active data exchange

active data CALENDAR

Advanced Registration

User Guide

version 3.14.1

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Welcome to Active Data Calendar v3.14.1

Active Data Calendar is your solution to sharing event information with customers, students, partners and other key constituent groups throughout your organization.

You can use Active Data Calendar to display events on your organization's web site, intranet, extranet, and more. You can even share event information across multiple web sites.

Active Data Calendar is easy to use with its browser-based interface. This allows users to enter and view calendar information from any Internet connection.

Active Data Calendar includes *Online Administration*, which supports multiple levels of security. This allows entry of events from many levels of your organization, while still having the ability to approve events before they are viewable on your web site.

TIP: Before starting, take a look at the **- Glossary of Terminology**. Referring to it while reading will help you with new concepts.

What's New in Version 3.14.1?

Active Data Calendar (ADC) 3.14.1 includes new features and functionality in all six of ADC's modules. These are:

- Advanced Registration
- Base Calendar
- Custom Text
- Facilities Management
- Open Entry – Marketing
- Open Entry – Facilities

This *Advanced Registration User Guide* addresses the Advanced Registration module, and includes the changes to it that are implemented in ADC release 3.14.1.

Advance Registration Enhancements

This release includes improvements to the event scheduling and modification processes:

- **Registration:** A new option to allow *Early Bird Registration* that supports discount codes with expiration times.
- **Registration:** A custom *Invoice Me* button can now be uploaded similar to the existing *Credit Card*, *Check* or *Cash* options.
- **Registration:** New email and notice added for notifying the event owner when a registrant has paid for an event.

- **Registration:** Confirmation e-mails now include the total event cost to the registrant.
- **Reports:** Event location is now included in the *Registrant Summary Report*, along with any of the four "Internal Custom"fields that you have created in *Custom Event Administration Information*.

Version 3.14.1 Requirements

To install 3.14.1 in your environment, you must have:

- SQL Server 2005, 2005 Express, 2008, 2008 Express or 2008 R2
- For access to the Facility Enhancements and sub-divided rooms you will need to have the Facilities Module installed.
- For Open Entry Enhancements you will need to have the Open Entry Module installed.
- For Custom Text Settings you will need to have the Custom Text Settings Module installed. This is a new module released in 3.12.
- Complete server requirements are listed in the *Server Requirements Tip Sheet* available on the Client Portal's *Documents* page.

User Guide Features

This User Guide presents procedural and reference information for Active Data Calendar. Along with basic use directions, it gives important Tips, Tricks and Security suggestions to help you configure your calendar. As you continue through the guide, look for these icons:

The notepad icon denotes a helpful tip or trick.

The lock icon denotes a security suggestion or tip that we feel it will help you to know. Whenever viewing a security message, remember that your organization's security procedures and policies always override any suggestions in this guide. Always consult your organization's security authority with any questions about security.

The finger with a bow points you to a Reminder tip. Reminder tips are placed in User Guides to call your attention to something that was previously mentioned in the guide. We will provide you with helpful reminders as you go through Active Data Calendar.

Logging into the Calendar Administration Area

Before managing events or administer your calendar, log in to the calendar administration menu. Active Data Exchange supplies each calendar administrator with a login ID and password. Use these to log into the calendar.

Calendar Login

1. From the main view of the calendar, click the **Submit Events** link, as shown:

2. Active Data Calendar's main login screen appears, as shown.

   If you are already logged in, the calendar bypasses this screen. Continue by entering your login ID and password.

3. Enter your login ID and password, then click Submit or press Enter to continue.

> If your login ID and password do not authenticate, you can either contact your calendar administrator for the correct login information, or click on the link "Forgot Your Password? Click Here." Clicking *Forgot Your Password* prompts you to enter in your login ID or e-mail address. Entering either of these sends an email to the address associated with your account, containing your current login ID and a new password.

Note: Calendar installations that authenticate users with LDAP do not show the *Forgot Your Password* option. Contact your network administrator to resolve problems with your credentials.

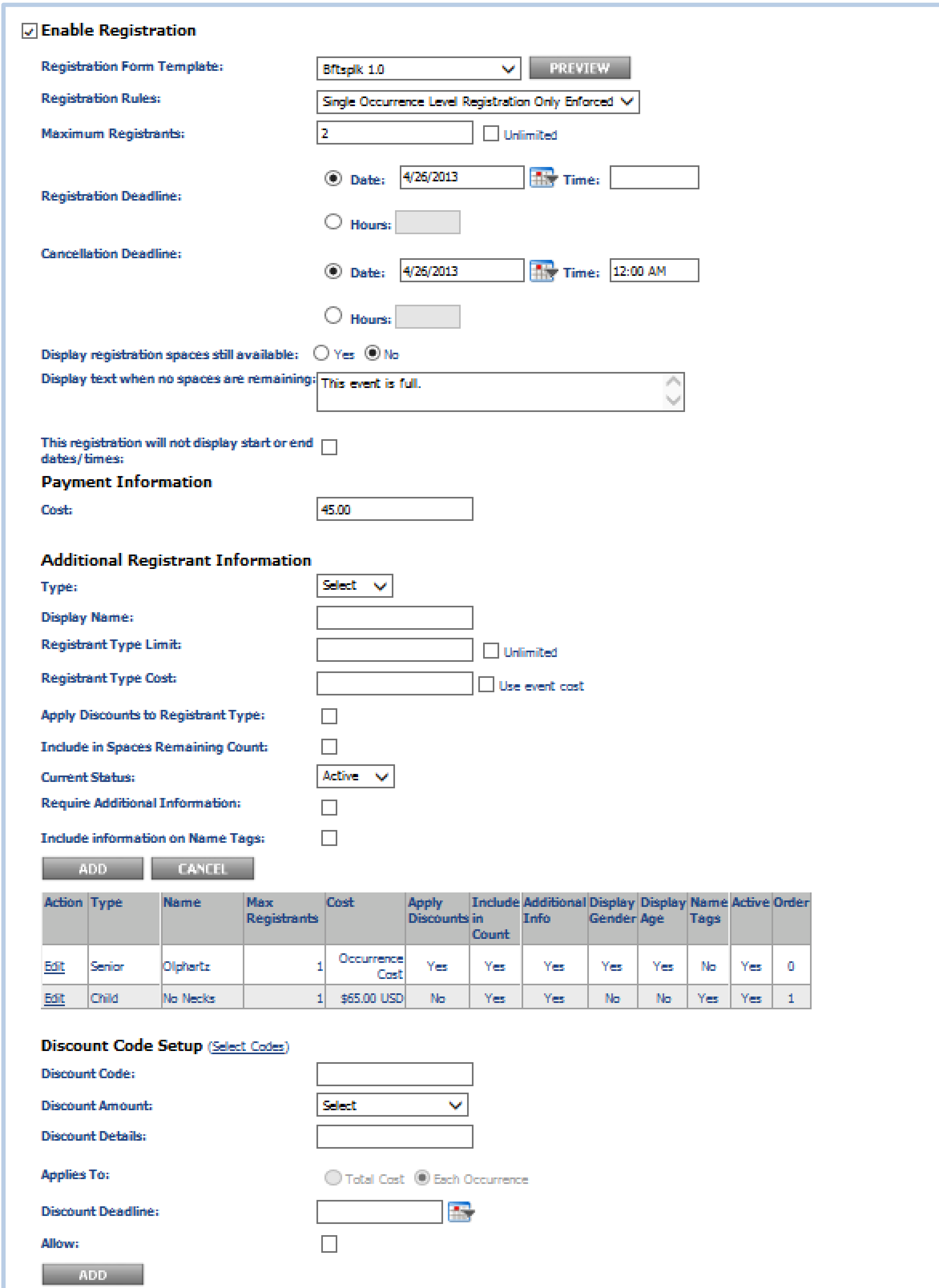
Adding Registration to an Event

Once an event has been created, participant registration capability can by added to it as described in the next section.

Note: The options described below represent an overview of the registration functionality within the Active Data Calendar software, and the differences between the default registration functionality and the functionality included with the Advanced Registration Module. Details regarding the differences when Advanced Registration is enabled are outlined in the supplement, *Advanced Registration Module User Setup*.

Enabling Event Registration for events is a privilege that may be assigned to each user. A user having this privilege will see the *Enable Registration* check box and related fields on the *Add Event: Contact and Location Information* screen.

Here is a capture of the *Enable Registration* area of the *Add Event* page:



☑ **Enable Registration**

Registration Form Template: Bftsplk 1.0 [PREVIEW]

Registration Rules: Single Occurrence Level Registration Only Enforced

Maximum Registrants: 2 ☐ Unlimited

Registration Deadline: ◉ Date: 4/26/2013 Time: ○ Hours:

Cancellation Deadline: ◉ Date: 4/26/2013 Time: 12:00 AM ○ Hours:

Display registration spaces still available: ○ Yes ◉ No

Display text when no spaces are remaining: This event is full.

This registration will not display start or end dates/times: ☐

Payment Information

Cost: 45.00

Additional Registrant Information

Type: Select

Display Name:

Registrant Type Limit: ☐ Unlimited

Registrant Type Cost: ☐ Use event cost

Apply Discounts to Registrant Type: ☐

Include in Spaces Remaining Count: ☐

Current Status: Active

Require Additional Information: ☐

Include information on Name Tags: ☐

[ADD] [CANCEL]

Action	Type	Name	Max Registrants	Cost	Apply Discounts	Include in Count	Additional Info	Display Gender	Display Age	Name Tags	Active	Order
Edit	Senior	Olphartz	1	Occurrence Cost	Yes	Yes	Yes	Yes	Yes	No	Yes	0
Edit	Child	No Necks	1	$65.00 USD	No	Yes	Yes	No	No	Yes	Yes	1

Discount Code Setup (Select Codes)

Discount Code:

Discount Amount: Select

Discount Details:

Applies To: ○ Total Cost ◉ Each Occurrence

Discount Deadline:

Allow: ☐

[ADD]

TIPS

- To not limit your registration spaces, select the *Maximum Registrants: Unlimited* check box.
- You can also set a maximum number of registrants, but choose not to display that maximum number on the event details screen.
- The maximum number set for a series event is automatically applied to every occurrence in the series. You can always modify the number of maximum spaces for an individual occurrence.
- You can set a registration deadline by specifying either a date <u>or</u> a time after which new registrations will not be accepted.
- You can also set a deadline for registration cancellation by specifying the last date, <u>or</u> time prior to event start, that the Calendar will accept a cancellation.

Notes: An available “space” is only removed from your total remaining once you approve a registrant. For example, you set a limit of 25 spaces, but 50 registrants are pending. When you approve the 25th pending registrant, the registration icon disappears from the event details screen.

You cannot select to have your maximum number of registrants exceed the maximum capacity for the facility that you request for your event.

Event Registration – *Enable Registration*

If you have privileges to enable event registration, you see this check box at the top of this screen. Selecting this check box opens the registration set-up area, and enables the registration icon on the event details screen. A potential registrant viewing the event details can click the registration icon to open and complete the interactive registration form.

Registration Form Template

From the drop-down menu, you must choose a registration form for your event. Only those forms that you have been granted permission to use appear in the drop-down menu. After selecting a form, you may click the *PREVIEW* button to see the form in a new browser tab.

If you select a form that includes payment options, the screen is refreshed and payment setup fields are displayed, along with a field for event cost. Note that an event cost <u>*must*</u> be supplied before the PREVIEW function will work.

Important: Once you enable a registration form for an event, once a single registrant is approved, you cannot modify the form’s fields. This is to protect against changes impacting people that have already signed up. Please be sure your form is complete and final before adding it to an event.

Registration Rules

This drop-down list provides the options listed below.

Note: Registrations are keyed to the registrant’s e-mail address, rather than any formal user account credentials. Visitors register for events without having to be known to (or signing in to) the Calendar, so it is possible for a registrant to sign up for an event more than once under different e-mail addresses. The Calendar will simply see the two registrations as being for two separate registrants.

Mandatory Complete Series Registration Only

Select this option, and a Calendar visitor clicking on a registration icon for a series event sees only the option to register for the entire series, not for individual occurrences within the series. By completing the registration, the event administration area includes only one "event" listing for approving (or denying, etc.) the registrant for the entire series.

If the user managing registrants clicks on the registrant link, the calendar shows the series details and all dates included, but the user can only process the registration at the series level. With this option selected, the Calendar interface only displays the registration option for the series up to the start date & time of the first occurrence in the series. Once the first occurrence's start date/time has passed, registration capability is removed from the event, for all occurrences.

Selecting this option enforces that the registrant is signing up to attend all event occurrences. If one occurrence has passed, this requirement can't be met, so registration capability is removed.

Series Registration Enforced with Partial Series Allowed

Select this option, and a Calendar visitor clicking on a registration icon for a series event sees only the option to register for the entire series, not for individual occurrences within the series. When complete, the event administration area includes only one "event" listing to approve (or deny, etc.) the registrant for the entire series. If the user managing registrations clicks on the registrant's link, the calendar shows the series details with all dates included, but the user can only process the registration at the series level.

With this option selected, the calendar interface continues to display the registration option throughout the entire series date/time span, up to the start date/time of the last occurrence in the series. By selecting this option the user is saying that even though series registration is enforced, visitors may register to attend the series, even when they have missed occurrences because the start date/time of one or more occurrences has passed. This allows registration at the series level up to the last occurrence date/time. When registration is complete, the event administration area include only one "event" listing for approving (or denying, etc.) the registrant for the entire series. If the user managing registrants clicks on the registrant link, the calendar shows the series details and all dates included, but the user can only process the registration at the series level. The user managing registrants can determine which registrants attended all occurrences by reviewing the registration date/time stamp in the administration area.

Single Occurrence Level Registration Only Enforced

Select this option, and a Calendar visitor who clicks on a registration icon for any date/time occurrence in a series:

- Sees the registration option for that occurrence only
- Does not see a link to view other occurrences in the series

With this option, the user can only register for one occurrence. If the user attempts to register for another occurrence after the registration has been completed and approved, a message states that registration is not permitted for more than one occurrence in that series. It also shows the details of the registration already approved for that user.

The registration icon displays, but if the visitor is already registered for an occurrence in the series and selects the icon, the registration form screen does not display the registration form fields. Instead, it shows the message, *You are already registered for the event date and time listed below. You may not register for more than one event in this series*. The occurrence name, with the date and time that the visitor is already registered for displays, for informational purposes only. It also includes instructions on how the member can cancel their existing registration. That text is preset to "If you would like to cancel your existing registration and register for a new date/time, please use the cancellation option available in the email confirmation that was sent when your registration was approved."

Multiple Occurrence Registration Allowed

If you select this option, a Calendar visitor clicking on a registration icon for any occurrence in a series sees the registration option for that occurrence as the default at the top of their registration form. However, the form also presents the option, *Click here to register for other occurrences within this series.* Selecting this option presents all future occurrence dates and times as individual options for registration. The visitor may select one or more check boxes to also register for those occurrences.

Calendar administrators see each occurrence in a series that has Multiple Occurrence Registration Allowed individually as a separate "event", with separate registrants to process for just that event.

Maximum Registrants

When enabling registration for an event, you may also specify:

- A maximum number of event registrants
- Whether the number of available registration spaces is shown on the event details page (and on the list view if that view is configured to show it)

The number of registrants the administrator may approve is limited by the maximum number of registrants you set here.

The maximum number of registrations cannot be set to a number that exceeds the lesser of the maximum capacity of the room scheduled for the event and the setup chosen. If you attempt to make the number greater than the room's or setup's maximum capacity, registrants receive this warning message when they click NEXT or FINISH:

> *The maximum number of registrants entered exceeds the maximum capacity for the room and set-up that you selected. Please adjust your maximum number of registrants or use the BACK button in the navigation options on this screen in order to return to your event location/schedule area in order to modify your selections.*

Unlimited (Registrants) Option

Selecting this check box disables the calendar's registration-checking function. Any number of registrants may sign up for the event.

Registration Deadline

You can cut off new registrations at a date and time, or a number of hours before event start. Registration is automatically turned off from the front-end Calendar screens when you specify, even if the maximum registrants value has not been reached. Note that if both *maximum registrants* and a registration deadline are set, the first limit hit closes registration.

Date

Stops new registrations at a date and time. Enter a valid date (in `mm/dd/yyyy` format), or click the Calendar Date Selector icon. You can move this deadline after creating the event using *Event: Modify*. This date and time must be later than the current date and time.

Hours

Select this option to stop new registrations at a number of hours before the event starts. Registration is automatically turned off from the front-end Calendar screens at that time, even if the maximum registrants value has not been reached. Use *Event: Modify* to extend the deadline or make it sooner, though the date and time you specify must be in the future. If *maximum registrants* is set, and a registration deadline is set, then meeting the first of these "rules" closes registration.

TIP: If you set a Registration Deadline when creating a series, you will avoid having to edit the deadline of each occurrence separately later.

Cancellation Deadline

Use this field to specify when registration cancellations will no longer be accepted (and monies may not be refunded, if applicable). Enter a valid date (in `mm/dd/yyyy` format) or use the Calendar Date Selector, or enter a number of hours prior to event start when registration may still be cancelled.

Date

This option disallows cancellations as of the date and time you enter. Place a valid date into the text field (in `mm/dd/yyyy` format), or click the Calendar Date Selector icon. To change this limit after creating the event, use *Event: Modify*, and extend the deadline or make it sooner, though the date and time you specify must be in the future.

Hours

Select this option to disallow cancellations at a number of hours before the event starts. Cancellation is automatically disabled from the front-end Calendar screens at that time, even if the maximum registrants value has not been reached. You can use *Event: Modify* to change this cancellation deadline.

Display registration spaces still available

Controls whether the number of registration spaces still available for the event appears with the event details on the front-end Calendar views. Options are *Yes* and *No*, with *No* as the default. *Yes* means that a message shows the number of registration spaces remaining available:

- At the top of the event details screen
- On all Front-End Calendar Event Details Views
- On list views if they are configured to show it.

Display text when no spaces are remaining

Where no registration spaces remain available, the default text displayed with the event details on the front-end Calendar-view screens is *There are no registration spaces remaining for this event.* In this field, you can enter a message up to 100 characters to replace that default message.

Event Registration – *Payment Information*

Cost

If the registration form you select includes payment capability, the Payment Information section appears, with a box for entering the event Cost. The price of a standard registration you enter here (just numbers, no currency sign; decimal point and cents are optional) appears on the registration form. The event cost text field accepts up to 12 numeric characters, but rounds to a 2-decimal value[1].

- If the event's registration type is *mandatory series registration*, this cost applies to the entire series.
- For all other registration types, this cost is for one occurrence. If the registrant is allowed to select more than one occurrence, the total due is the number of occurrences selected multiplied by this cost.

Event Registration – *Additional Registrant Information*

Type

You may specify multiple registrant types such as a senior citizen registration, student registration, or even to register for a premium (for example, a free T-shirt) to offer that as part of general registration, or separate from it.

You can have more than one registrant type associated with an event. Enter each registrant type's information and click Add, then select another type and enter the information for that type and click Add again. All the types that you add are listed in the table that appears below this area after you add the first type.

[1] Note that this decimal functionality dependends on the period character for separating whole numbers from decimal units, as is the convention in the United States and elsewhere.

Note: Though you configure registrant types here, you create them on the administration area's REGISTRATION tab, under *REGISTRANTS: Types*.

- To modify a type that you have added, click on that type's *Edit* link, make your changes, then click SAVE.
- To delete a type that you have added, click its *Edit* link, then click Delete.

Display Name

Enter here the name as it will appear on the form. You may use up to 100 characters of free-form text, such as "FreeT-shirt(s)" or "Number of Senior Citizens registering"**.**

TIP: It is helpful to word these so as to prompt the registrant to enter a numeric value. For example, "Number of alumni attending".

Registrant Type Limit

Enter the maximum number of this type of registrant on a single registration. Leave this field blank to allow the entire occurrence's registration limit.

Registrant Type Cost

Select the **Use event cost** checkbox to use the occurrence cost. You may optionally specify a separate cost for this registrant type.

Apply Discounts to Registrant Type

Select this check box to apply the discount specified in the original registrant type.

Include in Spaces Remaining Count

Check to include the count for this registrant type in the *Spaces Remaining* for the event.This function deducts the total number of this registrant type, on a given registration, from the total slots available for the event. *Not doing this will cause the number of this registrant type to NOT be counted in the attendance of the event.*

Current Status

Select *Active* or *Inactive* to make this registrant type an option on the registration form.

Require Additional Information

Selecting this box adds a section below the registrant type (on the registration form) where the registrant must provide additional information (name, plus age and gender if you select those check boxes).

Include information on Name Tags

Check this box to include the registrant's *Additional Information* in the name tag data. This may be age and/or gender, depending on which check boxes you selected under *Require Additional Information*.

Add & Cancel

Click *Add* after selecting parameters for each additional registrant type you enter to place the type on a list of types allowed for the event. Clicking *Cancel* clears any values you entered in this section.

Event Registration – *Discount Code Setup*

- **Select Codes**. Clicking this link reveals a table of discount codes entered by all users through the Calendar system that have been designated as "Allow General Use." Calendar does not allow duplicate discount codes, but you may add these previously entered codes to your event.
- **Discount Code**. Enter up to 25 alphanumeric characters as a unique discount code. Discount codes are not case-sensitive when entered by registrants.
- **Discount Type**. Select *Percentage Discount* or *Fixed Dollar Discount* to determine the business rules for the Discount Details field. Required if you have added a discount code.
- **Discount Details**. Enter up to 12 characters (including decimal point), as follows:
    - If you selected *Percentage Discount* above, enter a value between 1 and 100 (with no percent sign). Supports discounts with up to 2 decimal points (as nn**.**dd). The calculated discounted cost is rounded to two decimal digits.
    - If you selected *Fixed Dollar Discount* above, enter a fixed amount, optionally with a decimal point and one or two decimal digits (and no currency sign).
- **Applies To**. If the discount is a *percentage*, the discount is always applied to the total, and this option is disabled. If you selected a fixed dollar amount, you can apply the discount to each individual occurrence in the series (thus providing a possibly higher discount total amount) or to the total registration cost (for all occurrences).
- **Disccount Deadline.** If a discount deadline is selected, the discount in question is automatically applied to the registration up until the date you specify. The discount can be removed manually by the end user if the automatic discount code is not the one the end user desires to use. Reminder: Only one discount can be applied per transaction.
- **Allow.** Select to add this discount code to the general list usable by other users in their events. Be aware that any results related to discount codes will then be across all events where that discount is applied, and not limited to any one event.

ADD Button

Clicking this button adds the Discount Code to your event. Add as many discount codes to your event as you need, including unique discount codes you create, and those pulled from the *General Use* list. Note that registrants can apply only one discount code to their registration. Discount Codes added to the event appear in a list below the *Discount Code Setup* area. You can delete any discount codes that you need from your list until you are ready to proceed with your event entry.

Internal Notes

Enter an optional longer free form statement up to 1000 characters.

Add Event: Rules with Advanced Registration Module

Event Process	Primary Action	Secondary Choices	Rules
Add Event - Individual (Single Date)			
	Select to Enable Registration		
		Select Form Template	A form template must always be selected. In standard registration only the "Standard Form" is available. In Advanced Registration, the forms for which the user has been granted permission when the form was added/last modified display in the dropdown.
		Registration Type (Select One)	
		Multiple Occurrence Registration Allowed	Visitor may register more than once for the single occurrence event or if there is multiple occurrence setups on the single day, they may register for as many as they like from those that are available.
		Single Occurrence Level Registration Only Enforced	Visitor may only register for one occurrence if there is more than one setup for the single day event. Once the visitor is approved for registration for one occurrence then they will no longer be able to register for any other time(s)/occurrence(s) on that date.
		Set Max Number of Registrants	
		Registration Deadline	Deadline can be any date prior to the start date of the event but not before the current date when the event is being added (or modified).
		Cancellation Deadline	Indicate the last date and time or number of hours prior to which registration cancellations will be accepted;
		Enable or Disable View of Remaining Slots	
		Event Cost	Any value can be entered based on the character size allowed.
		Additional Registrants	Multiple registrants can be added at any time up until the date and time of the event.
		Discount Code	New discount codes may be added or users can select from previously entered discount codes that were selected as General Use Codes.

