EVENT MANAGEMENT SYSTEM

The new Event Management System will be automatically released to your Encompass platform with the July release date.

The iModules Events system has been revamped to provide:

- Greater ease of use (for registrants and admins)
- An updated user flow and design
- A mobile-first design, with improved support of mobile registrations
- A more complete participation picture (about both primary registrant and guests)
- Improved reporting

The new system will deploy four different event registration “models," letting you choose the model that best supports your type of event.

- **Form-Driven**: Any user that submits the event form will be registered as attending.
- **Fee-Driven**: Users will be required to pay a fee on the main event to register.
- **Activities-Driven**: The event must have Activities for registration.
- **Simple RSVP**: A very simple "Yes / No" registration feature, without activities.

Limited time option to create Legacy Events For a limited time we are also going to provide the option to create a new Event from the “Legacy” Event system. T None of the new options, UI or capabilities are available in the new Legacy Events.

- In the new models, admins will be able to switch back and forth from any models up until the time that they accept registrations.
- The new registration system can only be added to Events created in the new Event models – existing Events and Event templates will not be able to be converted to the new Event registration system.

The **Calendar Announcement** and **Event with Detail Page** types have been removed from the Encompass "Create Event" options. These Event Types are only available via the front-end Content Management listing option for creating these non-registration types of Events that only exist in Listings or as content pages.

Updated Registration Design and Flow: The new event management system provides an updated user registration process, with a design optimized for mobile use when the flexible forms layout is enabled.

New Guest Category: A new Guest Category allows your registrants to simply "add another," for as many guests as needed. Full data field customization is available, enabling your institution to quickly and easily collect unique and distinct information about each guest that ties directly into reporting and exports.

New Event Fee Control: The new event Fee Control provides a more intuitive experience for collecting fees (selling tickets) for event attendance. All of the current capabilities of commerce items — including role support, fair market value, limits, SKU, $0 tickets and Early Bird pricing — are presented in a new dropdown list format, allowing a specific fee to be directly tied to the registrant or a guest.

***NOTE**: It is a crucially important best practice that your institution utilizes the new Guest Category for collecting guest information and the new Fee Control for collecting registration fees for paid events. These two pieces directly impact the value and accuracy of Event reporting and exporting.*

Activity Registration User Interface: Your constituents will be presented with a new, enhanced format for registering for an Event with related Activities. Registrants will select from the Activities that are presented for them, or their guests, and then the options for each registrant will be revealed. (Two new available role-basing scenarios will help streamline the registration process for registrants and reduce administrative event build time.) The system will collect the registrant and each guest as discrete data records in the event, providing a complete picture of who is registering for which Activity, what is being purchased, and the requested information for each registrant and guest.

Confirmation Emails: A new default confirmation email has been designed to display clearly for all email service providers without the use of CSS (which is not allowed in Gmail). Additionally, along with the existing Registrant confirmation email, a new Guest confirmation email has been developed and can be sent by the Registrant during the registration process in order to get registration confirmation and important event information directly to the Guest(s).

Improved Reporting: With the new Guest Category and Fee Control, the data relationships needed to define exactly who registered, their guests, and exactly what each member of the party is attending and purchasing will be in place to deliver solid, informative reports at a click of a button and greatly reduce extraneous event Export rows from false or mistaken admin form submissions and other causes.

New Name Badge Report: With the new data collection, an improved and standard Name Badge report will replace the current nametag option and is available via a simple admin interface for .csv file export. Or, create a custom report using only the columns you need, outputted in .csv or the formatted Microsoft Office® and PDF options. The .csv file from the new Name Badge standard report option can be uploaded directly into the Avery (one of the largest producers of name badges and labels) system to produce name badges with the Avery templates and print products.

Events Export and Web Services: Events Export is unchanged mechanically, but greatly improved by solid guest counts and explicit connection between guests and their activities and the items they purchase. Each guest is a non-member account with their own row in the Event export and there is a new “Guest of” column that will show which registrant added them. Web services for the new registration will not be in the initial July product release. This will be worked as a follow on release planned for a August Product Release.

Data Entry mode vs. Form Building mode: To reduce mistaken and unwanted form submissions, the Events admin system now provides separate "Form Building" and "Data Entry" modes to separate form build / configuration from inputting / submitting member data.

Editing Events: Your registrants can easily edit registrations without changing fees or purchases associated with themselves or their guests.

