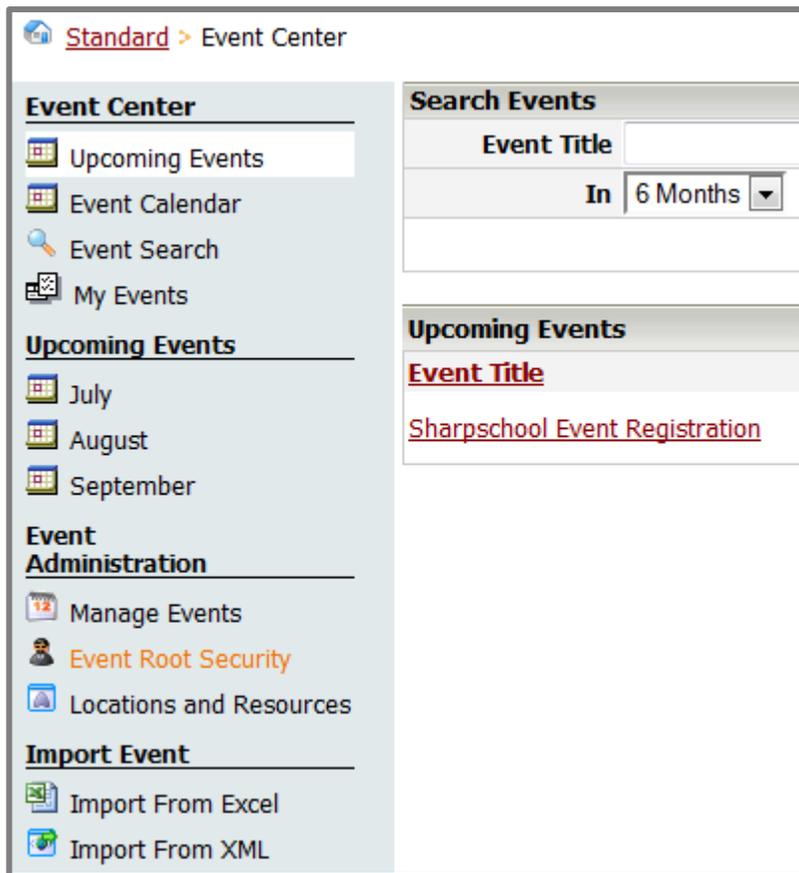


Allow Inheritable Permissions From Parent to Propagate to This Object will assign permissions based on the system permissions. In other words, whatever permissions a user has under **Administration -> Site Administration -> Security** will be inherited in Event Registration. By default a registered user will have **Read** access. If you want a user to be an event coordinator or have administrative permissions for the event add them to the **Permissions Granted To** list and provide them with the desired level of control.



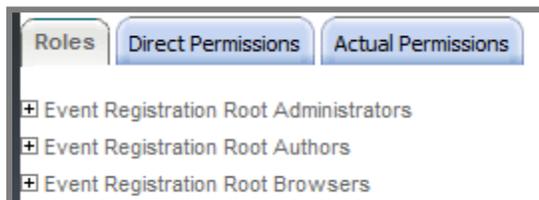
Configuring Event Root Security

This section controls permissions for **Event Registration**. Here administrators can assign event administrators and authors. To access these options, go to the Event Registration page and click **Event Root Security**.



The **Roles** tab:

- 1) **Administrator:** These users have complete control of the event
- 2) **Authors:** Can co-author content for the event
- 3) **Browsers:** Encompasses all users who can view and register for the event





Note: You must include the Guest user in the **Browser** role if you wish your events to be public.

The **Direct Permissions** tab lists the groups and/or users who have been assigned permissions to the event you are currently viewing. Here, you have the ability to **Add** and **Remove** permissions, and also inherit permissions for groups and/or users.

The **Actual Permissions** tab lists the individuals and groups who have inherited access to the event you are viewing.