Add Event - Series (SERIES REGISTRATION ONLY)			
	Select to Enable Registration		
		Select Form Template	A form template must always be selected. In standard registration only the "Standard Form" is available. In Advanced Registration, the forms for which the user has been granted permission when the form was added/last modified display in the dropdown.
		Registration Type (Select One)	
		Multiple Occurrence Registration Allowed	Visitors may register for each occurrence in the series individually. If a visitor would like to register for multiple or all dates in the series, then they will see an option to "register for other Dates in the Series" and they will have the option to select multiple occurrences, all occurrences or a single occurrence within the series by selecting the appropriate checkboxes. The visitor may or may not be approved for all dates/times that they request since approval/denial of registrants for these types of events is on an occurrence by occurrence basis.

		Single Occurrence Level Registration Only Enforced	Visitors will see the registration option available from all occurrence dates and will be able to register for any one single occurrence that they choose. Once the visitor is approved for registration for one occurrence in the series, then they will no longer be able to register for any other dates/times in the series. If the visitor attempts to register for a second occurrence in the series, they will receive a message that they are already registered and may not register for more than one occurrence and the date/time of the occurrence for which they are already registered will appear
		Mandatory Complete Series Registration Only	All details entered are for series registration. This setting enforces that all registrants will automatically be registered for every occurrence in the series if approved. This means that no event occurrences may be registered for individually and that series registration will be removed from the event after the first date/time of the series has passed.
		Series Registration Enforced with Partial Series Allowed	Visitors may only register for the series in its entirety, with no event occurrences available for individual registration. However, this option differs from "Mandatory Complete Series Registration Only" in that a visitor may still register for the series, even if one or more of the series occurrence dates/times has passed. Registering after the series has already "started" simply registers the visitor for all date/time occurrences remaining in the series.
		Set Max Number of Registrants	Max Number of Registrants cannot exceed the maximum number of space allowed in Room (If Facilities Module is Enabled). The maximum registrant number cannot exceed the maximum capacity set for the smallest room within the series.
		Registration Deadline	If Mandatory Series Registration is enabled then the deadline can be any date prior to the start date of the first occurrence in the series. The deadline cannot be before the current date when the event is being added (or modified). If Single Occurrence or Multiple Occurrence is selected then the registration deadline is for that particular occurrence. One thing to note is that if a visitor is attempting to register for more than one occurrence (multiple occurrence registration allowed), then it is possible that one of the occurrences that they select has past its deadline date and would show as disabled in the list of available occurrences. The registration deadline enables or disables the event from registration. It should show in the list as an event in the series but disabled from selection. (Same as currently how the display is handled when an occurrence date is past.)
		Cancellation Deadline	Indicate the last date and time or number of hours prior to which registration cancellations will be accepted; Can be modified at any time up to the date of the event.
		Enable or Disable View of Remaining Slots	
		Event Cost	Any value can be entered based off the character size allowed. If Mandatory series was selected as the registration type, then the amount entered is the cost for the entire series. If any of the other three occurrence level registration types was selected, then the cost entered is on a per occurrence basis. Occurrence default cost is saved on Event Add and if a user wants to make any individual occurrences a different cost, they must modify the occurrence.

		Additional Registrants	Multiple registrants can be added at any time up until the date and time of the event.
		Discount Code	New discount codes may be added, or users can select from previously-entered discount codes that were marked as General Use. Discount Codes added for mandatory series registration are applied to the entire series cost. Discount Codes added for single or multiple occurrences are applied based off the selection to apply codes to individual occurrences or to the combined total registration amount.

Modifying Events

Rules with Advanced Registration Module and Base off Event Schedule Type.

Event Process	Primary Action	Secondary Choices	Rules
Modify Event - Individual (Single Date)			
		RULES for modifying schedule of event to add more than one occurrence.	If an event was originally added as a one-time event and then is modified to have more than one occurrence (making it a series), then the option for selecting series or occurrence level registration will display ONLY if there are no current registrants for the individual occurrence. Otherwise, only occurrence level registration is allowed and the field does show but it shows as selected as single occurrence level registration only enforced and is able to be modified. **Please Note**: If there are active registrants already tied to the event, then you will not be allowed to modify the schedule. It is recommended that you copy the event and create a new event with the additional dates and include your new registration options within the copied event.
		RULES for modifying individual occurrence date/time.	Cannot modify the date and time of the event if there is at least one registrant. Registrants must be deleted first or event should be cancelled so the system automatically notifies all registrants that the event was cancelled (and issues payment credits if applicable based off the event).
	Select to Enable Registration		Cannot select to disable registration from here if it was previously enabled and there is at least one registrant. If there are no registrants then registration can be disabled and all fields are set back to their default "null" parameters as though nothing was ever selected. If there are registrants, then the event owner/admin can only disable registration from the Manage Registrants screen and it does not remove registrations from the event but rather temporarily disable the ability for anyone new to register. To completely remove registration from the event, the event owner/user must first delete all registrants and then the event can be modified to completely remove event registration.
		Select Form	The form cannot be modified if there is at least one active registration (pending or approved).
		Registration Type	This option can only be modified if there are no pending or active registrants tied to this event.
		Set Max Number of Registrants	The number of registrants can beincreased as long as the number does not exceed the maximum allowed for capacity of the selected room (if Facilities Module is enabled). The max number cannot be decreased to be less than the current number of approved registrants.

		Registration Deadline	Can be modified at any time up to the date of the event. The registration deadline simply enables or disables the ability for visitors to see the registration icon to register. If the registration deadline is past but there are still registrants pending that completed registration prior to the deadline modification, then they remain pending and can be processed.
		Cancellation Deadline	Indicate the last date and time or number of hours prior to which registration cancellations will be accepted; Can be modified at any time up to the date of the event.
		Enable or Disable View of Remaining Slots	This can always be modified.
		Event Cost	This field can be modified and the new cost will be applied to all new registrants (no approved, denied or cancelled registrants are affected, they remain as is with original information as entered and processed).
		Additional Registrants	Multiple registrant types can be added at any time up until the date and time of the event.
		Discount Code	New discount codes may be added or discount codes may be removed from the event which makes those codes deactivated for any new registrants attempting to enter them in for that particular event.
Modify Event - Series (Registration Not Enabled during Event Add) - ***(MANDATORY COMPLETE SERIES REGISTRATION ONLY is SELECTED)***			
		RULES for modifying schedule of event from a series to a one-time event.	Since registration was not originally enabled there are no limitations to making the event a onetime event if it was originally a series. If the user does decide to enable registration for the event once it is modified to be one-time, then they will not see the option for enabling series level registration.
		RULES for modifying the date/time of any occurrences within the series and or modifying the pattern of the series.	Since registration was not originally enabled there are no limitations to modifying the series dates/times or pattern.
	Select to Enable Registration		
		Select Form Template	A form template must always be selected. In standard registration only the “Standard Form” is available. In Advanced Registration, the forms for which the user has been granted permission when the form was added/last modified display in the dropdown.
		Registration Type Select One	
		Multiple Occurrence Registration Allowed	Visitors may register for each occurrence in the series individually. If a visitor would like to register for multiple or all dates in the series, then they will see an option to "register for other Dates in the Series" and they will have the option to select multiple occurrences, all occurrences or a single occurrence within the series by selecting the appropriate checkboxes. The visitor may or may not be approved for all dates/times that they request since approval/denial of registrants for these types of events is on an occurrence by occurrence basis.

		Single Occurrence Level Registration Only Enforced	Visitors will see the registration option available from all occurrence dates and will be able to register for any one single occurrence that they choose. Once the visitor is approved for registration for one occurrence in the series, then they will no longer be able to register for any other dates/times in the series. If the visitor attempts to register for a second occurrence in the series, they will receive a message that they are already registered and may not register for more than one occurrence and the date/time of the occurrence for which they are already registered appears.
		Mandatory Complete Series Registration Only	All details entered are for series registration. This setting enforces that all registrants will automatically be registered for every occurrence in the series if approved. This means that no event occurrences may be registered for individually and that series registration will be removed from the event after the first date/time of the series has passed.
		Series Registration Enforced with Partial Series Allowed	Visitors may only register for the series in its entirety, with no event occurrences available for individual registration. However, this option differs from "Mandatory Complete Series Registration Only" in that a visitor may still register for the series, even if one or more of the series occurrence dates/times has passed. Registering after the series has already "started" simply registers the visitor for all date/time occurrences remaining in the series.
		Set Max Number of Registrants	Max Number of Registrants cannot exceed the maximum number of space allowed in Room (If Facilities Module is Enabled). The maximum registrant number cannot exceed the maximum capacity set for the smallest room within the series.
		Registration Deadline	Can be modified at any time up to the date of the event. The registration deadline simply enables or disables the ability for visitors to see the registration icon to register. If the registration deadline is past but there are still registrants pending that completed registration prior to the deadline modification, then they remain pending and can be processed.
		Cancellation Deadline	Indicate the last date and time or number of hours prior to which registration cancellations will be accepted; Can be modified at any time up to the date of the event.
		Enable or Disable View of Remaining Slots	
		Event Cost	Cost can only be modified for the series up until the registration deadline date/date of the event. Since registration was not previously enabled for this event there would be no approved registrants to cost follows the same rules as on an event add for a series.
		Additional Registrants	Multiple registrants can be added at any time up until the date and time of the event.
		Discount Code	New discount codes may be added or discount codes may be removed from the event which makes those codes deactivated for any new registrants attempting to enter them in for that particular event.
Modify Event - Series (Registration was Enabled during Event Add) - ***(MANDATORY COMPLETE SERIES LEVEL REGISTRATION ONLY ORIGINALLY SELECTED)***			
		RULES for modifying	The event schedule cannot be modified for any event series that has at least one pending or approved registrant. If there are no

		schedule of event from a series to a one-time event.	registrants pending or approved, then the event schedule can be modified. All denied, cancelled or deleted registrants are deleted and not maintained for any audit trail. You will be presented with a message that states, "You will lose all registrants."
		RULES for modifying the date/time of any occurrences within the series and or modifying the pattern of the series.	The event schedule cannot be modified for any event series that has at least one pending or approved registrant. If there are no registrants pending or approved, then the event schedule can be modified. All denied, cancelled or deleted registrants are deleted and not maintained for any audit trail. You will be presented with a message that states, "You will lose all registrants."
	Select to Enable Registration		Cannot select to disable registration from here if it was previously enabled and there is at least one registrant. If there are no registrants then registration can be disabled and all fields are set back to their default "null" parameters as though nothing was ever selected. If there are registrants, then the event owner/admin can only disable registration from the Manage Registrants screen and it does not remove registration from the event but rather temporarily disables the ability for anyone new to register. To completely remove registration from the event, the event owner/user must first delete all registrants and then the event can be modified to completely remove event registration.
		Select Form Template	The form cannot be modified/changed if there is at least one active registration (pending or approved).
		Registration Type Select One	
		Multiple Occurrence Registration Allowed	Visitors may register for each occurrence in the series individually. If a visitor would like to register for multiple or all dates in the series, then they will see an option to "register for other Dates in the Series" and they will have the option to select multiple occurrences, all occurrences or a single occurrence within the series by selecting the appropriate checkboxes. The visitor may or may not be approved for all dates/times that they request since approval/denial of registrants for these types of events is on an occurrence by occurrence basis.
		Single Occurrence Level Registration Only Enforced	Visitors will see the registration option available from all occurrence dates and will be able to register for any one single occurrence that they choose. Once the visitor is approved for registration for one occurrence in the series, then they will no longer be able to register for any other dates/times in the series. If the visitor attempts to register for a second occurrence in the series, they will receive a message that they are already registered and may not register for more than one occurrence and the date/time of the occurrence for which they are already registered will appear.
		Mandatory Complete Series Registration Only	All details entered are for series registration. This setting enforces that all registrants will automatically be registered for every occurrence in the series if approved. This means that no event occurrences may be registered for individually and that series registration will be removed from the event after the first

			date/time of the series has passed.
		Series Registration Enforced with Partial Series Allowed	Visitors may only register for the series in its entirety, with no event occurrences available for individual registration. However, this option differs from "Mandatory Complete Series Registration Only" in that a visitor may still register for the series, even if one or more of the series occurrence dates/times has passed. Registering after the series has already "started" simply registers the visitor for all date/time occurrences remaining in the series.
		Set Max Number of Registrants	Max Number of Registrants cannot exceed the maximum number of space allowed in Room (If Facilities Module is Enabled). The maximum registrant number cannot exceed the maximum capacity set for the smallest room within the series.
		Registration Deadline	Can be modified at any time up to the date of the event. The registration deadline simply enables or disables the ability for visitors to see the registration icon to register. If the registration deadline is past but there are still registrants pending that completed registration prior to the deadline modification, then they remain pending and can be processed.
		Cancellation Deadline	Indicate the last date and time or number of hours prior to which registration cancellations will be accepted; Can be modified at any time up to the date of the event.
		Enable or Disable View of Remaining Slots	
		Event Cost	This field can be modified and the new cost will be applied to all new registrants (no approved, denied or cancelled registrants are affected; they remain as is with original information as entered and processed).
		Additional Registrants	Multiple registrants can be added at any time up until the date and time of the event.
		Discount Code	New discount codes may be added or discount codes may be removed from the event which makes those codes deactivated for any new registrants attempting to enter them in for that particular event.
Modify Event - Occurrence part of Series **(Registration Not Enabled during Event Add Series for Series or the Particular Occurrence Now Being Modified)**			
	Select to Enable Registration		Registration can be enabled at the occurrence level and is only then for that occurrence.
		Select Form Template	
		Registration Type Select One	
		Multiple Occurrence Registration Allowed	Visitor may register more than once for the single occurrence event or if there are multiple occurrences setup on the single day, they may register for as many as they like from those that are available.
		Single Occurrence Level Registration Only Enforced	Visitor may only register for one occurrence if there is more than one setup for the single day event. Once the visitor is approved for registration for one occurrence then they will no longer be able to register for any other time(s)/occurrence(s) on that date.
		Set Max Number of Registrants	Max Number of Registrants cannot exceed the maximum number of space allowed in Room (If Facilities Module is Enabled).
		Registration Deadline	Deadline can be any date prior to the start date of the event but not before the current date when the event is being modified.

		Enable or Disable View of Remaining Slots	
		Event Cost	Any value can be entered based off the character size allowed.
		Discount Code	New discount codes may be added or users can select from previously entered discount codes that were selected as General Use Codes.
Modify Event - Occurrence part of Series **(Registration Enabled during Event Add Series and Mandatory Complete Series Level Registration Only was Selected) - *(OCCURRENCE REGISTRATION MODIFICATION RULES)***			
		RULES for modifying the date/time of any occurrences within the series when series level registration is enabled.	The event schedule cannot be modified for any event occurrence that has at least one pending or approved registrant at the series level. If there are no registrants pending or approved for the series, then the event schedule can be modified for the occurrence.
	Select to Enable Registration		Shows as Not Available
		Select Form Template	Shows as Not Available
		Registration Type	Shows as Not Available
		Set Max Number of Registrants	Shows as Not Available
		Registration Deadline	Shows as Not Available
		Cancellation Deadline	Indicate the last date and time or number of hours prior to which registration cancellations will be accepted; Can be modified at any time up to the date of the event.
		Enable or Disable View of Remaining Slots	Shows as Not Available
		Event Cost	Shows as Not Available
		Additional Registrants	Multiple registrants can be added at any time up until the date and time of the event.
		Discount Code	Shows as Not Available
Modify Event - Occurrence part of Series **(Registration Enabled during Event Add Series and Occurrence Level Registration was Selected) - *(OCCURRENCE REGISTRATION MODIFICATION RULES)***			
		RULES for modifying the date/time of any occurrences within the series when series level registration is enabled.	The event schedule cannot be modified for any event occurrence that has at least one pending or approved registrant at the series level. If there are no registrants pending or approved for the series, then the event schedule can be modified for the occurrence.
	Select to Enable Registration		Cannot select to disable registration from here if it was previously enabled and there is at least one registrant for the occurrence. If there are no registrants for the occurrence then registration can be disabled and all fields are set back to their default "null" parameters as though nothing was ever selected.
		Select Form Template	You cannot modify the form at the occurrence level if at least one registrant is pending or approved for the occurrence.
		Registration Type	Shows as Not Available

		Set Max Number of Registrants	Max Number of Registrants cannot exceed the maximum number of space allowed in Room (If Facilities Module is Enabled).
		Registration Deadline	Can be modified at any time up to the date of the event. The registration deadline simply enables or disables the ability for visitors to see the registration icon to register. If the registration deadline is past but there are still registrants pending that completed registration prior to the deadline modification, then they remain pending and can be processed.
		Cancellation Deadline	Indicate the last date and time or number of hours prior to which registration cancellations will be accepted; Can be modified at any time up to the date of the event.
		Enable or Disable View of Remaining Slots	This can always be modified.
		Event Cost	This field can be modified and the new cost will be applied to all new registrants (no approved, denied or cancelled registrants are affected, they remain as is with original information as entered and processed).
		Additional Registrants	Multiple registrants can be added at any time up until the date and time of the event.
		Discount Code	New discount codes may be added or discount codes may be removed from the event which makes those codes deactivated for any new registrants attempting to enter them in for that particular event.

Canceling or Deleting Events - Rules with Advanced Registration Module and Based off Event Schedule

Cancel Event - Series (Registration Enabled during Event Add at the Series Level and Payment was enabled for event.)
If the series is cancelled and there are registrants who are approved, they are automatically cancelled and an email is sent to them from the Calendar Registration Form area based off what was configured for cancellations. This is also the case if the individual registrant cancels their own registration.
Cancel Event - Occurrence or Single Day Event
If an occurrence is cancelled and there are registrants who are approved, they are automatically cancelled and an email is sent to them from the Calendar Registration Form area based off what was configured for cancellations. This is also the case if the individual registrant cancels their own registration.
Delete Event - Series
An event cannot be deleted that has payment tied to. The delete option will be disabled once that event is selected for modify/delete.
Delete Event - Occurrence or Single Day Event
An event cannot be deleted that has payment tied to it. The delete option will be disabled once that event is selected for modify/delete.

Purge Events
If a purge event process is performed and an event that would normally meet the purge criteria selected has registration payment enabled and there is at least one approved registrant, then the event will not be included in the purge action.

General Rules, Synopsis

- If active or pending registrants are tied to an event, you cannot change the registration form template or registration type.
- If a series-level registration is selected for an event series, you cannot change any registration parameters at the occurrence level.
- If there are any occurrence changes, you cannot modify any registration parameters at the series level.
- If a series-level registration is selected for an event series, you cannot change any registration parameters at the occurrence level, including cost and discount codes.
- If there are any occurrence changes, you cannot modify any registration parameters at the series level, including deadline and cost.
- Rules that apply throughout when entering costs are:
  - Amounts must use commas to separate thousands, use the period character to separate whole numbers from decimal parts, and have two digits after the decimal point, if any.
  - Percentages must use the percent sign (%).

Managing Payment Accounts

Clients licensing the Advanced Registration Module can add an unlimited number of payment accounts. Payment Accounts can be set up to work with PayPal Express.

PayPal and Active Data Calendar

To test payments without using live PayPal accounts, you need to set up a PayPal Sandbox Test Environment. Sample credentials are listed below. Within this Sandbox account, you can add multiple test accounts on both the business side and personal side, so you can test both sides of the transaction.

Logging in to PayPal

Before you start working with PayPal, you must log in to PayPal.

- Development Link: https://developer.paypal.com/
- Email Address: sample@activedatax.com
- Password: TestAccountADE123

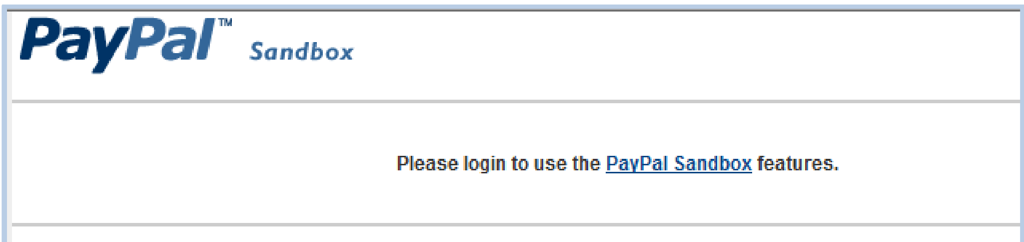
Logging in takes you to the Sandbox home page, from which you can navigate to any area of the development environment.

- **Test Accounts.** The section that's used to set up and maintain all the test accounts. You use these accounts to mimic the business and personal accounts for each PayPal transaction.

- **Test Email.** Here, you can see all emails generated during a PayPal transaction. Because test accounts do not have a valid email addresses, you must look here to see what would be sent to each account by PayPal throughout the payment process.
- **API Credentials.** This is where you manage the API credentials needed to process transactions. You can also get these when you log in to a test business account, which is how a live site will get their API Credentials.
- **Test Tools.** This is where PayPal provides tools to help in testing.

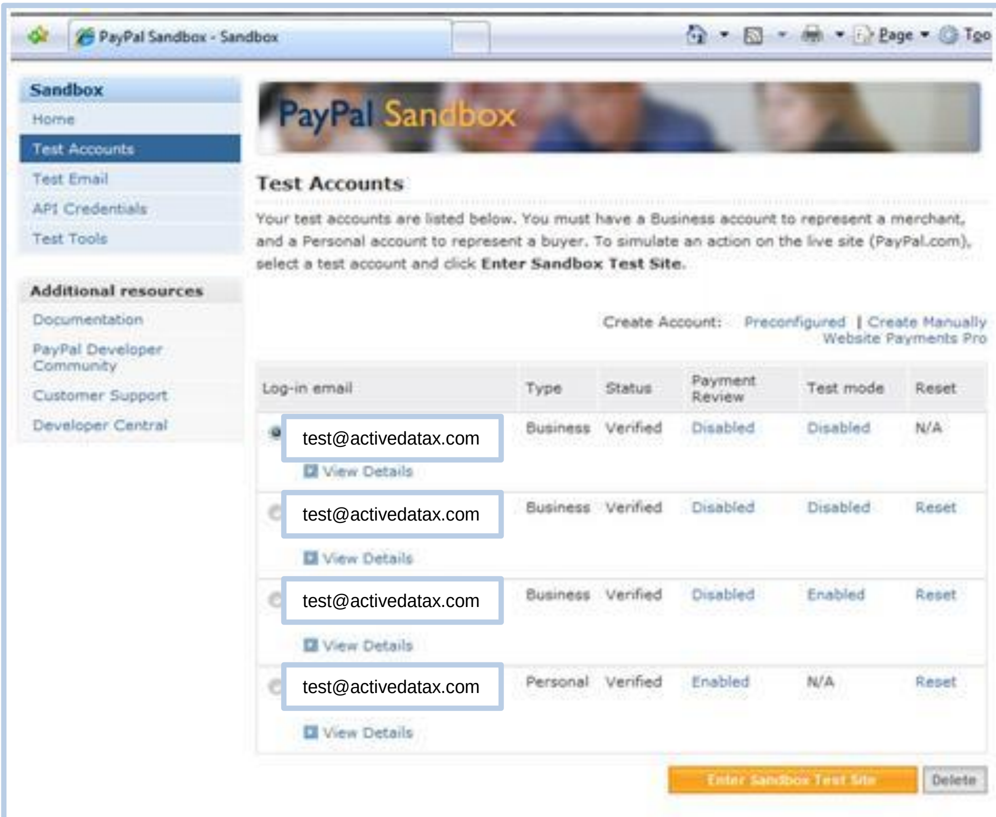
Once you are logged in, you can start testing payments through PayPal.