Existing Event customization and configuration capabilities: Many of the current and popular event building, and field customization capabilities remain in the new system, folded into the new Event registration business models and rules as appropriate.

- Custom fields and categories
- All role customization including role-based fees and custom fields
- The ability to pre-populate event form data from an email link
- Events with Donations
- Commerce Items and Commerce Amount fields
- $0 tickets, Early Bird tickets, Fair Market Value, SKU, and other commerce item options
- Promo Codes and Appeal Codes
- The Event Center

To better support the new Events Management System, some items have been removed:

- Events Message Boards
- Events Photo Albums
- The current (Legacy) Guest Control
- RSVP Activities (the "Are you attending? Yes/No" response)

Existing (Legacy) Events

Your institution's existing Encompass events will be referred to as Legacy Events with the release of the new system. While you will not be able to convert events or clone events in the Legacy system into the new Events system, your existing Legacy Events will continue to be supported for editing, updating, managing, reporting and exporting — all of the current capabilities — in the existing system (but they will not be transferred into the new Events system). For a limited time after the release of the new Events system, you will be able to create new Events in the Legacy Events system. These Legacy Events will not have the option to be created from your current (Legacy) Event templates. Both the Legacy and new Events systems will be managed via the same Event Management tools, with some admin changes applied to the new Events system.

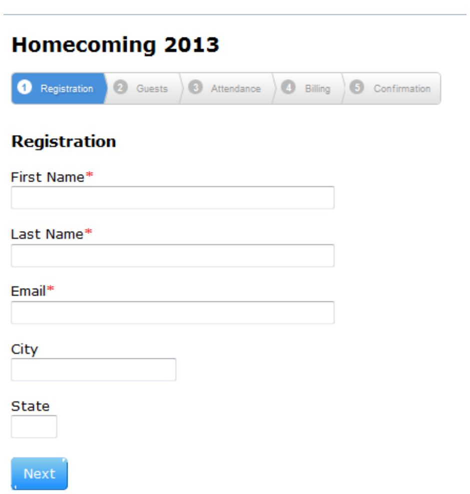
New vs. Legacy Events:

- Legacy Events built in the Legacy system, remain active and manageable in the current system.
- Legacy Events cannot be transferred / ported to the new Events system.
- Legacy Events cannot be used to create an Event or Event template in the new system.
- There is no longer the ability in Legacy Events to create new Event Templates.
- Legacy Event templates are not transferable to the new Events system - clients will need to create Event templates in the new system.
    - Event Center Layouts will remain the same and can be applied to new templates in the new Event system.

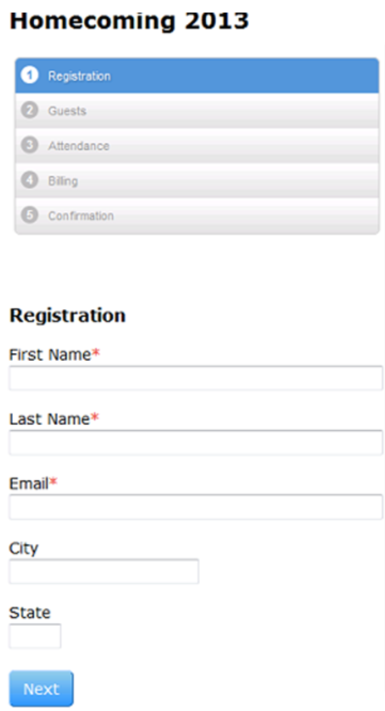
Registration Flow and Look & Feel

The registration process has a completely new look & feel and user flow, with a design optimized for mobile usage when flexible forms layout is turned on. The design team will have the ability to access the CSS for additional client customization. The design itself is mobile first, enabling registration across devices.

Desktop View



Mobile View



The system will utilize discrete steps to better control the event building, reporting and support process. The basic rule is that the step with the main registrant information must be before the Guest information step, and the Guest information step must be before the Activities step (if applicable).

Beyond that, customization of additional data collection steps is supported by interspersing Steps, as long as they keep the defined order of operations.

One of the main goals of this development was to stop the false or bailed registrations that junk up the reports and exports with meaningless data. In all of the new Event models, the registrant is required to complete all steps in the defined flow in order to be registered for the event. To that end, the system will no longer support the scenario of allowing users to purchase commerce items for an event without registering for the event, as the support of this vexing scenario is one of the leading causes of defects and reporting issues.

