EMS Regics User’s Manual

User’s Manual

Version 3.0

Event Management Systems
Schedule Clarity

Customer Support

Customer support is available to organizations that purchase EMS Regics and that have a current Annual Service Agreement (ASA). Contact DEA, Inc. at:

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Preface

Welcome to the *EMS Regics User's Manual*. The purpose of the *EMS Regics User's Manual* is to answer your questions and guide you through the procedures necessary to use EMS Regics efficiently and effectively.

Using the manual

You will find the *EMS Regics User's Manual easy* to use. You can simply look up the topic that you need in the table of contents or the index. Later, in this Preface, you will find a brief discussion of each chapter to further assist you in locating the information that you need.

Special information about the manual

The *EMS Regics User's Manual* has a dual purpose design. It can be distributed electronically and then printed on an as-needed basis, or it can be viewed online in its fully interactive capacity. If you print the document, for best results, it is recommended that you print it on a duplex printer; however, single-sided printing will also work. If you view the document online, a standard set of bookmarks appears in a frame on the left side of the document window for navigation through the document. For better viewing, decrease the size of the bookmark frame and use the magnification box to increase the magnification of the document to your viewing preference.

If you do print the document using a single-sided printer, you might see a single blank page at the end of some chapters. This blank page has been added solely to ensure that the next chapter begins on an odd-numbered page. This blank page in no way indicates that your book is missing information.

Conventions used in the manual

The *EMS Regics User's Manual* uses the following conventions:

- Two types of users can work with the products (online registration forms and surveys) that are produced in EMS Regics—a registrant and a respondent. For brevity, the collective term "participant" is used when an EMS Regics definition or function is applicable to both event registrants and survey respondents. For definitions or functions that are user-specific, the correct individual term, "registrant" or "respondent," is used.
- Information that can vary in a command—variable information—is indicated by alphanumeric characters enclosed in angle brackets; for example, <Group tab name>. Do not type the angle brackets when you specify the variable information.

- A new term, or term that must be emphasized for clarity of procedures, is *italicized*.
- Page numbering is "online friendly." Pages are numbered from 1 to x, *starting with the cover* and ending on the last page of the index.

Although numbering begins on the cover page, this number is not visible on the cover page or front matter pages. Page numbers are visible beginning with the first page of the table of contents.

- This manual is intended for both print and online viewing.
  - If information appears in blue, it is a hyperlink. Table of Contents and Index entries are also hyperlinks. Click the hyperlink to advance to the referenced information.

Assumptions for the manual

The *EMS Regics User's Manual* assumes that:

- You are familiar with a web-based application and basic web functions and navigational elements.
- If you are running EMS Regics in Internet Explorer 8, you have enabled the following setting: Tools -> Internet Options -> Security -> Custom Level -> Downloads -> Automatic prompting for file downloads. (Enabling this setting ensures that you can generate reports or export a file to a list.)

Organization of the manual

In addition to this Preface, the *EMS Regics User's Manual* contains the following chapters:

- Chapter 1, "Getting Started with EMS Regics," on page 15 details the procedures for opening and logging in to EMS Regics. It also provides an overview of the major navigational elements in the application, including required fields and icons.
- Chapter 2, "Event Registration Form and Survey Creation," on page 25 details the procedures for creating an online event registration form or a survey for your organization, and for managing participant information.
- Chapter 3, "Event Registration Form and Survey Management," on page 67 details the procedures for managing an online event registration form or a survey for your organization, and for managing participant information.
- Chapter 4, "EMS Regics System Administration - Configuration," on page 107 details the configuration functions that are available in EMS Regics, including configuring registrant/respondent fields, payment types, global emails, global confirmation messages, and secondary statuses.

- Chapter 5, “EMS Regics System Administration - General Administration,” on page 131 details the general administrative functions that are available in EMS Regics, including managing system parameters, your EMS Regics license, the Help text in your EMS Regics system, and searching for credit card transactions for event registrations.
- Chapter 6, “EMS Regics System Administration - Security,” on page 143 details the security functions that are available in EMS Regics, including managing users and groups.
- Chapter 7, “EMS Regics Reports,” on page 163 details how to generate both standard and custom EMS Regics reports.
- Appendix A, “EMS Regics System Parameters,” on page 181 details the system parameters (by area) that the EMS Regics administrator can configure.

Chapter 1
Getting Started with EMS Regics

EMS Regics is online event registration software that provides event planners and organizers with data management and control of their events and attendees. The application also provides for the quick and easy creation of professional online surveys that can be standalone surveys, or that can be used in support of events. This chapter details the procedures for opening and logging in to EMS Regics. It also provides an overview of the major navigational elements in the application, including required fields and icons.

This chapter covers the following topics:

Opening and Logging in to EMS Regics

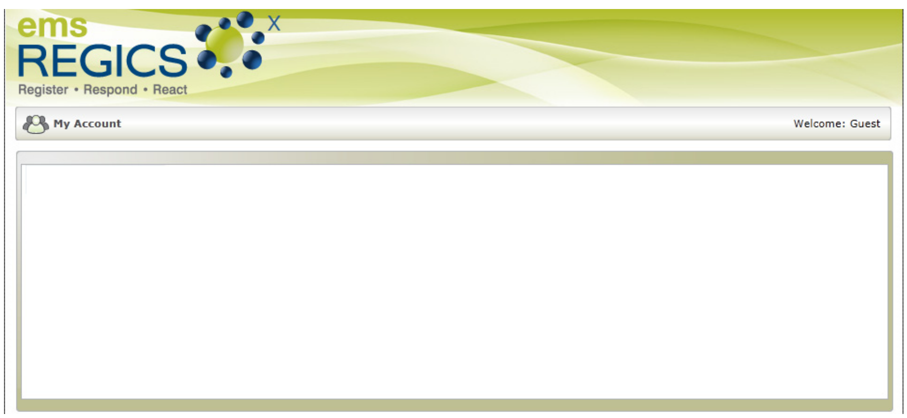
EMS Regics is a web-based application that has two levels of users—*Administrator* and *Standard*—who can work with the application to create and manage event registration forms and surveys. The options that are available to you and the information that you can view after you log in to EMS Regics depend on your user classification and are detailed in the appropriate sections in this manual.

To log in to EMS Regics

1. Open a web browser session.
2. In the address field, enter the URL (address) for your organization's installation of EMS Regics.

   The EMS Regics Home page opens.

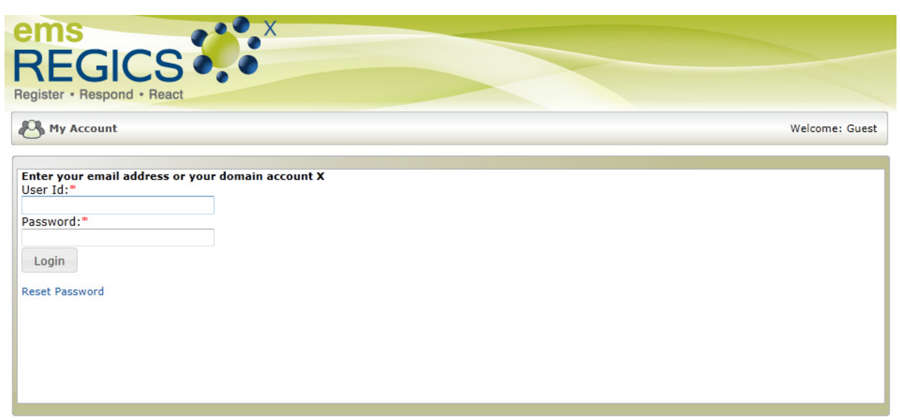
Figure 1-1: EMS Regics Home page



3. Under My Account, click Log In.

   The EMS Regics Login page opens.

Figure 1-2: EMS Regics Login page

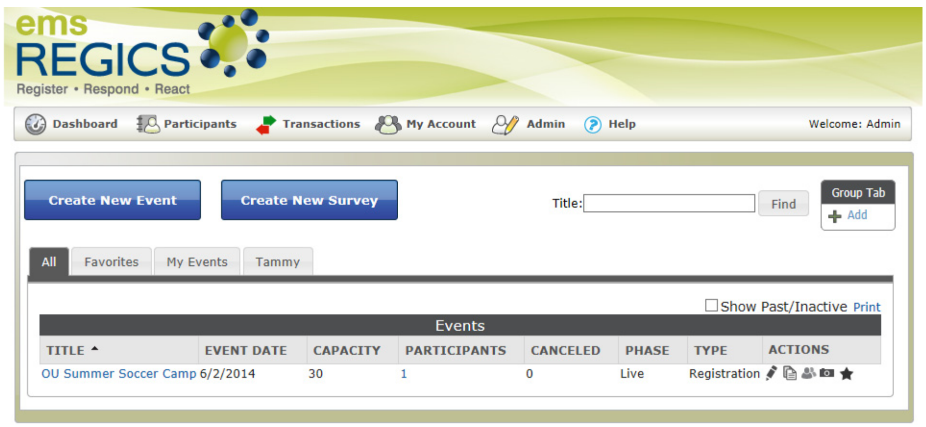


4. Enter your user ID (network ID or email address) and password, and then click Login.

For subsequent log ins, the User Id field is automatically populated with your user ID. If you have forgotten your password, then you can click the Reset Password link to have EMS Regics reset your password and email it to you. You also have the option of changing your password after you login. See "To change your account password" below.

The Dashboard opens. If you are an Administrator user, then you have full site privileges and you have full access to all of the event registrations forms and surveys that have been defined in your organization's system. If you are a Standard user, then you have limited privileges and you have access to only specific event registration forms or surveys as specified by your EMS Regics administrator.

Figure 1-3: EMS Regics Dashboard



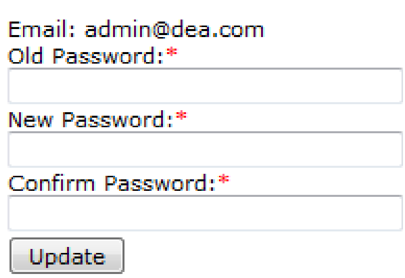
To change your account password

After you login to EMS Regics, you can manually change the password for your account.

1. On the Dashboard, click My Account > Change Password.

   The Account Password page opens.

Figure 1-4: Account Password page

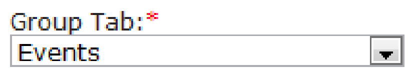


2. In the Old Password field, enter your current password.
3. In the New Password field, enter your new password.
4. In the Confirm Password field, enter your new password exactly as you entered it in the New Password field.
5. Click Update.

Required Fields and Using Icons to Enter Data

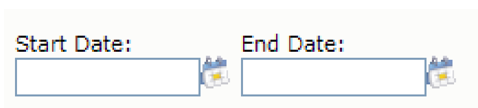
A required field is a field into which you must enter data before you can save an addition or modification in EMS Regics. A required field is denoted by a red asterisk to the right of it.

Figure 1-5: Example of a required field



Many fields in EMS Regics, whether required or optional, have an icon next to them. For some fields with an icon next to them, the only available option is to click the icon to open a list from which you can select a value for the field. For other fields, you can click the icon next to the field, or you can manually enter data into the field.

Figure 1-6: Example fields with icons on an EMS Regics page



For a date field, you can click the Calendar Picker icon to open a calendar and select the date, or you can enter the date manually into the field,

Each icon is identified by a unique name in EMS Regics. If a procedure in the EMS Regics User's Manual refers to an icon and you are not certain as to which icon the procedure is referring, then place your mouse pointer on the icon. The name of the icon is displayed in a tooltip.

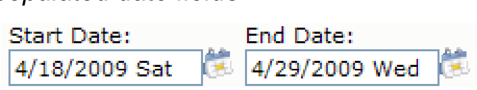
Figure 1-7: Viewing the name of an icon

Several icons—the Calendar picker icon, the Color Picker icon, and the Time Picker icon—are used repeatedly in EMS Regics and these icons function the same way regardless of the page on which they are used.

Calendar Picker icon

For any date field in EMS Regics, you can manually enter the date in the field, or you can click the Calendar Picker icon to open the Calendar Tool from which you can select a date. If you manually enter a date in a date field, you can enter the date in any month/day/year format—mm/dd/yyyy, m/d/yy, and so on. The application always displays the date based on the language that is specified for your web browser and you cannot modify the format.

Figure 1-8: Example of populated date fields



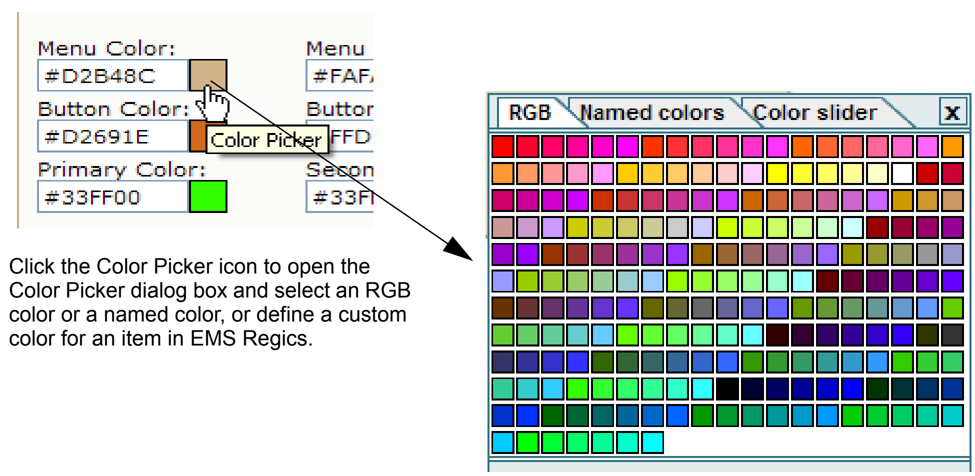
When you click the Calendar Picker icon, the Calendar Tool opens. This tool shows the current day's date. You can use the scroll features on the tool to select dates within the current calendar year, or for previous or future years.

Figure 1-9: Calendar Tool

Color Picker icon

If you can specify a color for a selected item in EMS Regics, for example, a survey title, then a Color Picker icon is displayed next to the item. You can manually enter an RGB or HEX value for the color in the field, or you can click the Color Picker icon to open the Color Picker dialog box. You can select an RGB color on the RGB tab, you can select a named color on the Named Color tab, or you can define a custom color on the Color slider tab. After you use the Color Picker dialog box to select or define a color, the dialog box closes automatically and the Color field is populated with the RGB or HEX value for the selected color.

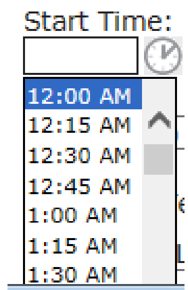
Figure 1-10: Color Picker dialog box



Time Picker icon

For any time field in EMS Regics, you can click the Time Picker icon to open a list from which you can select a time for the field. The list shows quarter hour time increments for a 24 hour period.

Figure 1-11: Time Picker list

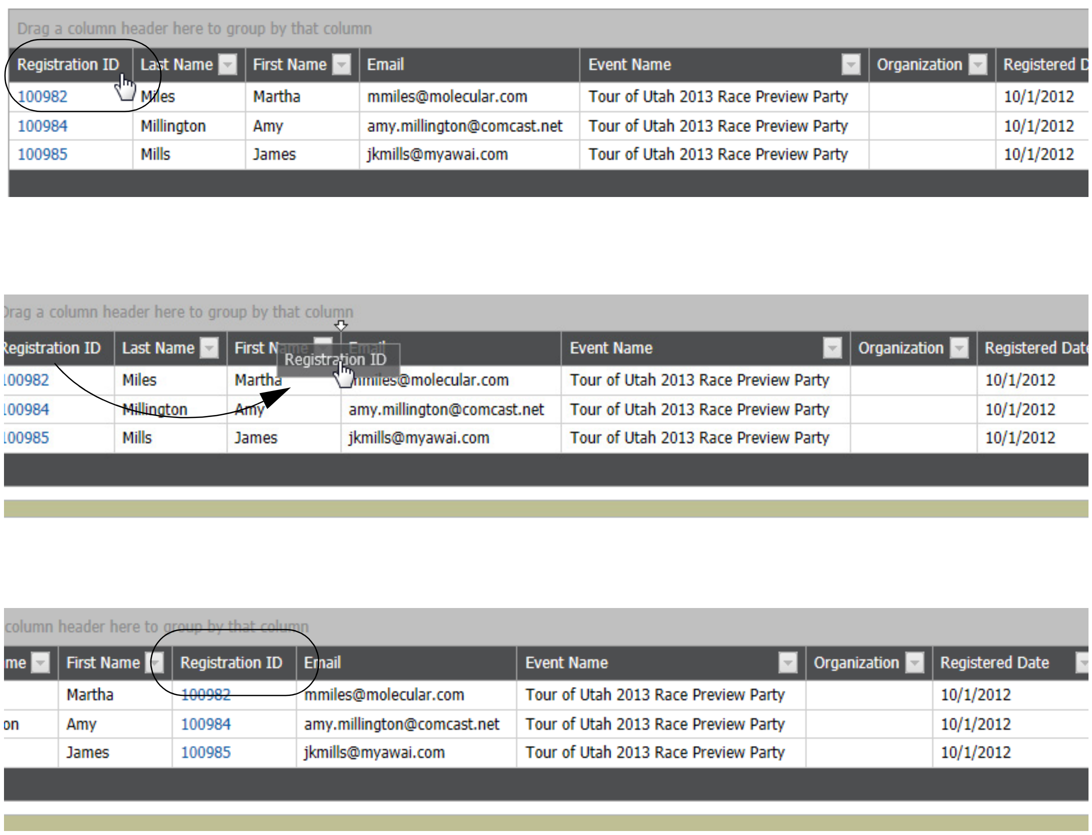


An EMS Regics Browser Page

Several pages in EMS Regics are special pages known as an EMS Regics Browser page. Many options are available on an EMS Browser page for rearranging the page display to better suit your working needs.

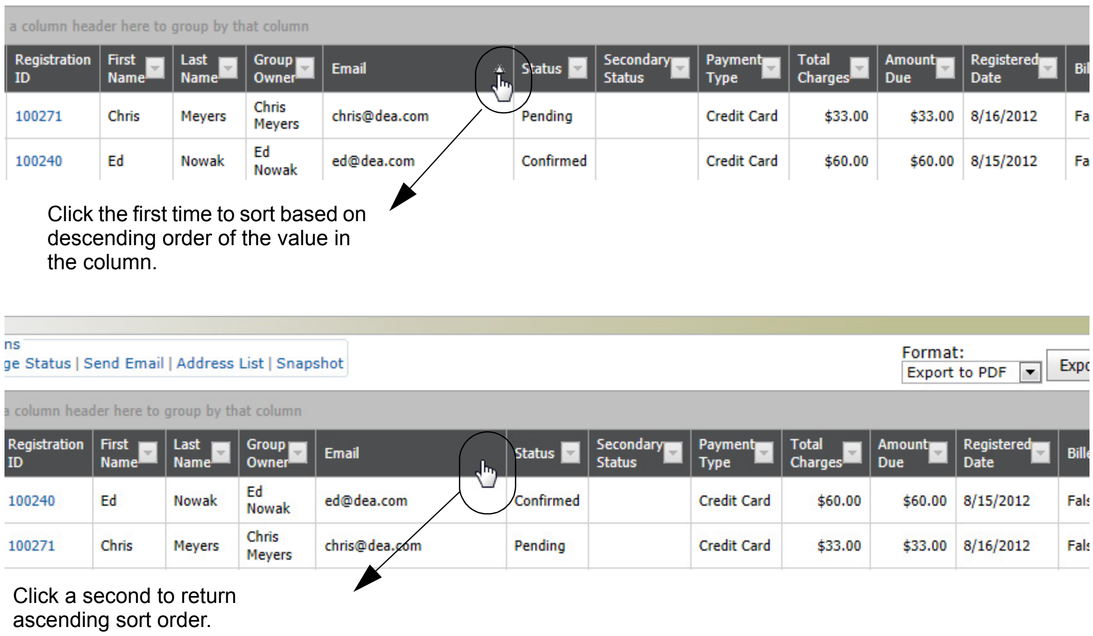
- To change the order of the columns on an EMS Regics Browser page, click and drag a column header to a new position.

