Managing your Events Module: Setup, Event Creation and Management

The Events Module:

- Allows members to sign up for your events online
- Accepts credit card payments for clubs that charge dues and have a US dollar bank account
- Is accessible from www.stanfordalumni.org website
- Automatically populates and updates event registrant contact information from Stanford’s database
- Enables you to e-mail all event registrants
- Enables you to keep track of your event registration and print registration spreadsheets

INITIAL SETUP

Step 1:

The first step to setting up an events module is completing the necessary Automated Clearing House form – which allows us to link the module to your club bank accounts so you can take in the fees from your event – and mail it along with a voided check to:

Club Tools  
SAA Alumni Communities  
Frances C. Arrillaga Alumni Center  
326 Galvez Street  
Stanford, CA 94305-6105

Once we receive the forms, we will notify you to start set up.

Step 2:

We highly recommend establishing a permanent @stanfordalumni.org e-mail address for your club. This will allow you to have a consistent e-mail address for your members despite yearly leadership changes. If you would like to establish a club stanfordalumni.org e-mail address, please contact your region manager.

Step 3:

Let your region manager know who should have access to your events module so they may be granted rights.

Registration and Login

Login to the www.stanfordalumni.org website is required before alumni or prospective event attendees can access your online event registrations. If a potential registrant does not have a username or password, he/she is required to register for the site. The site registration process customarily takes 5 to 10 minutes to complete.

Credit Card Payments

A monthly transfer of funds to your club’s bank account will typically occur during the first week of the month. This amount will be the amount of money received though online credit card payments minus the 3% fee that it costs to perform the transfer.
Events Setup Overview

The Event Setup and Maintenance page is the starting point for managing your events. You can view, update, clone or create reports for a current or upcoming event. You can also view or clone past events to create reports or make notations. This is the first step in creating new events.

- To enter your event module, log into www.stanfordalumni.org using your username and password, then enter the Volunteer Leader Resource page through the link that appears on the left-hand corner of the SAA homepage. An option that states “Web events module (manage)” will now appear in your Volunteer Leader Resources page.

The main menu is on the left under the Stanford graphic. These menu links help you move within past, current or past events, or take you to the event management page. By default, you are shown a list of “upcoming/current events” that have a Start Date that is greater than or equal to today, and the buttons right above these events help you report, update, or clone these current events. You must select one of these events to update the event details or to access event reports.

The links and button that are presented on this page are each described below:

<table>
<thead>
<tr>
<th>Link/Button</th>
<th>Description</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a Single Activity Event</td>
<td>Click the &quot;Create a Single Activity Event&quot; link to set up a new event.</td>
<td>Select this option to view Events that have already been held.</td>
</tr>
<tr>
<td>View All Past Events</td>
<td>Click the &quot;View All Past Events&quot; link to view a listing of events that have already been held. The list looks similar to the Upcoming/Current Events list but only allows you to report on past events.</td>
<td></td>
</tr>
<tr>
<td><strong>Event Management</strong></td>
<td>The Event Management link on the left sidebar will return you to the Event Management page.</td>
<td></td>
</tr>
<tr>
<td>----------------------</td>
<td>---------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td><strong>Report Event button</strong></td>
<td>Click the &quot;Reports Event&quot; button to access the Web Reporting tool and run reports about an event. You must select an event from the Event list (either Upcoming/Current or Past) before pressing this button.</td>
<td></td>
</tr>
<tr>
<td><strong>Update Event button</strong></td>
<td>Click the &quot;Update Event&quot; button to access the pages containing the Event setup information. You must select an event from the Event list (either Upcoming/Current or Past) before pressing this button.</td>
<td></td>
</tr>
<tr>
<td><strong>Clone Event button</strong></td>
<td>Click the &quot;Clone Event&quot; button if you wish to clone an event from the Event list (only Upcoming/Current events). You must select an event from the Event list before pressing this button. After you clone the event, you will be given the opportunity to rename the cloned event as well as change the Event Start date. Please note that the default event name will be “Clone of []” and the Event Start, Stop, and Registration start/stop dates will have the default of today’s date.</td>
<td></td>
</tr>
</tbody>
</table>
Create a New Event

From the Event Setup and Maintenance Page, use the left-hand menu to click the “Create a Single Activity Event” link. You will now be taken through the event creation process, which has 5 different pages.

