Event Booking Registration Management

Overview

The Registration Management tools (part of the **Event Booking** application) provide Board and Director level staff access to see the number of registrants for an event, view and export event registration information, mark attendance, and re-send confirmation emails.

Some events, such as Roundtables, do not take registration. However, they must be set up as events in our system to appear in our online calendar, and the list of events.

Enhancements from DT Register Event Management:
1. Can sort registrants lists by Last name and other criteria.
2. One screen allows you to view registrants, send emails and export lists.
3. Can view a Past event (event text, not the registration form).
4. Repository of Historical Registration data kept centrally in a Google Drive folder.
5. New links to Export ALL Records or to View Archived Events.

Event Manager Responsibilities

1. See how many are registered for an event:
   - See Filter by Event
2. See if someone is registered for an event (or not):
   - See Search for a Registrant.
3. Tell Members how they can look up their own Registrations:
   - They log in, then go to the My Registrations link at the top left of the home page.
4. Export registration lists (open events only):
   - See Export Registration Rosters
5. Re-send a confirmation email (registration receipt):
   - See Resend Confirmation Email
6. Mark attendance:
   - See Mark Attendance
7. Cancellation / Refund:
   - Contact Event Manager to cancel (Registrant)
   - Calculate amount to refund based on date and Refund Policy (Event Manager)
   - Send event name, event date, registrant name and amount to Finance (Event Manager)
   - Process Refund in PayPal (Finance)
   - Update Registration Record in Event Booking. (Finance) See Edit Registration Record
8. Process Waiting List (To Be Updated)
   - See Waiting List

Steps

A. Log in to the website

1. Go to www.pmi-portland.org
2. Log in using the MEMBER LOGIN link
   - Use your PMI Global username and password
   - (Finance and Registrar use the LOGIN HELP screen and a special login.)

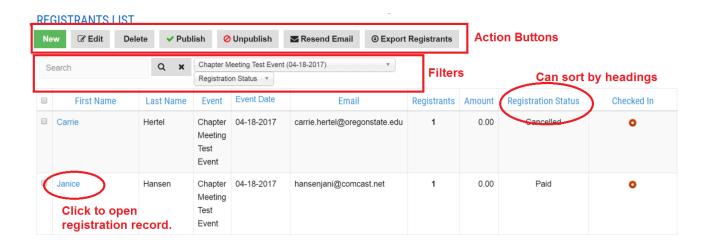## B. Go to the Registrant Management Control Panel

NOTE: You can only pull records for events that are currently OPEN and/or in the future. If you need records from a past event, see **Historical Records**.

1. Go to Board menu > Registrant Management > EB Registration Management
2. The Registrants List appears. From here you can:
   - Filter by Event or Registration Status
   - View registration records,
   - Re-send Thank you emails,
   - Mark attendance.
   - Export the registration list.
3. See below for instructions for each task.

C. Registrant List Overview

This is the main screen for Registration Management.

> **WARNING: NEVER MANUALLY REGISTER SOMEONE OR EDIT A REGISTRATION RECORD WITHOUT CONSULTING WEBMASTER OR FINANCE.**

D. Search for a Registrant

Use the Search field to search by last name. if you have NOT selected an Event filter, this will bring up all events this person is registered for in the future.

Past event data is not accessible here. See **Historical Records**.

E. Filter by Registration Status

Use the drop down at the top to filter by registration status. You can use this in conjunction with other filters and settings. Only events that are upcoming and open for registration will appear in this list. See **Historical Records**.

- Active – registered

- Cancelled – we manually cancelled their registration.
- Waiting List – They are on the Waiting List for a full event (if that event has this feature enabled).
- Pending (for the Pay Later feature) – Only used for sponsor payment, not events.