NOTE: You must be logged into the PayPal development site before processing any requests through Calendar. If you are not logged in, you receive the error:



Test Accounts

From this screen you can configure test accounts:



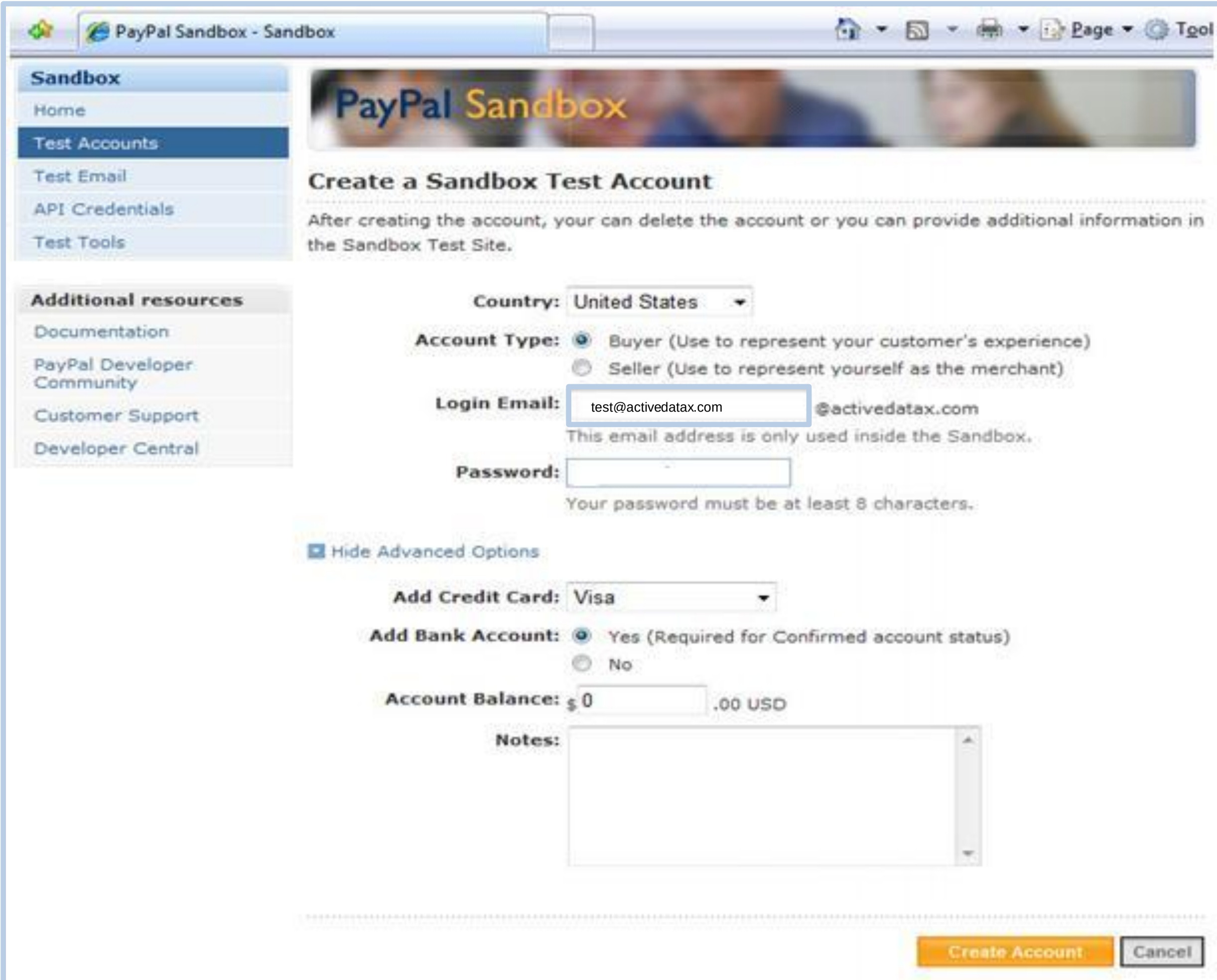
You can configure two types of accounts, *Business* and *Personal*, as follows:

- **Business Account**: A business account will mimic the site/organization (merchant) that is accepting payments.
- **Personal Account**: A personal account will mimic the user who is making a payment (registrants).

You can configure an account using preconfigured settings or you can go through a wizard and configure you account yourself. The "Create Manually" way of configuring a test account is very close to what a real user will see when setting up a live PayPal account.

There are a few options you can set from this screen. The first is payment review. If you enable this, every payment that is sent to this account will need to be reviewed by you and either accepted or declined. PayPal does this automatically for each payment in the live system, but for testing they allow you to accept or decline payments to see what happens. The other is the test mode. If you enable this, then you can simulate an API error for testing purposes. The setting of this field will not affect sales demos since it just tells the system if errors can be raised through the API.

Preconfigured Account



Required Fields

Country: The country the test account is based in.

Account Type: Choose a Business account (Seller) or a Personal account (Buyer)

Login Email: The email address for logging in to this test account. Does not have to be a valid email address for testing.

Password: The password for logging in to this test account. Since it's a test account, the only restriction on the password is that it must be at least 8 characters.

Advanced Optional Fields

Add Credit Card: For adding a fake credit card to the test account. You specify the card type. It configures the rest.

Add Bank Account: Adds a fake bank account to the test account.

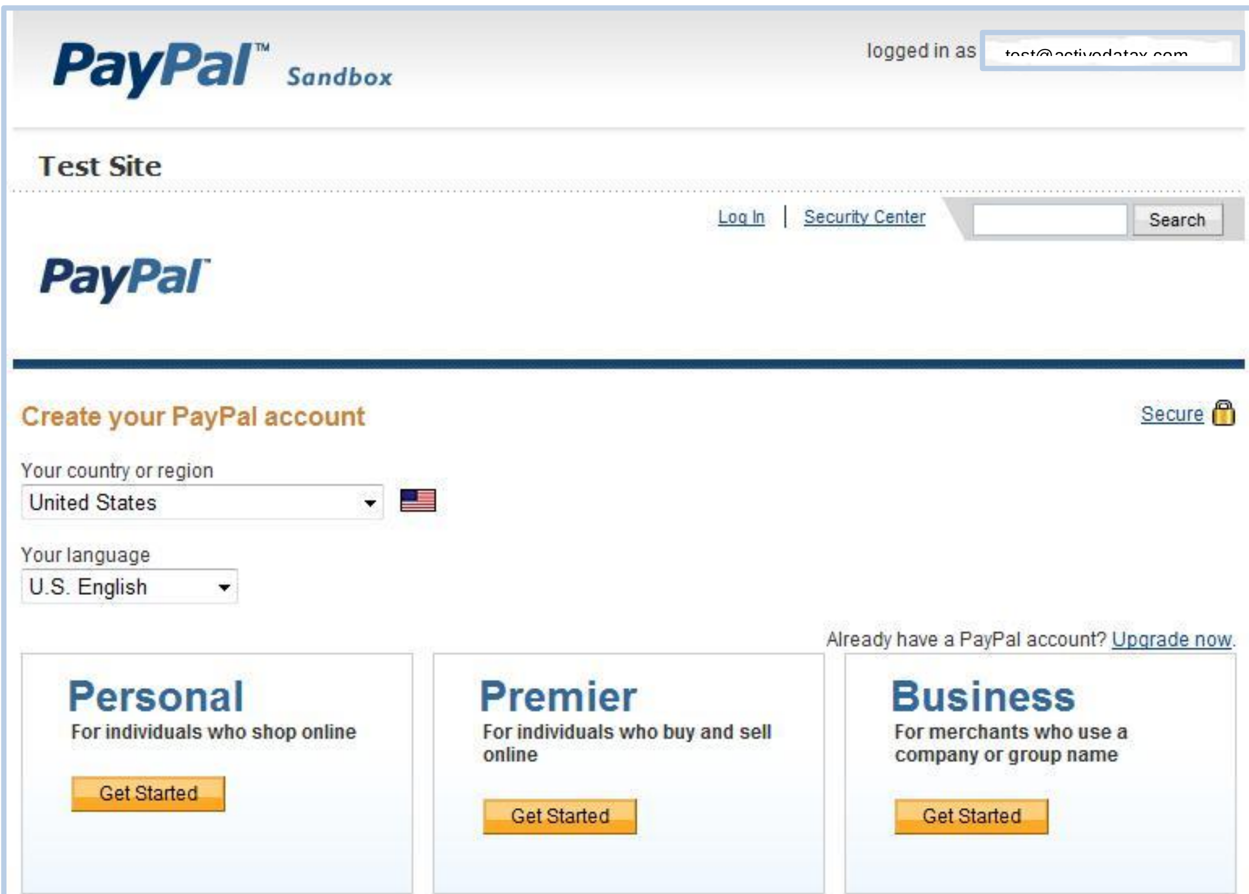
Account Balance: Adds a beginning balance to the PayPal account. Useful in testing how an instant payment from a PayPal balance is handled.

Notes: Free-form notes about the account.

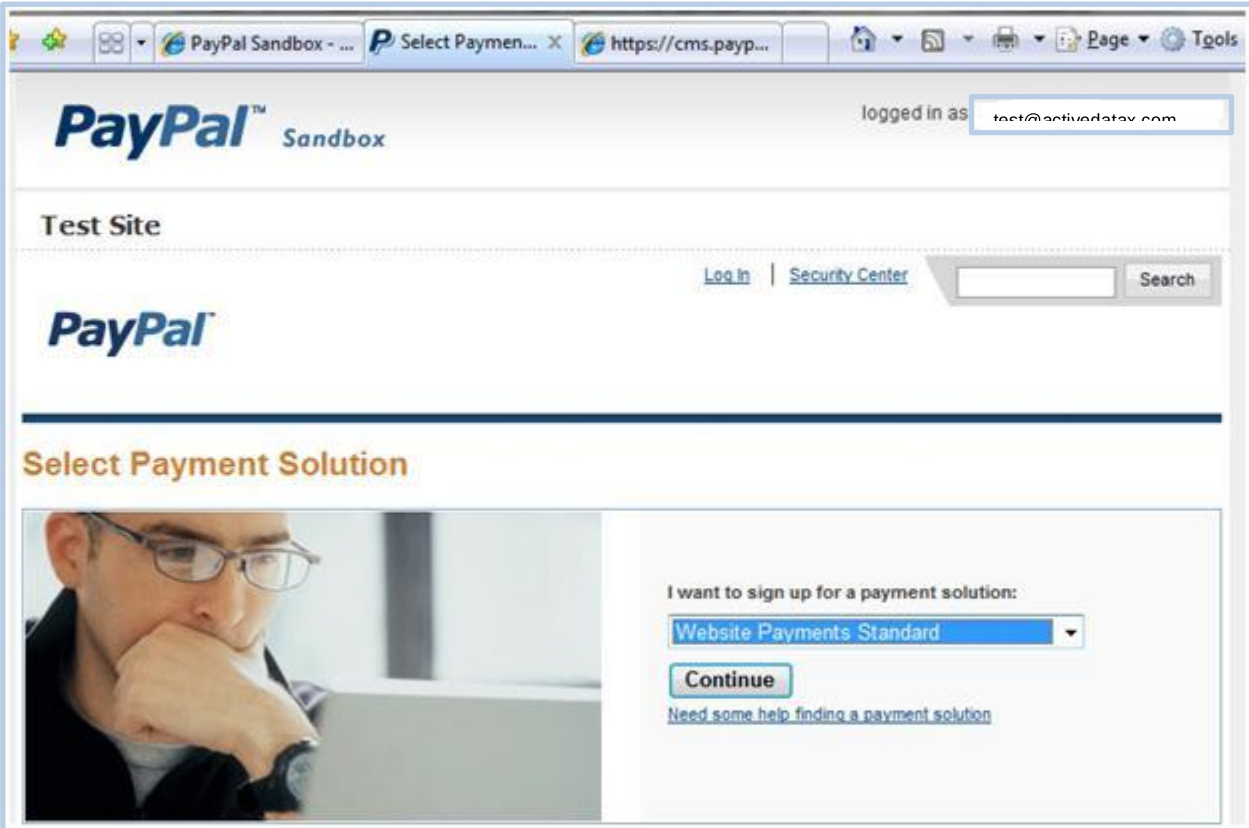
Manually Created Accounts

First, choose the type of account to create. Your choices are *Personal*, *Premier* and *Business*. For the purposes needed within Active Data Calendar, only Personal and Business are needed. Creating a business account manually is the preferred method since it closely mimics the steps a business will need to take on the live site to get set up. A personal account is easier to setup and can be done using the preconfigured options.

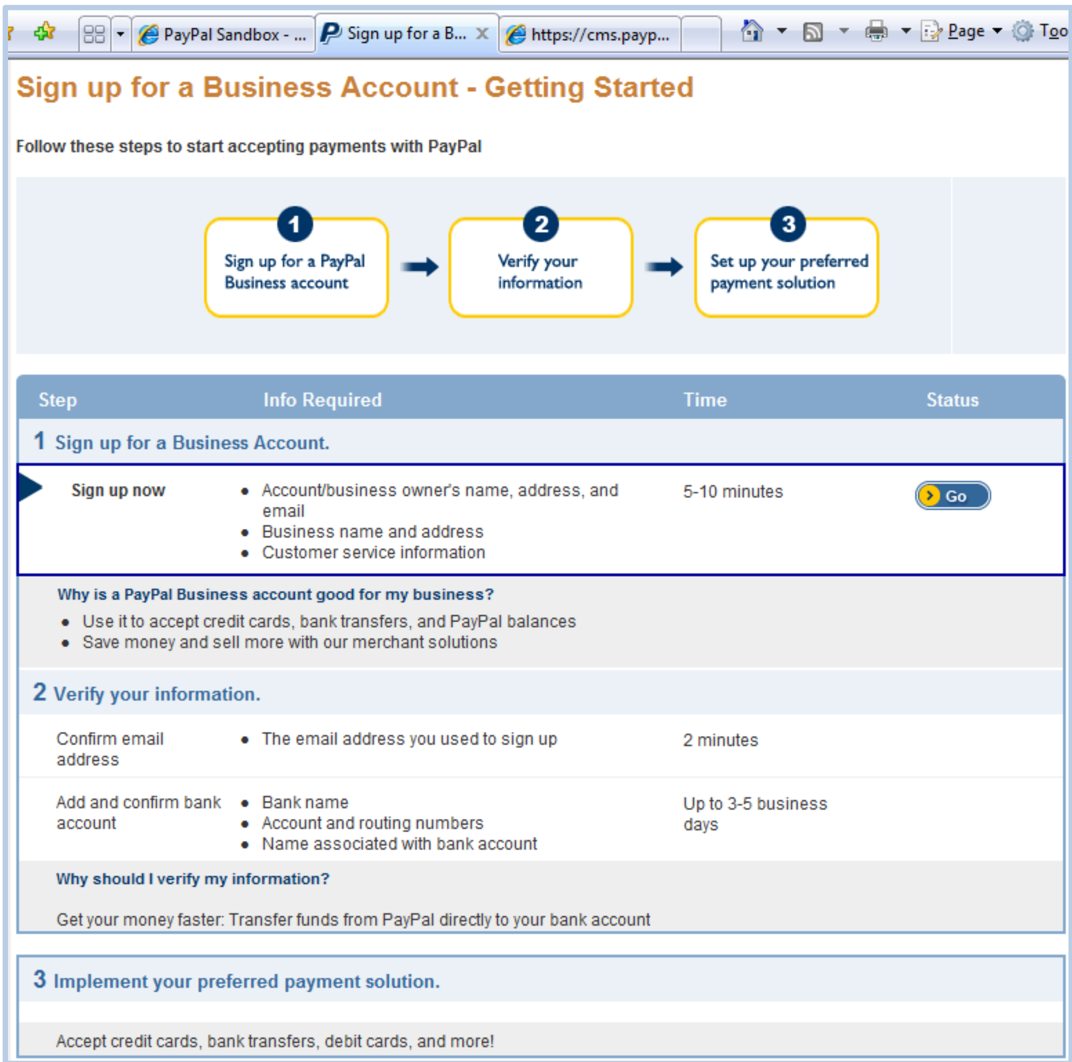
1. Start by selecting your country or region, then your language, and click *Get Started*. Next, a wizard helps you set up your business account.



2. Next, select the type of payment solution to use. Active Data Calendar requires a site to have at least Website Payments Standard (which is free), but it will work with Websites Payment Pro if you choose to go with that paid version. For testing, select *Website Payment Standard* and click Continue.



3. Having selected your payment solution, you are are taken to the three-step business account sign-up process. Here, you enter and then verify your business information, and finally set up the payment solution you chose in step 2. Remember that this is not a live account, so you do not have to put in valid information. Active Data suggests creating accounts using email addresses that describe the account. For example sales_main@activedatax.com or personal_user1@activedatax.com. No emails will be sent to these accounts. All emails that would normally be sent will be accessible from the Sandbox.



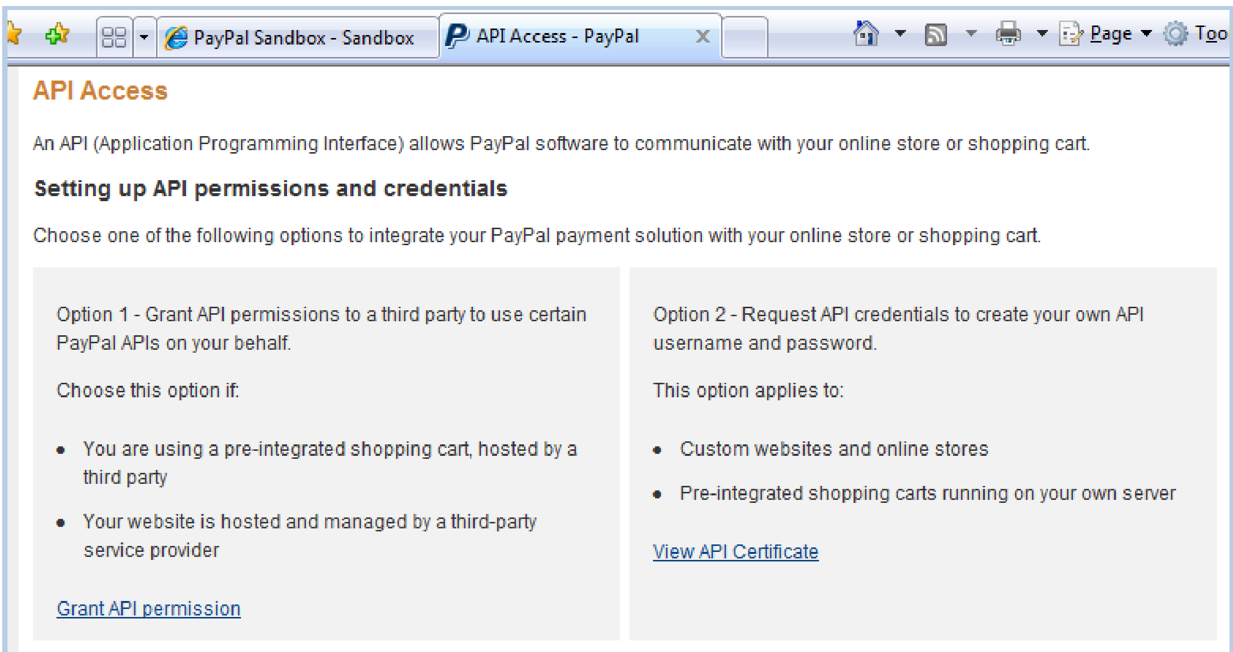
Accessing Test Accounts and getting the API Credentials

Once you have set up your testing accounts, you need a way to access them. From the Test Accounts screen, you will select which account you wish to access, then click on Enter Sandbox Test Site. This will take you to a log-in page having the email address pre-populated with the account you selected to access. Enter the password for that account and click Log In. Once you're logged in, you are taken to a Sandbox site that mimics what that account would look like if you logged into it from the live PayPal site. You can do everything in here that you could with a live account. For a personal account, the most used functionality is to check the payments you have made or update your personal or financial information. If you have used PayPal before, this site and its layout will be familiar.

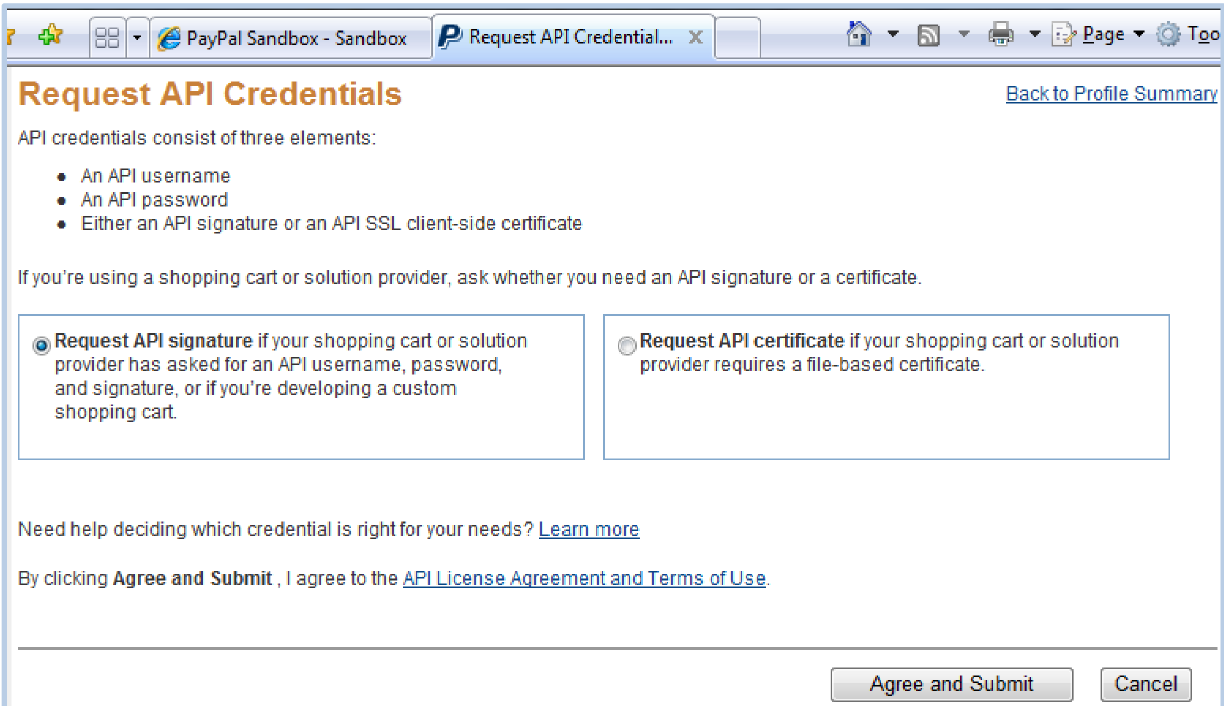
1. For a business account, it's important to get your API Credentials, so you can start processing payments. To do this, click on the *Profile* submenu and then click on *API Access* under *Account Information*. You next come to a screen that gives you two options:

   Option 1: Grant API permissions to a third party to use certain PayPal APIs on your behalf.

   Option 2: Request API credentials to create your own API username and password.



2. Choose Option 2 to view your API Credentials. This gives you the choice to request an API Signature or an API Certificate. Calendar uses API Signature, so select that option, then click *Agree and Submit*.