**Event Setup - Single Event Details**

Enter specifics about the event on the Single Event Details page. Details to be provided on this page include the event name, date and time, registration information, confirmation email information, capacity limitation, and cancellation and refund policies.

![STANFORD ALUMNI](image)

<table>
<thead>
<tr>
<th>Field/Button</th>
<th>Description</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the event as you would like it to appear during registration.</td>
<td>Required, with a limit of 60 characters.</td>
</tr>
<tr>
<td>Start Date and Start Time</td>
<td>The Start Date and time for the event. Dates should be entered as mm/dd/yyyy. For example, January 1st 2007 would be entered as 01/01/2007. Time should be entered in the format: hh:mm. For example, nine thirty in the morning should be entered as 09:30, then select the am button. To enter six o'clock in the evening, type 06:00 and select the pm button.</td>
<td>Required.</td>
</tr>
<tr>
<td>End Date and End Time</td>
<td>The End Date and time for the event. These will default to the same values as the Start date and time. Be sure to update this information accordingly. See Start Date and Start Time description for format instructions.</td>
<td>Required, but defaults to the same value as Start date/time.</td>
</tr>
<tr>
<td>Contact Email</td>
<td>Enter the email address to be displayed on the reg. page for people to use if they have questions. This is also the address used when capacity is reached (only if you use the capacity feature). The contact NAME will be the name of person creating the event. If you wish to change the NAME of the contact person your SAA representative can change it on your behalf.</td>
<td>Required.</td>
</tr>
</tbody>
</table>
**Description on Registration**

Enter the event description that should be shown on the registration page. Since the date, time, location and contact information will automatically show on the registration page, the description does not need to include that information unless further clarification is required. It is good practice to provide a short description that welcomes the registrant and confirms that they are signing up for the correct event. You can also mention price options and promote membership (especially if it results in reduced event prices).

**Registration Start and End Dates**

Enter the Start and End Dates for accepting registrations. The registration start date defaults to today. The registration end date defaults to the day of the event. Dates should be entered in the format of `mm/dd/yyyy`. For example, January 1st 2007 would be entered as `01/01/2007`.

**Status**

This is the status of the registration process. Valid statuses are:
- "Active" - The event is still being actively managed, registration may still be open, and reporting and accounting is still in progress.
- "Finished" - Registration is closed, the event is over and any reporting or accounting is done.
- "Cancelled" - The event has been cancelled and will not be held.

**Capacity Quantity**

This allows you to enter the capacity limit for the event and restricts the capacity for the event’s total attendance.

**Capacity Code**

Select either "Cancel" or "Allow". "Cancel" stops registrations when the capacity quantity is reached and sends an email notification to the organizer of the event. "Allow" sends an email to the organizer of the event when capacity is reached, but still allows registrations until the Capacity Code is manually changed to "Cancel".

*If you have selected the Cancel option, then the capacity status (described below) will automatically toggle to "Capacity Limit Reached" when event is full and will not allow any more registrations, even from the administrator end.*

**Capacity Status**

This field will automatically change to "Capacity Limit Reached" when capacity quantity is reached. When setting up an event, be sure to LEAVE THIS BLANK. It will turn to "capacity limit reached automatically when your event reaches capacity. **If you change capacity to allow more people, be sure to manually toggle this option off, as the system will continue to turn people away until you do.**"

**Capacity Message**

The message you enter here will display to a registrant once capacity is reached. This is a good place to indicate to contact the event manager to begin a waitlist.