F. Filter by Event

Use the Event filter dropdown to select the event in question. By default, all registrants for all open events will display.   If you are interested in records for events in the past, See **Historical Records.**
1. Select Event (Filter by event). The list…
   - displays all events that are open for registration or are in the future.
   - is in order by date – most recent first.
   - also includes events that people do not register for – we have put in a request to have these removed.
2. Optional - Select Registration Status (see above)

G. Mark Attendance

After filtering your registrant list, you can mark attendance in this screen.
1. You will probably want to SORT by clicking on the column headings first
2. Click on the Red Circle in the Attended column, next to the name.   It will change to a Checkmark.   You can use this method to de-select Attendance.

H. View Registration Record Details

Click on the **first name** to open the registration record details.   DO NOT EDIT THE RECORD!

I. Export Registration Rosters

1. **To export registrations from a single event:**
   - In the Registrants List, select the event.
   - Tick the box(es) to select the records to be exported.
   - Click on the Export Registrants button.
   - An export with every possible field will be created in Excel format.
   - If you need information about the fields, contact webmaster.

2. **To export ALL registrations from all events** (including past events), go to Board > Registration Management > EB – Export All Registrants.
3. If you are interested in records for **events in the past**, See **Historical Records.**

IMPORTANT: The registration list contains personal information and should not be shared or left unattended.

J. Resend Confirmation Email

Select the records in question and click on the **Resend Email** button to resend the confirmation email this person received when they registered. This will send to the email in the account. You cannot edit the email.

This only sends the REGISTRATION confirmation. If they need a PAYMENT confirmation, contact VP of Finance.

K. Create a New Registration (Finance and Web Team only)

L. Edit a Registration (Finance and Web Team only)

M. Delete a Registration (Finance and Web Team only)

If a person cancels and has their payment refunded, they will remain in our database with the Status = Cancelled. The only reason that registrations will be completely DELETED is if they are TEST registrations. All others should remain.

N. Waiting List (Will update later, it's very similar to this.)

If the Wait List feature is enabled for your event, this is how it works:
1. If the event is full, the user will see a message when they try to register that says it is full, but that they can continue and get on the waiting list.
2. If they do so, these things happen:
    - They are on the list with a status of WAITING LIST.
    - They will see a message that they've been added to the wait list.
    - They will receive an email saying they are on the waiting list and they will be contacted if space becomes available.
3. The Event Manager must review the registrant list and filter for Registration Status=Waiting List. Then contact the person if space becomes available (due to a cancellation for example). The person on the waiting list must register from scratch, and will therefore have 2 registrations on the rolls (one in Waiting status, which could be deleted).

Historical Records

A. Data from events in Event Booking that are in the Past

To export ALL registrations from all events (including past events), go to Board > Registration Management > EB – Export All Registrants.

To view the event information (text) from past events go to Board > Registration Management > EB – Past Events.

B. Data from events in Dt Register (Prior to April 21, 2017)

Board and Directors can access a Google Drive folder with exports of all registration information for all events from the DT Register system. https://drive.google.com/open?id=0B3rA_3swfPVyV1RBa0dPb2tPNjQ

Access to DT Register Event Management will be maintained on our site for several months in the same location as Registration Management.

C. Data Prior to July 1, 2015

Contact VP of Operations for event registration data prior to July 2015.

Additional Resources

- Event Registration FAQs for end users
- Event Registration FAQs for Chapter Officers and Staff
- Board > Procedures and Forms web page (or new Google Drive – Link ??)
- Cancellation/Refund Policy web page
- LOGIN HELP link
- New Member Info web page
- Event Roster Archive https://drive.google.com/open?id=0B3rA_3swfPVyV1RBa0dPb2tPNjQ

Revision History

The Portfolio responsible for this procedure is the Operations Portfolio, and the procedure will be revised as needed.
The latest version of the document can be found in the Web Team Documentation folder on Google Drive:
https://drive.google.com/open?id=0B3rA_3swfPVyZ0ZnaTViYWNxTWs

Revision Date	By	Portfolio	Comments
4/21/2017	Janice Hansen	Operations	Updated from DT Register document, for Event bookings implementation to replace DT Register.