Figure 1-12: Dragging a column to a new position on an EMS Regics Browser page



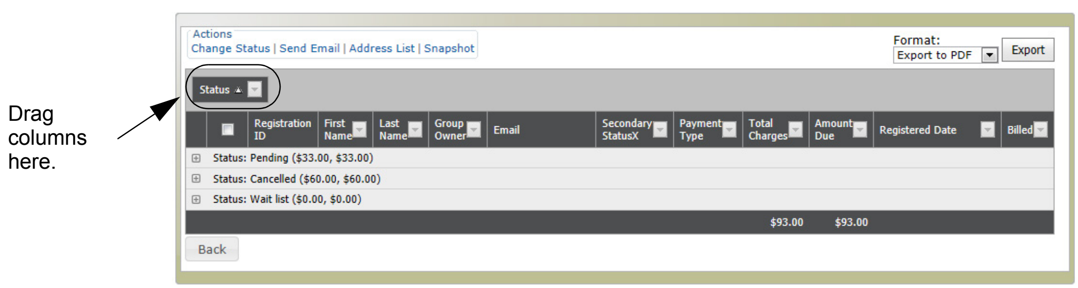
- Initially, an EMS Regics Browser page is sorted in ascending order based on the Registration ID. To change the sort order based on descending order for a column, click the column header. To change the sort based on ascending order for the column, click the column header again.

Figure 1-13: Changing the sort order on an EMS Regics Browser page



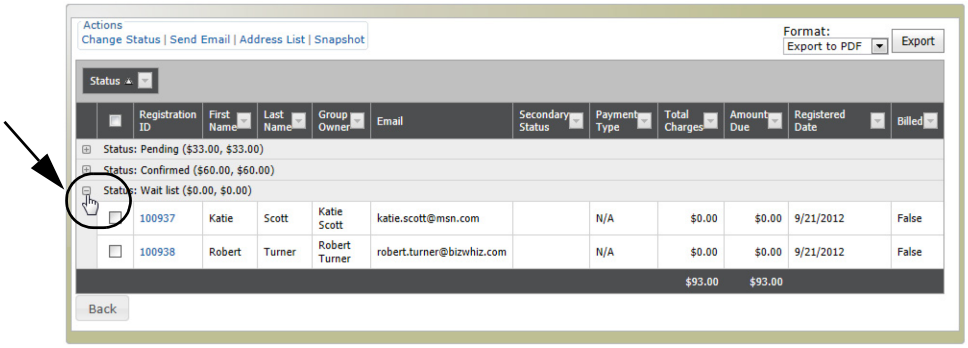
- To group the information on an EMS Regics Browser page by a particular piece of information (for example, to group participants by Status on the Manage Participants page), drag the appropriate column header to the location indicated above the participant list.

Figure 1-14: Example of a participant list grouped by status



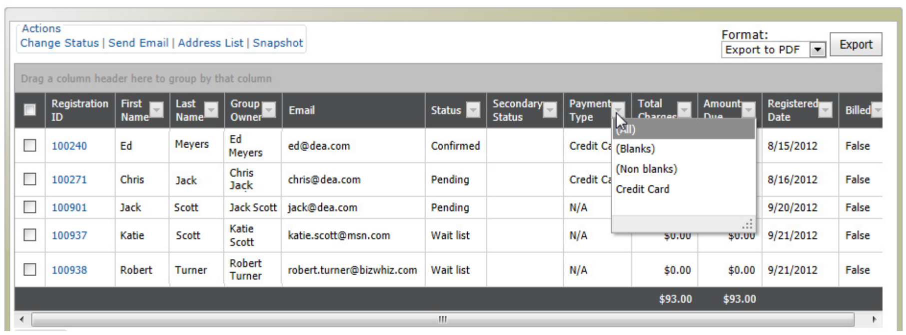
- To view the information for a participant or participants after you have grouped the participant list by a particular piece of information, click the Expand icon ⊞.

Figure 1-15: Viewing the information for participants grouped by Status



- To filter the display based on a specific value in the participants' records, open the appropriate Filter list, and then select a filtering value.

Figure 1-16: Example of filtering a participants list based on Payment Type



Chapter 2

Event Registration Form and Survey Creation

The Dashboard is the starting point for creating an online event registration form or a survey in EMS Regics. You use the functions on this page and related pages to manage all aspects of creating an online event registration form or a survey for your organization, and for managing participant information.

This chapter covers the following topics:

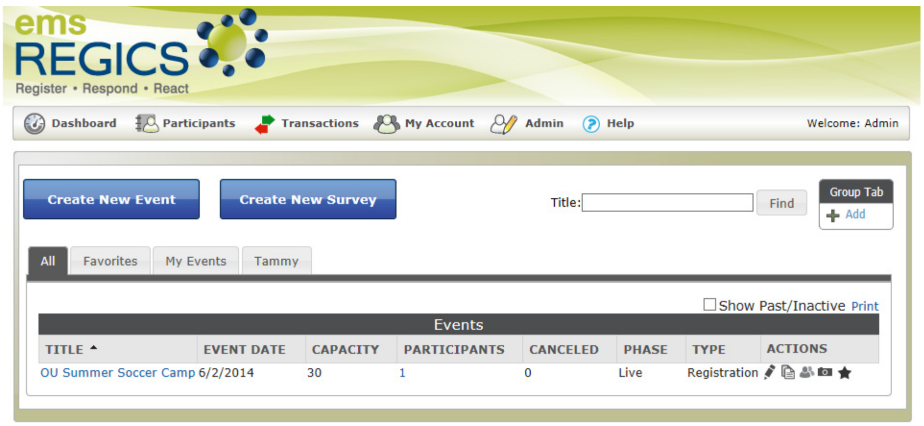
- "Creating Event Registration Forms and Surveys" on page 27.

Creating Event Registration Forms and Surveys

The Dashboard is the starting point for creating an online event registration form or a survey in EMS Regics. You use the functions on this page and related pages to manage all aspects of creating an online event registration form or a survey for your organization. You can also modify an existing event registration form or survey, delete an existing event registration form or survey, and manage participant information from the Dashboard.

To create an event registration form or survey

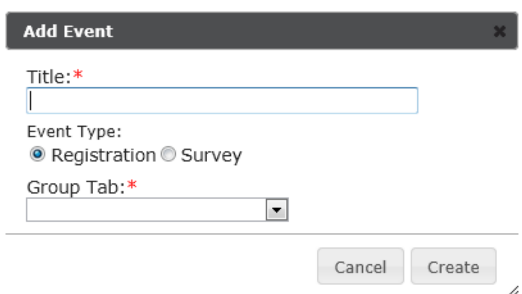
Figure 2-1: Dashboard



1. On the Dashboard, click Create New Event or Create New Survey as appropriate.

   The Add Event or Add Survey dialog box opens. The Event Type is selected accordingly (Registration or Survey), but you can always select the other value.

Figure 2-2: Add Event dialog box



2. Enter the information for the new event registration form or survey.

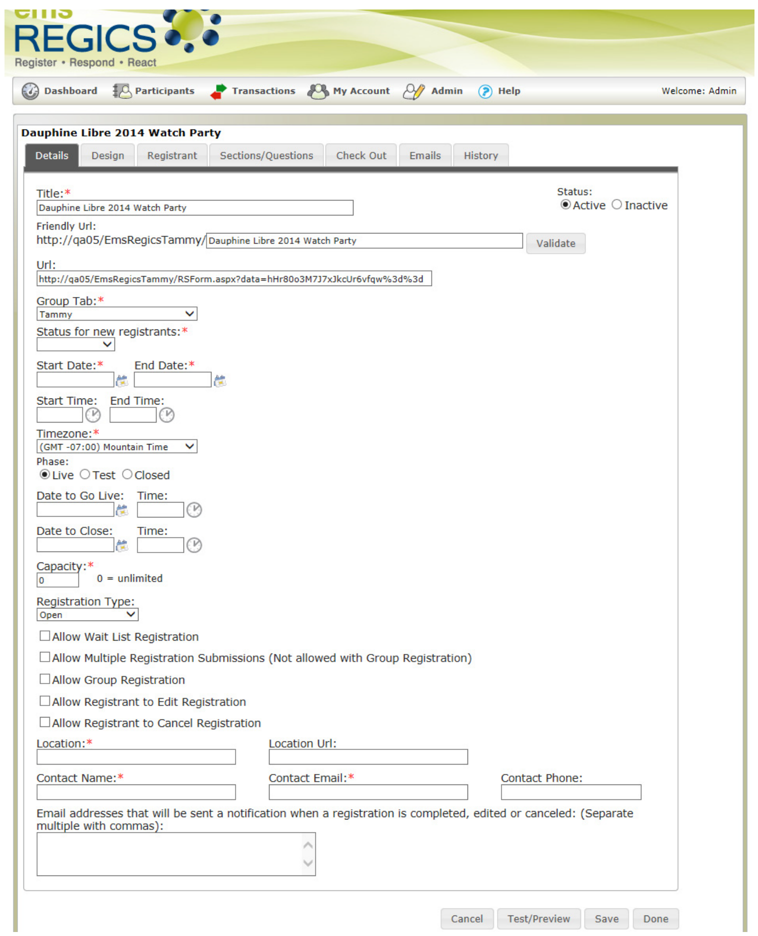
Table 2-1: New Event Registration or Survey Information

Item	Description
Title	The title or name for the event registration form or survey.
Event Type	Registration or Survey. (You can select only one value.)
Group Tab	A list of all available Group tabs on the Dashboard. You use Group tabs to organize your registration forms and surveys. The title for the event registration form or survey that you are adding (as well as other information) is displayed on the Group tab that you select here. By default, EMS Regics initially has only two tabs and these tabs are titled Events and Surveys. You can rename these tabs and you can also create additional tabs. See “Managing Group Tabs” on page 105.

3. Click Create.

   The Add Event dialog box and the Dashboard close, and the Add Event page opens. This page contains a series of tabs for adding the detailed information for the event registration form or survey. The Details tab is the active tab.

Figure 2-3: Add Event page (for an event), Details tab



4. Add the information for the event registration form or survey. See:
    - "Details tab" on page 30.
    - "Design tab" on page 34.
    - "Registrant tab/Respondent tab" on page 36.
    - "Sections/Questions tab" on page 43.
    - "Check Out tab" on page 58.
    - "Emails tab" on page 59.

This step list the tabs in the order in which they appear on the Dashboard; however, you can enter the information for the event registration form or survey in any order that meets your business needs.

At any time when you are creating the event registration form or the survey, you can click Test/Preview to preview the event registration form or survey before registration for the event or the survey goes live. The pages that you see when you click Test/Preview are identical to the pages that participants see when they click the event registration link or survey link. Submissions of an event registration or survey are not counted as live registrations. Only the five most current registrations in test mode are saved to the database. The Sections/Questions tab also has a Preview Section function which you can click to preview a selected section instead of the entire event registration form or survey.

5. Click Save.

    After you add your first event or survey, up to two additional Group tabs are displayed on the Dashboard—All and My Events.

    - The All Group tab displays *all* event registration forms and surveys that have been created in your EMS Regics system.
    - The My Events tab displays all the events and surveys that you created. (This means that the event or survey that you just created is available not only on the Group tab that you selected in Step 2, but also on the My Events tab.)

For information about Group tabs, see "Managing Group Tabs" on page 105.

Details tab

Figure 2-4: Add Event page (for an event), Details tab

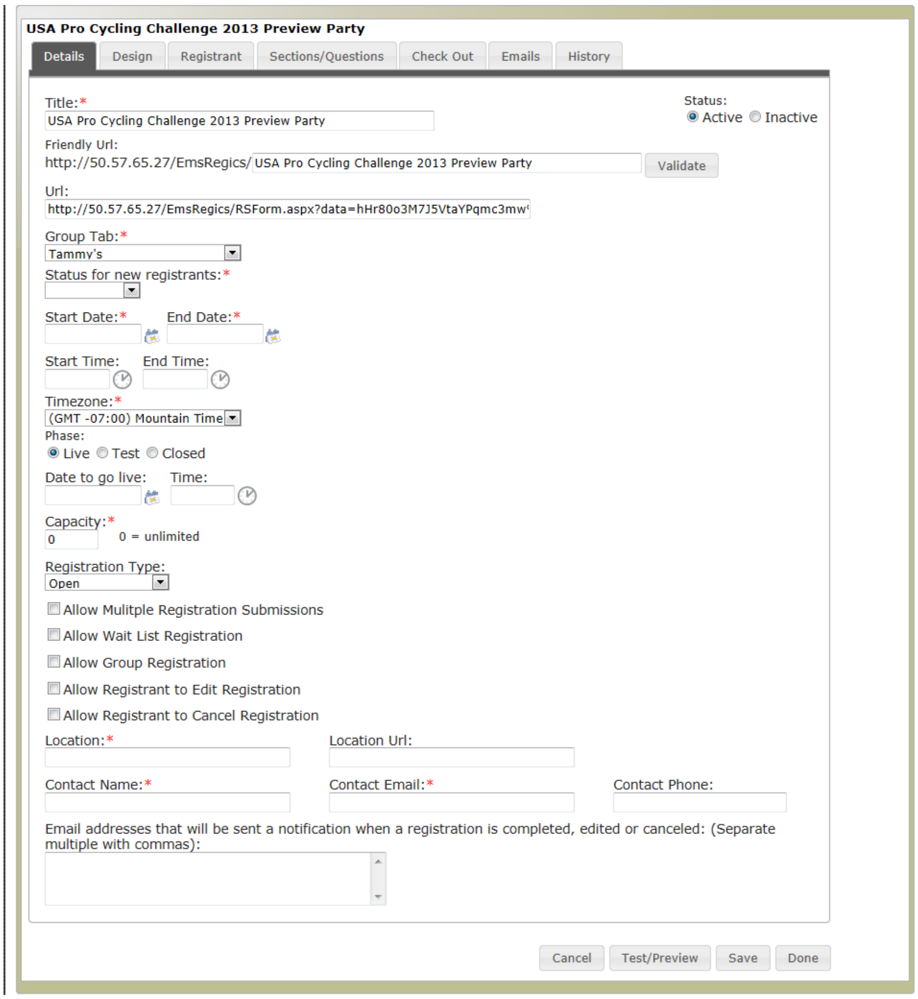


Table 2-2: Details tab fields

Item	Description
Status	Active or Inactive. By default, the status for a new event registration form or survey is always set to Active. **Note:** Before you can delete an event registration form or survey, you must change the status to Inactive.
Title	The title or name for the event registration form or survey as you entered it on the Add Event page. **Note:** If needed, you can edit the value on the Dashboard.

Table 2-2: Details tab fields (continued)

Item	Description
Friendly Url	Instead of using the fully encrypted URL format, you can use the Friendly URL format, which is a short and descriptive URL that a participant must click to open the online event registration form or survey. By default, the URL contains the title of the event or survey that you entered in Step 2 but you can edit this if needed. **Note:** Before you place the URL link on a site, you must click Validate to confirm that the link is fully functional.
Url	The fully encrypted URL that a participant must click to open the online event registration form or survey.
Note: For an event registration form, you typically place the URL link somewhere on the website where you are advertising the event. For either link, you should also click Test/Preview and confirm that you have the event registration form or survey pages designed exactly as you want them. The pages that you see when you click Test/Preview are identical to the pages that participants see when they click the URL link	
Group tab	The title for the event registration form or survey that you are adding (as well as other information) is displayed on the indicated tab. (Remember, you selected this tab in Step 2.) You can select a different tab if needed.
Status for new registrants	Available only for event registration forms. Values are Pending or Confirmed. **Note:** If you select Pending, you can later change the status for new registrants to Confirmed. For example, you might want to set the status to Pending for new registrants if the registrant must pay prior to attending the event. Then, after you have confirmed payment for the registrant, you can change the status to Confirmed. See "Managing Participants" on page 91.
Start Date/End Date	Available only for event registration forms. The starting date and the ending date for the event.
Start Time/End Time	Available only for event registration forms. The starting time and ending time for the event.
Timezone	Available only for event registration forms. The timezone in which the event is scheduled.
Phase	• Test: Allows you to set up and verify the event registration or survey link. • Live: Allows a participant to "hit" the link and register for an event or take a survey. • Closed: Registration for the event or the survey is complete. The link for event registration or the survey is no longer active.
Date to Go Live/Time	The date and time at which the event registration/survey link is to go live. **Note:** If you select Live for the phase, but you do not specify a time and date, then the link is live immediately upon saving the event registration form/survey.

Table 2-2: Details tab fields (continued)

Item	Description
Date to Close/Time	The date and time at which the event registration/survey is to be closed to new participants. **Note:** If you select Closed for the phase, but you do not specify a time and date, then the event/survey is closed immediately upon saving the event registration form/survey.
Capacity	Available only for event registration forms. The maximum capacity for the event. If you do not want the event to have a maximum capacity, then do not change the default value of zero. When the number of registrants for an event equals the maximum capacity, new registration for the event is not allowed. **Note:** If the maximum capacity for an event is reached, an option is available to accept wait-list registrations. See "Allow Wait List Registration" below.
Registration Type/ Survey Type	Values are: • Open—Any participant who has access to the registration/survey link can register for the event/survey. • Invitation Only—You must upload a list of participants, and then invite them to register using the registration link. See "To manage your invitees" on page 83.
Allow Anonymous?	Available only for surveys. Select this option to allow a respondent to take the survey without providing any identifying information. **Note:** When a survey is marked as Anonymous, a Skip Registration option is made available to the respondents.
Allow Multiple Registration Submissions (Not allowed with Group Registration)/Allow Multiple Survey Submissions	• For event registration forms—Select this option to allow a single registrant to complete multiple registrations that are tied to the *same* email address. Each registrant is assigned a unique registration number. For example, an administrative assistant could use this option to register three different employees for a conference. The registrations are tied to the assistant's email address and therefore, the registration confirmation is sent to this address. The registration email, however, contains three distinct registration IDs for the three employees that were registered. • For surveys—Select this option to allow a single respondent to complete one or more surveys that are tied to the same email address. For example, as a customer of a software application, you might receive a "How Did We Do?" survey after the vendor's technical support desk provides assistance to you. If you have more than one interaction from the support desk, you can still submit multiple, unique surveys that are tied to your single email address. **Note:** For groups, you can add *new* registrants with an existing registration. These registrations are displayed under the same event manager, so EMS Regics does not consider them as separate, multiple registrations. See "Allow Group Registration" on page 33.

Table 2-2: Details tab fields (continued)

Item	Description
Allow Wait List Registration	Available only for event registration forms. Select this option to accept wait list registrations when the maximum capacity for the event is reached. **Note:** If the maximum capacity for the event is reached, and a confirmed registrant cancels their registration, then you must manually register wait-listed registrants for the event. See "Managing Participants" on page 91.
Accept Payment in Wait List Status	Available only for event registration forms and displayed only if Allow Wait List Registration is selected. Select this option to require wait-listed participants to make any necessary payments for the event.
Allow Group Registration	Select this option to allow a single registrant to complete multiple registrations, with each registration tied to a *unique* email address. Not only does each registrant assigned a unique registration ID, but also each registrant receives his/her own registration confirmation email. For example, an administrative assistant could use this option to register three different employees for a conference but each employee is responsible for managing his/her own registration information after being registered for the event.
Allow Registrant to Edit Registration/Allow Respondent to Edit Survey	Select this option to allow the participant to edit the registration/survey information up to and including the specified date.
Send Notification When a Registrant Updates Their Information/Send Notification When a Respondent Updates Their Information	Available and selected by default only if you first selected Allow Registrant to Edit Information or Allow Respondent to Edit Information. A notification is sent to the event or survey contact when a participant updates their registration/survey information.
Allow Registrant to Cancel Registration	Available only for event registration forms. Select this option to allow confirmed registrants to cancel their registration up to and including the specified date.
Location	Available only for event registration forms. The location where the event is to take place.
Location Url	Available only for event registration forms. The URL (website address) for the event location's web page.
Contact Name	The name of the contact person for the event or survey. For example, this could be the name of the event organizer.
Contact Email	The email address for the event or survey contact.
Contact Phone	The phone number for the event or survey contact.
Email addresses that will be sent a notification when a registration is completed, edited or canceled	Available only for event registration forms. The indicated recipients receive an automatically generated email when a registrant is successfully registered for the event, or when a registrant edits or cancels a registration.

Table 2-2: Details tab fields (continued)

Item	Description
Email addresses that will be sent a notification when a survey is completed or edited	Available only for surveys. The indicated recipients receive an automatically generated email when a respondent successfully completes a survey or edits a survey.