**Registration URL and View Registration button**

This is the URL to be used for registration. The URL can be used as a link on your website or in an email to direct people to the registration website. The "View Registration" button allows you to enter a real registration and see what the registration pages look like.
to a registrant. This is helpful in verifying that your setup has produced the desired results. **Note:** the Registration URL and View Registration button do not show until after you have saved the Single Event Detail page.

### Location, Address, City, State and Zip
Enter the name and address of the location at which the event is being held. This information will appear on your Announcement page as well as on the Event registration home page. You can also select to have a map link to this address (see the Announcement page for this option). **PLEASE NOTE:** enter the address line only – entering room numbers, building numbers, etc. on another line may cause the Registration button to malfunction. The State is selected from a list of US states and territories.

### Confirmation Email - Display Fees
This is where you can opt to display the registration fees in the confirmation email. The default is "Yes".

<table>
<thead>
<tr>
<th>Required, but defaults to &quot;Yes&quot;.</th>
</tr>
</thead>
</table>

Each registrant (the main participant and associated guests) is listed in the detail section of the confirmation email showing the activities for which each is registered. This option is to indicate whether you want to show the corresponding fees associated with each activity.

### Confirmation Email Text Before Registration Details
Enter the text that will appear in your email confirmation in the section just before listing of participants and activities. A sample is provided to help you understand how this is used. You can opt to leave the text exactly as it is, or customize it for your event. HTML coding and other special formatting is not allowed in this section.

### Confirmation Email Text After Registration Details
Enter the text that will appear in your email confirmation in the section just after the listing of participants and activities. A sample is provided to help you understand how this can be used. You can opt to leave the text exactly as is, or customize it. HTML coding and other special formatting is not allowed in this section.

### Sample Confirmation Email

**Date:** Mon, 14 Oct 2002 17.00.47-0700(PDT)  
**From:** alumnirelations@Stanford.edu  
**To:** keller@yahoo.com  
**Subject:** Confirmation of Registration 11837 for Picnic in the Park

Thank you for your registration. We are happy that you will be able to join us - it should be fun. Please review your registration details below. If you need to make changes, please do not hesitate to contact us

Mac Keller 1998 AB  
1 Sat 11/11 07:00 PM - Children Between 5 and 12.

**Payments to Date:** $17.50

**We are looking forward to seeing you!**

### Cancellation and Refund Policy for Registration
Enter the text of your cancellation and refund policy. This appears during registration when processing payments. This is recommended if you are charging fees; you should be very clear about what your refund

**Recommended if fees are involved.**
and cancellation policy is for the event to prevent future problems with cancelled or no-show registrants.

**Event Setup - Single Event Fees**

Enter the fees that you will be charging for the event on the Single Event Fees page. The selected fee types on this page should correspond to the fee types that you plan to use during registration. If you will not be charging any fees at all, you should choose General 1 and change the description to No Charge Registration (or something similar).

To select a Fee type to use, click the appropriate fee type box in the "Show" column, change the description to reflect the appropriate fee description (optional), and enter the fee amount. If you later decide not to use a Fee Type, just unclick the "Show" box.

![STANFORD ALUMNI](https://example.com/stanford_alumni.png)

Each field or button is described below:

<table>
<thead>
<tr>
<th>Field/Button</th>
<th>Description</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>General 1 and 2</strong></td>
<td>These fee types do not limit registrations by any criteria. You can use them for general admission or when you want to use the honor system for your fees.</td>
<td>Displays for all registrant types.</td>
</tr>
<tr>
<td>Fee Type</td>
<td>Description</td>
<td>Display For</td>
</tr>
<tr>
<td>--------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------</td>
</tr>
<tr>
<td><strong>Alum</strong></td>
<td>Choose this fee type if you want the registration system to only offer this price to alumni registrants. Non-alumni registrants will NOT see or be able to register using this fee type.</td>
<td>Displays only for alums.</td>
</tr>
<tr>
<td><strong>Non-Alum</strong></td>
<td>Choose this fee type if you want the registration system to only offer this price to non-alumni registrants (such as a spouse or friends). Alumni will NOT see or be able to register using this fee amount.</td>
<td>Displays only for non-alums.</td>
</tr>
<tr>
<td><strong>Member</strong></td>
<td>Choose this fee type if you want the registration system to only offer this price to registrants who are active members of your club — AS DEFINED BY YOUR MEMBERSHIP MODULE. Non-members and past members will NOT see or be able to register using this fee amount. We discourage you from using this option if your membership module is not up-to-date.</td>
<td>Displays only for active club members. Do not use if your membership is not up-to-date.</td>
</tr>
<tr>
<td><strong>Member's Guest</strong></td>
<td>Choose this fee type if you want the registration system to only offer this price to registrants who are guests of a member. Non-members and members who are the primary registrant will NOT be able to register using this fee type.</td>
<td>Displays for all guests of a member.</td>
</tr>
<tr>
<td><strong>Non-Member</strong></td>
<td>Choose this fee type if you want the registration system to only offer this price to registrants who are not members of your club. Members will NOT be able to see or register using this fee type.</td>
<td>Displays only for non-members.</td>
</tr>
<tr>
<td><strong>Children Between</strong></td>
<td>This fee type requires two age parameters: the low age limit (must be greater than 0) and the high age limit (must be lower than 18). Choose this fee type if you want the registration system to only offer this price to registrants who have filled in the child's age on the registration. Registrants who do not fall within this age group (inclusively) will NOT be able to see or register using this fee amount. Please note that this pricing is only displayed if the age has been filled in during registration. Stanford does not keep the age of children on record so this price will not be offered unless age is provided during registration.</td>
<td>Displays only for registrants who fall within the specified age range (inclusively). This is required if you want to use the Children Under fee type.</td>
</tr>
<tr>
<td>Please note that the &quot;Children&quot; options are not shown as a ticket option until AFTER the &quot;add a guest&quot; button is pressed and the age field in the &quot;Nametag Information&quot; page for that guest is filled.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Children Under</strong></td>
<td>This fee type will assume the age of the lower limit in the &quot;Children Between&quot; line. Choose this fee type if you have an instance where children between 5 - 10 (as an example) will get one price and children under 5 will get another price (or get in free). Once again, this fee amount will only be displayed if a child's age is entered during registration.</td>
<td>Displays only for registrants who fall under the lower age limit. This fee type can only be used in conjunction with the &quot;Children Between&quot; fee type.</td>
</tr>
<tr>
<td><strong>Class Year From</strong></td>
<td>This fee type requires two parameters: the lower</td>
<td>Displays only for alumni</td>
</tr>
</tbody>
</table>
Class Year (entered with four digits i.e. 1998 not 98 or ‘98) and the upper Class Year. Choose this fee type if you want to offer a different fee for those who graduated within a certain range of years. You would typically use this to offer ‘Recent Alum’ discounted fees.

**Additional Non-Event Specific Fees**

In this section, you should press the "More Fees" button every time you want to add a new line for fees. Use these fees to set up pricing that expires after a certain date. For instance, to set up an early bird price only honored until a particular date, enter "Early Bird Discount" (or similar) in the description and enter the dates within which the price option is to be given.

Displays for everyone whose class year for their first degree earned falls within the lower and upper class year limits (inclusively).

**Event Setup - Single Event Question List**

Questions that you want to ask registrants are listed on the Single Event Questions page. This is helpful if you are offering dining options, for example, and need an entrée count. The first screenshot lists the questions that will appear for your registrants if they are active. The second screenshot displays the fields you will need to use to create or edit questions and answers.

Questions that are added in Event Setup can be viewed as they would appear during registration by clicking the View Registration button on the Details page.