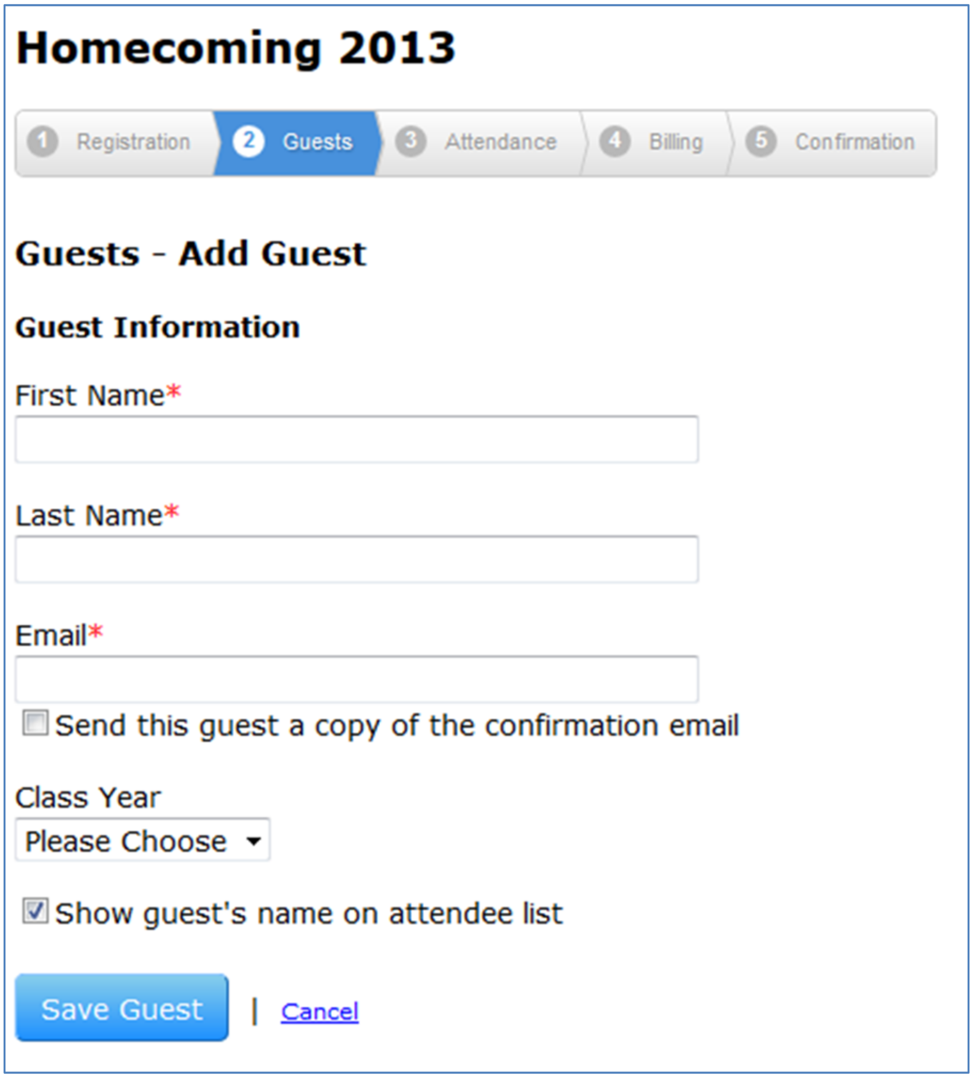
Both free and fee-based Events will now appear in the constituent's Event History.

Registration and the New Guest Category

As noted above, the basic steps for the registration flow are Registrant Info -> Guest Info ->Activities (if applicable). Custom steps can be added and interspersed in the flow, although the order of operations must be Registrant step before Guest step and Guest step before the Activities step.

- Full customization of Registrant information, as current with that step supporting custom categories
  - Default Registrant category fields are:
    - First Name, Last Name, Email, Class Year, Attendee list opt-out
  - As current, clients can customize the data collection with any existing or new member fields
- There is now a new Guest Category, with full customization on what data fields can be added
  - Default Guest category fields are:
    - First Name, Last Name, Email, Send confirmation email, Class Year, Attendee list opt-in.
  - Clients are able to configure and customize one guest category per event.
  - Clients can customize the data collection with any existing or new member fields.
  - New or existing member fields can be added to the guest category.