Design tab

Figure 2-5: Add Event page, Design tab

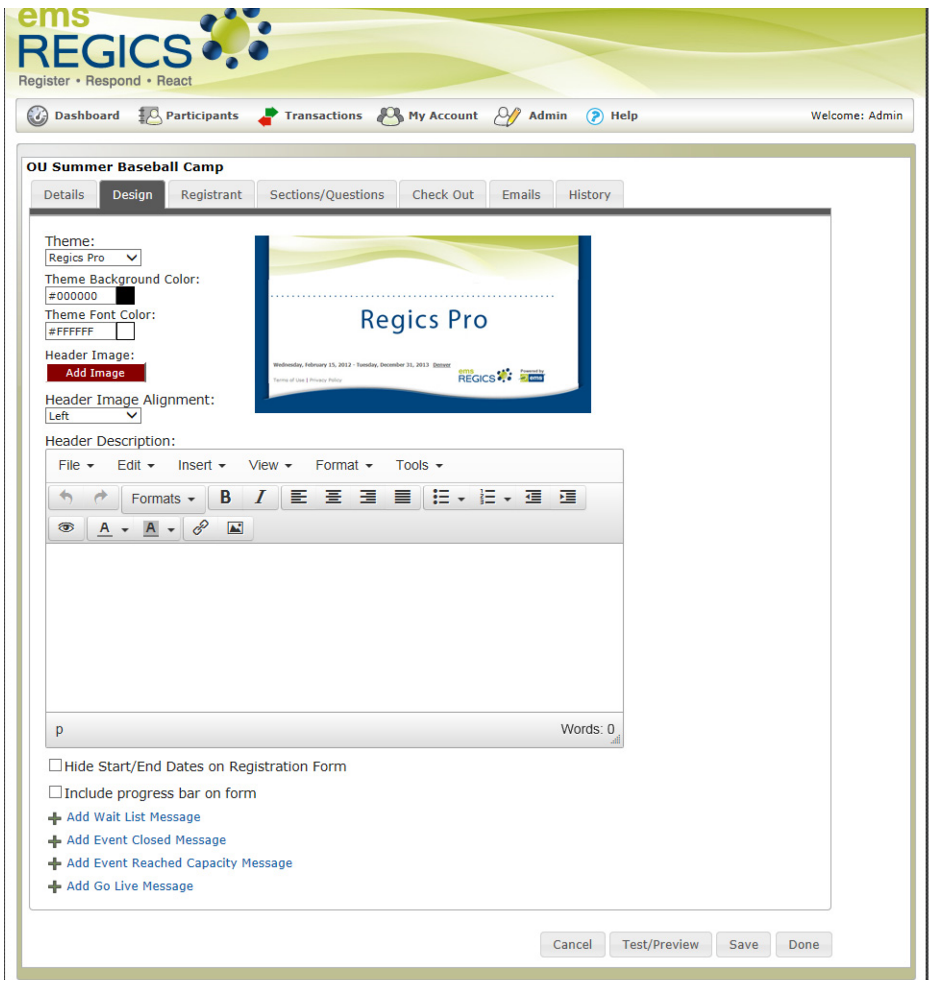


Table 2-3: Design tab fields

Item	Description
Theme	Select a theme to apply to the event registration form or survey. The default theme is Regics Pro.
Theme Background Color	The background color for the selected theme for the online registration form or survey.

Table 2-3: Design tab fields (continued)

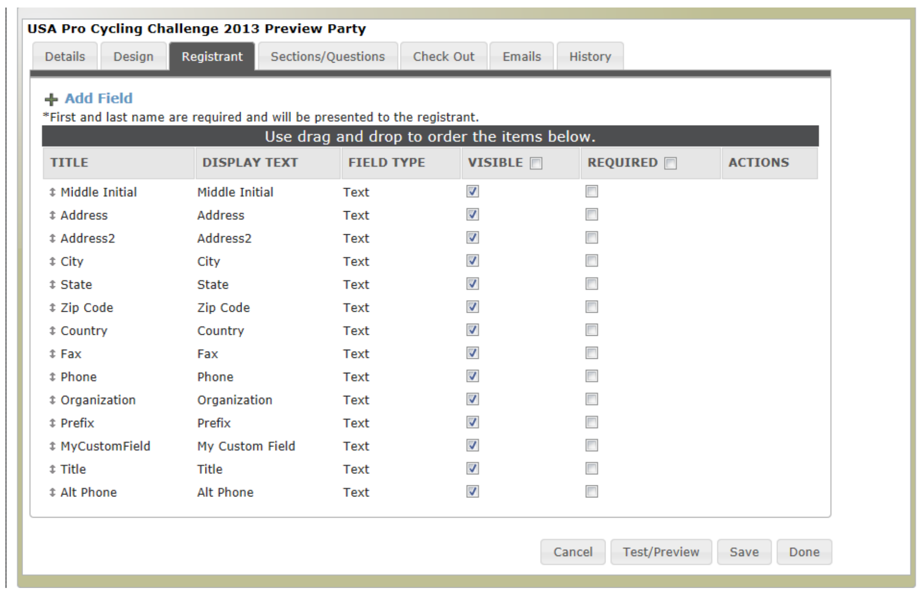
Item	Description
Theme Font Color	The color of any font in the selected theme for the online registration form or survey.
Header Image	• Click Add Image to add an image that appears on the first page that opens after a participant clicks the event registration or survey link. • Click Remove Image to remove the image.
Header Image Alignment	The alignment of the image on the first page of the event registration form or survey—Left, Center, or Right.
Header Description	Use the options on this tab to design the format and layout of the Header information on the first page that opens after a participant clicks the event registration or survey link.
HIde Start/End Dates on Registration Form	Available only for event registration forms. Select this option if the event start date and end date are not to be displayed on the event registration form.
Include progress bar on form	Select this option if a progress bar is to be displayed on the registration form or survey as a participant fills it out.
Add Wait List Message	Available only for events when the maximum capacity has been reached and the Wait List option has been enabled. Select this option to design the format and layout of a Wait List message on the first page that opens after a registrant clicks the event registration link.
Add Event Closed Message	Available only for events when an event has been closed. Select this option to design the format and layout of an Event Closed message on the first page that opens after a registrant clicks the event registration link.
Add Event Reached Capacity Message	Available only for events when the maximum capacity for an event has been reached. Select this option to design the format and layout of an Event Reached Capacity message on the first page that opens after a registrant clicks the event registration link.
Add Go Live Message	Available for both events and surveys. Select this option to design the format and layout of a Go Live message (a message that indicates when the event registration form or survey link will be live or available) on the first page that opens after a participant clicks the event registration/survey link. **Note:** If you have specified a Go Live date/time, but you do not add a custom-designed Go Live message, a default Go Live message is still displayed.

Registrant tab/Respondent tab

If you are creating an online event registration form, then the third tab on the Add Event page is labeled "Registrant." If you are creating a survey, then the tab is labeled "Respondent."

The Registrant/Respondent tab displays all the pre-defined registrant/respondent fields that can be displayed on any registration form or survey. You can also add one or more custom *registrant/respondent* fields during the creation process. You typically use a custom registrant/respondent field to gather information about/ask questions of your participants.

Figure 2-6: Add Event page, Registrant tab/Respondent tab



- Select the fields into which a participant can/must enter information when registering for an event or responding to a survey.
  - Visible selected, but Required not selected—The participant can enter information into this field, but the information is not required for the participant to successfully register for the event or complete the survey.
  - Visible and Required both selected—The participant must enter the indicated information into the field to successfully register for the event or complete the survey.
- To make all fields Visible on the event registration form or survey, select Visible.
- To make all visible fields required on the event registration form or survey, select Required.

Although the statement "First and Last name are required and will be presented to the responder" is displayed on the Respondent tab, any survey that is set up as anonymous has a Skip Registration option for the respondents.

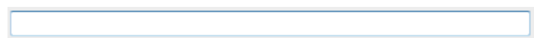
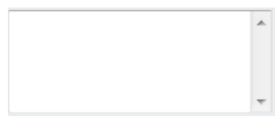
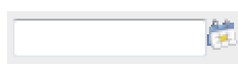
- Actions—Available only for the custom registrant/respondent fields that you have manually added to the event registration form or survey that you are creating. You can click the Edit icon to open the event registration form or survey form and edit the field, and you can click the Delete icon to delete the field.
- To change the order in which the fields are to be displayed on the event registration form or survey, use the drag and drop feature.

To add a custom registrant/respondent field

When you add a custom registrant/respondent field to a registration form or survey, you must indicate the field type. Different field types serve different functions and different field types also have different options. Table 2-4 on page 38 details the field types that are available for a custom registrant/respondent field and the specific options that are available for each field type. It also provides examples as to why you would use one field type instead of another for a custom registrant/respondent field.

As an EMS Regics user, if you find that you need to add the same custom registrant/respondent field or fields to an event registration form or survey, contact your EMS Regics administrator about adding these fields to the global list of registrant/respondent fields. As an EMS Regics administrator, see "Managing Registrant/Respondent Fields" on page 108.

Table 2-4: Custom registrant/respondent fields - Field types, descriptions, and options

Field Type	Description	Available Options		
		Default Value	Min	Max
Text	The most unstructured of field types. When a participant enters text into a text field, the text is entered on a single, continuous line without any text wrapping. *Figure 2-7: Text field* 	X		
Text with area	Although Text with area is also an unstructured field type, this field type provides for text wrapping and scrolling functions. *Figure 2-8: Text with area field* 	X		
Date	For any date field in EMS Regics, participants can manually enter the date in any format, or they can click the Calendar Picker icon to open the Calendar Tool from which to select a date for the field. *Figure 2-9: Date field* 	X		

- Default value—The default value that is displayed for the question on the event registration form or survey. A participant can modify this value.

Table 2-4: Custom registrant/respondent fields - Field types, descriptions, and options

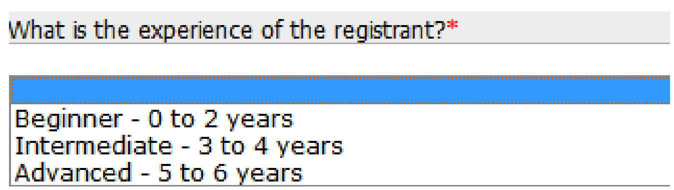
<table>
<tr><th rowspan="2">Field Type</th><th rowspan="2">Description</th><th colspan="3">Available Options</th></tr>
<tr><th>Default Value</th><th>Min</th><th>Max</th></tr>
<tr><td>Numeric</td><td>The Numeric field format allows for whole numbers only.
Note: Numeric fields are indistinguishable in appearance from text fields; however, you cannot enter any non-numeric characters into a Numeric field.</td><td>X</td><td>X</td><td>X</td></tr>
<tr><td colspan="5">• Default value—The default value that is displayed for the question on the event registration form or survey. A participant can modify this value.
Note: If a minimum value is specified, the default value cannot be less than the minimum value. If a maximum value is specified, the default value cannot be greater than the maximum value.
• Min—The minimum value that a participant can enter into the field and successfully register for the event or complete the survey. You can specify a minimum value without a maximum value.
• Max—The maximum value that a participant can enter into the field and successfully register for the event or complete the survey. You can specify a maximum value without a minimum value.</td></tr>
<tr><td>List</td><td>Select a field type of List if you are adding a list of items to a registration form or survey. A list field displays the entire list to a participant. A participant can scroll through the list and select one item only—the list items are mutually exclusive. This field type is particularly useful for situations in which multiple choices are available, but you want the participant limited to only one of the available choices, for example, a participant's level of experience.
Figure 2-10: List field

</td><td></td><td></td><td></td></tr>
</table>

Table 2-4: Custom registrant/respondent fields - Field types, descriptions, and options

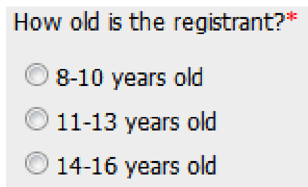
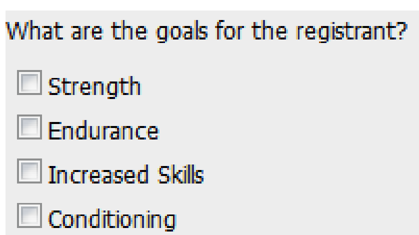
Field Type	Description	Available Options		
		Default Value	**Min**	**Max**
Radio button	Select a field type of Radio button if you are adding a group of items to a registration form or survey from which a participant can select only one item a time—the items are mutually exclusive. This field type is particularly useful for situations in which multiple choices are available, but you want the participant limited to only one of the available choices, for example, a participant's age group. *Figure 2-11: Radio button field*  			
Check box	You select a field type of Check box if you are adding a group of items to a registration form or survey from which a participant can simultaneously select multiple items. This field type is particularly useful for situations in which multiple choices are available and you want the participant to have access to all of the choices, for example, a participant's goals for the event. *Figure 2-12: Check box field*  			

Table 2-4: Custom registrant/respondent fields - Field types, descriptions, and options

Field Type	Description	Available Options		
		Default Value	**Min**	**Max**
Decimal	The Decimal field format allows for four places past the decimal point.	X	X	X
Percentage	The Numeric field format allows for whole numbers only. You must manually enter a percentage sign (%) for this field to indicate that the field is a Percentage field and not simply a Numeric field.	X	X	X

- Default value—The default value that is displayed for the question on the event registration form or survey. A participant can modify this value.

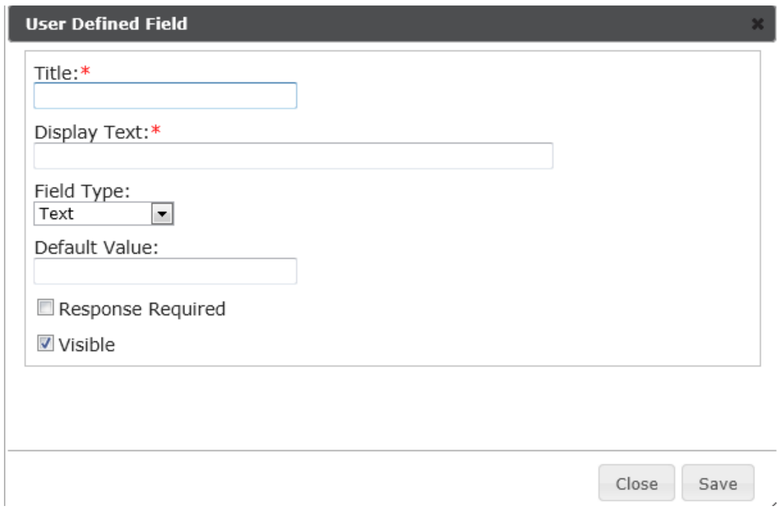
Note: If a minimum value is specified, the default value cannot be less than the minimum value. If a maximum value is specified, the default value cannot be greater than the maximum value.

- Min—The minimum value that a participant can enter into the field and successfully register for the event or complete the survey. You can specify a minimum value without a maximum value.
- Max—The maximum value that a participant can enter into the field and successfully register for the event or complete the survey. You can specify a maximum value without a minimum value.

1. Add the top of the Registrant tab, click Add Field.

   The User Defined Field dialog box opens.

Figure 2-13: User Defined field dialog box



2. Enter the information for the new field.

Required fields are marked with a red asterisk (*).

Table 2-5: User Defined Field dialog box fields

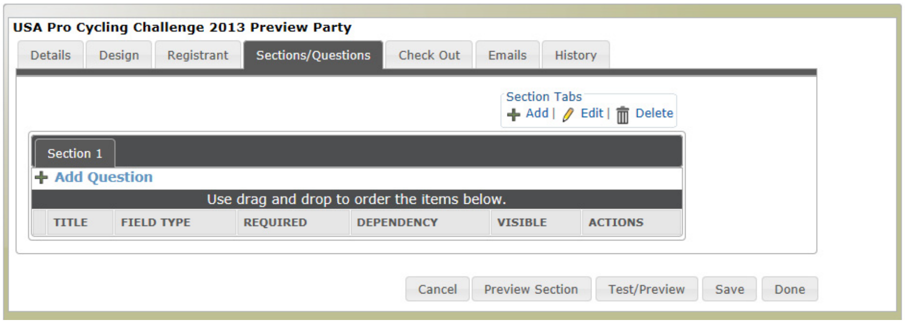
Item	Description
Title	The title/name for the user-defined field that is displayed in the Title field on the Registrant/Respondent tab.
Display text	The field text that is displayed on the event registration form or survey.
Field Type	The type for the user-defined field, for example, a Text field, a Text field with a defined area, a Date field, and so on. See Table 2-4 on page 38. **Note:** For a List, Radio button field, or Check box field, you can edit a list item within the question and you can order your list items within the question. The Description field holds a maximum of 500 characters.
Default Value	The default value for the field. A participant can always edit this value.
Response Required	Select this option if a participant must enter information in the field before they can register for the event or complete the survey.
Visible	Selected by default. Clear this option to remove the field from an event registration form or survey.

3. Click Save.

   The User Defined Field dialog box remains open. You can repeat this procedure to add as many user-defined fields as needed, and then click Close to close the dialog box and return to the Registrant/Respondent tab.

Sections/Questions tab

Figure 2-14: Dashboard, Sections/Questions tab



You use the options in this section to create a series of questions that relate to the event or to create the questions for a survey. A question can be for informational purposes only, or you can mark a question as Required, which means that participants must answer the question before they can register for the event or complete the survey. You can also use the Sections function to group related questions in the same category. For example, for an event, you could create questions that are grouped in an “Registrant Info” category, you could create another series of questions that are grouped into an “Registrant Fees” category, and so on. You can add new sections or questions, modify an existing section or question, and delete a section or question. When you add questions, you can create a dependency between questions. If you create a dependency for a question, a *child* question is displayed on the registration form or survey only if *all* its *parent* questions on which it is dependent are answered. For example, on an event registration form, a parent question could be “Are you attending the dinner prior to the conference kickoff? and a child question could be “Please select your dinner of choice.” If you have made the child question dependent on the answer to the parent question, then the child question is displayed on the registration form only if “Yes” is the answer that is supplied for the parent question.

Registration/survey questions are always displayed in the event contact email notification and you cannot change this.

See:

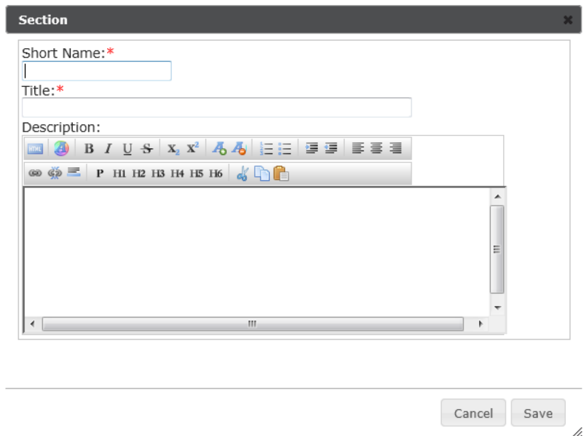
- “To add a section” on page 44.
- “To edit a section” on page 44.
- “To delete a section” on page 45.
- “To create a question” on page 45.
- “To create a question by copying another question” on page 55.
- “To create a dependency between questions” on page 56.
- “To edit a question” on page 57.
- “To delete a question” on page 57.

To add a section

The Sections/Question tab has one default section defined as "Section 1."

1. Under Sections tab, click Add to open the Section dialog box.

Figure 2-15: Section dialog box



2. Enter the information for the new section.

Table 2-6: New Section fields

Item	Description
Short Name	The tab name as it is displayed on the Sections/Questions tab.
Title	The section title that is displayed on the event registration form or survey. The title is displayed above the questions for the section.
Description	Further explanation/information about the section questions. Displayed immediately below the section title on the event registration form or survey.

3. Click Save.
4. Optionally, to preview this just this section, and not the entire registration form or survey, click Preview Section.

To edit a section

1. Open the section that is being edited.
2. Under Section Tabs, click Edit.
3. Modify the information for the section as needed.
4. Click Save.
5. Optionally, to preview this just this section, and not the entire registration form or survey, click Preview Section.

To delete a section

When you delete a section, all the questions in the section are also deleted.

1. Open the section that is being deleted.
2. Under Section Tabs, click Delete.
3. In the Delete dialog box, click Delete.

To create a question

You can create a question “from scratch” or you can create a question by copying an existing question and then making the necessary modifications to the question. When you create a question for a registration form or survey, you must indicate the field type for the question. Different field types serve different functions and different field types also have different options. Table 2-7 on page 46 details the field types that are available for a question and the specific options that are available for a field type. It also provides examples as to why you would use one field type instead of another for a question.

Table 2-7: Sections/Questions tab - Field types, descriptions, and options

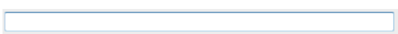
Field Type and Description	**Available Options**						
	Default Value	**Min**	**Max**	**Has Price?**	**Add Tax Rate?**	**Eligible with Percentage Discounts?**	**Inventory**
Text The most unstructured of field types. When a participant enters text into a text field, the text is entered on a single, continuous line without any text wrapping. *Figure 2-16: Text field* 	X						
Text with area Although Text with area is also an unstructured field type, this field type provides for text wrapping and scrolling functions. *Figure 2-17: Text with area field* 	X						
• Default value—The default value that is displayed for the question on the event registration form or survey. A participant can modify this value.							