You can also refer to *Chapter 1 – SitePublish (User Guide)* for more information regarding SharpSchool permissions and security.

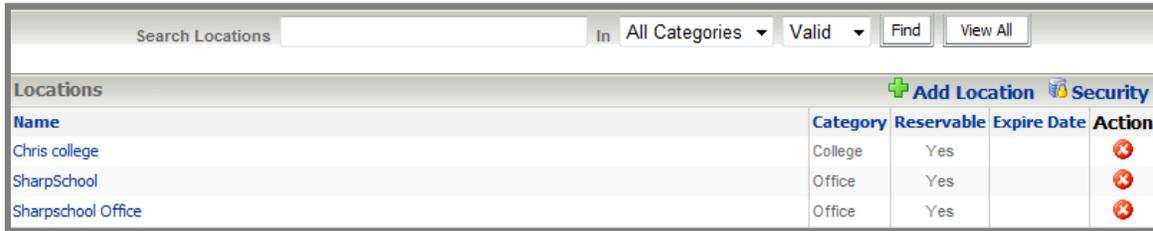
Creating Locations and Resources

Administrators can create **Locations** and **Rooms**. These locations can then be selected while creating events.

To access the locations and resources click **Locations and Resources** under **Event Administration** on the left hand navigation.



Once you click on **Locations and Resources** you will see the screen below:



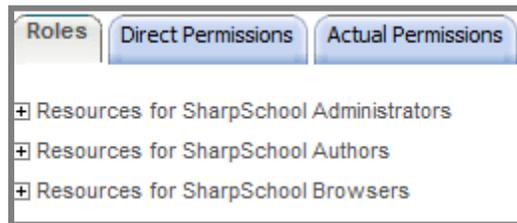
Name	Category	Reservable	Expire Date	Action
Chris college	College	Yes		
SharpSchool	Office	Yes		
SharpSchool Office	Office	Yes		

Search Locations

The **Search Locations** field allows you to search for a specific location by category name and validity.

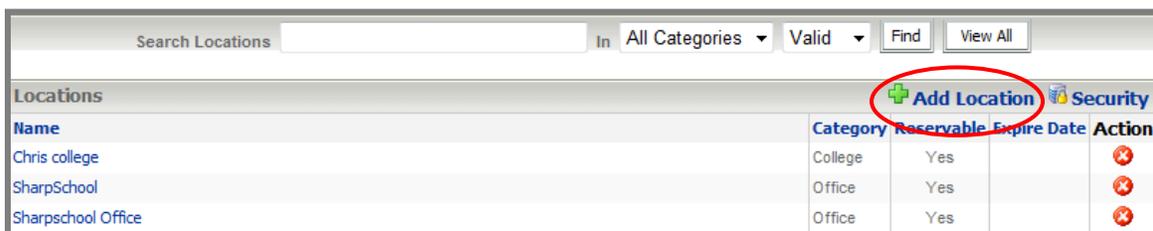
Security

The security link will allow administrators to assign permissions to users to be allowed to create, edit, view or delete locations for the Event Registration. For more information on how these permissions work see *Configuring Event Root Security* on page 35.



How to create a location

To add a new location click on **Add Location**.



Name	Category	Reservable	Expire Date	Action
Chris college	College	Yes		
SharpSchool	Office	Yes		
SharpSchool Office	Office	Yes		

Location Details	
Category	College
Name	<input type="text"/>
Address Line 1	<input type="text"/>
Address Line 2	<input type="text"/>
City	<input type="text"/>
State/Province	New York
Country	UNITED STATES
Zip/Postal Code	<input type="text"/>
Time Zone	(GMT-07:00) US/Mountain
Website	<input type="text"/>
Phone (With Extension)	<input type="text"/>
Fax (With Extension)	<input type="text"/>
Contact Person	<input checked="" type="radio"/> Existing Site User <input type="text"/>  <input type="radio"/> No Contact Person <input type="radio"/> Non Site User
Reservable In Room Reservation	<input checked="" type="radio"/> Yes <input type="radio"/> No
Expire Date	<input type="text"/> 
<input type="button" value="Add Location"/> <input type="button" value="Cancel"/>	

Fill out the form with the required information such as **Category**, **Name**, **Address**, **City**, **State/Province**, **Country**, **Zip/Postal Code**, **Time Zone**, **Website**, **Phone** and **Fax** numbers.