- A new folder is added under existing fields to allow client to copy and re-use fields from the registrant category to the guest category.
- The Guest Category is a one-to-many field. The registrant user simply selects to add another for as many guests they want to add to their party, enabling clients to collect unique, distinct information about each guest that ties directly into tighter reporting and exports.



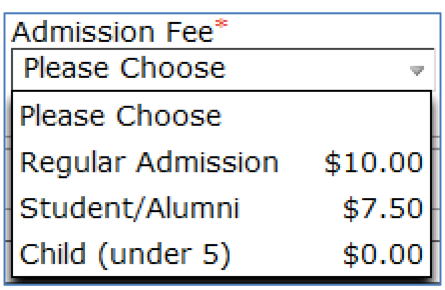
- The Guest Category has a separate capability for its own unique roles so that activities and other registration options can be customized based on the guest data values.
- Each guest is a non-member and is reported out separately in their own row in Export and a separate transaction detail in web services, each with all the attendant information collected from the guest category, activities and fees, if applicable.
- Activities themselves have additional options described below for how their registration options are presented to the main registrant and their guests.

- Only the primary registrant can edit the event registration.
- Identity Checkpoint does not apply to the Guest Category. Guest non-members can be merged via file upload in the Identity Checkpoint merge grid, but we advise clients to do this after registration closes because if done while event is active, if the main registrant were to come back and edit the guest's info they would be editing the guest's actual constituent record.
- This initial system release does not support role basing the fields in the guest category – the same fields will appear to all guests.
- The guest category cannot be a reusable category, due to complications that would arise from duplicate fields. This is a potential future development item.
- This release does not include the guest search / lookup capability. This will be added once the new Directory system is built, to provide a single text capability to look up guests in the client database.

New Event Fee Control

The Event Fee Control is a new type of Event field that is the default way to collect fees for event attendance. It is not called a ticket control only because the iModules system does not print tickets, but it is the standard type of interface used for selling tickets. In concert with the new guest control, the Event Fee Control is the final piece for solidifying event reporting.

> **It is a very important best practice in the new system that clients utilize the new Guest Category for collecting guest information, and the new Fee Control for collecting registration fees for paid events. These two pieces directly impact the value and accuracy of Event reporting and exporting.**



Another way to look at this is as a multi-price commerce item control, with all of the current options and capabilities of commerce items - including role support, fair market value, limits, SKU, $0 tickets and early bird pricing - still applicable to each fee price with the difference just being the presentation in a dropdown list so that a specific fee can be directly tied to the registrant or specific guest.

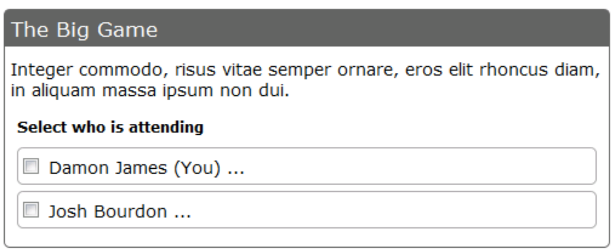
- Both the registrant and the guest role chain can drive role-based values in the Fee Control.

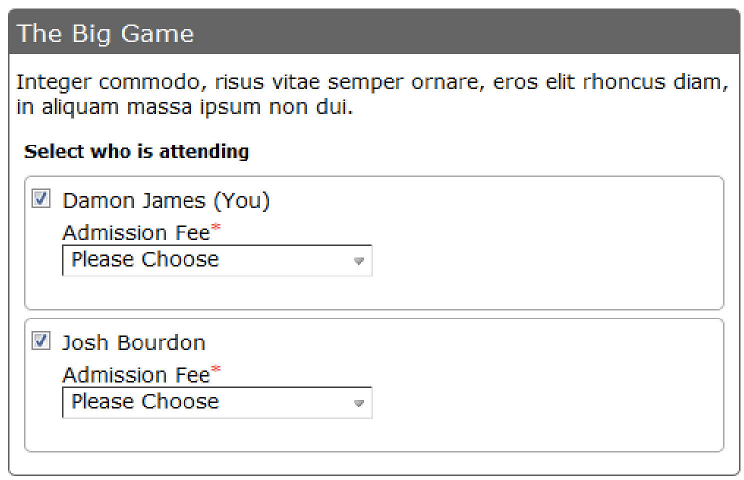
- There can be multiple, role-based Fee Controls on an event or activity, for role-basing.
- A Fee Control cannot have a commerce item in the same Event or Activity that also drives registration

In this initial release the Fee Control can't be used in Events for anything other than collecting Event fees – it will by definition be the field that drives registration for the Event or Activity it is used on. It cannot be used as a non-registration field.