Table 2-7: Sections/Questions tab - Field types, descriptions, and options (continued)

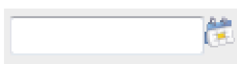
Field Type and Description	**Available Options**						
	Default Value	**Min**	**Max**	**Has Price?**	**Add Tax Rate?**	**Eligible with Percentage Discounts?**	**Inventory**
Date For any date field in EMS Regics, participants can manually enter the date in any format, or they can click the Calendar Picker icon to open the Calendar Tool from which to select a date for the field. *Figure 2-18: Date field* 	X						
• Default value—The default value that is displayed for the question on the event registration form or survey. A participant can modify this value.							

Table 2-7: Sections/Questions tab - Field types, descriptions, and options (continued)

<table>
<tr><th rowspan="2">Field Type and Description</th><th colspan="7">Available Options</th></tr>
<tr><th>Default Value</th><th>Min</th><th>Max</th><th>Has Price?</th><th>Add Tax Rate?</th><th>Eligible with Percentage Discounts?</th><th>Inventory</th></tr>
<tr><td>Numeric
The Numeric field format allows for whole numbers only.
Note: Numeric fields are indistinguishable in appearance from text fields; however, you cannot enter any non-numeric characters into a Numeric field.</td><td>X</td><td>X</td><td>X</td><td>X</td><td>X</td><td>X</td><td>X</td></tr>
<tr><td colspan="8">• Default value—The default value that is displayed for the question on the event registration form or survey. A participant can modify this value.
Note: If a minimum value is specified, the default value cannot be less than the minimum value. If a maximum value is specified, the default value cannot be greater than the maximum value.
• Min—The minimum value that a participant can enter into the field and successfully register for the event or complete the survey. You can specify a minimum value without a maximum value.
• Max—The maximum value that a participant can enter into the field and successfully register for the event or complete the survey. You can specify a maximum value without a minimum value.
Note: If Inventory is also selected, the maximum value cannot exceed the inventory limit.
• Has Price—Enter the price for the item. This price is displayed next to the field on the event registration form or survey.
• Include Tax?—Available only if Has Price is selected. The amount of tax that is to be added to the item at checkout. Your EMS Regics administrator configures the tax rate percentages that are available for selection. After you select a tax rate for the first Has Price item, by default, this tax rate is applied to all other items added for the same question; however, you can edit the tax rate on a per item basis and apply different tax rates to different items for the same question.
• Eligible with Percentage Discounts?—Available only if Has Price is selected. The amount of the discount is determined by the eligible discounts that are defined on the Check Out tab for the event.
• Inventory—Enter the available count of the item. When this count is reached for the item, the item is no longer available. For example, if you have 25 XL T-shirts for sale, and the first 25 registrants for an event order an XL T-shirt, the option for an XL T-shirt is not displayed for the 26th registrant and above.</td></tr>
</table>

Table 2-7: Sections/Questions tab - Field types, descriptions, and options (continued)

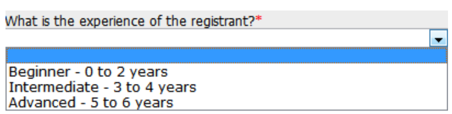
Field Type and Description	Available Options						
	Default Value	**Min**	**Max**	**Has Price?**	**Add Tax Rate?**	**Eligible with Percentage Discounts?**	**Inventory**
List Select a field type of List if you are adding a list of items to a registration form or survey. A list field displays the entire list to a participant. A participant can scroll through the list and select one item only—the list items are mutually exclusive. This field type is particularly useful for situations in which multiple choices are available, but you want the participant limited to only one of the available choices, for example, a participant's level of experience. *Figure 2-19: List field* 				X	X	X	X
• Has Price—Enter the price for the item. This price is displayed next to the field on the event registration form or survey. • Include Tax?—Available only if Has Price is selected. The amount of tax that is to be added to the item at checkout. Your EMS Regics administrator configures the tax rate percentages that are available for selection. After you select a tax rate for the first Has Price item, by default, this tax rate is applied to all other items added for the same question; however, you can edit the tax rate on a per item basis and apply different tax rates to different items for the same question. • Eligible with Percentage Discounts?—Available only if Has Price is selected. The amount of the discount is determined by the eligible discounts that are defined on the Check Out tab for the event. • Inventory—Enter the available count of the item. When this count is reached for the item, the item is no longer available. For example, if you have 25 XL T-shirts for sale, and the first 25 registrants for an event order an XL T-shirt, the option for an XL T-shirt is not displayed for the 26th registrant and above.							

Table 2-7: Sections/Questions tab - Field types, descriptions, and options (continued)

<table>
<tr><th rowspan="2">Field Type and Description</th><th colspan="7">Available Options</th></tr>
<tr><th>Default Value</th><th>Min</th><th>Max</th><th>Has Price?</th><th>Add Tax Rate?</th><th>Eligible with Percentage Discounts?</th><th>Inventory</th></tr>
<tr><td>Radio button

Select a field type of Radio button if you are adding a group of items to a registration form or survey from which a participant can select only one item a time—the items are mutually exclusive. This field type is particularly useful for situations in which multiple choices are available, but you want the participant limited to only one of the available choices, for example, a participant’s age group.

Figure 2-20: Radio button field

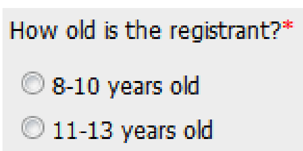

</td><td></td><td></td><td></td><td>X</td><td>X</td><td>X</td><td>X</td></tr>
<tr><td colspan="8">• Has Price—Enter the price for the item. This price is displayed next to the field on the event registration form or survey.
• Include Tax?—Available only if Has Price is selected. The amount of tax that is to be added to the item at checkout. Your EMS Regics administrator configures the tax rate percentages that are available for selection. After you select a tax rate for the first Has Price item, by default, this tax rate is applied to all other items added for the same question; however, you can edit the tax rate on a per item basis and apply different tax rates to different items for the same question.
• Eligible with Percentage Discounts?—Available only if Has Price is selected. The amount of the discount is determined by the eligible discounts that are defined on the Check Out tab for the event.
• Inventory—Enter the available count of the item. When this count is reached for the item, the item is no longer available. For example, if you have 25 XL T-shirts for sale, and the first 25 registrants for an event order an XL T-shirt, the option for an XL T-shirt is not displayed for the 26th registrant and above.</td></tr>
</table>

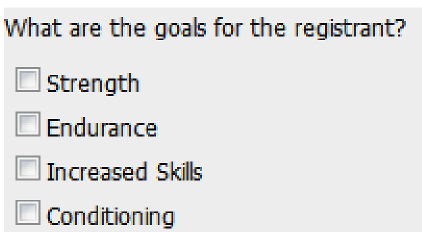
Table 2-7: Sections/Questions tab - Field types, descriptions, and options (continued)

<table>
<tr><th rowspan="2">Field Type and Description</th><th colspan="7">Available Options</th></tr>
<tr><th>Default Value</th><th>Min</th><th>Max</th><th>Has Price?</th><th>Add Tax Rate?</th><th>Eligible with Percentage Discounts?</th><th>Inventory</th></tr>
<tr><td>

Check box

You select a field type of Check box if you are adding a group of items to a registration form or survey from which a participant can *simultaneously* select multiple items. This field type is particularly useful for situations in which multiple choices are available and you want the participant to have access to all of the choices, for example, a participant's goals for the event.

Figure 2-21: Check box field



</td><td></td><td></td><td></td><td>X</td><td>X</td><td>X</td><td>X</td></tr>
<tr><td colspan="8">

- Has Price—Enter the price for the item. This price is displayed next to the field on the event registration form or survey.
- Include Tax?—Available only if Has Price is selected. The amount of tax that is to be added to the item at checkout. Your EMS Regics administrator configures the tax rate percentage that is applied to a pricing item.
- Eligible with Percentage Discounts?—Available only if Has Price is selected. The amount of the discount is determined by the eligible discounts that are defined on the Check Out tab for the event.
- Inventory—Enter the available count of the item. When this count is reached for the item, the item is no longer available. For example, if you have 25 XL T-shirts for sale, and the first 25 registrants for an event order an XL T-shirt, the option for an XL T-shirt is not displayed for the 26th registrant and above.

</td></tr>
</table>

Table 2-7: Sections/Questions tab - Field types, descriptions, and options (continued)

<table>
<tr><th rowspan="2">Field Type and Description</th><th colspan="7">Available Options</th></tr>
<tr><th>Default Value</th><th>Min</th><th>Max</th><th>Has Price?</th><th>Add Tax Rate?</th><th>Eligible with Percentage Discounts?</th><th>Inventory</th></tr>
<tr><td>Decimal
The Decimal field format allows for four places past the decimal point.</td><td>X</td><td>X</td><td>X</td><td></td><td></td><td></td><td></td></tr>
<tr><td>Percentage
The Numeric field format allows for whole numbers only. You must manually enter a percentage sign (%) for this field to indicate that the field is a Percentage field and not simply a Numeric field.</td><td>X</td><td>X</td><td>X</td><td></td><td></td><td></td><td></td></tr>
<tr><td colspan="8">• Default value—The default value that is displayed for the question on the event registration form or survey. A participant can modify this value.
Note: If a minimum value is specified, the default value cannot be less than the minimum value. If a maximum value is specified, the default value cannot be greater than the maximum value.
• Min—The minimum value that a participant can enter into the field and successfully register for the event or complete the survey. You can specify a minimum value without a maximum value.
• Max—The maximum value that a participant can enter into the field and successfully register for the event or complete the survey. You can specify a maximum value without a minimum value.</td></tr>
<tr><td>File Upload
Displayed as field labeled “Attach a file.” When a user clicks this field, a Choose File to Upload dialog box opens. The user can scroll to and select a file to upload.</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
</table>

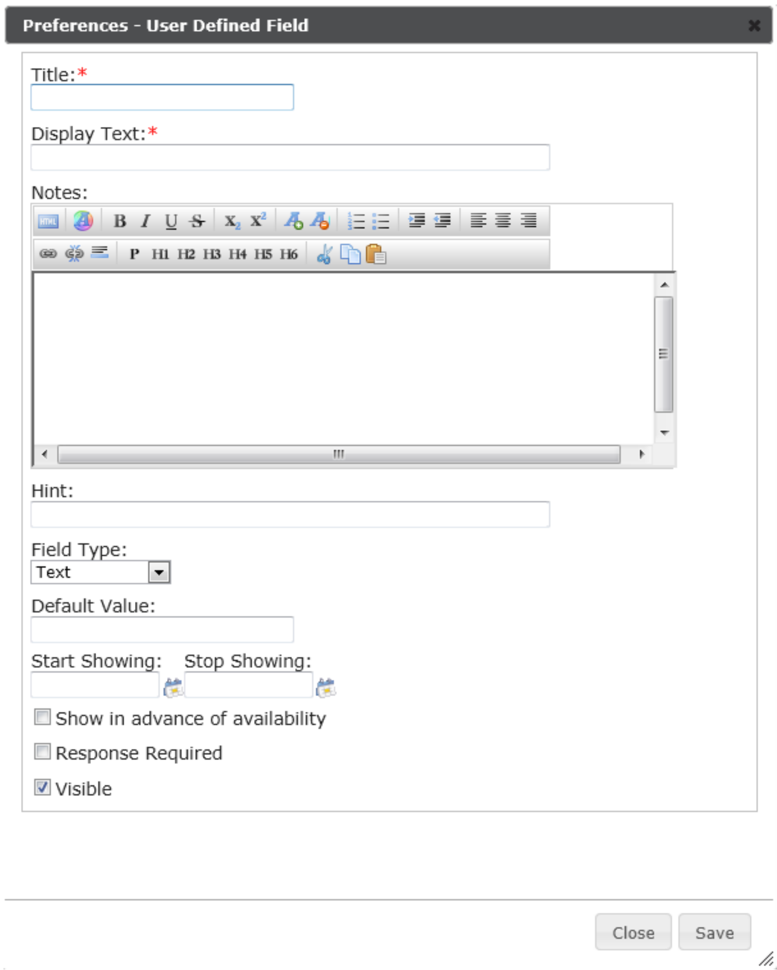
1. Open the section for which you are creating questions.

If you have only one section, then by default, all of the questions are placed in this section.

2. Click Add Question.

   The User Defined Field dialog box opens.

Figure 2-22: User Defined Field dialog box



3. Enter the information for the new question.

Required fields are marked with a red asterisk (*).

Table 2-8: New Question fields

Item	Description
Title	The title/name for the question that is displayed in the Title field on the Sections/Questions tab.
Display text	The question text that is displayed for the field on the event registration form or survey.
Notes	Further explanation or information about the section that is displayed immediately above the first question on the event registration form or survey.
Hint	Additional information or clarification that might help the participant answer the question. If a question has a hint, a Hint icon appears next to the question. A participant can click this Hint icon to open and view the hint in its entirety.
Field Type	The field type for the question, for example, a Text field, a Text field with a defined area, a Date field, and so on. See Table 2-7 on page 46. **Note:** For a List, Radio Button, or Check box field, you can edit a list item within the question and you can order your list items within the question. The Description field holds a maximum of 500 characters.
Default Value	The default value for the question. A participant can always edit this value.
Start Showing/Stop Showing	The date period during which the question is to be displayed on the event registration form or survey. • If you enter a value in both fields, then question is displayed on the registration form or survey beginning on the Start date and it is removed from the registration form or survey on the Stop date. • If you leave both fields blank, then the question is always displayed on the event registration form or survey. • If you do not enter a value for the Start date, but you do enter a value for the Stop date, then the question is displayed on the event registration form or survey only until the Stop date. • If you enter a value for the Start date, but you do not enter a value for the Stop date, then the question is displayed on the registration form or survey until registration for the event or the survey is closed. • If you want to show a question in advance of the Start date, but not have the question enabled until the Start date, select "Show in advance of availability."
Show in advance of availability	Select this option to display the question *before* the question is enabled on the event registration form or survey.
Response Required	Select this option if a participant must answer the question before they can register for the event or complete the survey.

Table 2-8: New Question fields (continued)

Item	Description
Visible	Selected by default. An override to the Start Showing/Stop Showing dates. *Clear* this option to remove the question from an event registration form or survey, regardless of the values in the Start Showing/Stop Showing fields.

4. Click Save.

   The User Defined Field dialog box remains open. You can repeat this procedure to add as many user-defined questions as needed, and then click Close to close the dialog box and return to the <Section> tab.

5. Optionally, to preview this just this section, and not the entire registration form or survey, click Preview Section.

6. Optionally, to create a dependency between questions, continue to “To create a dependency between questions” on page 56.

To create a question by copying another question

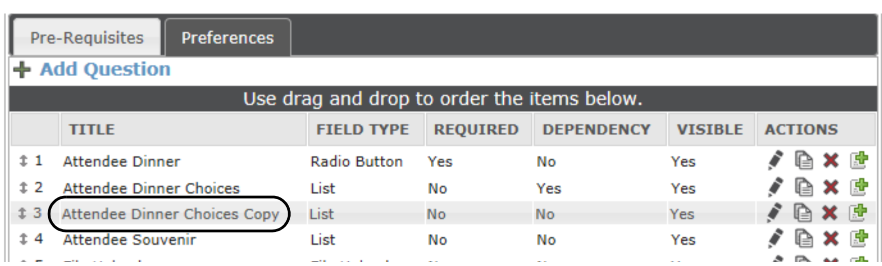
1. Open the section for which you are creating questions.

2. Click the Copy icon next to the question that you are copying.

   A copy of the question is created.

The copied question is indicated with the word “Copy” at the end of the title.

Figure 2-23: Example of a copied question



3. Click the Edit icon next to the copied question.

   The question opens in the User Defined Field dialog box.

4. Edit the question as necessary, including the field type and its dependencies.

See “To create a question” on page 45 for a table that details the information that you can edit for a question. See “To create a dependency between questions” on page 56 for information about creating dependencies between questions.

5. Click Save.

To create a dependency between questions

If you create a dependency for a question, a *child* question is displayed on the registration form or survey only if all its *parent* questions on which it is dependent are answered. For example, on an event registration form, a parent question could be “Are you attending the dinner prior to the conference kickoff? and a child question could be “Please select your dinner of choice.” If a registrant answers “Yes” to this question, and you have made the child question dependent on this answer, then the child question is displayed on the registration form. If the registrant answers “No” to the parent question, then the child question is *not* displayed. To make a child question dependent on the parent question:

- A parent question can be only one of three field types—List, Radio Button, or Check box.
- The child question must be placed anywhere *after* all its parent question in the list of questions.

1. Create the parent question.

⚠ *The parent question be only one of three field types—List, Radio Button, or Check box.*

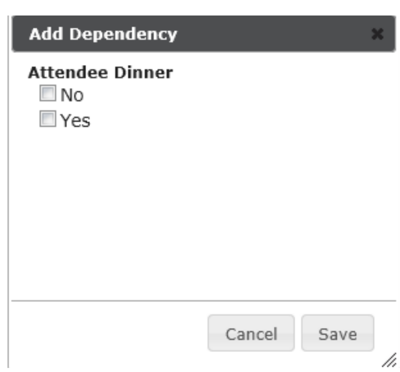
2. Create the child question.

⚠ *When you create the child question, you must place it anywhere after all its parent questions in the list of questions.*

3. Next to the child question, click the Create Dependency icon.

   The Add Dependency dialog box opens. This dialog box lists all of the potential parent questions for the selected child question by *Question Title*. It also lists all of the available choices for each question.

Figure 2-24: Add Dependency dialog box



4. Scroll to and select the correct option for each correct parent question, and then click Save.

   For example, the parent question “Are you attending the dinner prior to the conference kickoff? is titled “Dinner” and the child question “Please select your dinner of choice” is to be displayed only if a registrant answers “Yes” to the parent question. In this case, you would select “Yes” under the “Attendee Dinner” entry in the Add Dependency check box.

To edit a question

1. Open the section that contains the question that is being edited.
2. Click the Edit icon next to the question.
3. Edit the question as necessary, including the field type and its dependencies.

See “To create a question” on page 45 that details the information that you can edit for a question. See “To create a question” on page 45 that details the information that you can edit for a question. See “To create a dependency between questions” on page 56 for information about creating dependencies between questions.

4. Click Save.

You can also use the drag and drop feature to modify the order in which the questions are displayed in the section.

To delete a question

1. Open the section that contains the question that is being deleted.
2. Click the Delete icon next to the question.

   A Delete dialog box opens, asking you if you want to delete this User Defined Field.
3. Click Delete.

   The Delete dialog box closes. The question is deleted.

Check Out tab

Figure 2-25: Check Out tab

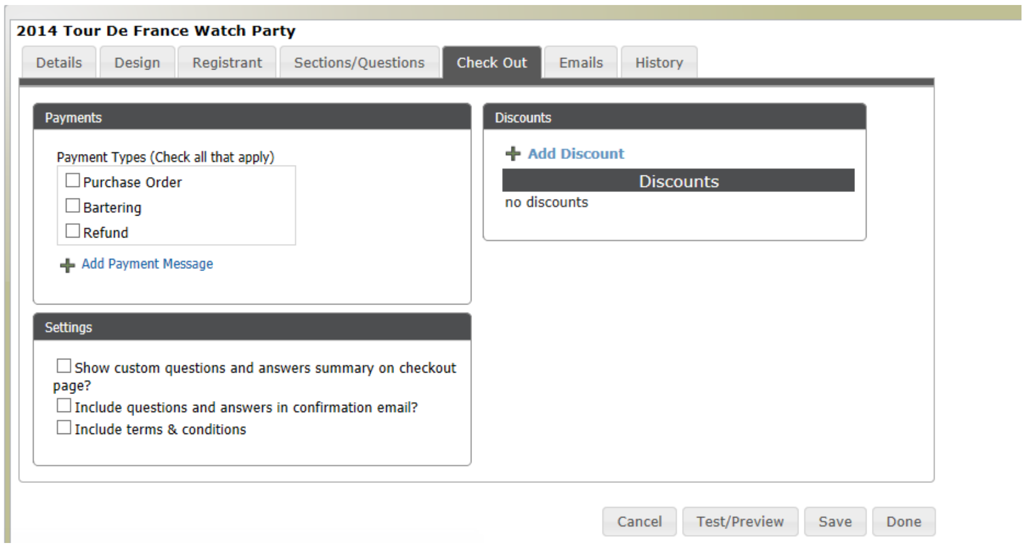


Table 2-9: Check Out tab fields

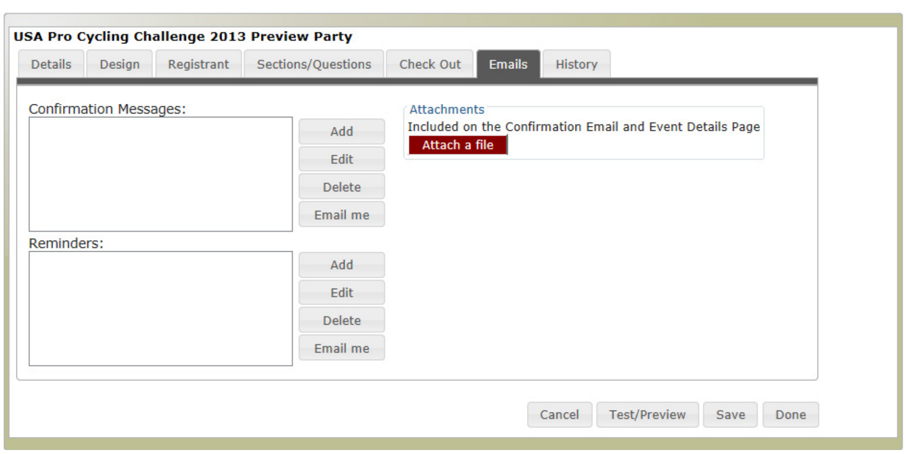
Item	Description
Payments	
Payment Types	Available only for events. List of available payment types as configured by your EMS Regics administrator. Select the options that are applicable for the event. **Note:** As an EMS Regics user, if a particular payment type that you require is not an option, contact your EMS Regics administrator. As an EMS Regics administrator, for information about configuring payment types, see “Managing Payment Types” on page 112.
Add Payment Message	Available only for events. Click this option to open a Payment Message dialog box and enter any relevant information about the payment methods that you are accepting for the event. For example, you might enter a message that a minimum processing charge of $5.00 is applied to all credit card payments. This message is displayed on the Checkout page when the event registration form goes live. **Note:** To delete a payment message, click Edit Payment Message, clear the payment message in its entirety, and then save this change.
Settings	
Show custom questions and checkout summary on checkout page?	Select this option to display a View Details link on the Checkout page that displays all the participant's responses to the questions that were asked of the participant.