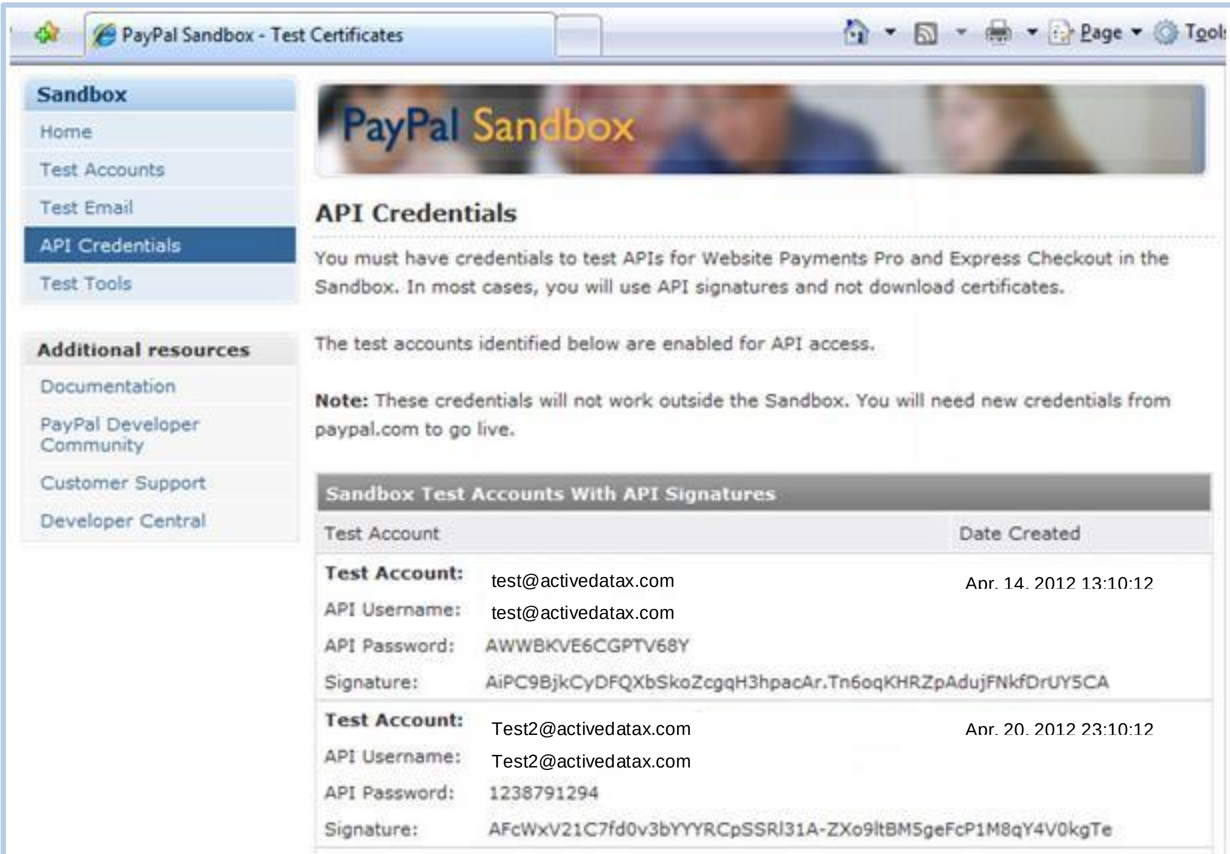
3. Note this information. You will need it to set up your PayPal account in Calendar.

Test Emails

PayPal sends out emails when a transaction occurs. Since the test accounts do not require valid email addresses, these emails are stored in the Sandbox. To access these emails click *Test Email* on the home page of the Sandbox or on the left navigation menu. You are brought to a page listing the most recent emails sent, ordered by date, most recent first. To view an email, click on its Subject.

API Credentials

PayPal makes it easy to see the API credentials for all of your business accounts in one place. Click on the API Credentials link on the home page of the Sandbox or on the left navigation menu. On this screen all of the API credentials will be listed for each account. These credentials are not valid for the live PayPal account and if you try to use them you will get an error.



Test Tools

PayPal provides only one test tool, which Active Data Calendar does not currently use, so we do not need to access this.

Maintaining Payment Accounts in Calendar

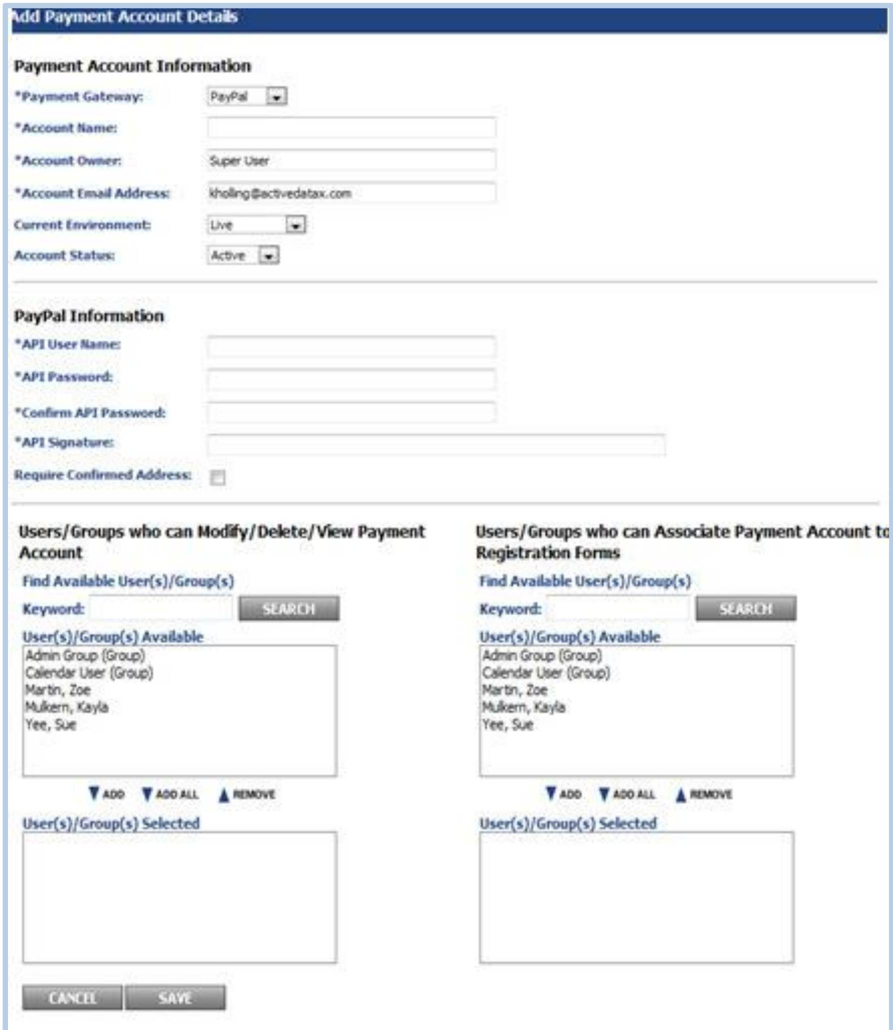
Add Account

First, you need to add a payment account into the system. Log into your Calendar, then click on the *Registration* tab, then on *PAYMENT: Add*. This brings you to the Payment Account Add screen. This screen is broken down into two sections. The first is for general account information required by Calendar for all payment accounts. The second area depends on the payment gateway you are using for your payment account, and the specific credentials required by that payment gateway.

Prior to setting up PayPal or TouchNet account information within Calendar, you must have already set up a PayPal Merchant Account or TouchNet account with the respective gateway company.

Payment Account Information

With this function, you add account information to your Calendar Installation. Use the following steps to add the account details.



1. **Payment Gateway:** Select PayPal.
2. **Account Name:** Required. Enter the name of the account. Accepts up to 100 alphanumeric characters.
3. **Account Owner:** Required. Enter the account owner.
4. **Account Email Address:** Required. Enter the account email address.
5. **Current Environment:** Choose the environment type, *Live* or *Development*. Conduct tests using the *Development* account.
6. **Account Status:** The account can either be *Active* or *Inactive*.

PayPal Information

1. **API User Name**: Supplied by PayPal. Required.
2. **API Password**: Supplied by PayPal. Required.
3. **Confirm API Password**: Re-enter the API Password supplied by PayPal. Required.
4. **API Signature**: Supplied by PayPal. Required.
5. **Require Confirmed Address**: Select this check box to require a confirmed shipping address. A confirmed address is a shipping address that PayPal has established as belonging to the PayPal account holder. To be protected by PayPal's Seller Protection Policy, you must require that the shipping address be a confirmed address.

Payment Gateway Information

A section for setting up payment gateways displays if enabled within your Calendar license. If you have a payment gateway configured, you must supply the configuration information specifc to that gateway. This information is provided to you by your gateway provider. The actual data items vary according to the specific gateway you are using.

Users/Groups who can Modify/Delete/View Payment Account

You can *ADD*, *ADD ALL* or *REMOVE* users and/or groups with the ability to modify, delete, and view the payment account information associated with this account.

Users/Groups who can Assign Payment Account to Registration Forms

You can *ADD*, *ADD ALL* or *REMOVE* users and/or groups with the ability to assign this payment account to their registration forms. When you have added all the required information to the payment account, click SAVE to save the payment account. Clicking SAVE writes the current entries to the database and makes a new drop-down field entry available for assignment to registration forms. Clicking CANCEL clears all current screen values.

Modify or Delete Payment Accounts

You can modify a Payment Account's details or completely remove the Payment Account from the system. Use the following instructions to begin the modify or delete process.

Select an Account Name: Use the drop-down to select the name of the account that you would like to modify or delete. Then select the action you would like to take from the two radio button options:

- **Modify**: Allows you to change Payment Account information. *Note: You must have Add/Modify/Delete permissions to modify the details of the account.
- **Delete**: Presents a *Delete Payment Account* confirmation. If you confirm the deletion, the Payment Account is entirely removed from the Calendar database. *You cannot delete a Payment Account if it is tied to any registration forms.*

Click SUBMIT to finalize your action and proceed to either the first step in the modification process, or to the *Delete Payment Account* confirmation screen.

Modify Payment Account

This function modifes Payment Account Information to your Calendar installation. All fields can be modified for a payment account.

Payment Account Information

Use this function to add Account Information to your Calendar Installation. Follow these steps:

1. **Payment Gateway:** Indicates which payment gateway this payment account uses. Cannot be modified.
2. **Account Name**: Required. Enter the name of the account, up to 100 alpha-numeric characters.
3. **Account Owner**: Required. Enter the owner of the account.
4. **Account Email Address**: Required. Enter the account email address.
5. **Current Environment**: Choose an environment type of *Live* or *Development*. The Development account is for testing.
6. **Account Status**: The account can either be active or inactive.

PayPal Information

1. **API User Name**: Supplied by PayPal. Required.
2. **Change Password**: Select this check box to change the current API password.
3. **API Password**: Supplied by PayPal. Required.
4. **Confirm API Password**: Re-enter the API Password supplied by PayPal. Required.
5. **API Signature**: Supplied by PayPal. Required.
6. **Require Confirmed Address**: Select this check box to require a confirmed shipping address.
   A confirmed address is a shipping address that PayPal has established as belonging to the PayPal account holder. To be protected by PayPal's Seller Protection Policy, you must require that the shipping address be a confirmed address.

Payment Gateway Information

This section displays if enabled within your Calendar license, showing your payment gateway set-up parameters. The data items shown depend on the gateway. You may modify them as required.

Users/Groups who can Modify/Delete/View Payment Account

You can *ADD*, *ADD ALL* or *REMOVE* users and/or groups with the ability to modify, delete, and view the payment account information associated with this account.

Users/Groups who can Assign Payment Account to Registration Forms

You can *ADD*, *ADD ALL* or *REMOVE* users and/or groups with the ability to assign this payment account to their registration forms.

When you are finished modifying the payment account information, click SAVE to write the changes to the Calendar database. The modified account is available for assignment to the registration forms. Click CANCEL to stop the modification process and return to the previous screen.

Delete Payment Account

Here you delete a Payment Account from your instance of Active Data Calendar.

- Select "Yes" to finalize the deletion.
- Select "No" to exit without deleting the payment account.

NOTE: You *cannot* delete a payment account that is tied to a registration form.

Cancel: Click this button to stop the delete process and return to the previous screen.

Delete: Click this button to remove the payment account from the database. After deletion, the payment account is not available to registration forms.

View Payment Accounts

The Calendar allows you to view its currently set up payment accounts.

View Types Available

- **View Available**: Shows all payment accounts available for the current logged-in user to add, modify or delete.
- **View My Accounts**: Shows all payment accounts created by the current logged-in user.

Payment Account Fields

These fields appear on the View Payment Account screen:

- **Gateway**: The gateway related to each specific account. Options include PayPal or TouchNet.
- **Payment Account Name**: This link takes the user to the *Payment Account Details* page.
- **Account Owner**: The Payment Account Owner.
- **Form(s) w/Account**: The total number of registration forms utilizing this payment account.
- **Status**: The account status, *Active* or *Inactive*.

Payment Account Details

Displays this Payment Account Information:

- **Account Name**: The name of the account.
- **Account Owner**: The account owner’s name.
- **Account Email Address**: The account’s associated email address.
- **Current Environment**: *Live* or *Development*. Development accounts are for testing.
- **Account Status**: *Active* or *Inactive*

- **Forms w/Account**: The number of registration forms to which this account is tied.
- **Created By**: The account creator's username.
- **Created On**: Date and time the account was created.
- **Modified By**: Username of the last person to modify the account.
- **Modified On**: Date and time the account was last modified.

PayPal Information

- **API User Name**: The API User Name supplied by PayPal.
- **API Password:** The API Password supplied by PayPal, encrypted.
- **API Signature:** The API Signature is supplied by PayPal.
- **Require Confirmed Address:** *Yes* or *No*. A confirmed address is a shipping address that PayPal has established as belonging to the PayPal account holder. To be protected by PayPal's Seller Protection Policy, you must require that the shipping address be a confirmed address.

Payment Gateway Information

This section displays if enabled within your Calendar license, showing your payment gateway set-up parameters. Use this information to verify your payment account.

Users/Groups who can Modify/Delete/View Payment Account

A list of users and groups that has permissions to modify, delete and view the account.

Users/Groups who can Assign Payment Accounts to Registration Forms

A list of users who can assign the account to Registration Forms.

Unfiltered View

The top right hand side of the screen includes a link "Back to Full List".

Managing Forms

Clients licensing the Advanced Registration Module can add an unlimited number of registration form templates to their installation in a Registration Form Library. Custom Workflow rules can be setup for each form, including who can assign the form to their events, who receives email notifications regarding new registrants and who can approved/deny registrations from the form.

To access the Advanced Registration Form creation and management area, click on the REGISTRATION tab, then *FORMS: Add - Modify/Delete - View*.

Add Form

From this screen you can create a new Advanced Registration form, with these general details:

- **Form Name**. Enter a form name of up to 100 alphanumeric characters.
- **Form Type**. Select the type of form that you would like to create, either *Registration Form without Payment* or *Registration Form with Payment* .

- Users/Groups with Permissions to use the form in various capacities
    - **Users/Groups to Assign Form to Events**. Search (by User or Group Keyword) to find and add users and groups to the list box entitled "User(s)/Group(s) Selected." User(s) and Group(s) Selected for this option will be the only users and groups who will see the form in their form library drop-down menu when adding events and selecting to enable registration.
    - **Users/Groups to Receive Registration Emails**. Search (by User or Group Keyword) to find and add users and groups to the list box entitled "User(s)/Group(s) Selected." User(s) and Group(s) Selected for this option will be the only users and groups who will receive emails that a new registration has completed the form and requires processing. ***NOTE**: You may choose to have more users/groups notified via email of new registrants, than the number of users/groups that you select to be able to process registrants (approve/deny). Choosing users and groups to receive emails is a way to notify individuals about registrants as more of an information only process (FYI) with no action required.
    - **Users/Groups to Process Form Registrants**. Search (by User or Group Keyword) to find and add users and groups to the list box entitled "User(s)/Group(s) Selected." User(s) and Group(s) Selected for this option will be the only users and groups who will be able to login to the Calendar administration area and see the events that have this form enabled within the Manage Registrants area in order to process (approve/deny/download) registrants.
    - **Users/Groups who can Modify/Delete Registration Form**. Search (by User or Group Keyword) to find and add users and groups to the list box entitled "User(s)/Group(s) Selected." User(s) and Group(s) Selected for this option will be the only users and groups who will be able to login to the Calendar administration area and select to Modify or Delete this Registration Form.
- E-mail domain control. Allows controlling the domains from which registrants may register using e-mail.
    - **E-mail Domains Authorized For Registration.** A list of domains from which registration e-mails will be accepted. If blank, Calendar places no restrictions on where registration e-mails can come from.
    - **Invalid Domain Message.** The message returned to persons sending registration e-mails from domains not in the Authorized list.

Continue to the next step of the Add Form process by clicking the **NEXT** button. If there have been fields that have not been completed correctly you will receive an error message indicating the fields that must be changed before finishing the process. Please correct these and click **NEXT**.

BACK and **FINISH** are not enabled on this screen.

Registration Text Configurations

From this screen you can select the workflow for your form, the automated reminders, and various screen and email text configuration options.

Form settings available from this screen include:

- **Form Name.** The form name displays at the top of the screen.
- **PayPal Account.** This drop-down allows you to select from the various PayPal accounts that have been setup. All registrants are automatically approved if processed through a form with payment and if their payment is approved. If their payment cannot be processed for any reason, then they will remain in a pending status and you will be required to either manually approve them once you receive an alternate form of payment or contact them to discuss other registration options. ***Note**: This option is available for form with payment.
- **Payment Account**: This drop-down allows you to select from the various credit card accounts that have been set up. All registrants are automatically approved if processed through a form with payment and if their payment is approved through their gateway. If their payment cannot be processed for any reason, then they will remain in a pending status and you will be required to either manually approve them once you receive an alternate form of payment or contact them to discuss other registration options. ***Note**: This option is available for a form with payment. **Please Note**: Each form can contain a PayPal or another payment gateway account but you may not assign multiple PayPal or payment gateway accounts to the same form.
- **Accept Checks**: If selected, the form allows registrants to select to pay by check, and will mark them as pending in your administration area until you receive the check and approve them manually to move them to *approved* status. A registration space is not debited from the total available until the pending registrant is moved to the approved list.
- **Accept Cash**: If selected, registrants may select to pay by cash . This marks them as pending in your administration area until you receive the cash and approve them manually to move them to the approved status. A registration space is not debited from the total available until the pending registrant is moved to the approved list.
- **Accept Invoice**: If selected, registrants may select to pay by invoice. This marks them as pending in your administration area until you receive the invoice and approve them manually, moving them to *approved* status. A registration space is not debited from the total available until the pending registrant is moved to the approved list.
- **Set New Registrants to**: This drop-down includes the ability to set the form workflow process. If "Approved" is selected, and this form is applied to an event, then any registrant completing the registration form will automatically be marked as approved for the event and will not require processing by any user. It will still be possible for users/groups that have been granted permission to process registrants from this form to login to the Calendar administration area and deny or cancel a registrant. If "Pending" is selected, and this form is applied to an event, then any registrant completing the registration form will be placed on the pending registrants list for this event (under Manage Registrants in the Calendar administration menu) and all registrants will need to be manually reviewed and approved or denied for the registration to the event. ***Note**: This option is only available for forms without payment.

- **Send Email Reminder**: This allows the form created to set an automated reminder schedule for the form that will kick-off an email at the desired interval prior to the events that the form is applied to. For example: If the form is applied to an event that has a start date and time of 07/21/2008 at 1:00 PM, and the reminder set is for 10 minutes prior to the event, then a reminder would automatically be sent to all approved registrants of that event at 12:50 PM on 07/21/2008. If the same form was applied to a different event that started on 08/01/2008 at 3:00 PM, then the approved registrants for that event would receive an automated reminder email at 2:50 PM.
- **Description**: This open text field allows for up to 1,000 alpha-numeric characters. This field is optional.

Form Text *(if Payment is <u>not</u> enabled)*

These text fields are displayed for configuring various areas of text displayed throughout the registration process:

- Text to appear at top of form
- Text to appear at bottom of form, above buttons
- Text to appear on preview screen
- Text to appear on final confirmation page

Each field name describes the area of the form and/or process that is being configured within that text field. Default text is supplied for each configurable text area and if maintained, does not require users to make any modifications to these fields. However, if you do desire to configure any of these text areas, each field holds up to 1,000 alphanumeric characters.

Email Opening Text and Closing Text *(if Payment is <u>not</u> enabled)*

Various e-mails are sent by the Calendar application at different stages in the registration workflow. Each e-mail can be selected from the *Select Email* drop-down list. If selected, the default e-mail text is provided in the appropriate fields. Some event details cannot be edited within each e-mail. These are not displayed here. The e-mail opening and closing text, however, *will* display, and can be modified for each e-mail as desired. check boxes are also displayed for some e-mails that note the option to remove the "Withdraw" feature, and other configurable text. If these check boxes are left selected, then the default settings will be applied. To remove an option, deselect its check box.

The Use HTML *Option*

Active Data Calendar now supports composing e-mail opening and closing text in HTML format. Select this check box to bring up WYSIWYG editing capabilities.

E-mails included for configuration

These e-mail types are available:

- Registration Confirmed

- Registration Cancelled
- Registration Approved
- Registration Deleted
- Registration Denied
- Registration Reminder

Form Text *(if payment is enabled)*

These text fields are displayed for configuring various areas of text displayed throughout the registration process:

- Text to appear at top of form
- Text to appear at bottom of form, above buttons
- Text to appear on preview screen
- Text to appear on final confirmation page if Payment Approved
- Text to appear on final confirmation page if Payment Declined

Each field name describes the area of the form and/or process that is being configured within that text field. Default text is supplied for each configurable text area and if maintained, does not require users to make any modifications to these fields. However, if you do desire to configure any of these text areas, each field allows for up to 1,000 alpha-numeric characters.

Email Text *(if payment is enabled)*

The Calendar application can send emails at various stages of the registration workflow. Each email is included in the drop-down for selection. If selected, the default email text is provided in the appropriate fields. There are event details that cannot be edited within each email and they will not display for configuration. The email opening and closing text, however, will display and can be modified for each email. There are also checkboxes displayed for some emails that note the option to remove the "Withdraw" feature and other configurable text. If these checkboxes are left selected, the default settings are applied. If you would like to remove one of these options, deselect the checkbox.

Configurable registration-related e-mails include:

- Registration Confirmation
- Registration Approved
- Registration Denied
- Registration Deleted
- Registration Cancelled
- Registration Reminder

All of these e-mails can be composed using HTML text. Just select the *Use HTML* check box. Bear in mind that HTML code counts toward the maximum message length of 4000 characters. The more complexly formatted your message, the less room remains for the actual content.

Send Emails From: All emails sent using the form will have the "From" field set to this address. If nothing is entered in this field, all emails sent from this registration form will be automatically "From" the event owner.

Form Buttons

There are various buttons included within the registration process and each can be configured to further customize your registration form. Default images are provided for the form buttons listed below, but you can replace one or more by browsing for a new image file and uploading it to the Calendar. Clicking the button's image name displays the default image supplied by the Calendar (or the current image you have uploaded).

The buttons you can configure include:

- Submit
- Back
- Finish
- Reset
- Cancel
- Credit Card
- Cash
- Check
- Invoice

Completing the Add Form Process

NEXT: Continue to the next step of the Add Form process. If any fields have not been completed correctly you receive an error message indicating which fields to change before finishing the process. Please correct these and click **NEXT** again.

FINISH: This button is not enabled on this screen.

Registration Fields

From this screen you can add the fields that you would like to include on your form. There are standard field choices and customizable field choices.

The following three fields are required for all registration forms and cannot be disabled or modified. These fields must completed by every registrant:

- First Name

- Last Name
- Email

Standard Contact Fields

The first two checkboxes on this screen allow you to select to include either ALL Standard Domestic or International Contact Fields. If either of these global selections are chosen, then you do not have the ability to configure anything about the contact fields, as they will be added to your form in their standard format.

