




Meeting Registration Simplified: Using RegOnline to Soar Above the Clouds



Jon Crossno, AHIP
UT Southwestern Library
Dallas, Texas

Overview

- SCC Registration Task Force
- Introduction to RegOnline
- Getting Started
- Event Preparation
- Testing & Activation
- Event Maintenance
- Event Reporting

SCC Registration Task Force

- Appointed by Brian Bunnett in 2007
- Charged with finding a replacement for “cumbersome” database
- Reviewed 3 options :
 - Acteva (Web-based)
 - RegOnline (Web-based)
 - EventPro Planner (software)
- Selected RegOnline

Introduction to RegOnline

- No overall system fees
- Event “activation” fee = \$150
- Other fees
 - \$3.50 per registrant
 - Credit card transactions
 - MasterCard / Visa (5%)
 - American Express / Discover (6%)

Introduction to RegOnline

- Extensive online help

<http://forums.regonline.com/helpcenter/>

- Customer & technical support

support@regonline.com

- Be sure to include acct & event #s

Introduction to RegOnline

- Roles for individual logins
 - Default role (full access)
 - Read only
 - Onsite only
 - Custom (e.g., treasurer)
- Secure Client Login page:

[https://www.regonline.com/marketing/
clientLogin.aspx](https://www.regonline.com/marketing/clientLogin.aspx)

RegOnline Manager

- Events
 - Annual Meetings
- RegMail
- Cross Event Reports
- Administration
 - Security (i.e., users, roles)
 - Hotels
 - Manage Account / Merchant Gateways

[+ Create New Event](#) ▼

Search for Attendees ▼ Last name, company, or Reference #

- My RegOnline
 - Events
 - Annual Meetings (2)
 - Samples (2)
 - Templates
 - Deleted Forms
 - RegMail
 - Jobs
 - Mailing Lists
 - Content
 - Reports
 - RSVP Report
 - Cross Event Reports
 - Standard Reports
 - Custom Reports
 - Administration
 - Security
 - Users
 - Roles
 - Hotels
 - Manage Account
 - Manage Merchant Gateways
 - Open Sub Account

ID	Title	Type	Location	Date	Status ▼	Total
169430	SCC/MLA 2008 Annual Meeting (Dallas, TX)	Event	Dallas	11-Oct-2008	Active	251
653185	SCC/MLA Annual Meeting Example	Event	Dallas	11-Oct-2008	Testing	0

SCC/MLA 2008 Annual Meeting (Dallas... (169430)

Current Status: **Active** [Change Status](#)

www.regonline.com/sccm1a-2008

[Functions](#)
[Standard Reports](#)
[Custom Reports](#)
[Directories](#)
[Labels & Badges](#)
[Charts & Graphs](#)

Main

[Event snapshot](#)

[Attendees](#) (Filter)

[Confirmed](#) | [Substitutions](#) | [Cancellations](#)

[Standby](#) | [Incomplete](#)

[Agenda Items](#) (Filter)

[RegAnalytics](#)

Accounting

[Transactions](#) (Filter)

[Credit card reconciliation](#) (Filter)

Lodging & Travel

[Lodging](#) (Filter)

[Lodging Booking report](#) (Filter)

[Travel report](#) (Filter)

RegOnline Manager

- Event Tabs
 - Functions
 - Standard Reports
 - Custom Reports
 - Directories
 - Labels & Badges
 - Charts & Graphs

Getting Started

- Copy existing event
 - SCC/MLA Annual Meeting Example
- Define registration form URL
- Set start/end dates & location
- Provide email address for primary contact

Event Overview

- Registration form pages
- Theme & colors
- Event website
- Emails

SCC/MLA 2008 Annual Meeting (Dallas, TX) (169430)

[Return to Manager](#)[Preview](#)[Save & Stay](#)[Save & Close](#)[Registration Form Pages](#)[Theme & Colors](#)[Event Website](#)[Emails](#)[Start](#)[Personal Information](#)[Agenda](#)[Lodging & Travel](#)[Merchandise](#)[Checkout](#)[Confirmation](#)

Page Tip:

Use this tab to set up the essential information for your registration form, such as title, location, different registrant types and cost of the registration.

Helpful hints:

1. Click the help link for each section for detailed instructions.
2. Click the Preview button to see how the form would appear to your attendee. Click again to return to editing.

☐ Don't show page tips again[Close](#)

Event Basics



[Help with this section](#)

* Event Title:

* Registration Form URL: <https://www.regonline.com/>

Event Fee: [Advanced](#)

Start Date:  Start Time: 

End Date:  End Time:  [Date/Time options](#)

Location Name:

Address Line 1:

Address Line 2:

City:

State/Province:

Postal Code (Zip):

Country:

* Contact Email Address:

Registrant Types

[Help with this section](#)[Add registrant type](#)

Event Preparation

- Registrant types
- Personal information
- Agenda
- Lodging & travel
- Merchandise
- Checkout
- Confirmation

SCC/MLA 2008 Annual Meeting (Dallas, TX) (169430)

[Return to Manager](#)[Preview](#)[Save & Stay](#)[Save & Close](#)[Registration Form Pages](#)[Theme & Colors](#)[Event Website](#)[Emails](#)[Start](#)[Personal Information](#)[Agenda](#)[Lodging & Travel](#)[Merchandise](#)[Checkout](#)[Confirmation](#)

Page Tip:

Use this tab to create a schedule for your event, such as workshops, optional activities, and any associated fees. Use this tab only if you have more than one item for your registrants to choose from, otherwise use the "Start" tab to set up your fees.

Helpful hints:

1. Click the help link for each section for detailed instructions.
2. Click the Preview button to see how the form would appear to your attendee. Click again to return to editing.

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Agenda Items

[Help with this section](#)[Add Agenda Item](#)

Name	Type	Date	Time	Amount	Limit	Required	Visible	Actions
1 (Non)Member Header	Section Header					No	Partial	
2 Mem - Super Inclusive (A)	Check Box			\$250.00	106	Partial	Partial	
3 NonMem - Super Inclus (A)	Check Box			\$320.00	1	Partial	Partial	
4 Pkg A: Event Header	Section Header					No	Partial / Conditional	
5 Pkg A: Welcome Reception	Check Box	12-Oct-2008	06:30 PM			No	Partial / Conditional	
6 Pkg A: HLIS Meal	Multiple Choice (Dropdown List)	13-Oct-2008	12:00 PM			No	Partial / Conditional	
7 Pkg A: Main Event Meal	Multiple Choice (Dropdown List)	13-Oct-2008	07:00 PM			No	Partial / Conditional	
8 Pkg A: Business Meal	Multiple Choice (Dropdown List)	14-Oct-2008	12:00 PM			No	Partial / Conditional	
9 Pkg A: Farewell Reception	Check Box	14-Oct-2008	06:00 PM			No	Partial / Conditional	
10 Member - Inclusive (B)	Check Box			\$220.00		Partial	Partial	
11 NonMem - Inclusive (B)	Check Box			\$200.00		Partial	Partial	

Testing & Activation

- Test, test, test!
- Use sample credit cards numbers (in help)
- Determine launch date
- Go live
- Delete test registrations

Event Maintenance

- Cash-basis accounting
- Each attendee record should have zero balance
- Treasurer or registration coordinator should record receipt of non-credit card payments

Event Reporting

- Standard reports
 - Event snapshot
 - Attendee list
 - Transactions
 - Credit card reconciliation
- Custom reports
- Attendee directory
- Labels & badges

Questions?