Table 2-9: Check Out tab fields (continued)

Item	Description
Include questions and answers in confirmation email	Select this option to display all the questions that were asked of the participant as well as the participant's answers in the confirmation email that is sent to the participant. **Note:** Registration/survey questions are always displayed in the event contact email notification.
Include terms & conditions	Select this option to open a text field in which you can enter such things as a Disclaimer statement, processing fees for payment installments, your cancellation policy, and so on. A participant must agree to these Terms and Conditions before he/she can submit a registration/survey.
Discounts—Available only for events. This section lists all the discounts (by Title and Status) that you have configured for the event.	
Add Discount	Select this option to open the Discount dialog box and enter the information for a discount that can be applied to an event at checkout. • Description—The description for the discount that is displayed on the Discounts list. • Discount Code—The unique code that identifies the discount. A registrant must enter this code at checkout to redeem it. • Dollar Amount/Total Discount/—If the discount is to be a fixed dollar amount, then select Dollar Amount, and then in the Total Discount field, enter the amount. • Percentage/Percentage of total—If the discount is to be a percentage of the total charges for the event, then select Percentage, and then in the Percentage of total field, enter the percentage. • Active—Select this option if the discount is to be active and can be used by the registrants for the event. **Note:** Discounts are applied only to those questions that have pricing defined and the Eligible with Percentage Discounts option selected.

Emails tab

Figure 2-26: Emails tab



You can do the following on the Emails tab:

- Configure a Confirmation message that is automatically generated and sent to the participant after a registration or survey is completed successfully or cancelled. See "To configure a new confirmation message" below.
- Configure a reminder that is automatically generated and sent to a registrant before an event on the date and time that you specify. The reminder can include an option to automatically send a survey to the registrants upon completion of the event. See "To configure a reminder" on page 62.
- Add an attachment to a confirmation message. This attachment is also included on the Event Details page. See "To add an attachment to a confirmation message" on page 64.

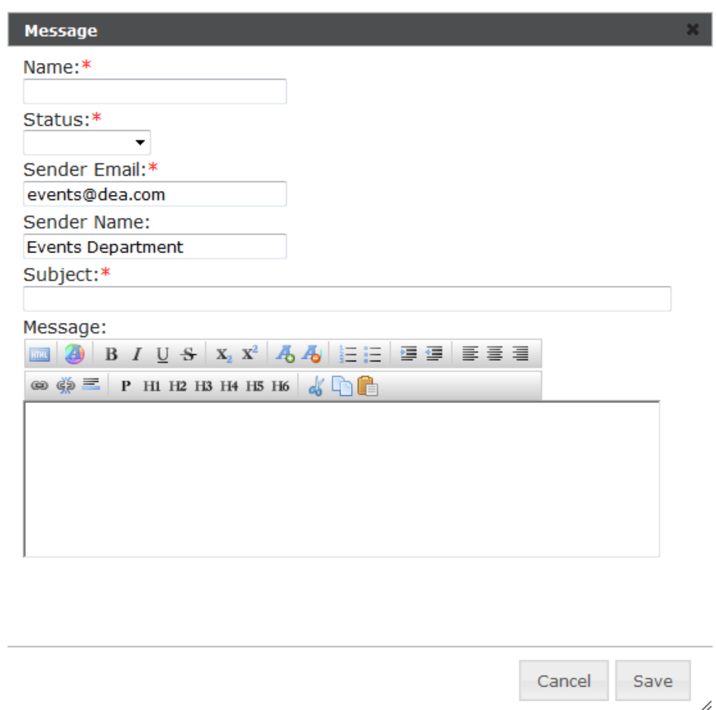
To configure a new confirmation message

You can configure one confirmation message for each of the three different participant statuses—Confirmed, Pending, and Cancelled. If Wait List registration is allowed for an event, then you can also configure an additional confirmation message for the Wait List status. When a participant registers for an event or submits a survey, the appropriate message, based on the participant's status, is automatically generated and sent to the participant.

1. Next to the Confirmation Messages pane, click Add.

   The Message dialog box opens.

Figure 2-27: Message dialog box



2. Do one of the following:
   - Enter the information for the new confirmation message.
   - Click Lookup to open a Saved Messages dialog box. This dialog box lists all the global confirmation messages that have been configured in your EMS Regics system. Select the appropriate message, and then click Select. You can use this message “as-is,” or you can modify the message as needed.

Any modifications that you make to a global confirmation message apply only to this event or survey. The global confirmation message itself remains unchanged. As an EMS Regics user, contact your EMS Regics administrator for configuring any needed global confirmation messages. As an EMS Regics administrator, for information about configuring a global confirmation message, see “Managing Global Confirmation Messages” on page 122.

Table 2-10: Message dialog box fields

Field	Description
Name	The title/name for the confirmation message that is displayed in the Confirmation Messages pane on the Emails tab.
Status	The participant status, which determines which confirmation message is automatically generated and sent to the participant. By default, the following statuses are always available—Pending, Confirmed, Cancelled, or Wait List.
Sender Email	The email address that is displayed by default in the Sender field for the confirmation message. You can edit this value. **Note:** Your EMS Regics administrator configures the default Sender Email address.
Sender Name	The name of the sender that is displayed by default in the in the Sender field for the confirmation message. You can edit this value. **Note:** Your EMS Regics administrator configures the default Sender Email address.
Subject	The text that is displayed in the Subject line for the confirmation message. The default value is Registration Confirmation, but you an edit this value.
Message	Use the formatting options at the top of the Message field to format (font, color, size, and so on) the confirmation message.

3. Click Save.

   The confirmation message is displayed (by Name) in the Confirmation Messages pane. Now, every time a participant submits a registration for the event or completes the survey, cancels a registration, or is assigned a Pending or Wait List status after registering for an event, a confirmation message, based on the participant’s status, is automatically generated and sent to the participant.

The email contains not only this confirmation message, but also a link to the Event Details page. See “Event Details page” on page 65.

4. Optionally, select the message, and then click Email me to email yourself a “preview” of the confirmation message.

To edit the confirmation message for an event or survey, select the message in the Confirmation Messages pane, and then click Edit. To delete a confirmation message for an event or survey, select the message in the Confirmation Messages pane, and then click Delete. When you delete a confirmation message for an event or survey, the message is no longer automatically generated for the event or survey; however, it is not deleted from the global list of confirmation messages.

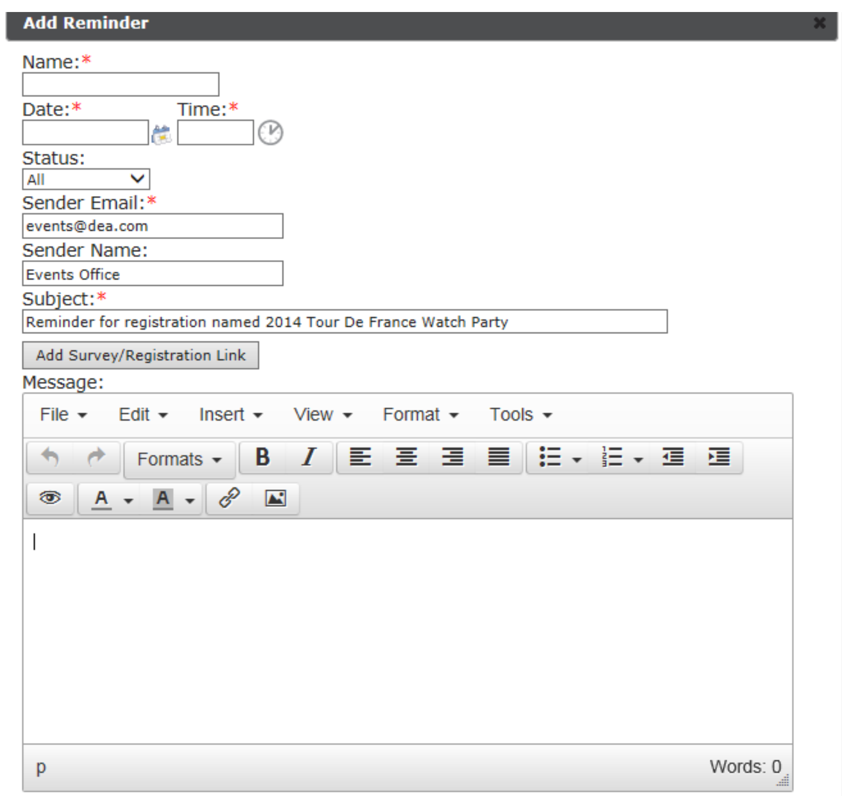
To configure a reminder

You can configure a reminder only for events. When a registrant receives a confirmation message, the message includes an option for the registrant to add the event to a personal calendar. If you want to send an automated reminder email before your event to registrants who have added the event to their personal calendars, you can configure a reminder and set the date and time for the reminder. You can add multiple reminders for an event. You also have the option of sending an automated post-event survey.

1. Next to the Reminders pane, click Add.

   The Add Reminder dialog box opens.

Figure 2-28: Add Reminder dialog box



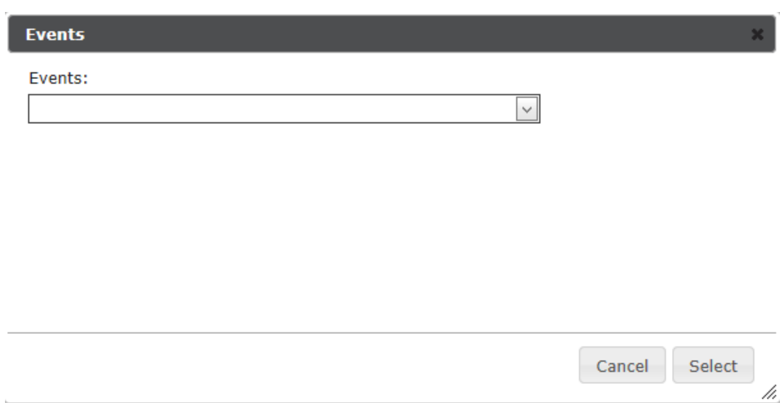
2. Add the information for the reminder.

Table 2-11: Add Reminder dialog box fields

Field	Description
Name	The name/title for the reminder that is displayed in the Reminders pane on the Emails tab.
Date/Time	The date and time at which the reminder is sent to the registrants who have added the event to their personal calendars.
Status	The participant status, which determines which reminder message is automatically generated and sent to the participant. By default, the following statuses are always available—Pending, Confirmed, and Wait List.
Sender Email	The email address that is displayed by default in the Sender field for the reminder. You can edit this value. **Note:** Your EMS Regics administrator configures the default Sender Email address.
Sender Name	The name of the sender that is displayed by default in the in the Sender field for the reminder. You can edit this value. **Note:** Your EMS Regics administrator configures the default Sender Email address.
Subject	The text that is displayed in the Subject line for the reminder. The default value is Reminder for registration named <Registration Name>, but you can edit this value.
Message	Use the formatting options at the top of the Message field to format (font, color, size, and so on) the reminder.

3. Optionally, click Add Survey/Registration Link to open the Events dialog box and select a survey that is automatically sent to the registrants upon completion of the event.

Figure 2-29: Events dialog box



4. Click Save.

   The reminder is displayed (by Title) in the Reminders pane. This reminder is automatically generated and sent at the indicated date and time to all the registrants with the selected status who have added the event to their personal calendars.

To edit a reminder for an event, select the reminder in the reminders pane, and then click Edit. To delete a reminder for an event, select the reminder in the Reminders pane, and then click Delete.

To add an attachment to a confirmation message

Any attachments that you specify here are attached to the confirmation messages that are displayed in the Confirmation Messages pane for the statuses of Confirmed, Pending, and Wait List. When you add an attachment to a confirmation message, the attachment is available from the Event Details page.

For information about the options available to a participant on the Event Details page, see *"Event Details page" on page 65.*

1. In the Attachments pane, click Attach a file.

   The Choose File to Upload dialog box opens.

2. Browse to and select the file that is to be attached to the confirmation message, and then click Open.

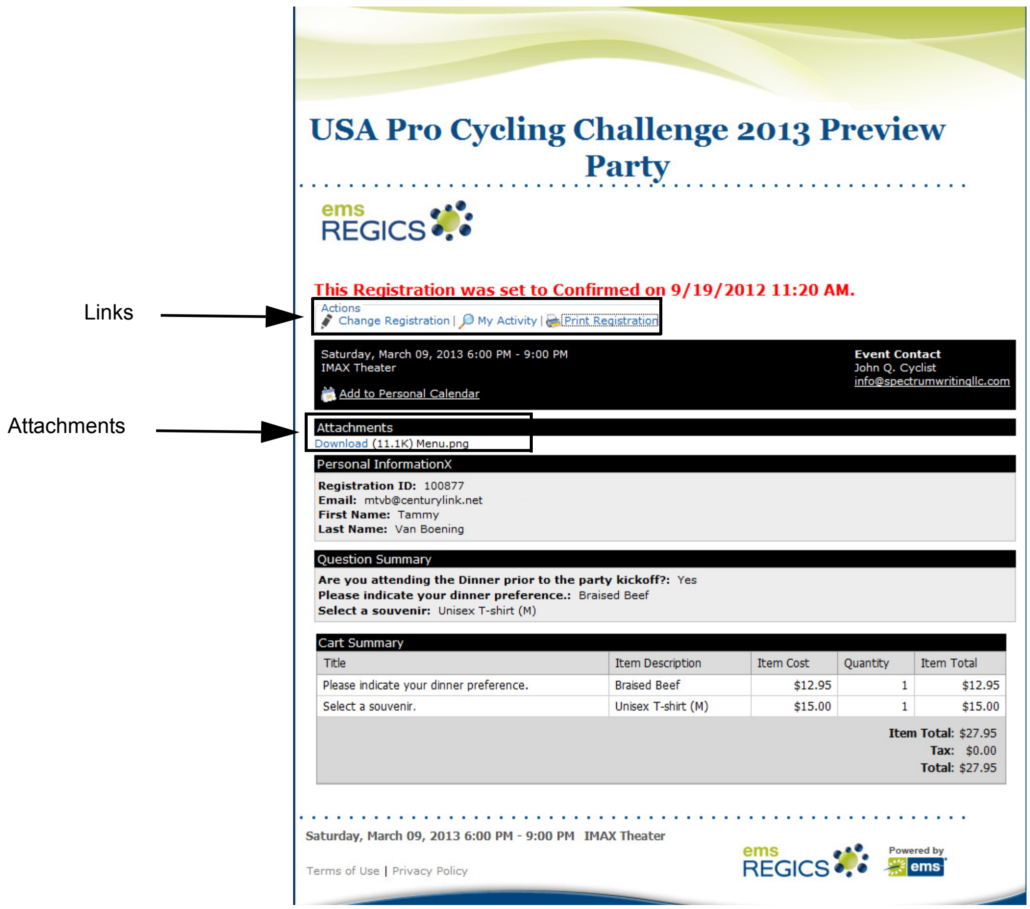
   The Choose File to Upload dialog box closes. The selected file is displayed (by file name) in the Attachments pane.

To remove an attachment from a confirmation message, click the Remove icon next to the attachment.

Event Details page

If you have configured the event registration form or survey so that confirmation message is automatically generated and sent to the participant after a registration or survey is completed successfully, then the confirmation message contains a link to the Event Details page.

Figure 2-30: Event Details page



The Event Details page provides a detailed summary of the event information, including the following:

- A Personal Information section that details the personal information for the participant (Registration ID, Email, First Name, Last Name, and so on).
- If applicable, a Question Summary section that details the questions that were asked of the participant as well as the participant's answers.
- If applicable, a Cart Summary section that details any pricing items that the participant has purchased.
- If applicable, an Attachments section that contains links for downloading any attachments that were included in the confirmation message.

At the top of the Event Details page, up to three links are displayed.

- Change Registration/Change Survey (Optional)—Participants can click Change Registration/Change Survey to return to the event or survey site and edit their current registration or survey information.
- My Activity—Participants can click My Activity to open the My Activity dialog box and view all the registrations and/or surveys that they have completed.
- Print Registration/Print Survey—Participants can click Print Registration/Print Survey to print a hard copy of the Event Details page.

Chapter 3
Event Registration Form and Survey Management

You can manage an online event registration form or a survey for your organization, as well as participant information from two pages in EMS Regics—the Dashboard and the Event Dashboard. Although both pages provide options for managing a live registration form or survey and managing participants, the Event Dashboard page provides additional options for managing participants and events, such as creating Invitee lists, manually registering participants, and deleting test registrations.

This chapter covers the following topics:

Managing Event Registration Forms and Surveys from the Dashboard

After you create an online event registration form or survey, the Dashboard is also the starting point for managing these forms and surveys in EMS Regics. After you search for and retrieve a registration form or survey, you can do the following from the Dashboard:

- Print a list of event registration forms or surveys (Manage Events report or Manage Surveys report).
- Edit the information for an event registration form or survey.
- Create new event registration forms and surveys by copying an existing form or survey.
- Add and follow specific registration forms and/or surveys on the Favorites tab.
- Generate an *Event Snapshot or Survey Snapshot* report, which summarizes the current information for the event or survey, including the responses for all participants who have registered for the event or responded to the survey, within a specified date range.

To generate a Snapshot report which summarizes only the participant information, you must generate the report from the Manage Participants page. *See "Managing Participants" on page 91.*

- Delete an *inactive* event registration form or survey.
- View the history for the event registration form or survey.
- Manage the participants for the event or survey.

For information about managing participants for an event or survey from the Dashboard, *see "Managing Participants" on page 91.*

To search for an event registration form or survey from the Dashboard

1. Because the search feature that is available on the Dashboard is a tab-specific search, you must do one of the following:
   - To search for *all* registration forms and surveys in your EMS Regics system, make sure that the All Group tab is open for the search.
   - To search for only those registration forms or surveys that are found in a specific group, make sure that the appropriate Group tab is open for the search.

2. In the Title field on the Dashboard, enter the search criteria by which to search for an event registration form or survey.

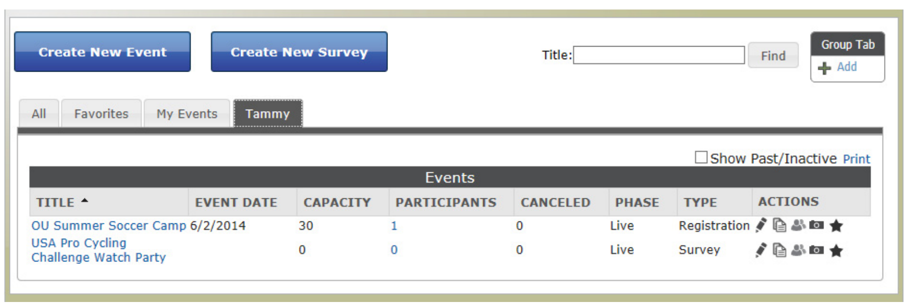
Your search is limited to the exact order of the characters in the string, but the string can appear anywhere in the search results, and the search is not case-sensitive. For example, if you enter ***OU****, search results can include campus t****ou****r, EMS R****ou****ndtable, and* ***OU*** *Summer Soccer Camp.*

3. Optionally, select Show Past to search for live or closed events with a date that occurred before the current day's date.
4. Click Find.