If you would like to choose from the list of standard domestic and international contact fields on an individual field basis, then skip the top two checkboxes and choose the checkbox beside each individual field that you would like included starting with "Company". For each field that you choose to enable in this manner, you will also be able to select if you would like to make the field "Required". If you select the checkbox for "Required" then this will be a mandatory field for completion by any individual completing this registration form once linked from an event.

For the "Address" field you will be able to also choose to use the standard Domestic or International field options.

Additional Fields

You may add more fields to your form from these field types:

- Checkbox
- Dropdown
- Radio button
- Textarea
- Text field
- Date selector

Descriptions

Checkbox: Allows registrants to select one or more options from a list.

Parameters that apply to check boxes:

- **Field Label:** Displays before the checkbox options for selection. Example: *Please select what you would like for dinner:*
- **Required:** If selected, users must supply this field.
- **Checkbox Selection Options:** A text field displays where you may type the specific answers to your question. Each answer should be entered on a new line. There is no limit to the number of options or the number of characters per option.

- **Allow Write-In Response:** Selecting *No* requires no further action on your part. If you select *Yes*, enter the label for the write-in response field, such as "Other:". Write-in responses are a way for registrants to enter a choice not included on the list you are providing.
- **Selection Display:** The selection display option allows the user to decide if they want to have the checkbox options displayed horizontally on the form or vertically. This field, along with the # per row option will dictate how the checkbox selection options are displayed on the form.
- **Finalizing your Custom Checkbox Field:** To finalize your custom checkbox field, click ADD. This validates that you have completed all the required elements for this new field. If you are missing one or more required elements, you are provided with error indication(s). If not, the field is added to your form. Selecting PREVIEW shows a preview of your new field prior to adding it to the form. CANCEL removes the new custom field and displays your form without the field added.
- **Field Identifier:** A string uniquely identifying the field on the form, for subsequent targeting by the software. If you leave this blank, the system will generate a form-unique ID for it.

Comma-separated Text Field: Allows registrants to enter in a string of comma-separated text values in a single text field (the text area can scroll side to side within the field).

Parameters that apply to comma-separated text fields:

- **Field Display Name**: Required. A label for the field. Example: "Sponsors:".
- **Required**: If selected, users completing this form cannot leave the field blank.
- **Field Identifier**: This will serve as the field identifier in the database and will be included with all data downloads related to this registration form. This field is auto-populated with the text that is entered in the "Field Display Name" field but may be modified to be unique. Example: Field Display Name may be "Unique Account Numbers that may View Events:" but the Field Identifier may be "Unique_Account_IDNS". This is a required field.
- **Max Characters**: This allows you to enter in the total number of characters that you would like a registrant to be able to enter in this field.
- **Field Data Type**: This allows you to select if the characters entered in the text field can be alpha only, numeric only or both alpha and numeric.
- **Width**: You may set the width of your text field in pixels (px), em or percentage.
- **Finalizing your Custom Text Field**: To finalize your custom text field, please click the link entitled "ADD". This will validate that you have completed all the required elements for this new field to be added to the form. If you are missing required elements, you will be provided with an error message on what fields require correction. Otherwise, the field will be added to your form. If you select the "PREVIEW" link, then you will be able to see a preview of your new field prior to adding it to the form. "CANCEL" will remove the new custom field and display your form preview without the custom field added.

- **Field Identifier:** A string uniquely identifying the field on the form, for subsequent targeting by the software. If you leave this blank, the system will generate a form-unique ID for it.

Dropdown: Allows registrants to select one option from a dropdown menu.

Parameters that apply to dropdown fields:

- **Field Label**: Required. A label for the field. Example: "Event Sponsor:".
- **Required**: If the checkbox beside of "Required" is selected, then this will be a mandatory field for completion by all users completing this form.
- **Dropdown Selection Options**: A text field displays where you may type the specific answers to your question or selection options. Each answer/option should be entered on a new line. There is no limit to the number of options or the number of characters per option.
- **Allow Write-In Response**: If "No" is selected, then no further action is required. If "Yes" is selected, then please enter the desired label for the write-in response field. Often times a write-in response is enabled if you would like to provide the option for registrants to enter in a choice that may not be included on the standard list you are providing. A common "write-in response label" is "Other:".
- **Finalizing your Custom Dropdown**: To finalize your custom dropdown, please click the link entitled "ADD". This will validate that you have completed all the required elements for this new field to be added to the form. If you are missing required elements, you will be provided with an error message on what fields require correction. Otherwise, the field will be added to your form. If you select the "PREVIEW" link, then you will be able to see a preview of your new field prior to adding it to the form. "CANCEL" will remove the new custom field and display your form preview without the custom field added.
- **Field Identifier:** A string uniquely identifying the field on the form, for subsequent targeting by the software. If you leave this blank, the system will generate a form-unique ID for it.

Radio Button: Allows registrants to select just one option from a list of choices.

Parameters that apply to radio button fields:

- **Field Label**: Required. A label for the field. Example: "What size T-Shirt do you need?".
- **Required**: If the checkbox beside of "Required" is selected, then this will be a mandatory field for completion by all users completing this form.
- **Radio Button Selection Options**: A text field displays where you may type the specific answers to your question or selection options. Each answer/option should be entered on a new line. There is no limit to the number of options or the number of characters per option.
- **Allow Write-In Response**: If "No" is selected, then no further action is required. If "Yes" is selected, then please enter the desired label for the write-in response field. Often times a write-in response is enabled if you would like to provide the option for registrants to enter in a choice

that may not be included on the standard list you are providing. A common "write-in response label" is "Other:".

- **Selection Display**: The selection display option allows the user to decide if they want to have the radio options displayed horizontally on the form or vertically. This field, along with the # per row option will dictate how the radio selection options are displayed on the form.
- **Finalizing your Custom Radio Buttons**: To finalize your custom radio buttons, please click the link entitled "ADD". This will validate that you have completed all the required elements for this new field to be added to the form. If you are missing required elements, you will be provided with an error message on what fields require correction. Otherwise, the field will be added to your form. If you select the "PREVIEW" link, then you will be able to see a preview of your new field prior to adding it to the form. "CANCEL" will remove the new custom field and display your form preview without the custom field added.
- **Field Identifier:** A string uniquely identifying the field on the form, for subsequent targeting by the software. If you leave this blank, the system will generate a form-unique ID for it.

Text Area: Allows registrants to enter multiple lines of text (can scroll up and down).

Parameters that apply to text area fields:

- Field Label: Required. A label for the field. Example: "Comments".
- Required: If the checkbox beside of "Required" is selected, then this will be a mandatory field for completion by all users completing this form.
- Max Characters: This allows you to enter in the total number of characters that you would like a registrant to be able to enter in this field.
- Field Data Type: This allows you to select if the characters entered in the text area can be alpha only, numeric only or both alpha and numeric.
- Width/Height: You may set the width and height of your text area in pixels (px), em or percentage. Depending on the size of the field selected, as well as the maximum characters allowed, will determine the amount of scrolling that a registrant may experience when completing the text area.
- Finalizing your Custom Text Area: To finalize your custom text area, please click the link entitled "ADD". This will validate that you have completed all the required elements for this new field to be added to the form. If you are missing required elements, you will be provided with an error message on what fields require correction. Otherwise, the field will be added to your form. If you select the "PREVIEW" link, then you will be able to see a preview of your new field prior to adding it to the form. "CANCEL" will remove the new custom field and display your form preview without the custom field added.
- **Field Identifier:** A string uniquely identifying the field on the form, for subsequent targeting by the software. If you leave this blank, the system will generate a form-unique ID for it.

Text Field: Allows registrants to enter one line of text (can scroll right to left)

Parameters that apply to text fields:

- **Field Label**: This will display before the text field as a label describing what to enter in the text field. Example: Guest Name:
- **Required**: If the checkbox beside of "Required" is selected, then this will be a mandatory field for completion by all users completing this form.
- **Max Characters**: This allows you to enter in the total number of characters that you would like a registrant to be able to enter in this field.
- **Field Data Type**: This allows you to select if the characters entered in the text field can be alpha only, numeric only or both alpha and numeric.
- **Width**: You may set the width of your text field in pixels (px), em or percentage.
- **Finalizing your Custom Text Field**: To finalize your custom text field, please click the link entitled "ADD". This will validate that you have completed all the required elements for this new field to be added to the form. If you are missing required elements, you will be provided with an error message on what fields require correction. Otherwise, the field will be added to your form. If you select the "PREVIEW" link, then you will be able to see a preview of your new field prior to adding it to the form. "CANCEL" will remove the new custom field and display your form preview without the custom field added.
- **Field Identifier:** A string uniquely identifying the field on the form, for subsequent targeting by the software. If you leave this blank, the system will generate a form-unique ID for it.

Date Selector: Allows registrants to select a date from a graphic calendar representation.

Parameters that apply to date selectors:

- **Field Label**: This will display before the field as a label describing what to enter in the text field. Example: "Birthday:" This is a required field.
- **Field Identifier**: This will serve as the field identifier in the database and will be included with all data downloads related to this registration form. This field is auto-populated with the text that is entered in the "Field Display Name" field but may be modified to be unique. Example: Field Display Name may be "When is your birthday?" but the Field Identifier may be "Birthday_Response". This is a required field.
- **Start Date**: Allows you to select a starting date. The users will not be allowed to select a date prior to the configured start date.
- **End Date**: Allows you to select an end date. The user will not be allowed to select any date past the configured end date.
- **Field Identifier:** A string uniquely identifying the field on the form, for subsequent targeting by the software. If you leave this blank, the system will generate a form-unique ID for it.

Field only available from registrant administration area

This checkbox allows users to specify that the field they are adding to the registration form only appears in the Calendar administration area. Data may be either automatically passed to this field in the database from a custom process (such as passing data from a Single Sign-On Application) or registrants may be added or modified directly from within the Calendar administration area and therefore this data could be entered and saved from within the administration area. Fields that are marked as "only available from registrant information area" will appear in a separate area of the form that is enabled on all registrant administration screens but disabled from viewing on the Public and Private Calendar registration screens.

Add Form - Registration Fields Preview and Finalization

From this screen you can preview your final form, along with configurable text, buttons and fields (including external- and internal-only fields).

This screen is separated into two main areas: External Event Registration Form (with fields available from Public/Private Registration Forms as well as Administrative screens) and Internal Registrant Information (with fields only available from within the Advanced Registration administration screens).

If the form has been configured to utilize payments then the form preview will include a placeholder to show where the event cost information would display. However, this is not the actual cost tied to any specific event since the form must first be tied to an event where the specific cost and discount options are set.

Example: Cost for the Selected Event(s): $1000.00 USD

Options available from this screen for further customizing your form:

- **DELETE**: Click to remove the field from the form.
- **MODIFY**: Click to open the field setup criteria at the top of the screen. Modify and click ADD to place the field back on the form.
- **Position Up Arrow**: If the *up arrow* is displayed beside a custom field, the field may be moved up one position on the form.
- **Position Down Arrow**: If the down arrow is displayed beside of a custom field, then that means that the field may be moved down one position on the form.

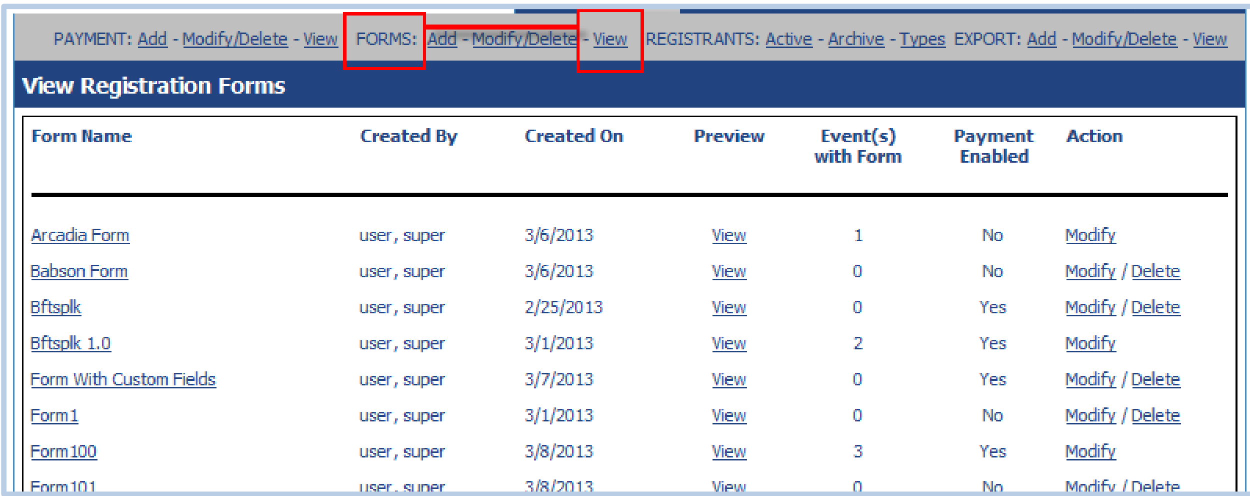
The **NEXT** button is disabled on this screen.

> **NOTE:**   A form used for even one approved registration cannot be modified.

View, Modify & Delete Advanced Registration Forms

FORMS: View

Displays the list of forms that have been created by the user accessing this screen, or for which the user has been granted permission.



Form Name	Created By	Created On	Preview	Event(s) with Form	Payment Enabled	Action
Arcadia Form	user, super	3/6/2013	View	1	No	Modify
Babson Form	user, super	3/6/2013	View	0	No	Modify / Delete
Bftsplk	user, super	2/25/2013	View	0	Yes	Modify / Delete
Bftsplk 1.0	user, super	3/1/2013	View	2	Yes	Modify
Form With Custom Fields	user, super	3/7/2013	View	0	Yes	Modify / Delete
Form1	user, super	3/1/2013	View	0	No	Modify / Delete
Form100	user, super	3/8/2013	View	3	Yes	Modify
Form101	user, super	3/8/2013	View	0	No	Modify / Delete

The information shown for each form:

- **Form Name:** Select this link to see the Form Details page. The list is sorted alphabetically by this column.
- **Created By:** The user who created the form (last name, first name)
- **Created On:** The date on which the form was created
- **Preview:** Click *View* to see an HTML preview of the form
- **Events w/Form:** Displays the number of active events that currently have this form applied.
- **Payment Enabled:** Displays if the form has payment enabled or not. Values are Yes or No.
- **Action:**Forms not actively applied to any events with approved registrants, provide *Modify* and *Delete* links. Click *Modify* to run the Modify wizard against the form. Click *Delete* to see the delete confirmation options. Select the *Yes* option and click SUBMIT to remove the form. Click SUBMIT without selecting *Yes* to return to the list of forms without removing the form.

Front-End Registration Process

Registering visitors see the registration form you have enabled for your event, along with the associated cost information once they click on the “REGISTER” icon on an event from the front-end Calendar views. They will be required to complete any registration fields, along with selecting which event occurrences they want to register for (if “multiple occurrence registration allowed” was selected for the event registration type).

If you are providing discount codes for the event, the registrant can enter a code in the field and click APPLY to update the Final Cost.

A registrant clicking SUBMIT sees a preview screen that includes their registration information along with payment information if applicable. From the preview screen, they can cancel their registration, go back and modify it, or complete their registration and make payment.

Currently, the PayPal button included is not a configurable button selection.

> **NOTE**: If mandatory series registration has been enabled, the cost will show as a series cost. If single or multiple occurrence registration has been made available, then the cost per occurrence will display beside of each occurrence in the list. The event cost is then updated to reflect the number of occurrences selected and total of all occurrence costs. The “Final Cost” shows the total amount that is required to be paid by the registrant minus any discount codes applied.

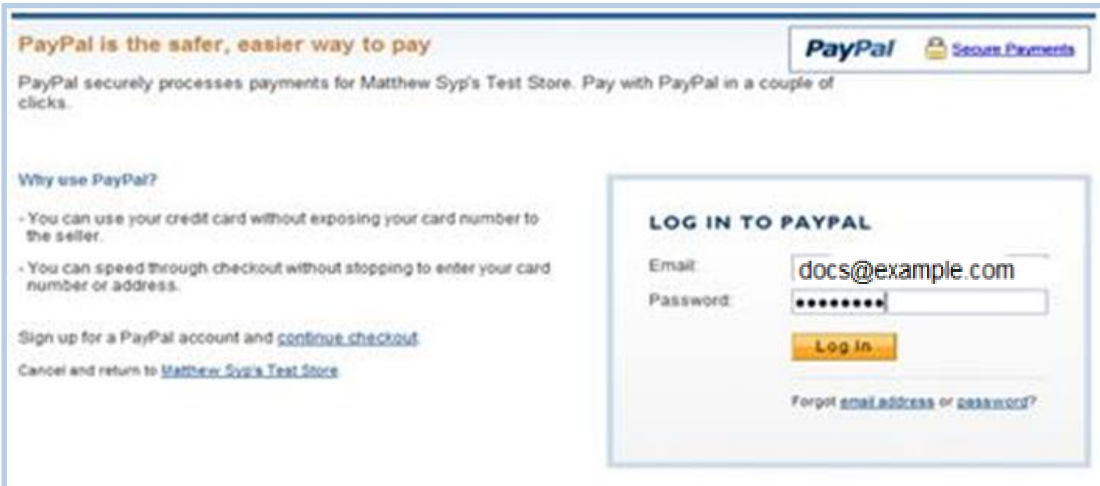
The Preview Screen allows the visitor to select their form of payment. The configuration of the form used for the event determines which payment options the form presents.

- The **PayPal**, process is outlined below.
- The **Credit Card** process is outlined below.
- A registrant selecting **Cash or Check** is automatically redirected to the confirmation message configured for the event/form and they are placed in *pending* status in the administration area. The registrant receives an email confirmation also, letting them know that they will be approved once payment is received. This confirmation email indicates the registrant’s total event cost.

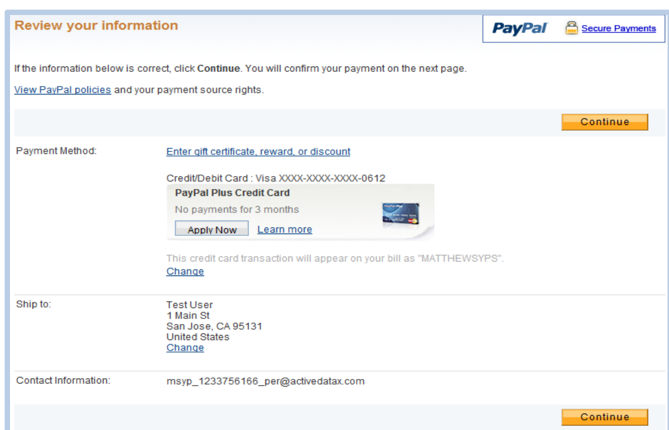
> IMPORTANT NOTE: It is highly advised that you configure your text and emails associated with forms that have Cash, Check or Invoice as payment options very carefully to inform registrants that they do not have approved spaces within the event until payment is received and they receive the “Approved” notification. Or, you may also choose to approve registrants prior to receiving payment. However, by default, all registrants who select to pay by cash, check or invoice will not debit one of your available spaces for the event until you approve them in the administration area. If other registrants choose to pay by Credit Card or PayPal and are approved, there is always a chance that all spaces could be reserved prior to the registrants in the Pending list being approved. Then you may either cancel other registrants to make space, extend the number of spaces available for your event, or inform the registrants paying by cash or check that spaces are no longer available.

PayPal Payment Process

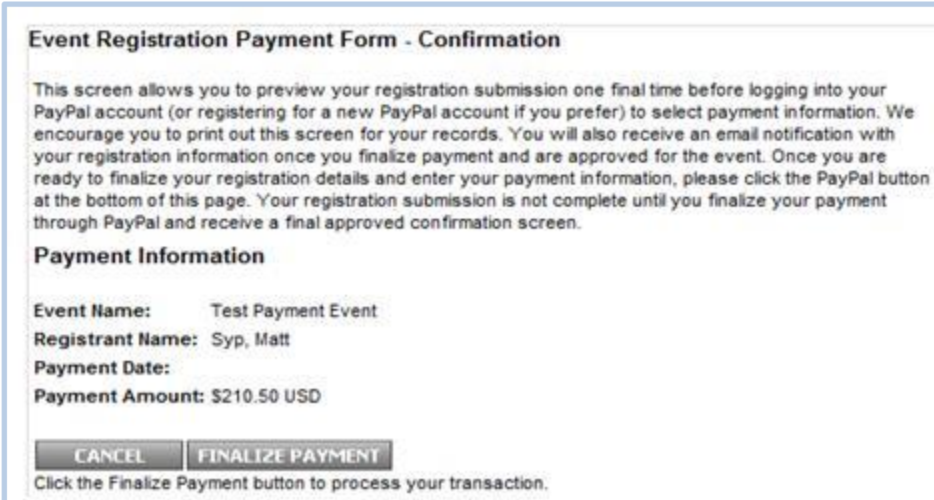
Registrants clicking *Check out with PayPal* areredirected to the PayPal page shown below. They either log in to a personal account, or use the site's *Sign up for a PayPal account and* *continue checkout* option.



After logging in (and signing up for PayPal if necessary), PayPal prompts the registrant to review their information, as shown:



When satisfied, the user clicks *Continue*, and is returned to the Calendar's *Event Registration Payment Confirmation* page shown here, to complete the registration process:


Event Registration Payment Form - Confirmation

This screen allows you to preview your registration submission one final time before logging into your PayPal account (or registering for a new PayPal account if you prefer) to select payment information. We encourage you to print out this screen for your records. You will also receive an email notification with your registration information once you finalize payment and are approved for the event. Once you are ready to finalize your registration details and enter your payment information, please click the PayPal button at the bottom of this page. Your registration submission is not complete until you finalize your payment through PayPal and receive a final approved confirmation screen.

Payment Information

Event Name: Test Payment Event
Registrant Name: Syp, Matt
Payment Date:
Payment Amount: $210.50 USD

CANCEL FINALIZE PAYMENT
Click the Finalize Payment button to process your transaction.

This is the registrant's final chance to cancel. Now:

- Clicking CANCEL ends the registration process without processing the payment
- Clicking FINALIZE PAYMENT processes the payment. Once approved, the registration is complete, and the Calendar sends the confirmation e-mail. This confirmation email indicates the registrant's total event cost.

After finalizing the payment, the registrant sees the final page in the process, the payment receipt, indicating that their registration is complete, and their payment has been processed.


Event Registration Payment Form - Receipt

Event Registration – Thank You!

Your registration and event payment has been approved! You will receive an email shortly with the details of your registration. Please save the email for future reference and in case you need to cancel your event registration submission.