![Single Event Questions](image)
Each field or button is described below:

**Initial Single Event Questions page**

<table>
<thead>
<tr>
<th>Field/Button</th>
<th>Description</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Add New Question button</strong></td>
<td>Click the Add New Question button to create a question.</td>
<td>Used to add questions.</td>
</tr>
<tr>
<td><strong>Question (column)</strong></td>
<td>The Question column lists the questions that are available to be asked during event registration.</td>
<td>If appropriate, the question displays on the Questions tab during registration.</td>
</tr>
<tr>
<td><strong>Status (column)</strong></td>
<td>The Status of the question. The question can be Active or Inactive.</td>
<td>Only active questions are displayed during registration.</td>
</tr>
<tr>
<td><strong>Edit button</strong></td>
<td>The Edit button is only displayed if a question has been created for the event. This button takes you to the second page to view or change the details about the question and answers.</td>
<td>Used to edit questions and answers.</td>
</tr>
</tbody>
</table>
**Single Event Questions Details page**

**Questions Section**

**Do Not Save button**  Click this button if you don’t want to save any changes to the page.

**Add New Question button**  Click the Add New Question button to create a question.

**Add New Answer button**  Click the Add New Answer button to create an answer for a question. Note that there will be three answers available as a default. Each additional answer will require you to use the Add New Answer button.

**Text**  Type in the question as it will appear to the registrant. This question will be listed on the initial questions page.

**Sequence**  The default sequence in how the question will appear to the registrant. The first value will be 1 and will increase by 1 if you add additional questions.

If you plan to modify the order of the questions, we suggest changing the default numbers so that they are not sequential. This will provide you room to change the order in which you want to display the questions. For example, my first question will be 10 and my second question will be 20. If I want to make my second question the first one, I will change the number 20 to something lower than 10.

**Active**  If checked, this will allow the question to appear for the registrant. Inactive questions will be listed in the initial Single Event Questions page, but will not appear for the registrant.

**Answer Choice**  The selection will determine whether you are allowing the registrant to select multiple answers, only a single answer, or a free format answer that the registrant types in.

**Required**  If checked, this will force the registrant to answer the question before completing registration.

**Audience**  The selection will determine if the question will appear to everyone who registers, to only the primary registrant, or to only guest registrants.

**Keyword**  Type in a word that describes the question type. This will be used to identify questions for event question-based reports.

**Answers Section**

**Text**  Type in the answer as it will appear to the registrant.
Sequence
The default sequence in how the answer will appear to the registrant. The values start off with 10 and increase by 10.

Active
If checked, this will allow the answer to appear for the registrant.

Inactive answers will appear here, but will not appear for the registrant.

Event Setup - Single Event Announcement

Enter the event description on the Single Event Announcement page as you want it to appear on the Event Announcement page. This description is different than the description on the Details page in that it is a marketing opportunity and should be written to encourage readers to sign up and attend your event. The Look Who’s Coming page will list registrants who will be attending the event.

- Populate this page only if all the details of your event are not already up on your webpage, invitation, or SAA event site. The majority of clubs can skip this page altogether. You may pull the “Look Who’s Coming” link from this page and add it to your main event website, if you’d like.