   All the registration forms and surveys in your EMS Regics system that meet your search criteria are displayed on the opened Group tab.

All registration forms or surveys with a Test status that meet the search criteria are always shown on the Dashboard, regardless of date.

Figure 3-1: Dashboard with list of search results



Every specific Group tab is also refreshed with a list of results that meet your search criteria. If the list of search results that is returned on the All Group tab is too long to be effective, then you can open a specific Group tab to locate the needed search results.

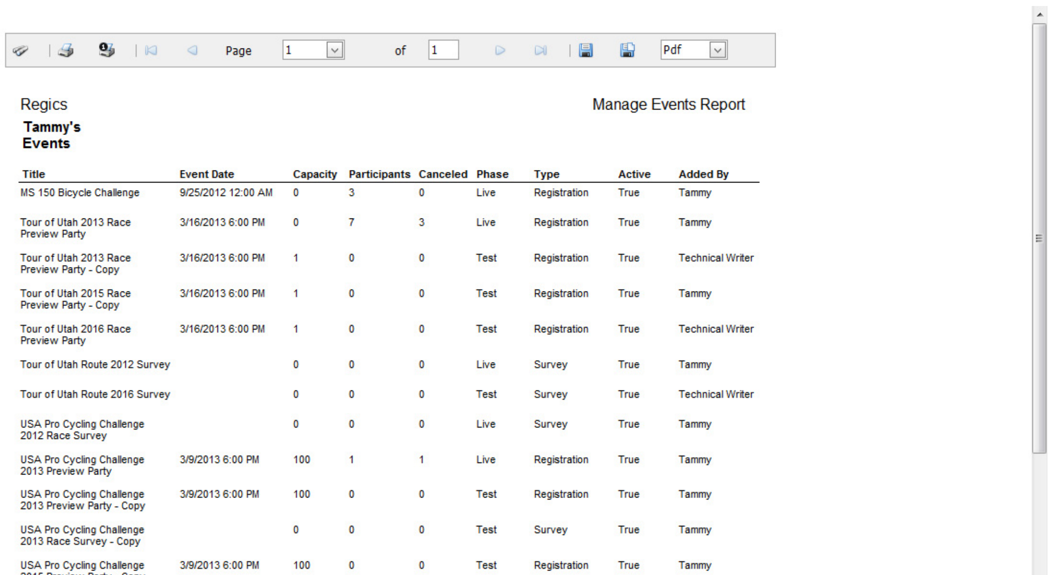
5. Continue to any of the following as needed:
   - "To print a list of event registration forms or surveys" on page 71.
   - "To edit an event registration form or survey from the Dashboard" on page 71.
   - "To create a new event registration form or survey by copying an existing form or survey from the Dashboard" on page 72.
   - "Managing an Event or Survey from the Event Dashboard" on page 77.
   - "To generate a Snapshot report for the event or survey" on page 73.
   - "To delete an inactive event registration form or survey" on page 75.
   - "To view the history for an event registration form or survey" on page 76.

To print a list of event registration forms or surveys

1. Optionally, click Show Past/Inactive if you want the printed list to include all past/inactive forms or surveys that are contained on the tab.
2. Click Print.

   The Manage Events report or Manage Surveys report opens. The report lists all the event registration forms or surveys that are contained on the Group tab. The report has options for printing the onscreen preview, exporting the list fields to a file such as a PDF, and so on. Place your mouse pointer on a toolbar button to open tooltip text for the button.

Figure 3-2: Manage Events report example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Regics

Manage Events Report

Tammy's Events

Title	Event Date	Capacity	Participants	Canceled	Phase	Type	Active	Added By
MS 150 Bicycle Challenge	9/25/2012 12:00 AM	0	3	0	Live	Registration	True	Tammy
Tour of Utah 2013 Race Preview Party	3/16/2013 6:00 PM	0	7	3	Live	Registration	True	Tammy
Tour of Utah 2013 Race Preview Party - Copy	3/16/2013 6:00 PM	1	0	0	Test	Registration	True	Technical Writer
Tour of Utah 2015 Race Preview Party - Copy	3/16/2013 6:00 PM	1	0	0	Test	Registration	True	Tammy
Tour of Utah 2016 Race Preview Party	3/16/2013 6:00 PM	1	0	0	Test	Registration	True	Technical Writer
Tour of Utah Route 2012 Survey		0	0	0	Live	Survey	True	Tammy
Tour of Utah Route 2016 Survey		0	0	0	Test	Survey	True	Technical Writer
USA Pro Cycling Challenge 2012 Race Survey		0	0	0	Live	Survey	True	Tammy
USA Pro Cycling Challenge 2013 Preview Party	3/9/2013 6:00 PM	100	1	1	Live	Registration	True	Tammy
USA Pro Cycling Challenge 2013 Preview Party - Copy	3/9/2013 6:00 PM	100	0	0	Test	Registration	True	Tammy
USA Pro Cycling Challenge 2013 Race Survey - Copy		0	0	0	Test	Survey	True	Tammy
USA Pro Cycling Challenge	3/9/2013 6:00 PM	100	0	0	Test	Registration	True	Tammy

To edit an event registration form or survey from the Dashboard

1. Click the Edit icon next to the registration form or survey that you are editing.

   The Add Event page opens. The Details tab is the active tab.
2. Modify the information for the event registration form or survey as needed. See:
   - "Details tab" on page 30.
   - "Design tab" on page 34.
   - "Registrant tab/Respondent tab" on page 36.
   - "Sections/Questions tab" on page 43.
   - "Emails tab" on page 59.
3. Click Save.
4. Click OK in the Event Saved message.

5. Click Done.

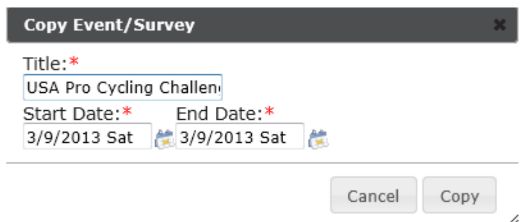
   You return to the Dashboard.

To create a new event registration form or survey by copying an existing form or survey from the Dashboard

1. Click the Copy icon next to the registration form or survey *from* which you are copying the information.

   The Copy Event/Survey dialog box opens. This dialog box lists the title for the copied event registration form or survey as well as the start date and end date for the event or survey.

Figure 3-3: Copy Event/Survey dialog box (for an event)



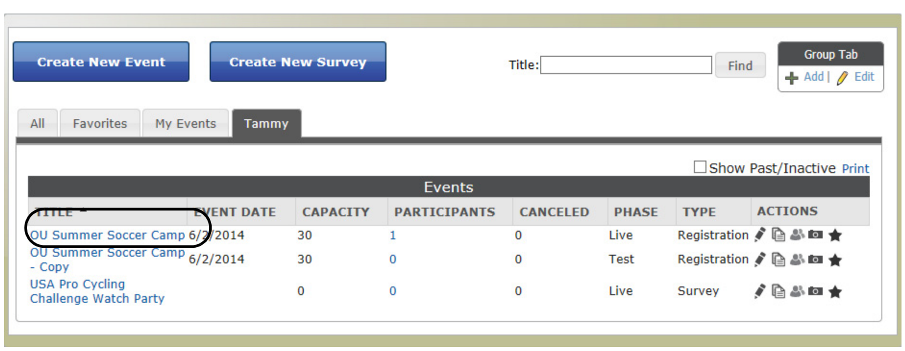
2. Do one of the following:

   - Modify the title for the copied event or survey, and if needed, the Start Date and/or End Date, and then click Copy.
   - Click Copy to modify this information later.

   The copied registration form or survey opens in the Event Dashboard. See "Managing an Event or Survey from the Event Dashboard" on page 77.

A copy of the event registration form or survey is also displayed on the Group tab on the Dashboard. The copied form or survey is indicated with the word "Copy" at the end of the title. See Figure 3-4 below. You can always work with the copy of the event or survey from this tab if needed.

Figure 3-4: Copied event on a Group tab



To add a registration form or survey to your Favorites tab

If you have registration forms or surveys with which you must work frequently, then you do not need to search for them every time. Instead, you can create a personalized list of your favorite forms and surveys. This list is saved so it is displayed on the Favorites tab every time that you log in to EMS Regics. To add a registration form or survey to your Favorites tab, click the Favorites icon next to the form or survey that is displayed on the Dashboard.

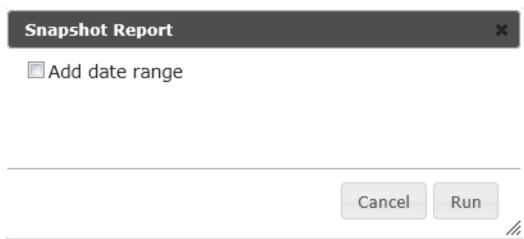
To generate a Snapshot report for the event or survey

An event or survey *Snapshot report* summarizes the current information for an event or survey, including the responses for all participants who have registered for the event or responded to the survey, within a specified date range.

1. Click the Event Snapshot icon next to the appropriate event registration form or survey.

   The Snapshot Report dialog box opens.

Figure 3-5: Snapshot Report dialog box



2. Do one of the following:

   - To generate a Snapshot report of up to and including the current day's date, leave Add date range blank, and then click Run.
   - To run a Snapshot report for a specific date range, click Add a date range, and then enter a Start date *and* an End date, and then click Run.

   See Figure 3-6 on page 74.

Figure 3-6: Example of a Snapshot report for an event or survey

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Regics — Event Snapshot

USA Pro Cycling Challenge 2013 Preview Party

Overall Statistics	Total	% of Total	Quantity	% of Quantity	Revenue
Registrations	1	17%			$27.95
Cancellations	1	17%			$27.95

Status Breakdown	Total	% of Total	Quantity	% of Quantity	Revenue
Pending	0	0%			$0.00
Confirmed	1	17%			$27.95
Cancelled	1	17%			$27.95
Wait list	0	0%			$0.00
Test	1	17%			$12.95
Inactive	0	0%			$0.00

Custom Questions	Total	% of Total	Quantity	% of Quantity	Revenue
Attendee Dinner	4	67%			
Yes	4	100%			
No	0				
Attendee Dinner Choices	4	67%			
Roasted Chicken Breast	0				
Braised Beef	2	50%			$25.90
Grilled Fish (Monk Fish Only)	2	50%			$39.90
Vegetarian	0				
Attendee Dinner Choices Copy	0				
Braised Beef	0				
Grilled Fish (Monk Fish Only)	0				
Roasted Chicken Breast	0				
Vegetarian	0				
Attendee Souvenir	4	67%			
Unisex T-shirt (XL)	1	25%	25	4%	$15.00
Unisex T-shirt (L)	0		25	0%	
Unisex T-shirt (M)	3	75%	25	12%	$45.00
Women's Only T-Shirt (Small)	0		10	0%	
File Upload	0				

9/19/2012 3:19 PM SYS — EMS Regics — 1/1

Page 1 of 1 Pdf

The Snapshot report has options for printing the onscreen preview, exporting the list fields to a file such as a PDF, and so on. Place your mouse pointer on a toolbar button to open tooltip text for the button

3. Click the Close button in the upper right corner of the Snapshot report to close the report and return to the Dashboard.

To delete an inactive event registration form or survey

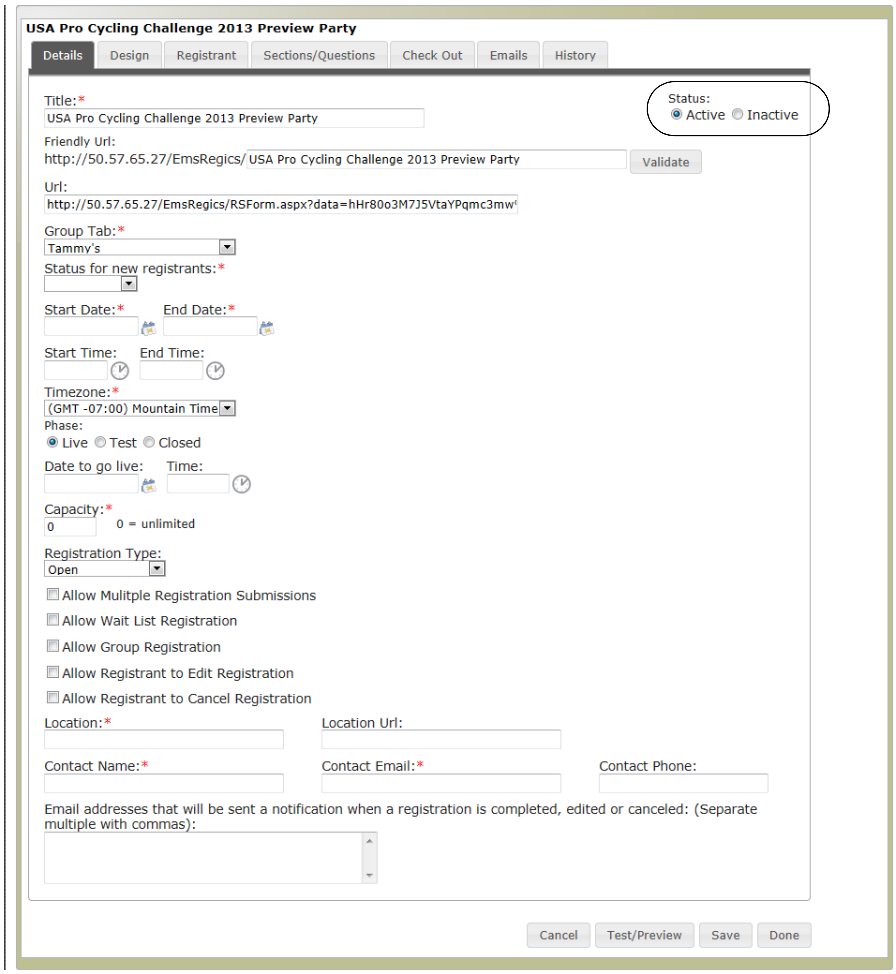
You can delete only inactive event registration forms or surveys from the Dashboard.

You can delete test data from a event registration form or survey from the Event Dashboard. See *"Managing an Event or Survey from the Event Dashboard" on page 77.*

1. Click the Edit icon next to the event registration form or survey that you are deleting.

   The Add Event page opens. The Details tab is the active tab.

Figure 3-7: Add Event page (for an event), Details tab



2. Select Inactive.
3. Click Save.
4. Click OK in the Event Saved message.

5. Click Done.

   You return to the Dashboard.

6. If needed, do one or both of the following:

   - Click Past/Inactive to display all events/surveys that have occurred prior to the current day's date or are inactive.

The title for an inactive or previously occurring form or survey is displayed in red and italics.

   - Search for the form or survey again.

7. Click the Delete icon next to the event registration form or survey that you are deleting.

   A message opens, asking you if you are sure that you want to delete the event.

8. Click OK.

   The message closes. A second message opens, indicating that the event was successfully deleted.

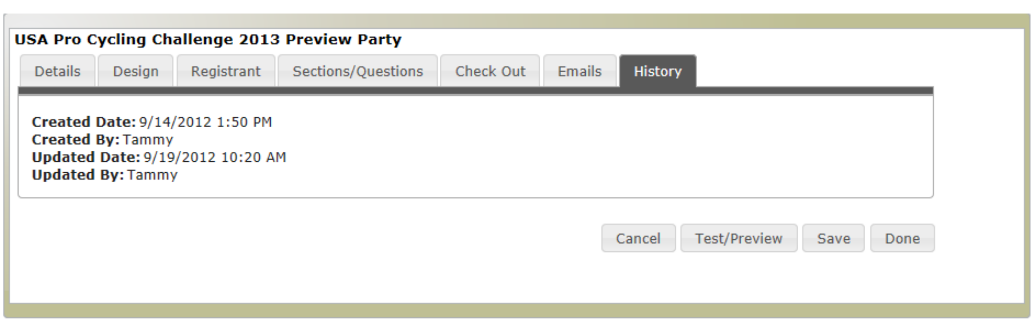
9. Click OK.

   The second message closes. The selected form or survey is deleted immediately from the Group tab.

To view the history for an event registration form or survey

Open the History tab. The History tab is a view-only tab that shows the original creation date of the registration form or survey and the name of the Administrator or Standard user who created the registration form or survey. The tab also shows last date that the registration form or survey was edited as well as the name of the Administrator or Standard user who last edited the registration form or survey.

Figure 3-8: History tab



Managing an Event or Survey from the Event Dashboard

The Dashboard provides a global view of the events and surveys to which you have access. The Event Dashboard displays information about a specific event registration form or survey. Just like the Dashboard, the Event Dashboard has an edit registration form/survey option, a copy registration form/survey option, and a manage participants option; however, the following options are also available from the Event Dashboard:

- Previewing the event registration form or survey.
- Bypassing any date restrictions and complete the registration or survey for a participant. (The *Admin Register* function.)
- Deleting test data from an event registration form or survey.
- Finding a participant in the event or survey.
- Managing your invitee list for an invitation only event or survey.
- Viewing the history for an event registration form or survey.

To work with an event registration form or survey in the Event Dashboard, you must first search for the form or survey on the Dashboard. You can then can open the form or survey in the Event Dashboard and work with the form or survey as needed.

For information about managing the participants for an event registration form or survey from the Event Dashboard, see “Managing Participants” on page 91.

If you copied an existing form or survey on the Dashboard, then the copied form or survey is already opened in the Event Dashboard. You can continue to any of the following as needed:

- *“To edit an event registration form or survey from the Event Dashboard” on page 80.*
- *“To preview an event or survey” on page 80.*
- *“To bypass date restrictions and complete a participant’s registration or survey” on page 81.*
- *“To create a new form or survey by copying an existing form or survey on the Event Dashboard” on page 81.*
- *“To delete test data from an event registration form or survey” on page 82.*
- *“To find participants in an event or survey” on page 83.*
- *“To manage your invitees” on page 83.*
- *“To view the history for an event registration form or survey” on page 88.*

To search for an event registration form or survey and open it in the Event Dashboard

1. Because the search feature that is available on the Dashboard is a tab-specific search, you must do one of the following:
   - To search for *all* registration forms and surveys in your EMS Regics system, make sure that the All Group tab is open for the search.
   - To search for only those registration forms or surveys that are found in a specific group, make sure that the appropriate Group tab is open for the search.
2. In the Title field on the Dashboard, enter the search criteria by which to search for an event registration form or survey.

Your search is limited to the exact order of the characters in the string, but the string can appear anywhere in the search results. The search is not case-sensitive. For example, if you enter ***OU****, search results can include campus t****ou****r, EMS R****ou****ndtable, and* ***OU*** *Summer Soccer Camp.*

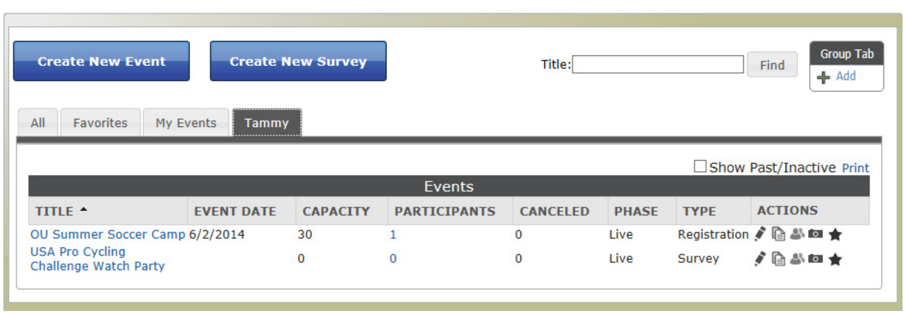
3. Optionally, select Show Past to search for live or closed events with a date that occurred before the current day's date.

All registration forms or surveys with a Test status are always shown on the Dashboard, regardless of date.

4. Click Find.

   All the registration forms and surveys in your EMS Regics system that meet your search criteria are displayed on the opened Group tab.

Figure 3-9: Dashboard with list of search results



Every specific Group tab is also refreshed with a list of results that meet your search criteria. If you carry out the search on the All Group tab, and you find that the list of search results that is returned on the All Group tab is too long to be effective, then you might want to open a specific Group tab to locate the needed search results.

5. In the Title field, click the title of the appropriate event registration form or survey.

   The Event Dashboard opens. The Details tab is the active tab.