When filling out the **Contact Person** for the location you can select the following options:

Existing Site User: Select a user from the list of users available on your website

No Contact Person: Do not choose a contact person

Non Site User: Allows you enter someone who is not a registered user on your website.

Enter in the **First** and **Last Name**, **Office Phone Number**, **Mobile Phone Number** if applicable and **Email Address**.

If applicable enter in an **Expire Date**. Once the **Expire Date** has passed the location will no longer be available for reservations.

Once you have completed filling out the form, click on **Add Location**.

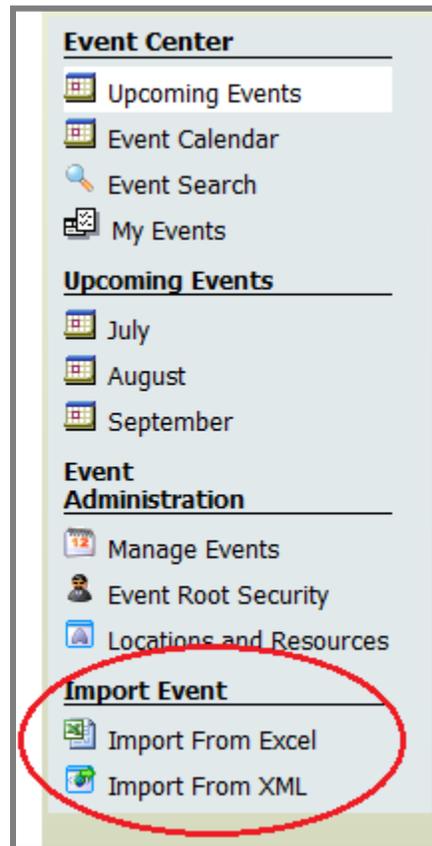
Deleting a Location

If you want to edit your location simply click on the name. To delete the location, click on **Delete** under the **Action** column.

Locations		Add Location	Security	
Name	Category	Reservable	Expire Date	Action
Chris college	College	Yes		
SharpSchool	Office	Yes		
Sharpschool Office	Office	Yes		

Importing Events

You can import events that are saved in Excel or XML format from the left hand navigation under the **Import Event** section.



From Excel

Import events from Excel file	
Location	Sharpschool Office ▾
<input type="checkbox"/> Automatically make room reservations for imported upcoming events	
Attention:	All rooms defined in the import file must be in the location set above. If the room does not exist in the above location, it will be created.
Source Excel File	<input type="text"/> Browse... View Example File
<input type="button" value="Import"/> <input type="button" value="Cancel"/>	

- 1) Click **Import from Excel** from the left hand navigation under **Import Events**.
- 2) Choose the location where you wish to import your event.
- 3) If required check **Automatically make room reservations for imported upcoming events**.
- 4) Click **Browse**, locate your file and click **Open**.
- 5) Click **Import** to complete.



Tip: If you need an example of what you require for the Excel spreadsheet click **View Example File**.

From an XML File

Import Events From XML File	
XML File	<input type="text"/> Browse... View Example File
<input type="button" value="Import"/> <input type="button" value="Cancel"/>	

- 1) Click on **Import from XML** from the left hand navigation under **Import Events**.
- 2) Click on **Browse**, locate your file and click **Open**.
- 3) Click on **Import** to complete.



Tip: If you need an example of what you require for the XML spreadsheet click **View Example File**.