Thank you for your participation and we look forward to seeing you at the event!
05/22/2012

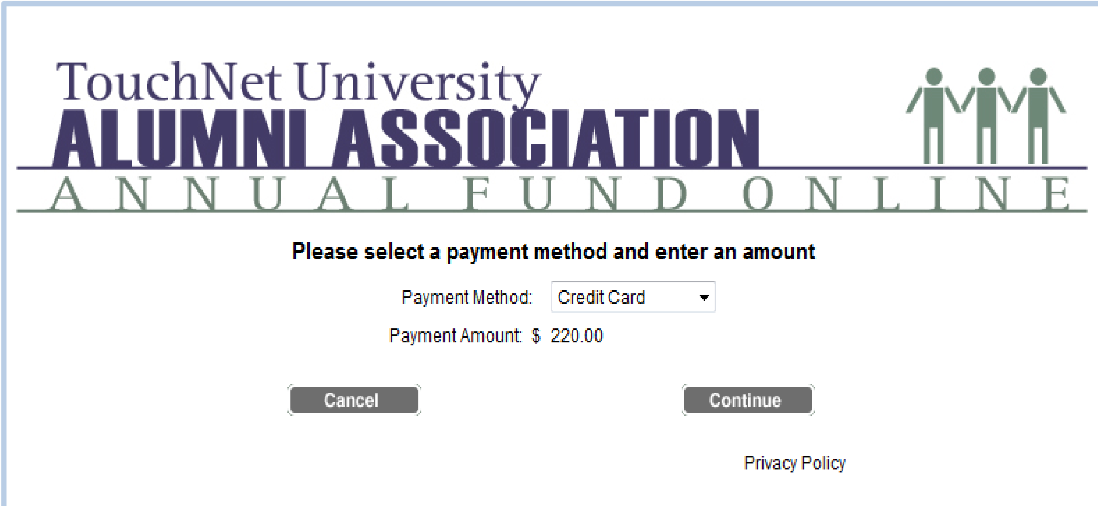
Payment Information

Event Name: Test Payment Event
Registrant Name: Syp, Matt
Payment Date: 05/22/2012
Payment Amount: $210.50 USD
Transaction ID: 5F267000F3795482A

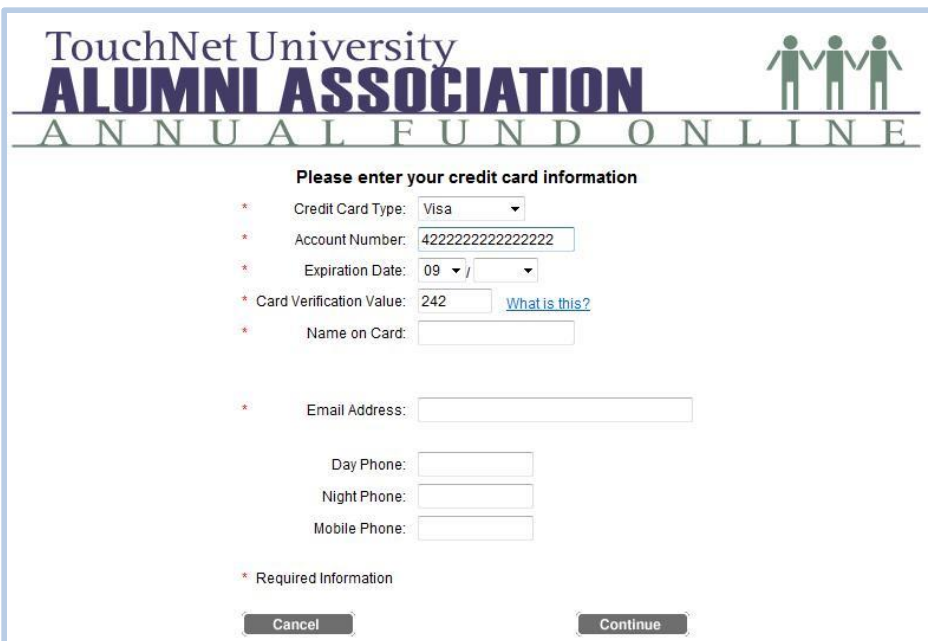
Close

TouchNet Payment Process

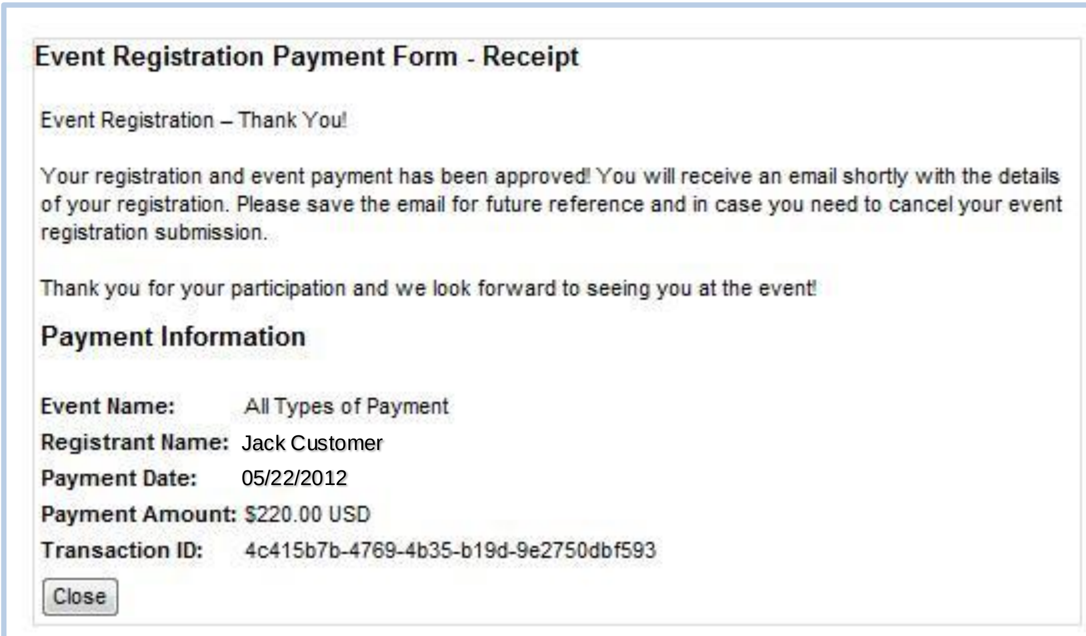
Here is a sample screen that a registrant may see when selecting Credit Card Payment, the example below is using TouchNet as the payment gateway associated with the event registration form.



Registrants enter their payment information, then verify the registration and payment information, and click **Continue** to finalize the payment.



Registrants whose payments were successfully processed through TouchNet see:


Event Registration Payment Form - Receipt

Event Registration – Thank You!

Your registration and event payment has been approved! You will receive an email shortly with the details of your registration. Please save the email for future reference and in case you need to cancel your event registration submission.

Thank you for your participation and we look forward to seeing you at the event!

Payment Information

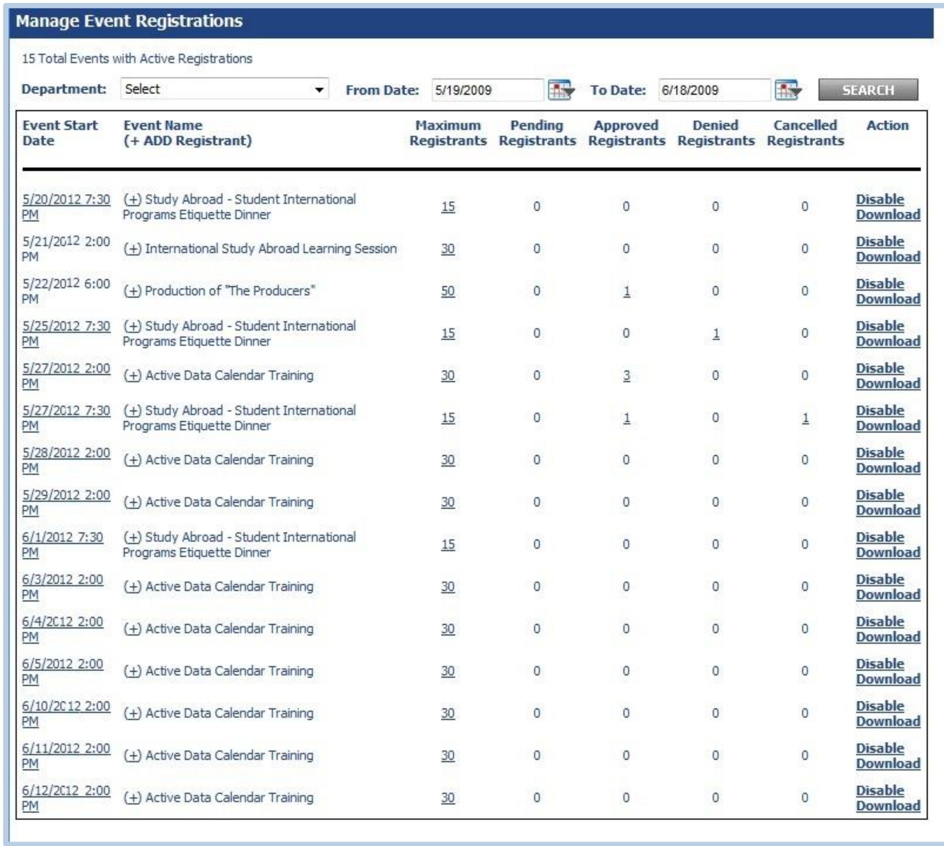
Event Name:	All Types of Payment
Registrant Name:	Jack Customer
Payment Date:	05/22/2012
Payment Amount:	$220.00 USD
Transaction ID:	4c415b7b-4769-4b35-b19d-9e2750dbf593

Close

For unsuccessful payment attempts, the registrant sees a message that their payment has been denied or that there was a problem processing the payment. You can customize the exact message when configuring the payment form. They may also receive an independent e-mail from the payment gateway, but unless they see the above screen, the payment has not been processed by the Active Data Calendar.

Managing Event Registrations

Events with active registration can be managed from the Manage Event Registrations area. Click on the Calendar's REGISTRATION tab, then click *REGISTRANTS: Active*. This page displays:



Manage Event Registrations

15 Total Events with Active Registrations

Department: Select **From Date:** 5/19/2009 **To Date:** 6/18/2009 SEARCH

Event Start Date	Event Name (+ ADD Registrant)	Maximum Registrants	Pending Registrants	Approved Registrants	Denied Registrants	Cancelled Registrants	Action
5/20/2012 7:30 PM	(+) Study Abroad - Student International Programs Etiquette Dinner	15	0	0	0	0	Disable Download
5/21/2012 2:00 PM	(+) International Study Abroad Learning Session	30	0	0	0	0	Disable Download
5/22/2012 6:00 PM	(+) Production of "The Producers"	50	0	1	0	0	Disable Download
5/25/2012 7:30 PM	(+) Study Abroad - Student International Programs Etiquette Dinner	15	0	0	1	0	Disable Download
5/27/2012 2:00 PM	(+) Active Data Calendar Training	30	0	3	0	0	Disable Download
5/27/2012 7:30 PM	(+) Study Abroad - Student International Programs Etiquette Dinner	15	0	1	0	1	Disable Download
5/28/2012 2:00 PM	(+) Active Data Calendar Training	30	0	0	0	0	Disable Download
5/29/2012 2:00 PM	(+) Active Data Calendar Training	30	0	0	0	0	Disable Download
6/1/2012 7:30 PM	(+) Study Abroad - Student International Programs Etiquette Dinner	15	0	0	0	0	Disable Download
6/3/2012 2:00 PM	(+) Active Data Calendar Training	30	0	0	0	0	Disable Download
6/4/2012 2:00 PM	(+) Active Data Calendar Training	30	0	0	0	0	Disable Download
6/5/2012 2:00 PM	(+) Active Data Calendar Training	30	0	0	0	0	Disable Download
6/10/2012 2:00 PM	(+) Active Data Calendar Training	30	0	0	0	0	Disable Download
6/11/2012 2:00 PM	(+) Active Data Calendar Training	30	0	0	0	0	Disable Download
6/12/2012 2:00 PM	(+) Active Data Calendar Training	30	0	0	0	0	Disable Download

TIP: You can change the maximum number of registrants for an event from the Modify Event Wizard, or by clicking the *Maximum Number* on the Manage Event Registration screen. You cannot change the maximum number of registrants to a number that exceeds the maximum capacity of your facility.

TIP: To temporarily disable an event registration from this screen, click *Disable*. To re-enable the registration, click *Enable*.

Note that you can only select or sort registrations in events for departments for which you have permissions. The date range option searches for any event with registration active during the date range selected and for registrations that you have permission to view.

The fields on the Manage Event Registration List screen include:

- **Event Start Date**: The date and time when the event is scheduled to take place.
- **Event Name**: The name of the event.

- **(+ Add Registrant)**: A plus (+) sign to the left of the event name indicates that an event has spaces available. Clicking the (+) sign navigates the administrator to the *Add Registrant* page.

- **Maximum Registrants**: Displays the maximum number of registration spaces set for the event. "Unlimited" means no maximum was selected. Click Unlimited to open a pop-up window for entering a maximum number of registrants. Note that this value cannot be set to less than the current number of approved registrants. Leave the text field blank to allow unlimited registration.

  Users also cannot change the maximum number of registrants to a number that exceeds the maximum capacity of your facility if you have chosen a facility that is locked and has a maximum capacity set.

- **Pending Registrants**: Displays the number of registrants currently pending for the event. Click the pending number to navigate to the Pending Registrants screen and process the registrants for this event.
- **Approved Registrants**: Displays the number of currently approved registrants for the event. Click the approved number to navigate to the Approved Registrants screen and view the currently approved registrants for this event.
- **Denied Registrants**: Displays the number of currently denied registrants for the event. Click the denied number to navigate to the Denied Registrants screen and view the currently denied registrants for this event.
- **Cancelled Registrants**: Displays the number of currently cancelled registrants for the event. Click the cancelled number to navigate to the Cancelled Registrants screen and view the currently cancelled registrants for this event.
- **Action**: This column displays a DOWNLOAD button that if selected allows you to download all registrants in one CSV file, along with their respective registration details (internal and external fields are included) and current status. There is also a DISABLE link beside each event that if selected will temporarily disable the registration link from the event details screen for this event. No new registrants will be able to access the registration form until you choose to re-enable the registration option by navigating back to this area and clicking the link which will now read ENABLE.

Add Registrant

The Calendar administration area's *Add Event Registrants* page includes both external and internal-only registration fields, divided by main heading titles. To add a new registrant using this page, you must complete all fields designated as required (whether external or internal).

When adding a registrant from the administration area, there is also an option to add a registrant with the status of Approved, Denied or Cancelled. This is in case you would like to make a note of a registrant who had been within another system or who elected to cancel their registration through a manual process and not through the system.

From the administration area's *Add Registrant* screen, an administrator can attempt to add an approved registrant for an occurrence within a series that has the rule for "Single Occurrence Registration Only", and the registrant already exists as approved for an occurrence within the series, then the administrator will receive a warning message: "This registrant is already approved for another occurrence in this series." You will also see the date/time of the occurrence for which the registrant is already approved. However, from the backend, the administrator can choose to go ahead and elect to add the registrant anyway. This is considered an override option. The warning is only there for informational purposes and to flag the user adding the registrant.

Fields on the Add Event Registrants *Page*

The top of the screen includes details about the event. The event cost associated with this event will also display if your installation has the Advanced Registration Module and if cost/payment was set up for this event.

The fields provided for adding a new registrant from within the administration area include:

Registrant Details

- **First Name**: Required. Accepts up to 100 characters.
- **Last Name**: Required. Accepts up to 100 characters.
- **Email**: Required. Accepts up to 100 characters.
- **Status**: When adding a registrant from the administration area, there is also an option to add a registrant with the status of Approved, Denied or Cancelled. It is required that the user adding the new registrant select the status for the registrant. If payment is associated with the event, then this option will be disabled as all new registrants for events with payment must be added as approved. (Please note that once added the registrant may be modified to change status.
- **Internal Registrant Information**: If any fields were added to the registration form as "internal only" fields, then they will appear below the main registrant detail fields for completion. Those fields that were added as required fields will display with an asterisk to show that they must be completed in order to successfully add a new registrant. *NOTE: If you are attempting to add a new registrant for an occurrence that is part of a series that has been set for "Single Occurrence Registration Only", and the registrant already exists as approved for an occurrence within the series, then you will be presented with a warning message: "This registrant is already approved for another occurrence in this series." Within the administration area it is possible to ignore this warning message and override the single occurrence rule by choosing to go ahead and elect to add the registrant. This is considered an override option. The warning is only there for informational purposes and to provide a warning regarding adding the registrant when they are already approved for another occurrence.
- Any other fields that were added to the event registration screens available from the public and private calendars.

Payment Details

- Register as No Cost Registrant ($0.00 USD)
- Register with Payment
  - **Select Payment Method**: Select the applicable payment method for this registrant from the drop-down menu provided. Options will include any payment method that was selected for the registration form that was applied to this event. Options may include: Cash, Check or Credit Card. If Cash or Check is selected, then it is advised that you enter the amount received in the Amount Paid area and information about the Check number and/or date when the Cash or Check payment was received, deposited, account information or other important notes into the "Notes on Payment" field. If Credit Card is selected, then once you click the "SUBMIT" button you will be presented with the configured payment gateway's interface (if enabled for the install) screens for processing the credit card information.
  - **Amount Paid**: Enter in an amount that was paid by the registrant through cash or check, or enter the amount that you want processed through the payment gateway via credit card transaction prior to clicking the SUBMIT button which will open the payment gateway payment process.
  - **Notes on Payment**: Text field allowing for the entry of up to 1,000 characters in order to store details about the payment method or other important information.

Pending Event Registrants

This page shows a point-in-time snapshot of all current pending registrants for an event.

TIP: You can process registrants individually by using the drop-down options under **Action**. To process multiple registrants, click the check boxes under **Change Status** beside each registrant, then select a bulk processing option from the **SELECTED** list (Approve, Deny, etc.), and click SUBMIT. You can also process all registrants in one operation by clicking Approve, Deny, etc. in the **ALL** list.

The fields on the Manage Pending Event Registrants List screen include:

- **Send Email:** Displays a checkbox and if selected and the SUBMIT button at the bottom of the screen is also selected, will navigate you to the Send Email Notice area of the product with the registrant's email automatically selected for creating and sending an email notice about this particular event. NOTE: A "Select ALL/DESELECT ALL" option is included so that you can easily have all checkboxes either selected or deselected that are currently displayed in your list.
- **Process**: Displays a check box and if selected and one of the other processing option checkboxes at the bottom of the pending registrants list is also selected and you click the SUBMIT button, you can process registrants in bulk. Options for using this checkbox to process registrants in bulk include:
    - **Approve Selected:** If you select this option and click SUBMIT, any registrant you selected for processing is approved, and receives an email containing their registration confirmation number and event total cost.
    - **Deny Selected:** If you select this option and click SUBMIT, any registrant you selected for processing is automatically denied and receives an email containing their registration denial information. This option is disabled for events with payment associated.
    - **Delete Selected:** Select this checkbox and click SUBMIT to delete any registrant selected for processing. Deleted registrants receive an email that their registration request has been deleted. This option is disabled for an event with payment associated.
    - **Cancel Selected:** If this checkbox is selected and the SUBMIT button is also selected, then any registrant that has been selected for processing will be automatically cancelled and will receive an email that their registration request has been cancelled. Please note that if you select to cancel a registrant and payment has been associated with the event, you will be navigated to a refund/credit screen to select if you would like to issue a refunds to the registrant(s).
    - **Approve All:** If this checkbox is selected and the SUBMIT button is also selected, then all event registrants currently listed on this pending screen will be automatically selected and will be approved in bulk. Each registrant will receive an email notifying them that they have been approved and the email will include their registration confirmation number and event total cost.
    - **Deny All:** If this checkbox is selected and the SUBMIT button is also selected, then all event registrants currently listed on this pending screen will be automatically selected and will be

denied in bulk. Each registrant will receive an email notifying them that they have been denied. This option will be disabled for an event with payment associated.

  - **Delete All:** If this checkbox is selected and the SUBMIT button is also selected, then all event registrants currently listed on this pending screen will be automatically selected and will be deleted in bulk. Each registrant will receive an email notifying them that they have been deleted. This option will be disabled for an event with payment associated.
  - **Cancel All:** If this checkbox is selected and the SUBMIT button is also selected, then all registrants that have been selected for processing will be automatically cancelled and will receive an email that their registration request has been cancelled. Please note that if you select to cancel a registrant and payment has been associated with the event, you will be navigated to a refund/credit screen to select if you would like to issue an refunds to the registrant(s).

- **Registrant Name:** Displays as a link which if selected will navigate you to the Manage Pending Registrant Details screen for that particular registrant. Registrant names are displayed as last name, first name and the list of registrants is sorted by this column in alphabetical ascending order.
- **Email:** Displays as a link and if selected opens your default mail client with the registrant's email automatically inserted into the TO: field of your mail client.
- **Registration Date/Time:** Display the date and time when this registration request was submitted.
- **Action:** This column displays a drop-down selection box with the following action options:
  - **Approve:** If selected, this will automatically approve the registrant and the registrant will receive an email with their registration confirmation number and event total cost.
  - **Cancel:** If selected, this will automatically cancel the registrant and the registrant will receive an email with the cancellation information.
  - **Deny:** If selected, this will automatically deny the registrant and the registrant will receive an email notifying them that they have been denied for registration to the event. (This does not display as an option if the registration has payment associated.)
  - **Modify**: If selected, this will navigate you to the Modify Registrant screen where you can make changes on this particular event registrant.
  - **Delete**: If selected, you will be prompted to confirm your delete action. If you confirm the action, the registrant will be deleted from the registration area and the registrant will receive an email that they have been deleted. (This does not display as an option if he registration has payment associated.)
  - **View**: If selected, this will take you to the View Registrant Details screen for the selected registrant.

The top of the list displays the current number of pending registrants for the event.

Navigation Options in this Area

To view all registrants already approved, click the button for VIEW APPROVED. To view all registrants already denied, click the button *VIEW: Denied*. The Back to List of Registration Events link navigates back to the main list of all events with active registration. *VIEW: Canceled* is a link to go to the Cancelled list of registrants.

Registrant Details

This screen shows the details about a registrant, including name and contact information. The options available from this screen change slightly depending on how you navigate to the registrant details.

Event details included on this screen:

- Event Name
- Start Date & Time
- End Date & Time

Registrant Details - For Advanced Registration

This area allows you to view the details of a particular event registrant. The top of the screen includes details about the event, including the event name, start date, end date, start time, end time and recurrence schedule if applicable.

The fields included on the Event Registrant Details screen will be based off the form that was used for the event registration.

Fields included in registrant details:

- First Name
- Last Name
- Email
- (Any other fields that were added to the event registration screens available from the Public and Private Calendars.)

Internal Registrant Information: If any fields were added to the registration form as "internal only" fields, then they appear below the main registrant detail fields, in a list format.

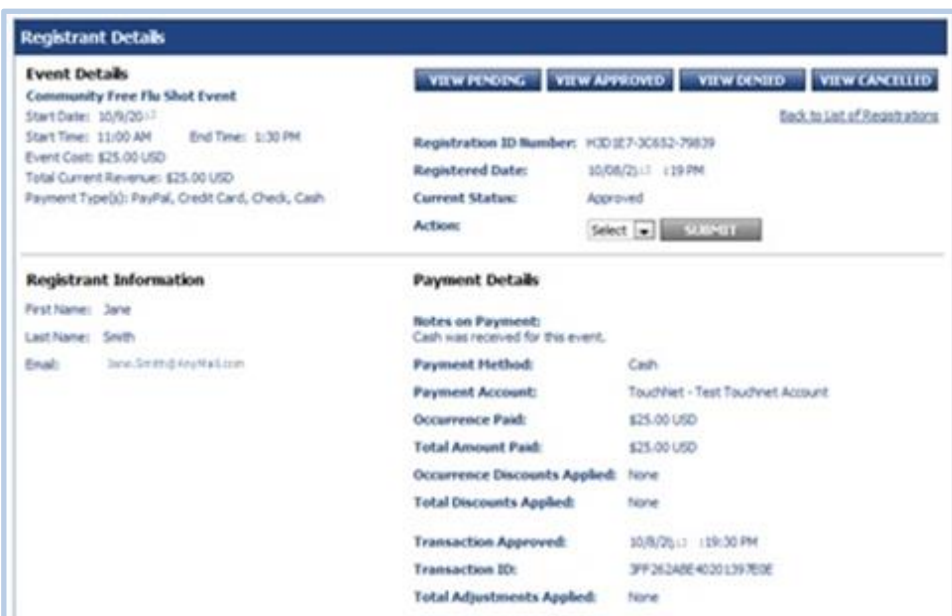
Other Registrant Details:

- Registration ID Number
- Cancelled Date/Time: The date the registrant cancelled or was cancelled by the administrator.
- Registration Last Updated: When the registration was last updated (date, time)
- Registration Last Updated By: Who made the last modification to registration. User account name (displayed as Last Name, First Name) that last modified the registrant details.
- Registered Date: The date of the original registration submission into Calendar.