Activity Registration User Interface

There is a new interface for registering for an Event with related Activities. Users will select the various Activities that are presented to them or their guests, and then the options for each registrant are revealed. All of the same capabilities for customizing the data collected in Activities, or the additional configuration options, are still supported.





Because the system is collecting the registrant and each guest as discrete data records in the event, the specific Event and/or Activity information will be associated with each registrant and guest. This provides for the complete picture of who is registering for which Activity, what they are purchasing and the requested information for each registrant and guest so that clients will get the full and solid reporting and data they need to manage their events.

Role-based customization is supported. Any data field in an Event or related Activity can be based on the registrant role or the guest role. In addition, the registrant and the guest roles can also drive which Activities are presented to the registrant for them and their guests to be registered to.

There will be a new option in the Activity settings for whether an Activity should appear for the registrant and/or guests. The initial release will support two role-basing scenarios, with a 3rd scenario to be added in follow-on development for release in Q3:

Example Scenario: Registrant is Class of 1995, Guest is Class of 1998.

- Option 1 (Default option) - Activities are displayed based on the Registrant's role.
  The registrant only sees Activities role-based for Everyone or the Class of 1995 and can register themselves and their guests for these activities – they will not see Activities role-based for the guest's Class of 1998.
- Option 2 - Registrant and guests can only be registered for Activities available for their specific role. The registrant sees Activities role-based for Everyone or the Class of 1995, and also Activities that are role-based for the Guest's Class of 1998, but they can only register themselves for the Class of 1995 Activity and only register their Guest for the Class of 1998 Activity.
- Option 3 (Not supported in initial release, to be built in follow on development) The Registrant sees all Activities role-based for their Class of 1995 and their Guest's Class of 1998, and could register both themselves and their guest for either Activity

Activities

- Activities are on their own special Activity Step, or can be spread across multiple Activity Steps.
- Activity Steps cannot have custom categories added to them.
- Clients will only be able to role base activities based on the guest role chain.
- In the initial release, categories will not be able to be customized based on the guest role chain. This will be in follow on development that is scheduled to be released in Q3

Confirmation Email

There is a new default confirmation email designed to display clearly in all email clients without the use of CSS, which is not allowed in Gmail. The information is organized to display the registrant information, the information entered for each guest, and the registration information for the registrant and each guest for the Event and any related Activities. Customization of confirmation email verbiage and graphics is done via the existing admin tool. The registrant's confirmation email includes the link to edit the registration.

New formatting is applied to the form data component - which includes all of the billing, registrant, guest, event and activity registration information - so the information is more clearly displayed in email applications that do not support CSS (primarily Gmail) which strip out styles in the current confirmation emails making them hard to understand.

The guest confirmation Email is a subset of the registrant confirmation data, with the name of the primary registrant, the information entered for the guest, and just their respective Event or Activity information.

- The guest confirmation email does not include a link to edit the registration.
- The registrant's event form information and billing / transaction information is not included in the guest confirmation email.

- Guests only receives the guest confirmation email if the registrant selects the option on the front end to send a confirmation email to the guest.
- The "Send to Guest" option is unchecked by default.
- In the initial release, there is no admin tool for configuring the guest confirmation email. It can be customized by iModules personnel at the client's request.

Standard Event Reports

The Standard Event Reports rolled out last year will now be much more meaningful, as the lack of tight, consistent guest counts, attendance and purchases were major limiting factors. With the new Guest Category and Fee Control combined with the new Event model business rules, the data relationships needed to define exactly who registered, their guests and exactly what each member of the party is attending and purchasing will be in place to:

- Deliver solid, informative reports at a click of a button.

- Greatly reduce extraneous event Export rows from false submissions, mistaken admin form submissions and other causes.

One of the current standard reports – the Registrant Report – will be eliminated because it is duplicative of what is now a very solid standard Registration Report showing all primary registrants and their guests.