Each field or button is described below:
<table>
<thead>
<tr>
<th>Field/Button</th>
<th>Description</th>
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</tr>
</thead>
<tbody>
<tr>
<td>View Announcement button</td>
<td>Click the View Announcement button to preview your Announcement text. If you checked the boxes next to &quot;Include Map Link&quot; and &quot;Include Look Who's Coming Link&quot;, you will be able to verify that the links work appropriately on the Announcement page.</td>
<td>Used for Viewing the Announcement Page.</td>
</tr>
<tr>
<td>Announcement URL</td>
<td>You can copy the automatically-generated Announcement URL into an email or web page to create a link to the event announcement. This is provided so that you can easily direct people via email or from your website to the event announcement and registration pages. You cannot change the URL on this page.</td>
<td></td>
</tr>
<tr>
<td>Include Map Link</td>
<td>This option allows you to include a link to graphical maps that display your event location (as entered on the Details page) on the Announcements page. Displaying the map link is the default.</td>
<td>When clicked, this option displays a map icon on the Announcement page AND enables mapping on the Event Home page.</td>
</tr>
<tr>
<td></td>
<td>This option can be very valuable in giving directions to your event. However, not all addresses are interpreted correctly by this software, so check to see that it works appropriately when you view your Announcement page.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Please be aware that when this option is checked, it also enables a mapping link on the Event Home page. Thus, even if you choose not to use the Announcement Page, this option should be reviewed to make sure that it has the appropriate impact on the Event Home page.</td>
<td></td>
</tr>
<tr>
<td>Include Look Who's Coming Link</td>
<td>This option allows you to display the Look Who's Coming link on the Announcement Page. The default is to display the link. To remove this link, uncheck the box next to &quot;Include Look Who's Coming Link&quot;. <strong>Look who's coming only displays primary registrants – not guests – so this is not an accurate count of how many have registered.</strong> To get a registration count, run the event registration report.</td>
<td>Defaults to &quot;Yes&quot;.</td>
</tr>
<tr>
<td>Announcement Details</td>
<td>Enter the description that you want for the Announcement page. This description can be the same as the Event Description (on the Details page), but is usually written with a marketing focus and can give more information about various activities, pricing, contact information, etc.</td>
<td>Displays on Announcement Page.</td>
</tr>
<tr>
<td>View Look Who's Coming button</td>
<td>To preview the Look Who's Coming page, click &quot;View Look Who's Coming&quot;. You should preview the page to ensure that it displays correctly.</td>
<td>Previews the Look Who's Coming page.</td>
</tr>
<tr>
<td>Look Who's Coming URL</td>
<td>You can copy the automatically-generated Look Who's Coming URL into an email or web page to create a link to the Look Who's Coming page for this event. You cannot change the URL on this page.</td>
<td>Defaults to unchecked or &quot;No&quot;.</td>
</tr>
<tr>
<td>Include Guest Names</td>
<td>This option allows you to include guest names in the Look Who's Coming list. The default option is to only include the primary registrant names. To include guest names on the list, check the box next to &quot;Include</td>
<td></td>
</tr>
</tbody>
</table>
Guest Names".

**Look Who’s Coming Message**
Enter the description to be displayed at the top of the Look Who’s Coming page.

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**Event Setup - Single Event Notes**
Enter notes about the event on the Single Event Notes page. Notes can include setup information such as caterers, venues, costs, volunteers, etc. It can also include comments about attendance, revenue, membership participation, and the overall success of the event. This page can be used as a free-format archive of information for future event planners of similar events.
Changing Capacity Limits for an Event During Registration Period

Many times, clubs will have a set capacity and then when they realize the event will be sold out, they reconfigure capacity. For example, a club may have bought a total of 20 tickets to a sporting event, but once they realize what a draw the event will be, they buy 20 more tickets. So, capacity must be changed from 20 to 40.

There are several important things to note about capacity:

1. Once you set a capacity limit (to 20, for example) and set the capacity code to "cancel", the system will automatically prohibit the 21st person from registering. The Capacity Status window, which was originally left blank, will automatically turn on, now reading "Capacity Limit Reached."

2. Now, you have 40 tickets instead of 20 and you want to change capacity. To do so, change the number in the capacity quantity box to 40 and make sure to turn the capacity status back to blank. The capacity status window will not turn off automatically.
3. The same is true if capacity is reached initially, and then registrations are cancelled. If the event was sold out, but then 2 people cancelled their registration, the system will continue to read "Capacity Limit Reached" until the admin manually turns it back to blank. This is actually a safety feature, so that if you have a waiting list, you can decide when to let people start to register again, as opposed to the system automatically freeing those spots up.

Final Steps

**Step 1:** Copy your registration URL (found in the Details tab) and paste it into your event announcement.

**Step 2:** Copy the “Look Who’s Coming” link (found in the Announcement tab) and post it on your event listing on your club website.

*Note: These links are immediately active as soon as the event is created.*