- Current Status: Options include Approved, Denied or Pending
- Action: Options may include Approve, Deny, Cancel, Modify or Delete and are dependent on the current status of the registrant when this screen is accessed. Options shown here also depend on if the event has payment associated. To change the status, select your status option from the drop-down and then click SUBMIT. If a registrant is being approved, denied or deleted from this screen, then the appropriate email will be sent to the registrant depending on the selected action.
  - If Delete is selected from this screen you will be prompted to select from Yes/No radio buttons in order to confirm your delete action. Delete is not an available action if there is payment associated with the event/registrant.
  - If Cancel is selected from this screen you will be prompted to select from Yes/No radio buttons in order to confirm your cancel action. You will also see a field entitled "Refund Amount" that you can select to enter in any amount up to and not exceeding the total amount paid. The total paid and available for refund will default in this field. Also, there is a checkbox for selecting to "Issue a Credit to this Registrant's PayPal Account" that will display and will show as automatically selected if this registrant originally paid through the PayPal payment option built into Active Data Calendar.

Payment Details

If payment was enabled for an event, Payment Details displays in the lower right hand area:



Fields included in Payment Details area:

- Notes on Payment
- Payment Method: Cash, Check, PayPal or Credit Card will display here.

- Payment Account: If Credit Card is selected as the payment type for the registrant, then the associated TouchNet Account is displayed. If PayPal was utilized by the registrant, then the associated PayPal account is listed.
- Occurrence Paid: Amount paid for the individual occurrence being viewed if the event is part of a series. The amount shows here in USD (US Currency/Dollars)
- Total Amount Paid: Shows total paid by this registrant for the entire event (if a series). If the event is a single day event then the Occurrence Paid and Total Amount Paid will be the same. The amount shows here in USD (US Currency/Dollars)
- Occurrence Discounts Applied: "None" will show if the registrant did not use any discount codes. If a discount code was used when registering, then the details show for what discount was applied to this specific occurrence. The amount shows here in USD (US Currency/Dollars)
- Total Discounts Applied: "None" will show if the registrant did not use any discount codes. If any discount codes were used when registering then the total discounts received across the entire registration will show here. It is possible for this amount to be the same as the Occurrence Discounts Applied if the event was a single day event. The amount shows here in USD (US Currency/Dollars)
- Transaction Approved: Shows the date and time for when the registration payment was approved.
- Transaction ID: If the registrant paid through PayPal, then the transaction ID from PayPal is displayed here.
- Total Adjustments Applied: If any credits or payments were added or refunded after the original registration and payment, then those will show here in an adjustments table along with the details of each credit/refund or payment.

Navigation Options in this Area

To view all registrants already approved, click the button for *VIEW: Approved*. To view all registrants already denied, click the button VIEW DENIED. There is also a text link entitled "Back to List of Registration Events" in order to navigate back to the main list of all events with active registration. VIEW CANCELED is a link to go to the Cancelled list of registrants.

If you choose to take action on the registrant from this screen, click the SUBMIT button to finalize your action selection.

Modify Event Registrant

This area allows you to view the details of a particular event registrant and make modifications to any field. The top of the screen includes details about the event, including the event name, start date, end date, start time, end time and recurrence schedule if applicable.

Standard Registration

The fields included for modification on the Modify Event Registrant Details screen include:

- Organization
- Title
- First Name
- Last Name
- Address 1
- Address 2
- City
- State (or State/Province/Prefecture) depending on if Domestic or International Fields are enabled.
- ZIP/Postal Code
- County (or Country) depending on if Domestic or International Fields are enabled.
- Phone
- Fax
- Email
- Registration ID Number: Displays but cannot be modified.
- Current Status: Options for display include Approved, Denied or Pending. To modify the status, use the action drop-down.
- Action: Options may include Approve, Deny or Delete or Cancel and are dependent on the current status of the registrant when this screen is accessed. To change the status, select your status option from the drop-down.

Advanced Registration

This area allows you to view the details of a particular event registrant and make modifications to any field. The top of the screen includes details about the event, including the event name, start date, end date, start time, end time and recurrence schedule if applicable. The Event Cost associated with this event will also display if your installation has the Advanced Registration Module and if cost/payment was setup for this event.

Fields modifiable on the Modify Event Registrant Details screen include:

Registrant Details

- First Name
- Last Name

- Email
- (Any other fields that were added to the event registration screens available from the Public and Private Calendars.)

Internal Registrant Information

If any fields were added to the registration form as "internal only" fields, they are listed below the main registrant detail fields.

Other Registrant Details

- Registration ID Number
- Registration Date: The date of the original registration submission into Calendar.
- Current Status: Options include Approved, Denied or Pending
- Action: Options may include Approve, Deny or Delete and are dependent on the current status of the registrant when this screen is accessed. To change the status, select your status option from the drop-down and then click SUBMIT. If a registrant is being approved, denied or deleted from this screen, then the appropriate email will be sent to the registrant depending on the selected action.
- Registration Last Updated: Date when the registrant was last modified.
- Registration Last Updated By: User account name (displayed as Last Name, First Name) that last modified the registrant details.

Payment Details

If payment was enabled for an event, this information displays in the lower right hand area. Modifications can be made only to fields shown as enabled:

- **Payment/Credit Radio Buttons**: These options display if payment was associated with your event. Selecting one of these radio buttons allows you to enter either a payment amount that was received via check, cash or other means outside of the automated process, or select to issue a credit and if the original amount paid was received from PayPal you can then select a checkbox to "Issue a Credit to this Registrant's PayPal Account" and enter in the amount to credit/refund. The amount to credit/refund (Adjustment Amount) cannot exceed the total paid by the registrant. NOTE: Not all payment gateways allow refunding through the application, and only PayFlow Pro allows re-charging the card.
- **Notes on Payment**
- **Occurrence Paid**: Amount paid for the individual occurrence being viewed if the event is part of a series. The amount shows here in USD (US Currency/Dollars)
- **Total Amount Paid**: Shows total paid by this registrant for the entire event (if a series). If the event is a single day event then the Occurrence Paid and Total Amount Paid will be the same. The amount shows here in USD (US Currency/Dollars)

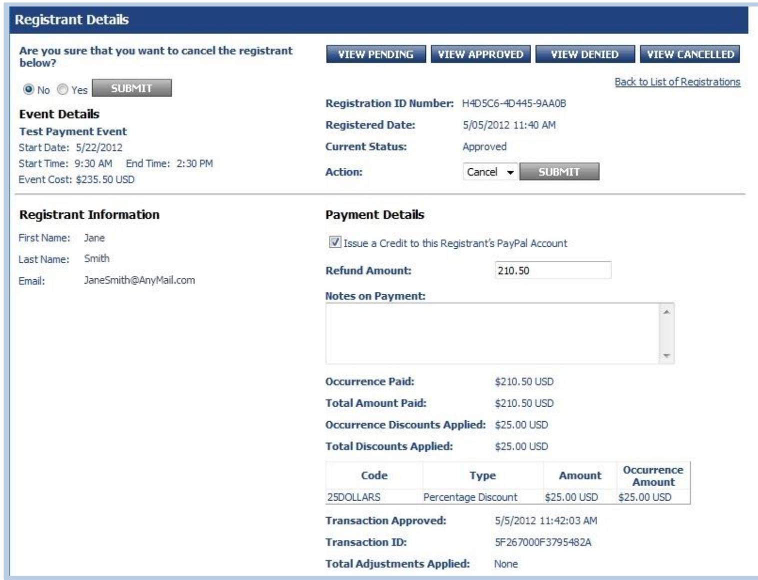
- **Occurrence Discounts Applied**: "None" will show if the registrant did not use any discount codes. If a discount code was used when registering, then the details show for what discount was applied to this specific occurrence. The amount shows here in USD (US Currency/Dollars)
- **Total Discounts Applied**: "None" will show if the registrant did not use any discount codes. If any discount codes were used when registering then the total discounts received across the entire registration will show here. It is possible for this amount to be the same as the Occurrence Discounts Applied if the event was a single day event. The amount shows here in USD (US Currency/Dollars)
- **Transaction Approved**: Shows the date and time for when the registration payment was approved.
- **Transaction ID**: If the registrant paid through PayPal, then the transaction ID from PayPal is displayed here.
- **Total Adjustments** Applied: If any credits or payments were added or refunded after the original registration and payment, then those will show here in an adjustments table along with the details of each credit/refund or payment.

When you're modifying a registrant, you can create adjustments to their payment. If they paid through PayPal, then you are given the option to create a credit transaction to their PayPal account. Adjustments can also be an additional payment made by the registrant. Any additional payments do not get associated with a PayPal transaction. A list of all adjustments is shown in the Payment Details section.

Navigation Options in this Area

You can view registrants connected with this event using these options:

- View approved registrants by clicking *VIEW: Approved*
- View denied registrants by clicking *VIEW: Denied*
- View pending registrants by clicking *VIEW: Pending*
- View canceled registrations by clicking *VIEW: Canceled*
- Navigate back to the event list by clicking *Back to List of Registration Events*
- The *Back to List of Registration Events* link takes you back to the main list of all events with active registration



If you choose to take action on the registrant from this screen or modify any of the registrant fields, click the SUBMIT button to finalize your action selection. You can also RESET all values back to their last saved status by clicking the RESET button or CANCEL out of this area completely and return to the Main Menu without saving any of your modifications.

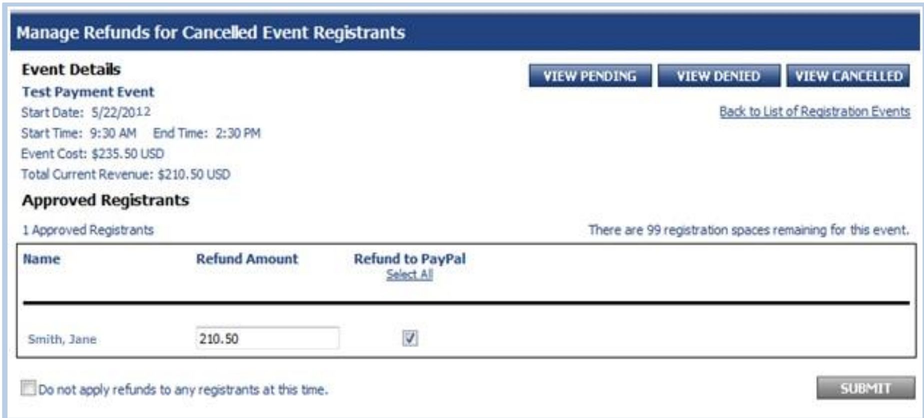
Deleting Event Registrants

If you select to delete an event registrant you will be asked to confirm your delete action. Once a registrant is deleted there is no notion of their registration saved within the Active Data Calendar system and they cannot be restored without registering for the event once again.

> **NOTE for installs with Advanced Registration**: On the administration side, you cannot deny or delete a registrant that has registered for an event with payment. You can only modify or cancel them.

Cancelling Registrants

You don't have to cancel each registrant separately. You can cancel multiple registrants at the same time. To do this, you select the registrants from the main list, select CANCEL, then click SUBMIT. Once you do this, if payment was associated with an event, you are brought to a page listing the registrants and refund information.Enter the refund amount for each registrant and select whether to refund it to their PayPal account. Only registrants who paid through PayPal will have the *Refund to PayPal* checkbox enabled. All refund amounts will be pre-populated to the max that user can get refunded. If you do not wish to refund any of the registrants, you can check the *Do not apply refunds to any registrants at this time* checkbox. Once you have made your selections, click on submit and the refunds will be processed.



When you cancel a registrant, you will be given the option to refund their payment and how much of that payment to refund. The application will know the maximum amount that you can refund them based on initial payment and any adjustments processed. It will also know if you can refund to PayPal or not and how much can be refunded to PayPal. To issue a credit to PayPal, check the "Issue a Credit to this Registrant's PayPal Account" and enter the refund amount. The maximum refund amount is pre-populated into this field so if you are issuing a full refund, you don't need to change this.

Viewing Approved Event Registrants

This area shows all current approved registrants for an event, along with some of the event's details.

TIPs: Calendar assigns approved registrants a unique **Registration Number**, as shown in the screen shot above. The number can be a combination of letters, numbers and special characters. It appears on the Approved list page as well as the Registrant Details page.

You can change the status of approved registrants by selecting a different **Process** option. The **Approve** options are automatically disabled, since all the registrants on this list are already approved.

The Event Cost and Total Current Revenue associated with the event also display if your installation has the Advanced Registration Module, and if a cost and payment were set up for this event. Please note that the Total Current Revenue is a sum of the amount paid by all approved registrants.

The fields included on the Manage Approved Event Registrants List screen include:

- **Email:** Displays a checkbox and if selected and the SUBMIT button at the bottom of the screen is also selected, will navigate you to the Send Email Notice area of the product with the registrant's email automatically selected for creating and sending an email notice about this particular event.
- **Change Status:** Displays a checkbox and if selected and one of the other processing option checkboxes at the bottom of the pending registrants list is also selected and you click SUBMIT, you can process registrants in bulk. Options for using this checkbox to process registrants in bulk include:
    - **Deny Selected**: If this checkbox is selected and the SUBMIT button is also selected, then any registrant that has been selected for processing will be automatically denied and will receive an email with their registration denial information. This option will be disabled for an event with payment associated.
    - **Delete Selected**: If this checkbox is selected and the SUBMIT button is also selected, then any registrant that has been selected for processing will be automatically deleted and will receive an email that their registration request has been deleted. This option will be disabled for an event with payment associated.
    - **Cancel Selected**: If this checkbox is selected and the SUBMIT button is also selected, and then any registrant that has been selected for processing will be automatically cancelled and will receive an email that their registration request has been cancelled.
    - **Deny All**: If this checkbox is selected and the SUBMIT button is also selected, then all event registrants currently listed on this pending screen will be automatically selected and will be denied in bulk. Each registrant will receive an email notifying them that they have been denied. This option will be disabled for an event with payment associated.
    - **Delete All**: If this checkbox is selected and the SUBMIT button is also selected, then all event registrants currently listed on this pending screen will be automatically selected and will be deleted in bulk. Each registrant will receive an email notifying them that they have been deleted. This option will be disabled for an event with payment associated.
    - **Cancel All**: If this checkbox is selected and the SUBMIT button is also selected, then all registrants that have been selected for processing will be automatically cancelled and will receive an email that their registration request has been cancelled.
- **Registrant Name**: Displays as a link which if selected will navigate you to the Modify Registrant Details screen for that particular registrant. Registrant names are displayed as last name, first name and the list of registrants is sorted by this column in alphabetical ascending order.
- **Registrant Email**: Displays as a link and if selected opens your default mail client with the registrant's email automatically inserted into the TO: field of your mail client.
- **Registration Date/Time**: Display the date and time when this registration request was submitted.

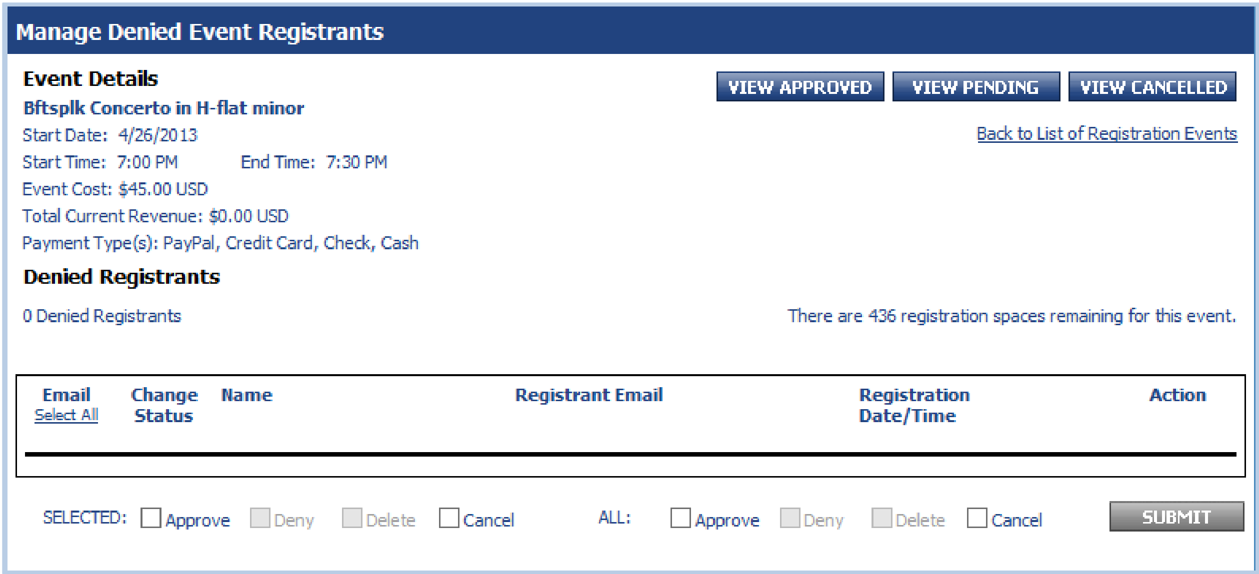
- **Registration Number**: This column displays the unique Registration Number assigned to this registrant for this particular event.
- **Action**: This column displays a drop-down selection box with the following action options:
  - **Cancel**: If selected, this will automatically cancel the registrant and the registrant will receive an email with the cancellation information.
  - **Delete**: If selected, you will be prompted to confirm your delete action. If you confirm the action, the registrant will be deleted from the registration area and the registrant will receive an email that they have been deleted. (This does not display as an option if the registration has payment associated.)
  - **Deny**: If selected, this will automatically deny the registrant and the registrant will receive an email notifying them that they have been denied for registration to the event. (This does not display as an option if the registration has payment associated.)
  - **Modify**: If selected, this will navigate you to the Modify Registrant screen where you can make changes on this particular event registrant.
  - **View**: If selected, this will take you to the View Registrant Details screen for the selected registrant. The top of the list displays the current number of approved registrants for this event.

Navigation Options in this Area

To view all registrants already denied, click the button for VIEW DENIED. To view all registrants still pending, click the button VIEW PENDING. There is also a text link entitled "Back to List of Registration Events" in order to navigate back to the main list of all events with active registration. VIEW CANCELLED is a link to go to the Cancelled list of registrants.

Denied Event Registrants

This area allows you to see a snapshot of all current denied registrants for a particular event. The top of the screen includes details about the event, including the event name, start date, end date, start time, end time and recurrence schedule if applicable.



TIP: Use your Denied Registrants list as a "Waiting List". You can deny a registrant if you do not have enough available spaces, but click the "Email" option to send them a special email informing them that if additional spaces become available or if there is a cancellation you will let them know. Then if you have spaces opened, come back to the denied screen, select the registrant(s) and click to change their status to approved! You can use the checkboxes beside each registrant to email multiple registrants at once!

This area allows you to see a snapshot of all current denied registrants for a particular event. The top of the screen includes details about the event, including the event name, start date, end date, start time, end time and recurrence schedule if applicable.

The Event Cost and Total Current Revenue associated with this event also display here if your installation has the Advanced Registration Module, and if cost/payment was set up for this event. The Total Current Revenue is obtained by summing the amounts paid by all approved registrants. The fields included on the Manage Denied Event Registrants page include:

- **Email**: Displays a checkbox and if selected and the SUBMIT button at the bottom of the screen is also selected, will navigate you to the Send Email Notice area of the product with the registrant's email automatically selected for creating and sending an email notice about this particular event. There is also a SELECT ALL option to quick check off all pending registrants currently shown in the list. You must click the SUBMIT button to navigate to the Send Email Notice area.

- **Change Status**: Select this check box and one of the other processing option check boxes at the bottom, then click SUBMIT to process mulitple registrants. Options available:
    - **Approve Selected**: Approves the selected registrants and sends them an email containing their registration confirmation number and event total cost.
    - **Delete Selected**: Deletes the selected registrants and sends them an email that their registration has been deleted. Disabled for events with payment associated.
    - **Cancel Selected**: Cancels the selected registrants and sends them an email that their registration has been canceled. For paid events, this operation takes you to the refund/credit page to process refunds.
    - **Approve All**: Approves all listed registrants and sends them an email containing their registration confirmation number and event total cost.
    - **Delete All**: Deletes all listed registrants and sends them an email that their registration has been deleted. Disabled for events with payment associated.
    - **Cancel All**: Cancels all listed registrants and sends them an email that their registration has been canceled. For paid events, this operation takes you to the refund/credit page to process refunds.
- **Registrant Name**: Displays as a link which if selected will navigate you to the Modify Registrant Details screen for that particular registrant. Registrant names are displayed as last name, first name and the list of registrants is sorted by this column in alphabetical ascending order.
- **Registrant Email**: Displays the registrant's e-mail address as a link. Clicking the link opens a new message in your default mail client with the registrant's e-mail address in the TO: field.
- **Registration Date/Time**: Displays the date and time when this registration request was submitted.
- **Action**: Displays a drop-down list with these options:
    - **Approve**: Approves the registrant, and sends an e-mail with a registration confirmation number and event total cost.
    - **Cancel**: Cancels the registration and sends an e-mail with cancellation information.
    - **Modify**: Navigates to the Modify Registrant page, where you can make changes to this particular event registrant.
    - **Delete**: Prompts to confirm your delete action. If you confirm it, the registrant is deleted from the registration are, and receives an e-mail that they have been deleted. (This does not display as an option if the registration has payment associated.)
    - **View**: Navigates to the View Registrant Details screen for the registrant.

Navigation Options in this Area

You can view registrants connected with this event using these options:

- View approved registrants by clicking VIEW APPROVED

- View pending registrants by clicking VIEW PENDING
- Navigate to the *Cancelled Event Registrants* list by clicking VIEW CANCELED
- Navigate back to the list of all events with active registration by clicking *Back to List of Registration Events*

Cancelled Event Registrants

Displays all current canceled registrants for the event. The top of the screen includes selected details about the event.

The Event Cost and Total Current Revenue associated with this event also display if your installation has the Advanced Registration Module and if cost/payment was set up for the event. The Total Current Revenue is the total amount paid by all approved registrants. The fields included on the Manage Cancelled Event Registrants List screen include:

- **Email**: Displays a checkbox and if selected and the SUBMIT button at the bottom of the screen is also selected, will navigate you to the Send Email Notice area of the product with the registrant's email automatically selected for creating and sending an email notice about this particular event. There is also a SELECT ALL option to quick check off all pending registrants currently shown in the list. You must click the SUBMIT button to navigate to the Send Email Notice area.
- **Change Status**: Displays a checkbox and if selected and one of the other processing option checkboxes at the bottom of the pending registrants list is also selected and you click the SUBMIT button, you can process registrants in bulk. Options for using this checkbox to process registrants in bulk include:
  - **Delete Selected**: If this checkbox is selected and the SUBMIT button is also selected, then any registrant that has been selected for processing will be automatically deleted and will receive an email that their registration request has been deleted. This option will be disabled for an event with payment associated.
  - **Delete All**: If this checkbox is selected and the SUBMIT button is also selected, then all event registrants currently listed on this pending screen will be automatically selected and will be deleted in bulk. Each registrant will receive an email notifying them that they have been deleted. This option will be disabled for an event with payment associated.
- **Registrant Name**: Displays as a link which if selected will navigate you to the Modify Registrant Details screen for that particular registrant. Registrant names are displayed as last name, first name and the list of registrants is sorted by this column in alphabetical ascending order.
- **Registrant Email**: Displays as a link and if selected opens your default mail client with the registrant's email automatically inserted into the TO: field of your mail client.
- **Registration Date/Time**: Display the date and time when this registration request was submitted.
- **Action**: This column displays a drop-down selection box with the following action options:

  - **Delete**: If selected, you will be prompted to confirm your delete action. If you confirm the action, the registrant will be deleted from the registration area and the registrant will receive an email that they have been deleted.
  - **View**: If selected, this will take you to the View Registrant Details screen for the selected registrant. The top of the list displays the current number of cancelled registrants for this event.