Figure 3-10: Event Dashboard (for an event)

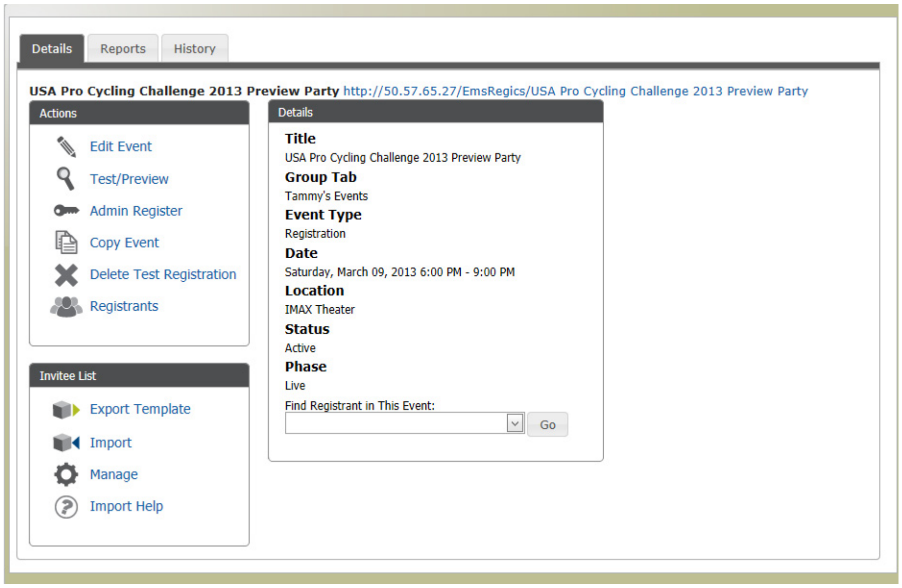
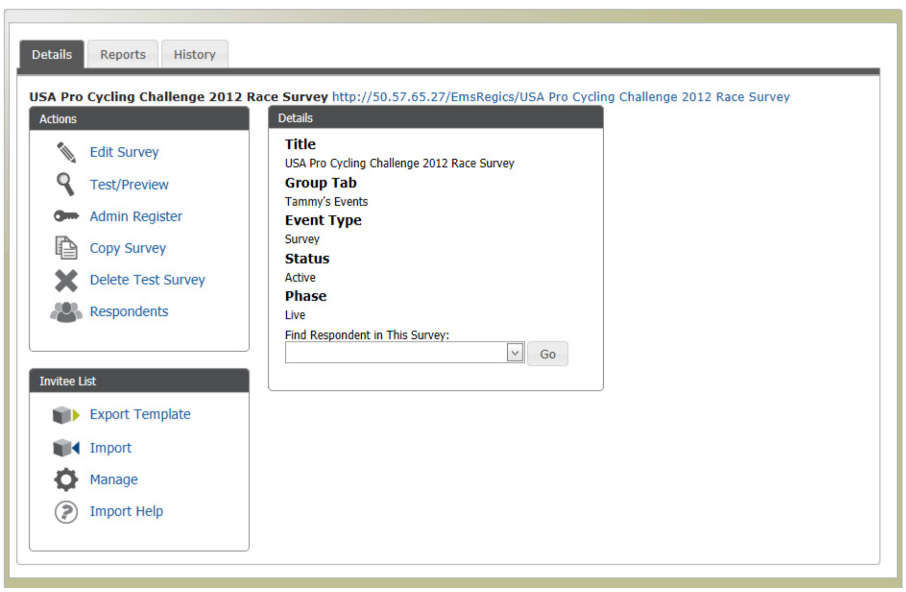


Figure 3-11: Event Dashboard (for a survey)



6. Continue to any of the following as needed:
   - "To edit an event registration form or survey from the Event Dashboard" below.
   - "To preview an event or survey" on page 80.
   - "To bypass date restrictions and complete a participant's registration or survey" on page 81.
   - "To create a new form or survey by copying an existing form or survey on the Event Dashboard" on page 81.
   - "To delete test data from an event registration form or survey" on page 82.
   - "To find participants in an event or survey" on page 83.
   - "To manage your invitees" on page 83.
   - "To view the history for an event registration form or survey" on page 88.

To edit an event registration form or survey from the Event Dashboard

1. In the Actions pane, click Edit Event or Edit Survey, as appropriate.

   The Add Event page opens. The Details tab is the active tab.

2. Modify the information for the event registration form or survey as needed. See:
   - "Details tab" on page 30.
   - "Design tab" on page 34.
   - "Registrant tab/Respondent tab" on page 36.
   - "Sections/Questions tab" on page 43.
   - "Emails tab" on page 59.
3. Click Save.
4. Click OK in the Event Saved message.
5. Click Done.

   You return to the Event Dashboard.

To preview an event or survey

In the Actions pane, click Test/Preview. The pages that open when you click Test/Preview are identical to the pages that participants see when they click the URL link for the event or survey.

To bypass date restrictions and complete a participant's registration or survey

Sometimes, it might be necessary for an EMS Regics administrator to complete a participant's registration or survey. For example, an event that your organization is hosting might have an early bird registration that has a reduced registration fee only for a specific time period and a standard registration time period with a higher registration fee. After the early bird registration time period has expired, any participant who has access to the event/survey link can register only at the standard registration price. To bypass these date restrictions and register an attendee at the early bird price, an EMS Regics administrator can use the *Admin Register* function.

1. In the Actions pane, click Admin Register.

   The event registration form or survey form opens.

2. Complete the registration form or survey for the participant.

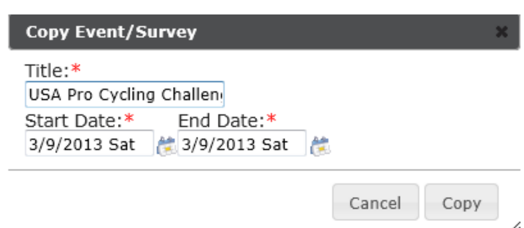
As an EMS Regics administrator, you can reuse an email address as needed when you are manually completing a registration or survey for a participant.

To create a new form or survey by copying an existing form or survey on the Event Dashboard

1. In the Actions pane, click Copy Event or Copy Survey, as appropriate.

   The Copy Event/Survey dialog box opens. This dialog box lists the title for the copied event or survey (appended with the word "Copy") as well as the start date and end date for the event or survey.

Figure 3-12: Copy Event/Survey dialog box (for an event)



2. Do one of the following:

   - Modify the title for the copied event or survey (as well as the Start Date and End Date, if needed), and then click Copy.
   - Simply click Copy to modify this information later.

   The Event Dashboard is refreshed with the information for the copied form or survey, including a link to the copied form or survey at the top of the page.

3. In the Actions pane, click Edit Event or Edit Survey as appropriate.

   The Add Event page opens. The Details tab is the active tab.

4. Modify the information for the event registration form or survey as needed. See:

   - "Details tab" on page 30.
   - "Design tab" on page 34.
   - "Registrant tab/Respondent tab" on page 36.
   - "Sections/Questions tab" on page 43.
   - "Emails tab" on page 59.

5. Click Save.

6. Click OK in the Event Saved message.

7. Click Done.

   You return to the Event Dashboard.

To delete test data from an event registration form or survey

Before an event registration form or survey goes live, you should test the form or survey to ensure that you have it formatted as you want and that it is working correctly. EMS Regics allows for five completed test records to be saved for an event registration form or survey. After you complete a test event registration form or survey, and save the results, you can delete the test data from the form or survey before the form or survey goes live. To delete test data, in the Actions pane, click Delete Test Registration or Delete Test Survey as appropriate.

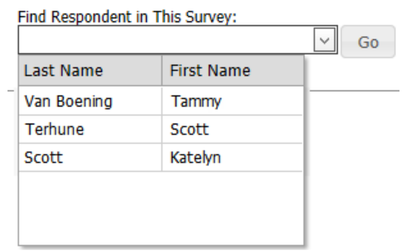
Delete Test Registration or Delete Test Survey is displayed in the Actions pane only if you have completed and saved at least one test record for the form or survey. Only the test data is deleted for the form or survey. The form or survey themselves are not deleted.

To find participants in an event or survey

In the Details pane, do one of the following:

- To view a list of all participants for an event or survey, click the Down arrow in the Find Registrant in this Event/Find Respondent in this Survey field. A list of all participants who have registered for the event/taken the survey opens. This list is ordered by Last Name, First Name.

Figure 3-13: Participant list



- In the Find Registrant in this Event/Find Respondent in this Survey field, enter your search criteria, and then click Go.

---

*Your search is limited to the exact order of the characters in the string, but the string can appear anywhere in the search results and the search is not case-sensitive. For example, if you enter **scott**, search results can include **Scott**, Katelyn and Terhune, **Scott**.*

As you enter your search string, the list of participants that meet your search criteria is dynamically updated. After you click Go, the Participant page opens with the list of participants who meet your search criteria. See "Managing Participants" on page 91.

To manage your invitees

If an event or survey is invitation-only, then only those participants that you specify, your *invitees,* have access to the link for the event or survey. You use the Invitee List functions that are available on the Dashboard page to create your Invitee list for an invitation-only event or survey. You can create your Invitee list automatically or you can create the list manually. You can also delete invitees from the Invitee list.

No matter how you create your Invitee list, it is separate from the Participant list. Invitees to an invitation-only event or survey must still register for the event/ respond to the survey to appear in the Participant list.

To automatically create your Invitee list

1. In the Invitee List pane, click Export Template.

   A message opens, asking you if you want to open or save the InviteeList file, which is a comma-separated values (.csv) file.

2. Click Open.

   The InviteeList.csv file opens in Microsoft Excel. This file contains all the fields (standard, user-defined, and global) that have been specified as visible for the selected event or survey.

3. Enter the information for each invitee, and then save the file *as a tab-delimited text file.* (The file is named InviteeList.txt.)

A message might open indicating that the text file may contain features that are not compatible with Text (Tab delimited) and asking you if you want to keep the workbook in this format. Click Yes to keep the InviteeList file in a tab-delimited format when you save it.

4. In the Invitee List pane, click Import.

   The Choose File to Upload dialog box opens.

5. Scroll to and select the tab-delimited text file (InviteeList.txt) that you just created and then click Open.

   A dialog box opens indicating that the InviteeList.txt file is being uploaded.

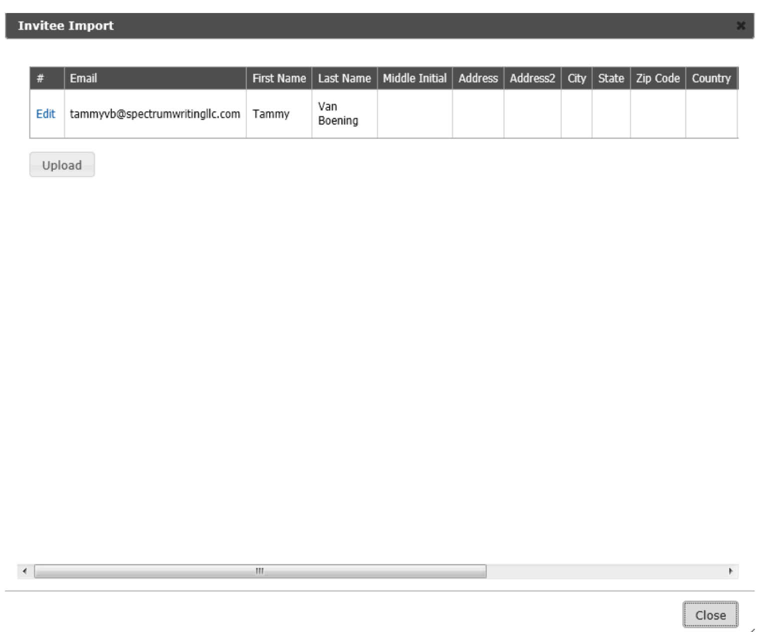
6. Click OK to close the dialog box.

   A second dialog box opens indicating that the text file was uploaded.

7. Click OK to close this second dialog box.

   The Invitee Import dialog box opens. This dialog box lists all the invitees who will be imported into your EMS Regics application.

Figure 3-14: Invitee Import dialog box



8. Optionally, before you import the Invitee list, click Edit next to each invitee as needed to edit the invitee's information.

9. Click Upload.

   A dialog box opens indicating that the import was successful.

10. Click OK to close the dialog box and remain on the Dashboard page.

    When your invitees register for an event, or take a survey, a large portion of their information will already be populated with the information that you imported from the InviteeList text file. They can always edit their information if needed.

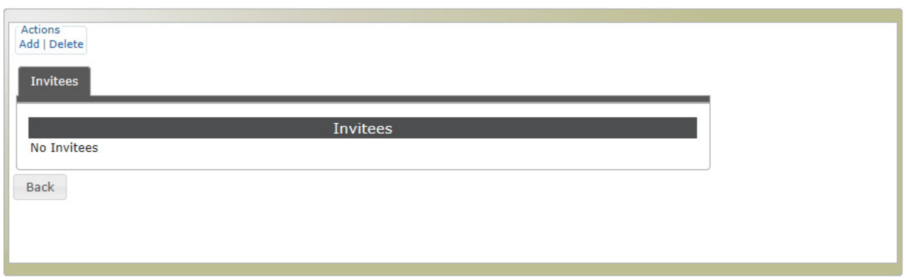
To manually create your Invitee list

You can manually create your entire Invitee list, or you can add more invitees to the Invitee list that you created automatically.

1. In the Invitee List pane, click Manage.

   The Invitees page opens. If you have previously created and imported an Invitees list, then the information for the imported invitees is displayed on this page; otherwise, the page is blank.

Figure 3-15: Invitees page

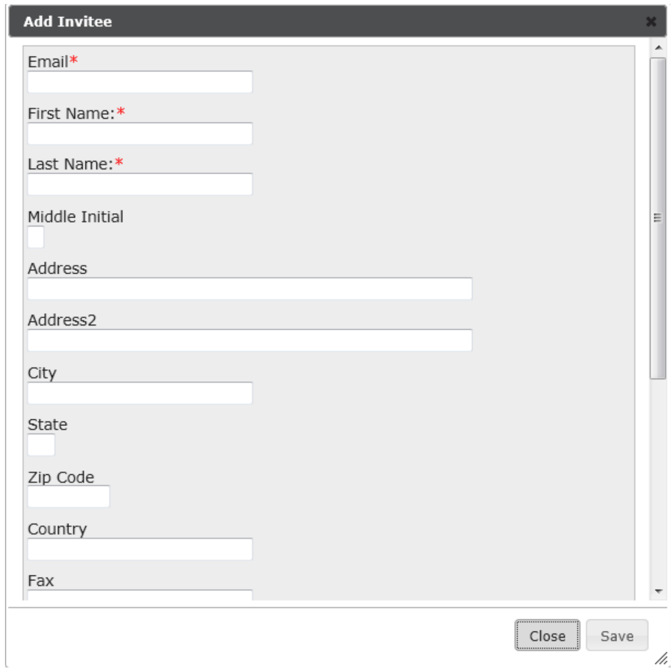


2. Optionally, to sort the Invitee list by email (in reverse alphabetical order), click the Sort icon next to the Email column heading. To change the sort order back to alphabetical order based on email, click the Sort icon again.

3. Under Actions, click Add.

   The Add Invitee dialog box opens. See Figure 3-16 on page 86.

Figure 3-16: Add Invitee dialog box



4. Add the information for the new invitee, and then click Save.

Required fields are marked with a red asterisk (*).

The Add Invitee dialog box closes and you return to the Invitees page with the newly added invitee displayed on the page.

5. Repeat Step 3 and Step 4 until you have added all the necessary invitees, and then click Back to return to the Dashboard page.

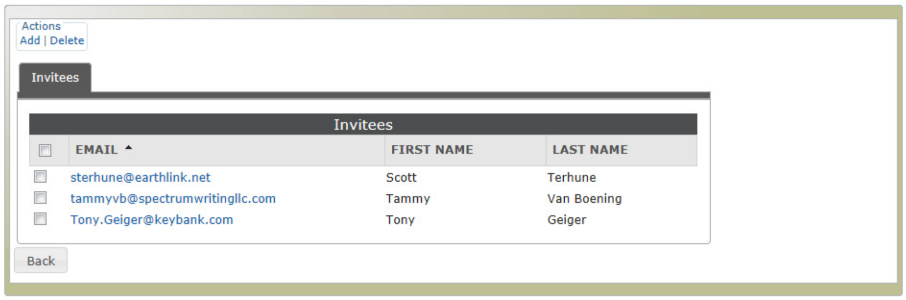
   When your invitees register for an event, or take a survey, a large portion of their information will already be populated with the information that you entered in the Add Invitee dialog box. They can always edit their information if needed.

To delete invitees from the Invitee list

1. In the Invitee List pane, click Manage.

   The Invitees page opens. All the current invitees in your Invitees list are displayed on the page.

Figure 3-17: Invitees page



2. Optionally, to sort the Invitee list by email (in reverse alphabetical order), click the Sort icon  next to the Email column heading. To change the sort order back to alphabetical order based on email, click the Sort icon again.
3. Select the blank check box next to each invitee that you are deleting from your Invitees list.

To select all invitees in a single step, select the blank check box in the column heading row (the check box to the left of Email.)

4. Under Actions, click Delete.

   A dialog box opens, asking you if you are sure that you want to delete all checked invitees.
5. Click OK.

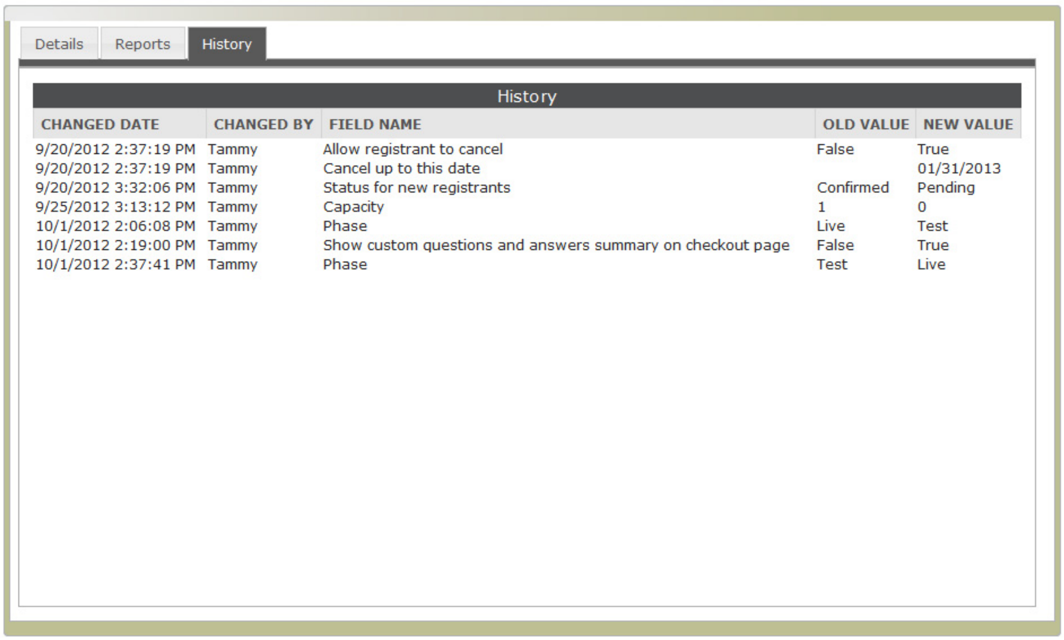
   A second dialog box opens, indicating that the selected invitees were deleted.
6. Click OK.

   The second dialog box closes. The invitee is deleted immediately from the Invitees list.

To view the history for an event registration form or survey

On the Event Dashboard, open the History tab. The tab displays all the history for the event registration form or survey—the date of the change to the form or survey, the name of the user who made the change, the field that was changed, the old field value, and the new field value.

Figure 3-18: Event Registration Form, History tab (Event Dashboard)



Details | Reports | History

History

CHANGED DATE	CHANGED BY	FIELD NAME	OLD VALUE	NEW VALUE
9/20/2012 2:37:19 PM	Tammy	Allow registrant to cancel	False	True
9/20/2012 2:37:19 PM	Tammy	Cancel up to this date		01/31/2013
9/20/2012 3:32:06 PM	Tammy	Status for new registrants	Confirmed	Pending
9/25/2012 3:13:12 PM	Tammy	Capacity	1	0
10/1/2012 2:06:08 PM	Tammy	Phase	Live	Test
10/1/2012 2:19:00 PM	Tammy	Show custom questions and answers summary on checkout page	False	True
10/1/2012 2:37:41 PM	Tammy	Phase	Test	Live

Searching for Registrations and/or Surveys Completed by a Specific Participant

The Participants search feature is an option that is available from the EMS Regics menu. You can use this option to search across *all* the forms and surveys in your EMS Regics system for the registration and/or surveys that were completed by a specific participant.