New Name Badge Report

Clients use a simple field picker to select columns for a custom CSV file to import into their name tag / labeling software. This can also be a type of mini ad hoc report capability for clients to build a simple custom report with the columns of their own choosing, outputted in CSV or the formatted Microsoft Office® and PDF options. The nametag option on the attendee report is being removed since admins can now use the new Name Badge Report.

Printing Name Badges

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  - Avery, one of the largest producers of name badges, labels, has a free online product that clients can use to produce their name badge

formats: http://www.avery.com/avery/en_us/Templates-%26-Software/Software/Avery-Design--Print-Online.htm?int_id=quicklinks-dpo

- The CSV file from the new Name Badge standard report option can be uploaded directly into this system to produce name badges with the Avery templates and print products.

Events Export and Web Services

Export

The Events Export process is unchanged but is greatly improved by solid guest counts, explicit connection between guests and their activities and the items they purchase. The two new changes to exports in the new system are:

- Each guest is a non-member account with their own row in the Event export.
- There is a new "Guest of" column that will show what registrant added them.

Web Services

Important Note: Web services for the new registration will not be in the initial July product release. This will be worked as a follow on release planned for a August Product Release

Reconciliation Reports

Reconciliation Reports are unchanged for this development. The "Guest of" column is not included.

Data Entry Mode vs. Form Building Mode

The Events admin system now has separate "Form Building" and "Data Entry" modes in the Encompass UI. To make changes to the configuration of the Event form, the admin selects the Form Building mode which prevents admins using this mode from accidentally inputting data for a member. For entering data on behalf of a constituent, admins will use the Data entry mode.

Adjustments

All registrations collected between July 22 and August 26 will be adjustable, but the tool for adjusting them will not be available until the August release.

The new adjustments system for new events will be in the August release scheduled for International on 8/18 and U.S. on 8/25.

For clients that are concerned about the gap between the July and August release, you will still have the ability to create Events in the legacy (current) system. Legacy Events continue to be adjusted from the Event History tab.

Editing a registration

The primary registrant can use the Edit Registration link to edit guest information at any time, including un-registering a guest for a non-fee based activity. When the primary registrant comes back to the site through the edit registration link, they will see the fees previously purchased for themselves and their guests for the main event and the activities. The primary registrant is able do the following:

- Edit the fields in the main registrant category and the guest category.
- Purchase additional tickets for guests that did not already have a ticket purchased for the event and/or activity.
- Add additional guests and purchase fees to the event and/or activity for that guest.
- Un-register themselves or a guest from an activity if the activity doesn't have commerce.

The primary registrant **cannot** do the following:

- Change the fees associated with themselves or their guests. (Example: Change from a student fee to and alumni fee.)
- Remove fees purchased or remove guest fee purchases.
- Remove a guest that purchased through a commerce item or a fee control.

For **Simple (RSVP) Events**, the primary registrant will be able to change the response to the 'Are you attending?' question for themselves and their guests.

When an event registration is edited, a confirmation email is sent to:

- The primary registrant
- Any new guests that are added to the event if the 'Send guest confirmation email' option is selected
- Any guest that was updated if the 'send guest confirmation email' option is selected

Existing Event Customization and Configuration Capabilities Remain

All other current event form building, and field customization capabilities remain in the new system, with the applicable ones folded into the new Event registration business models and rules.

- Custom fields and categories can be added to all new Events
  - Custom categories cannot be added to the Guest or Activity Steps

- Registration limits
  - All current (Legacy) event activity registration limit capabilities are supported in the new system
  - Registration limits for members, or for the Event or specific Activity, will be honored in the Guest UI and Activity UI
  - The new system removes the optional setting to hide event or activity when limits are reached – the standard behavior in the system will now be to turn off registration / hide the specific activity when the registration limit reached.

- Roles
  - All role customization, included role-based fees and custom fields are supported

- Email Pre-population
  - Email Pre-population for Events is unchanged

- Events with Donations
  - Events with Donations function is unchanged. The Events with Donation system will continue to not be supported with

- Commerce Items and Commerce Amount fields can still be added to all Events

- $0 tickets; Early bird tickets; Fair Market Value; SKU; and other commerce item options are supported
  - A Fee Control, which by definition drives registration cannot have a commerce item in the same Event or Activity that also drives registration

- Promo Codes
  - Promo Codes still apply to the total amount of the overall registration, including guest regiitration purchase amounts

- Appeal Codes
  - No change
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- Event Center
  - No change