Navigation Options in this Area

To view all registrants already approved, click the button for VIEW APPROVED. To view all registrants still pending, click the button VIEW PENDING. To view all denied registrants, click the button VIEW DENIED. There is also a text link entitled "Back to List of Registration Events" in order to navigate back to the main list of all events with active registration.

Manage Event Registrations - Archive

Events with archived registration can be managed from the Manage Event Registrations area. Click on the REGISTRATION tab and then select REGISTRANTS: ARCHIVE.

This area allows you to see a snapshot of all past events (archived) that had registrations enabled on the Calendar. Events with registration enabled are automatically moved to this archive list once the date/time of the event has passed. You can sort the list by department or by date range. Only those departments to which you have been granted permission will display for selection of sorting. The date range option searches for any event with registration that was active during the date range selected and for which you have permission.

The fields included on the Manage Archived Event Registration List screen include:

- **Event Date/Time**: The date and time when the event took place.
- **Cancelled**: Shows with an "X" in the column if the Event was cancelled prior to the start date/time
- **Event Name**: The name of the event.
  - (+ Add Registrant):
  - If an event has remaining spaces available, then a (+) sign will display to the left of the event name within the list. If selected, the (+) sign will take you to the administrative "Add Registrant" screen.
- **Pending Registrants**: Displays the number of pending registrants at the time the event took place. You may click on the number displayed to go to list of registrants.
- **Approved Registrants**: Displays the number of approved registrants at the time the event took place. You may click on the number displayed to go to list of registrants.
- **Denied Registrants**: Displays the number of denied registrants at the time the event took place. You may click on the number displayed to go to list of registrants.

- **Cancelled Registrants**: Displays the number of cancelled registrants at the time the event took place. You may click on the number displayed to go to list of registrants.
- **Total Attendees**: Displays the number of registrants who have been marked as attendees. To mark a registrant as an attendee, you must click on the Approved number and then from the Approved Registrants screen (for an archived event) select to mark each registrant as Yes or No.
- **Action**: This column displays a DOWNLOAD button that if selected allows you to download all registrants in one CSV file, along with their respective registration details and status at the time the event registration was archived.

Exporting Registrations

Active Data Calendar provides the ability to export registration data as one-time and persistent registration exports. You can optionally specify criteria to export only selected registrations.

From the Calendar's REGISTRATION tab, you can:

- Create a new export by clicking *EXPORT:* *Add*
- Change or remove saved persistent exports by clicking *EXPORT:* *Modify/Delete*
- Browse completed export activity by clicking *EXPORT:* *View*

One-Time Registration Export

This area includes options for you to create a one-time registrations download, optionally filtered by criteria you specify.

You can select new search criteria every time the download function is used. This area allows you to download a CSV (comma-separated value) or XML document file for import into the program of your choice. After clicking SUBMIT, Calendar prompts to save or open the file, which you can save where you need it, with an appropriate file name.

Procedure

After clicking *REGISTRATION,* then *EXPORT:* *Add*, follow these steps to execute the one-time registrations download process:

1. Select *One-Time Registrant Download* from the **Select a Download/Export Option** drop-down list.
2. Select a format in which to export the registration data:
    - Export CSV
    - Export XML
3. Select one of these three options:
    - **Export All Registrants**: Exports all registrations without filtering on registration or event parameters.
    - **Export All Registrants by Criteria:** Export registrations filtered by these registration criteria**:**

– **Start Date/End Date:** This time range searches against the registrations' start and end date. This field remains disabled unless the date range is selected.

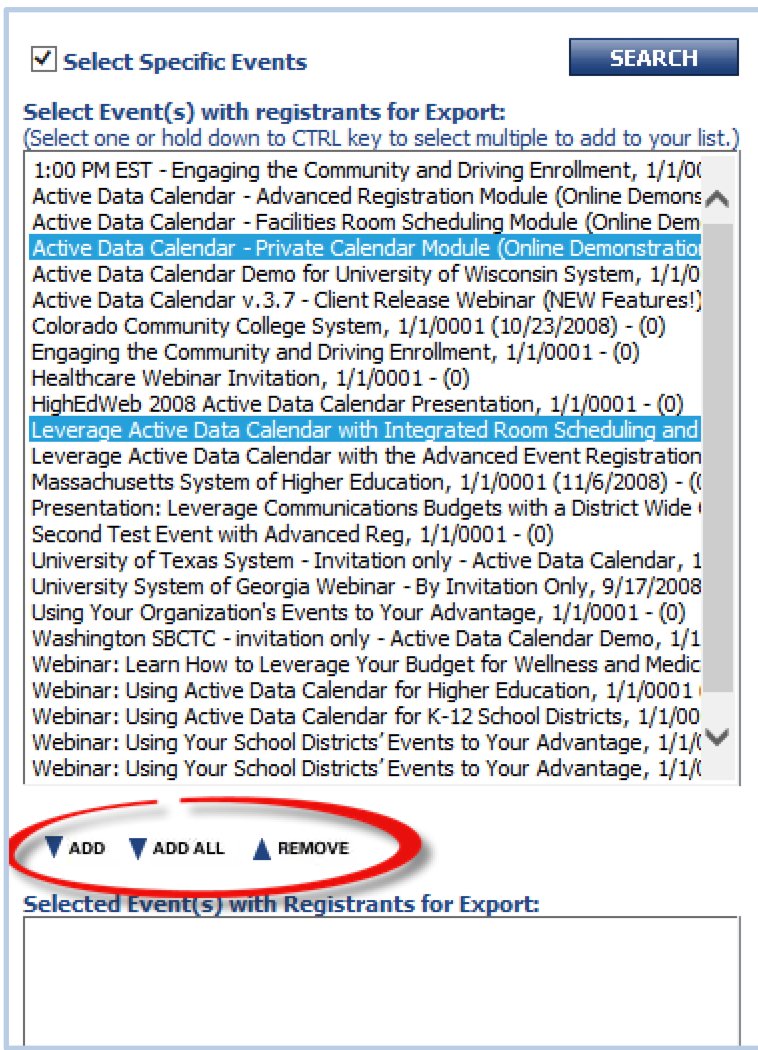
– **Start Time/End Time:** This time range searches against the registrations' start and end time. This field remains disabled unless the date range is selected.

– **Registrant Status:** Click *Select All*, or select one or more entries (hold down Ctrl key for multiple) from: *Approved*, *Denied*, *Cancelled*, or *Pending*.

– **Export Registrants for Users:** Select one or more entries (hold down Ctrl key to select multiple) for the users who created the events for which registrants signed up.

- **Select Specific Events:** Select this box to choose events from the list shown below it, which is populated from events in the Calendar. Hold down the Ctrl key and click to select multiple events. The resulting export contains registrations for only the events that you select from the list.

  – After choosing the events whose registrations you want to include in the export, click *ADD*, *ADD ALL* or *REMOVE*, below the list, as shown:



– Click ADD to move the events you selected onto the *Selected Events* list

– Click ADD ALL to move all the events to the *Selected Events* list

– Click REMOVE to move one or more selected events back to the *Select Events* list

Note: The list of events can get very long, and become hard to work with. To make it shorter, apply the search filter as described below in *The* Search for Events *Dialog*.

Navigation Options in this Area

Once you have finished entering your export parameters, you may:

- Click RESET to return this page's values to their defaults.
- Click SUBMIT to finalize your selections and begin the export and download process, then either Open or Save the file.
- Click CANCEL to end the export operation and return to the Calendar's *Main Menu*.
- Click View Export Feeds to view all current export feeds.

Persistent Registration Export

Administrative users with the privilege to export registrations can use this function to add persistent export feeds for use with other applications or systems where they are managing registration information. All export feeds from Active Data Calendar are formatted according to the Calendar's internal data definitions.

Procedure

After clicking *REGISTRATION,* then *EXPORT: Add*, follow these steps to add a new persistent registration export feed to your Calendar.

1. Select *Persistent Registrant Export* from the **Download/Export Option** drop-down list.
2. Enter an **Export Name**, up to 50 characters, to identify this export when retrieving it.
3. Select an **Export Type** for registrations, from these two options:
    - **Push:** If you select this option, Calendar pushes the resulting file to a location you specify. Enter these parameters:
        – **Export URL:** the location where the Calendar will upload (*push*) your exported data

        – **User Name** and **Password** for the system at the receiving URL, if required by that system

        – **Start Date:** the first day on which the export will run

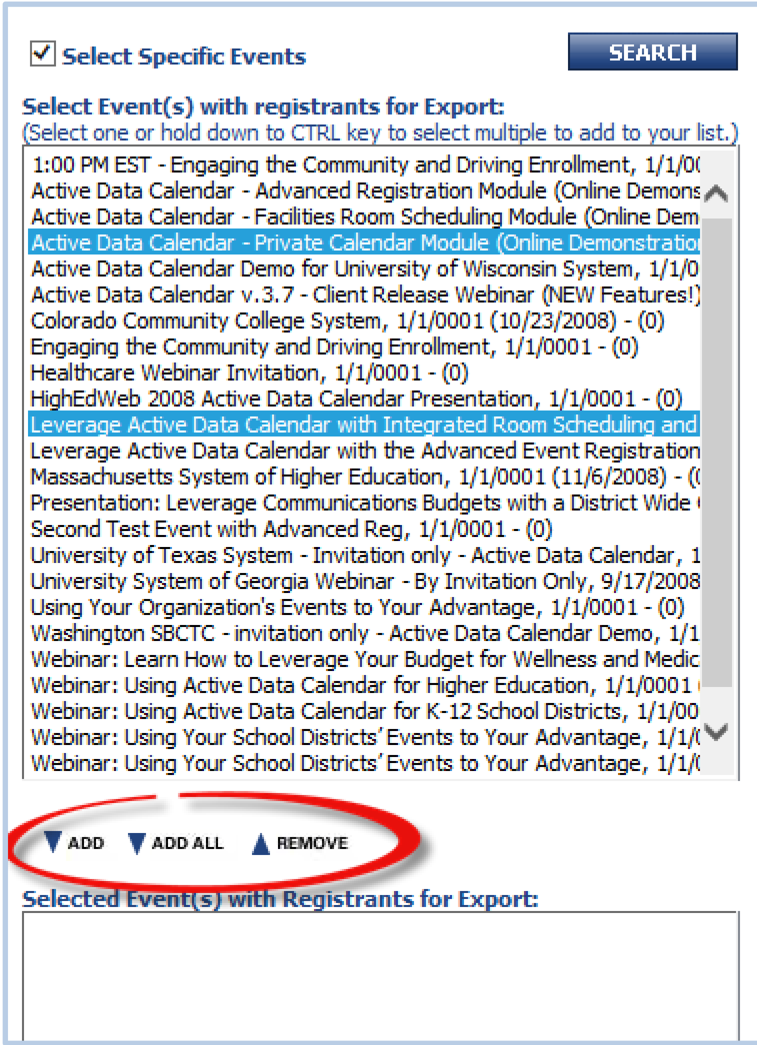
        – **End Date:** the last day on which the export will run

        – **Time to Begin Exporting:** the time of day each run will begin

        – **Time to End Exporting:** the time of day after which a new run will not begin. A run that has already started before this time runs to completion even if it completes after this time.

    - **Export Interval:** The export process counts this many minutes after a run completes before starting the next run
    - **Active:** Select *Active* to put this job into production, or *Inactive* to save it for future use but not put it into production yet.
  - **HTTP Pull:** Calendar supplies a URL from which you may download your exported data.
4. Select the File Format for exported registrants:
   - Export CSV
   - Export XML
5. Select the registrations to export:
   - **Export all Registrants**: Exports all registrants for all events. Disables other selection criteria listed below.
   - **Export All Registrants by Criteria:** You may Export registrants based on the following criteria**:**
     - **Start Date** and **End Date:** This date range searches against the registrant start and end dates.
     - **Start Time** and **End Time:** This time range searches against the registrant start and end time. This field remains disabled unless the date range is selected.
     - **Registrant Status:** Select All, or select one or multiple entries (hold down the *Ctrl* key) from: Approved, Denied, Cancelled, or Pending.
     - **Export Registrants for Users:** Select one or multiple entries (hold down the *Ctrl* key) from the registrants shown.
   - **Select Specific Events:** Select this box to choose events from the list shown below it, which is populated from events in the Calendar. Hold down the Ctrl key and click to select multiple events. The resulting export contains registrations for only the events that you select from the list.

– After choosing the events whose registrations you want to include in the export, click *ADD*, *ADD ALL* or *REMOVE*, below the list, as shown:



– Click ADD to move the events you selected onto the *Selected Events* list

– Click ADD ALL to move <u>all</u> the events to the *Selected Events* list

– Click REMOVE to move one or more events back to the *Select Events* list

Note: The list of events can get very long, and become hard to work with. To make it shorter, apply the search filter as described below in *The* Search for Events *Dialog*.

Navigation Options in this Area

When finished making selections and entering parameters, you can:

- Click RESET to return this page's values to their defaults.
- Click SUBMIT to finalize your selections and begin the export and download process, then either Open or Save the file.
- Click CANCEL to end the export operation and return to the Calendar's *Main Menu*.
- Click View Export Feeds to view all current export feeds. See the next section.

Viewing Persistent Registrant Export Feeds

If you are an administrative user with registration export privileges, you can use this area to manage persistent export feeds. Functions include:

- Check the current status of a feed
- View logs for ongoing feed status
- Modify or delete a persistent export job

Feed Area Contents

This area lists all export feeds in a table. Information it provides includes:

- **Export Name**: The Export Name entered when the export job was set up.
- **Polling Dates**: The export's start and end dates.
- **Polling Time**: The export's daily start and end times, on the dates entered.
- **Frequency of Polling**: The interval at which the calendar application polls the export URL to find updates and export them into Calendar. This is the number the Calendar should wait until it runs the export thread for the feed.
- **Feed Status**: The current feed status in general. Status options that may display include:
    - **Active:** The export currently has an *active* status. It is scheduled to run on the day you are viewing this report.
    - **Inactive:** The export currently has an *inactive* status and is not running regardless of the schedule.
    - **Future:** The export is active, but its start date is in the future.
    - **Expired:** The export has an end date in the past, so it is no longer running.
- **Last Run Result**: The outcome the last time Calendar ran the export thread for this export feed. Status options that may display include:
    - **Failed:** The export currently has a failed status and was not able to export registrants on the last export run
    - **Success:** The export is running successfully)

The status value displays as a link you can click to retreive the entire log of each export run including that run's status.

- **Action**: Options include Modify and Delete. Click Modify to navigate to the Modify Export screen. Click Delete to navigate to the Delete Export confirmation screen.

The Search for Events *Dialog*

You can simplify finding and selecting events by filtering the events in the list, thereby reducing its length. Click the SEARCH button, and in the *Search for Events* dialog box, choose these filtering options:

- **Select Saved Search:** Retrieves a search you previously created and saved under a name. This is useful, for example, for filtering on a specific set of categories for which you have responsibility, and therefore regularly use. Choosing your named search automatically populates the search criteria in this dialog with the values you saved. Save your search as described in *Name this Search*, below.
- Select **# of Events Displayed:**Choose from the drop-down menu how many events you would like to display on one page.
- **Event Type:** Choose from Public, Private, Both or All[2].
- **Department Name:** Select a department name from this drop-down list that includes all active departments (sorted alphabetically, plus *All* at the top).
- **Search By Category/Subcategory:** Choose from one or more of the categories and/or subcategories shown. Selecting no entries in this list instructs the export process not to filter on this field; that is, selecting none of them is equivalent to selecting all categories and subcategories.
- **Location:** Choose from the locations shown in this list box. It includes all active locations in the registrant database. All users can see all locations, and the list is sorted alphabetically (plus *All* at the top.)
- **Keyword Search:** Enter up to a total of 255 characters of keywords into this open text field. Use commas to separate multiple entries. The Calendar searches for your keywords in:
    - Registrant Name
    - Registrant Description
    - Contact Info (Name & Email)
    - Details
    - Admission Info
    - Remarks
    - Any custom fields that you have set up in the Configuration area

[2] In Active Data Calendar, an event can be tagged as being on the *Public* calendar, *Private* calendar, or *Both* calendars. Selecting *All* for **Event Type** effectively removes the test for this tag, thereby retrieving all records with any of these three calendar designations.

- **Select Events for a Specific Date Range**: Select a range of event dates such as *Today*, *Tomorrow*, *Current Week*, etc., or spans of a number of days (such as *Next 14 days*), up to the *Next Year*. You can also specify starting and ending dates. The default start date is the first day of the current month, and the default end date is the last day of the current month.
- **Select Events for a Specific Time Range:** Select from:
  - Midnight to 5 AM
  - 5 AM to Noon
  - Noon to 5 PM
  - 5 PM to Midnight

  You may instead specify a start time and end time. Start and end times have no default. To enter start and end times, set the Range of Time drop-down list to *Select*.
- **Save for Current User Login Session** or **Save for all Future Sessions:** If you choose to save this search you just entered for this session, you can save it for only as long as you are logged in, or permanently.
- **Name this Search:** If you checked either of the above **Save For…** check boxes, enter a name in this field for these search criteria. You may want to come up with a convention for naming searches so you know what they include when you look for it.

  When you click the SEARCH button at the bottom of this dialog box, the search is saved under this name.

Manage Export Service

At the top of this screen there is an area noting the current status of your organization's Calendar export thread. The export thread may be stopped completely for some reason and if so, you will see a message stating this and that will inform you that all exports are currently in a stopped status and are not running. You can click the "Start" button to restart the export thread and begin running all exports again. Or, if for some reason you need to stop the export thread, you can do that as well by clicking the "Stop" button.

Further Information

Note: Access to this area requires an ID and Password. Your Calendar administrator can supply you with credentials for it.

FAQ's and Tip Sheets

FAQ's and Tip Sheets are available to assist with your Calendar. They are available on your Client's Only Page at http://www.activeddatax.com. These sheets cover information such as Import/Export, Installation help, basic configuration and many other pieces of information to configure and maintain your calendar.

User Guides

Active Data Exchange provides multiple modules and User Guides to support these modules on the Client's Only Page at http://www.activedatax.com. These guides include:

- **Active Data Calendar User Guide**: Available to all Active Data Calendar clients
- **Active Data Calendar Facilities User Guide**: Available to clients with the Facilities Module installed.
- **Active Data Calendar Custom Text Settings User Guide:** Available to clients with the Custom Text Module installed.
- **Active Data Calendar PayFlow Pro User Guide**: Available to clients using the PayFlow Pro payment gateway.
- **Active Data Calendar Advanced Registration User Guide:** (This guide.)

Other Guides

These Guides will be made available soon!

- **Active Data Calendar SharePoint Connector User Guide** – This guide will cover how to implement your Calendar so that it shares data with SharePoint. It will be made available to Clients with the SharePoint Connector Module installed.
- **Active Data Calendar Open Entry User Guide** – Available to Clients with the Open Entry Module installed. This guide includes Public and Private Open Entry as well as Facilities Open Entry.

If you are interested in obtaining further information on any of the above documentation or in looking at some of the Modules offered by Active Data Exchange please contact your Account Executive at Active Data Exchange or call 610-997-8100.

Active Data Calendar Help and Support

If you have any questions or require assistance with the Calendar application please contact Active Data Exchange Support:

- Email: Support@ActiveDataX.com
- Phone: 610-997-8100

Glossary of Terminology

Below are definitions of common Active Data Calendar terms.

Account – An account is made up of the combined user information, including a Login ID and password, which is added to Active Data Calendar to allow users to login and use the calendar product.

- *User account* – This account role can log into the calendar and perform functions. Key information for this account level:
  - Add, update, and delete events within their associated department.
  - When adding and updating events to the calendar this user will require an administrator within their department or a Super User to approve the events.
  - This level can also update their login information.
- *Administrator account* – A department often has an administrator assigned to it. Key information for this account level:
  - This account role can add, update, and delete events in their associated department.
  - Events added by an Administrator automatically post live to the calendar.
  - They may also process pending events from the "User" level accounts in their department.
- *Super User account* – The Super user-level account is created at the time of the install of Active Data Calendar. Key information for this account:
  - Provided to your organization
  - Performs any function within the calendar product
  - Primarily used to setup the initial configuration and framework of the calendar
  - Only account that can add other administrative-level user accounts
  - Receives notifications to process any events pending approval
  - Can process any other event inside the Calendar regardless of Department or Locked Category status.

Category – Categories are provided so you can group events, helping people using your calendar to find events more easily.

- Events can be displayed by category when viewing the calendar.
- Categories are not specific to a department.
- Categories are available to all users of the calendar.

Department – A department is used to group people together.

- Groups Administrative and Users accounts
- Uses logical groupings by work function/responsibilities
- A few examples are *Human Resources*, *Marketing*, *Admissions* and *Student Services*.

Event – An event is a gathering or occasion that appears on your calendar.

- Combines date, time and details of a scheduled meeting, concert, sports match, dinner, fund raiser, etc.
- All users of the calendar can add, update and delete events.

Font Color Numbers – Font colors are configured using "hexadecimal" digits (0-9 plus A-F). Each color is represented by a different six-digit hexadecimal number. These numbers are entered anywhere in the configuration of Calendar where the Font Color is requested. For example: White is FFFFFF while Black is 000000, while Yellow (depending on the shade desired) may be FFFF00. Please see your Clients Only FAQ page for a general list of colors. The Internet provides many color-selection tools. You can also contact Active Data Product Support for a list of colors and numeric equivalents.

LDAP –Lightweight Directory Access Protocol. A network protocol that e-mail and other programs use to look up user account (and related) information from a server.

Location – A location enables a "quick list" of physical locations to be used when adding events. There are three (3) divisions in locations:

- Location: Main locations and/or areas where buildings are clustered
- Building: Physical buildings, centers or areas at a defined location.
- Room: Located inside buildings, centers or areas at a defined location.

Login ID – Information uniquely identifying a user, for logging into the Calendar program. A Login ID is often convventionally referred to as a user account.

Payment Gateway – A company or organization that provides payment processing services.

Payment Account – An account setup under a payment gateway that contains information about how to connectto the payment gateway and provide information required by the payment gateway.

Processing Platform – Certain additional parameters can be set, depending on the processing platform used. Processing platforms supported by the Calendar include:

- Paypal
- American Express Brighton
- First Data Merchant Services (FDMS) North
- First Data TeleCheck
- Global Payments East
- Elavon (Formerly Nova)
- Paymentech Tampa
- Moneris Solutions
- American Express Phoenix
- First Data Merchant Services (FDMS) Nashville
- First Data Merchant Services (FDMS) South
- Global Payments Central
- Merchant e-Solutions
- Paymentech Salem (New Hampshire)
- TSYS Acquiring Solutions (Formerly Vital Processing Services)

Pending Event – An event waiting to be approved by an Administrator or the Super User.

- All user level accounts must have events the submit/update approved
- Until the event is approved it is placed in pending status.

RSS – Really Simple Syndication – Allows users to subscribe to their favorite content.

- Delivers its information as an XML file called an RSS feed
- Simple XML-based system
- Formats are specified in XML (a generic specification for data formats)
- A program known as a feed reader or aggregator can check a list of feeds on behalf of the user.
- A feed reader displays any updated information (or events) that it finds.

Subcategory – Subcategories are used to further classify events on the calendar.

- When viewing the calendar users can further refine event listings
- Subcategory's are not required but are recommended