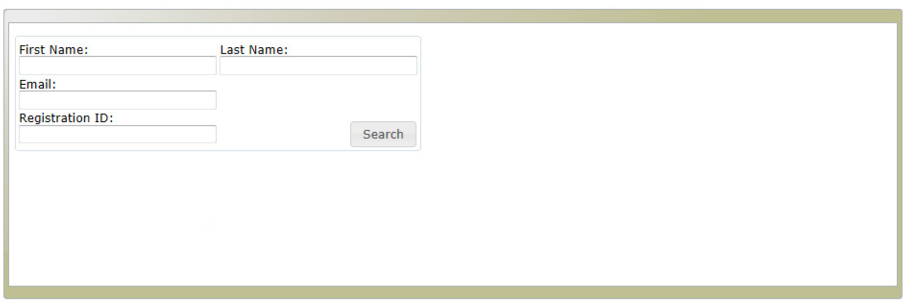
To search for the registrants for a specific event, or the respondents for a specific survey, you must do so from the Manage Participants page. See *"Managing Participants" on page 91.*

To search for registration and/or surveys completed by a specific participant

1. On the EMS Regics menu, click Participants.

   The Participants page opens. The search options are displayed at the top of the page.

Figure 3-19: Participants page with search options



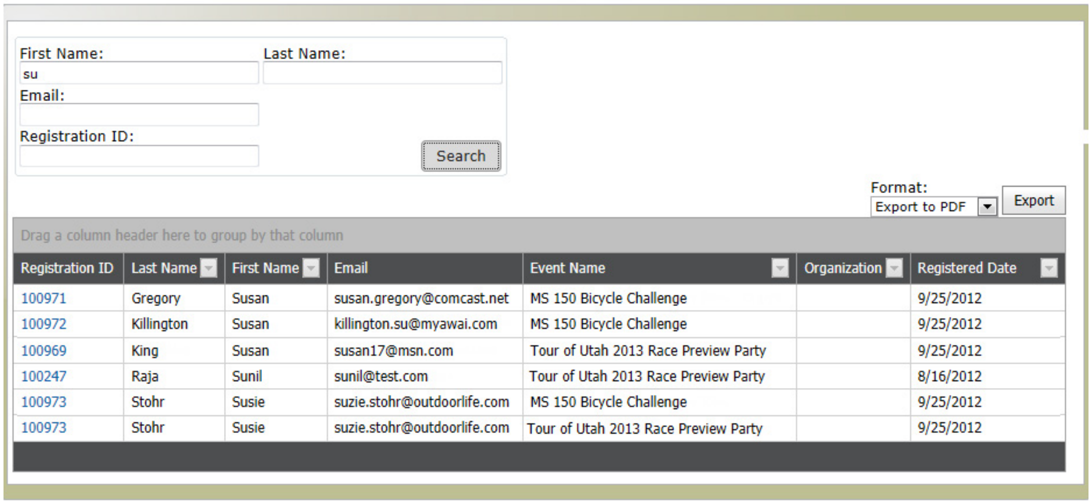
2. Enter your search options.

   - Leave all search fields blank to search for all participants who have registered for an event or completed a survey in your EMS Regics system.
   - First Name, Last Name, and Email—Your search is limited to the exact order of the characters in the string, but the string can appear anywhere in the search results. The search is not case-sensitive. For example, if you enter **Son** in the Last Name field, then search results can include John**son**, **Son**deheim, and so on.
   - Registration ID—Your search is limited to the exact order of the characters in the string, and the search results must begin with the string. For example, if you enter **100** in the Registration ID field, then search results can include **100**001, **100**002, but not 001100.

3. Click Search.

   A list of participants who meet all the search criteria that you specified is displayed on the Participants page.

Figure 3-20: Participants page with search results



Registration ID	Last Name	First Name	Email	Event Name	Organization	Registered Date
100971	Gregory	Susan	susan.gregory@comcast.net	MS 150 Bicycle Challenge		9/25/2012
100972	Killington	Susan	killington.su@myawai.com	MS 150 Bicycle Challenge		9/25/2012
100969	King	Susan	susan17@msn.com	Tour of Utah 2013 Race Preview Party		9/25/2012
100247	Raja	Sunil	sunil@test.com	Tour of Utah 2013 Race Preview Party		8/16/2012
100973	Stohr	Susie	suzie.stohr@outdoorlife.com	MS 150 Bicycle Challenge		9/25/2012
100973	Stohr	Susie	suzie.stohr@outdoorlife.com	Tour of Utah 2013 Race Preview Party		9/25/2012

4. Optionally, do one or both of the following:

   - Rearrange the search results to better suit your working needs.

See "An EMS Regics Browser Page" on page 22.

   - Export the list of participants:

     1. On the Format dropdown list, select the format to which you are exporting the list of participants. (PDF is the default value.)
     2. Click Export.

        A message opens, asking you if you want to open the file or save the file.

     3. Do one of the following:

        - To view the file online (you cannot rename or save the file), click Open.
        - To save the file to a location of your choice (you can also rename the file), click Save.

Managing Participants

After you search for and retrieve a specific event registration form or survey, you can manage the participants for the form or survey from the Manage Participants page. Managing participants consists of:

- Viewing and editing the information for a participant (changing a registrant's status and/or secondary status, adding/editing/deleting a registrant's transaction information, processing a credit card refund for a registrant, adding notes to a participant's record, viewing the history for a participant's record, viewing a list of all the emails that were sent to the participant, resending a confirmation to a participant sending an itemized receipt to a registrant, and/or sending a request for payment due to a registrant).
- Viewing a list of participants who have not completed the necessary forms or surveys (incomplete participants).
- Changing the status for multiple event registrants.
- Sending email to a participant or participants.
- Generating a list of addresses for participants (the Address List report).
- Generating a *Participant Snapshot* report, which is a list of all the responses provided by all participants for the time period up to and including the current day's date and time.

To generate an Event Snapshot or Survey Snapshot report, which includes not only the participant responses, but also the summary information for the relevant event or survey, you must generate the report from the Dashboard or from the Reports tab on the Event Dashboard. See "Managing Event Registration Forms and Surveys from the Dashboard" on page 69 or "Generating Standard Reports" on page 164.

- Exporting a list of participants for the event or survey to a PDF, XLS, or CSV file.

To manage participants

1. Search for the event registration form or survey form for which you are managing the participants. See:

   - "To search for an event registration form or survey from the Dashboard" on page 69

   or

   - "To search for an event registration form or survey and open it in the Event Dashboard" on page 78.

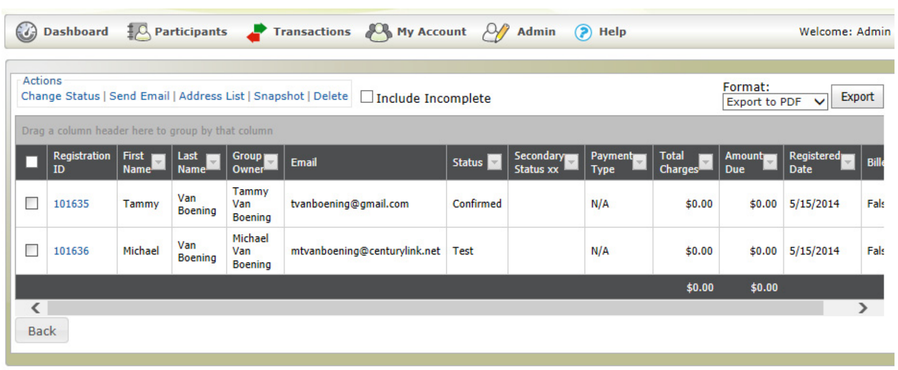
2. Do one of the following:

    - On the Dashboard, click the Participants icon next to the event registration form or survey for which you are managing the participants.
    - On the Event Dashboard page, under Actions, click Registrants or Respondents, as appropriate.

    The Manage Participants page opens. This page lists all the participants who have completed their registrations and/or surveys for their events. When the page first opens, the participants are grouped by Registration ID.

To search across all the forms and surveys in your EMS Regics system for the registration and/or surveys that were completed by a specific participant, you must do so from the Participants page. See “Searching for Registrations and/or Surveys Completed by a Specific Participant” on page 89.

Figure 3-21: Manage Participants page



3. Optionally, before you continue, do one or both of the following:

    - To also show the participants who have not completed the necessary forms or surveys, click Include Incomplete.

An Incompletes report is also available. See “Generating Standard Reports” on page 164.

- Rearrange the search results on the Manage Participants page to better suit your working needs.

See “An EMS Regics Browser Page” on page 22.

4. Continue to any of the following as needed:

   - "To view and edit the information for a participant" below.
   - "To change the status for multiple event registrants" on page 100.
   - "To send an email to one or more participants" on page 100.
   - "To generate a list of participants' addresses (Address List report)" on page 102.
   - "To generate a Participant Snapshot report" on page 103.
   - "To export a list of participants to a file" on page 104.

If you do now want to continue, you can click Back to return to the Event Dashboard (Details tab), and carry out other work as needed. See Step 6 of "To search for an event registration form or survey and open it in the Event Dashboard" on page 78.

To view and edit the information for a participant

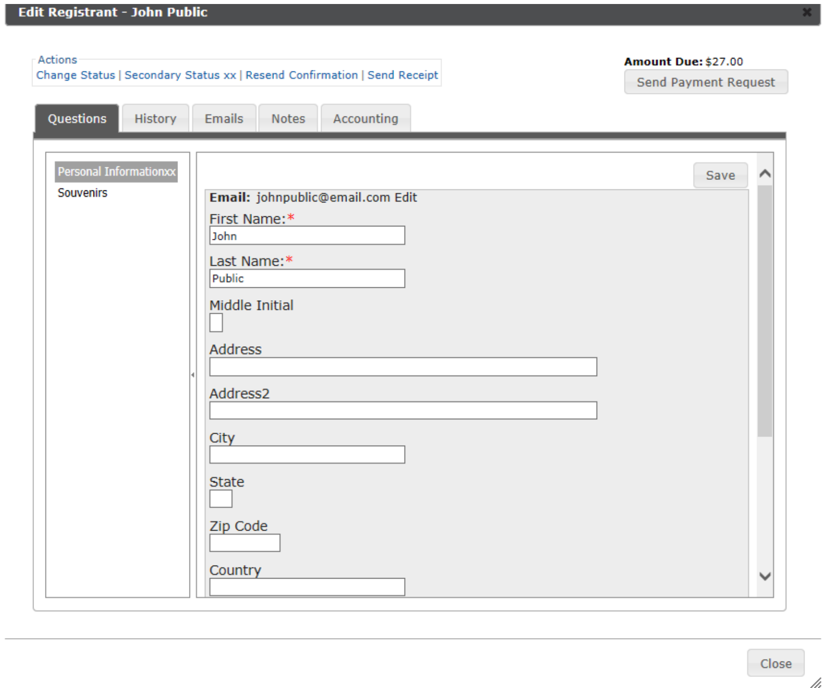
You can edit the personal information that the participant entered on the event registration form or survey and the answers to any of the questions. You can also view the history for the participant's record, add notes to the participant's record, add, edit, or delete transactions for a registrant, including marking the participant as "Billed" for an event, and refunding a credit card payment. Finally, you can change the (primary) status for a participant, assign or change the secondary status for an event registrant, resend a confirmation to a participant, send an itemized receipt to an event registrant and/or send a payment due request to an event registrant.

1. Click the Registration ID for the participant.

   The Edit Registrant/Edit Respondent dialog box opens. The dialog box contains a series of tabs for editing the information for a participant. The Questions tab is the active tab. See Figure 3-22 on page 94.

If you are editing the information for an event registrant, then the Edit Registrant dialog box opens. If you are editing the information for a survey respondent, then the Edit Respondent dialog box opens.

Figure 3-22: Edit Registrant/Edit Respondent dialog box, Questions tab



2. Edit any and all of the information for the participant as necessary. See:
   - “Questions tab” on page 96.
   - “Notes tab” on page 97.
   - “Accounting tab” on page 98.
3. Under Actions, click any of the following as needed:

Table 3-1: Available actions when editing a participant

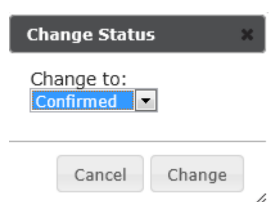
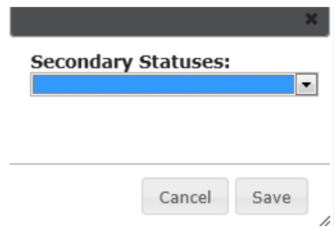
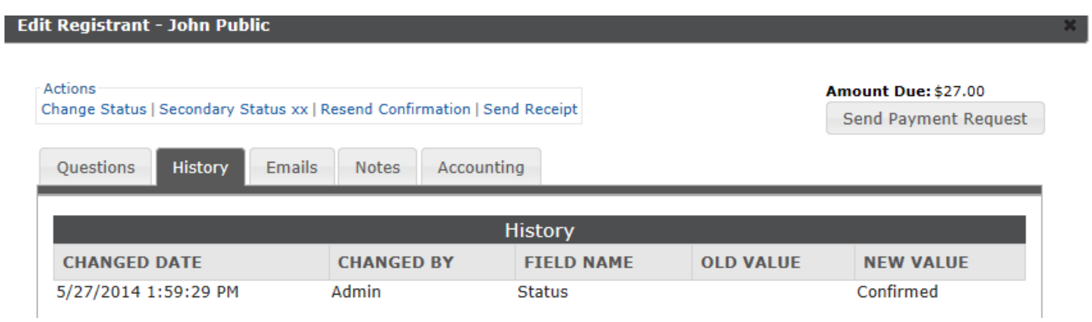
Action	Description
Change Status	Open the Change Status dialog box and change the status of the participant (for example, from Pending to Confirmed for an event registrant). *Figure 3-23: Change Status dialog box*  **Note:** You can change the status of only one participant at a time with this option. To change the status of multiple participants, you must do so from the Manage Participants page. See “To change the status for multiple event registrants” on page 100.

Table 3-1: Available actions when editing a participant (continued)

Action	Description
Secondary Status	Open the Secondary Statuses dialog box and assign/change the secondary status of the registrant. For example, if a confirmed registrant does not attend the event, select a secondary status of No Show. *Figure 3-24: Secondary Statuses dialog box*  **Note:** Your EMS Regics administrator configures the secondary status values. Contact your administrator if you need specific values configured. For information about configuring secondary statuses, see "Managing Secondary Statuses" on page 126.
Resend Confirmation	Send a Confirmation email again to a participant who has been confirmed for an event or submitted a survey
Send Receipt	Automatically send a itemized receipt that lists the items purchased, their pricing, the total billed and paid, and any amount due to the event registrant.

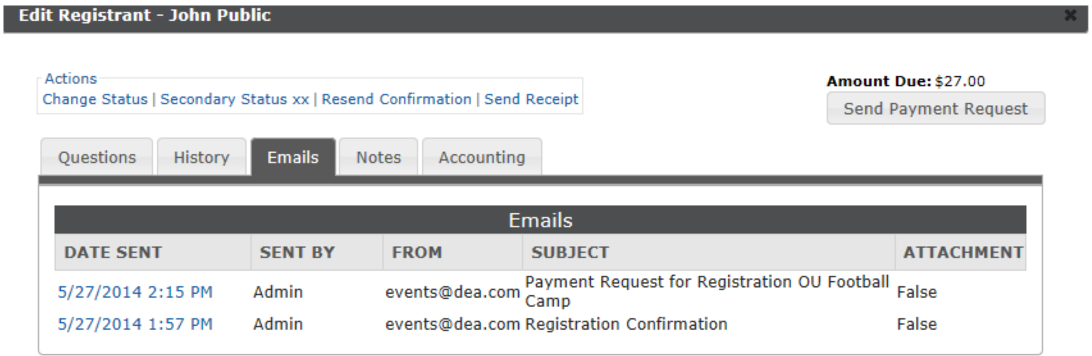
4. If the participant owes a payment for the event, then optionally, click Send Payment Request to have an automatic payment request that details the amount due for the event sent to the registrant.
5. Optionally, do one or both of the following:
   - Open the History tab to view the history for the participant's record, which is a list of all the edits made to the participant's record and includes the edit date, the name of the Standard or Administrative user who edited the record, the field that was edited for the record, and the old and new values for the field.

Figure 3-25: Edit Registrant/Respondent dialog box, History tab



- Open the Emails to tab to view a list of all the emails that have been sent to the participant. The list details the date that each email was sent, the user name for the user who sent the email, the email address from which the email was sent, the subject of the email, and whether attachments were included for the email.

Figure 3-26: Edit Registrant/Respondent dialog box, Emails tab

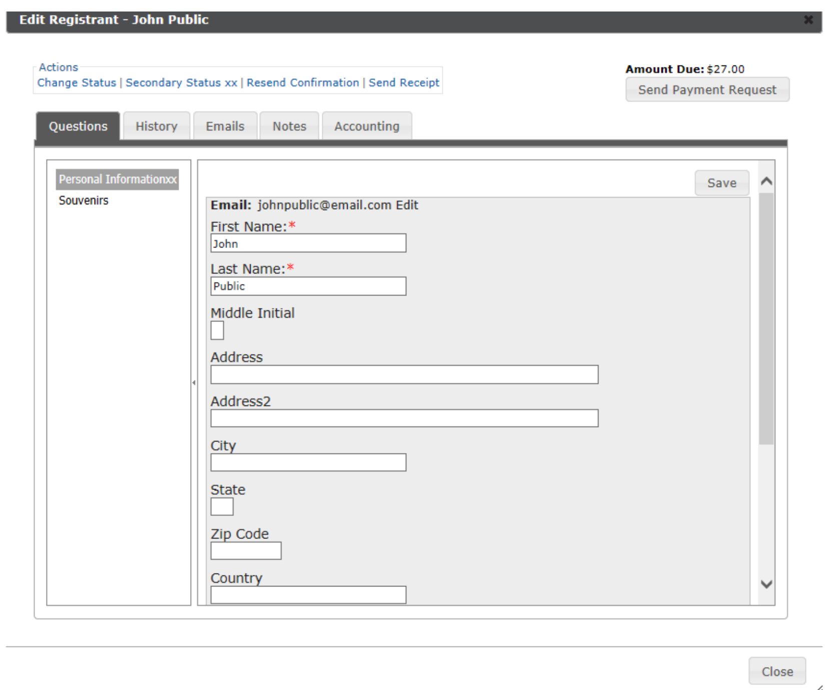


6. When you are done editing and/or viewing the information for the participant, click Close on the Edit Registrant/Edit Respondent dialog box.

   You return to the Manage Participants page.

Questions tab

Figure 3-27: Edit Registrant/Edit Respondent dialog box, Questions tab



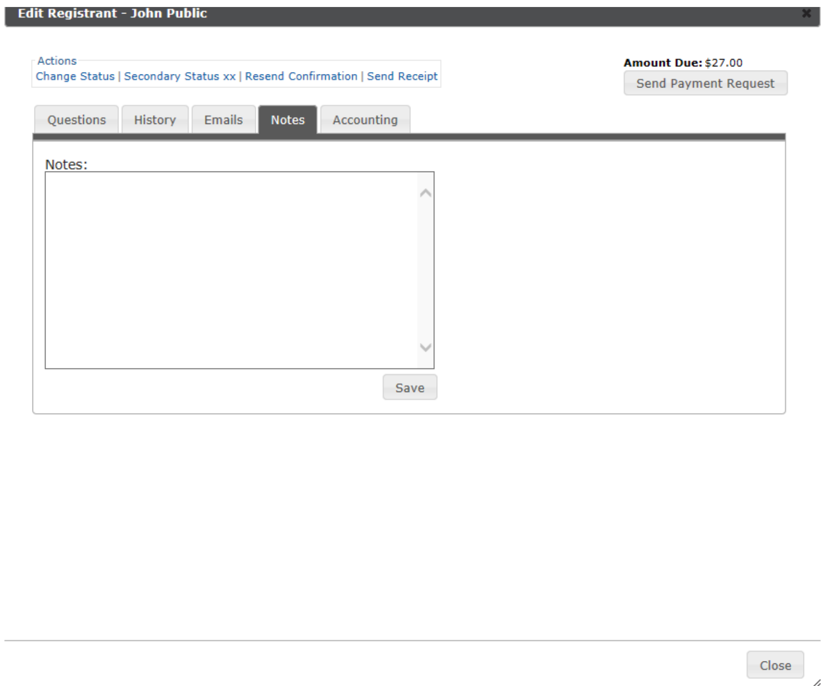
1. Edit the personal information that the participant entered on the event registration form or survey as well as the answers that they provided to any questions.

Required fields are marked with a red asterisk (*).

2. Click Save to save the changes to the participant record, and then continue with any other editing of the participant record as needed; otherwise, click Close return to the Manage Participants page.

Notes tab

Figure 3-28: Edit Registrant/Edit Respondent dialog box, Notes tab



1. Enter any additional information that is pertinent to the participant.
2. Click Save to save the changes to the participant record, and then continue with any other editing of the participant record as needed; otherwise, click Close return to the Manage Participants page.

Accounting tab

Figure 3-29: Edit Registrant dialog box, Accounting tab

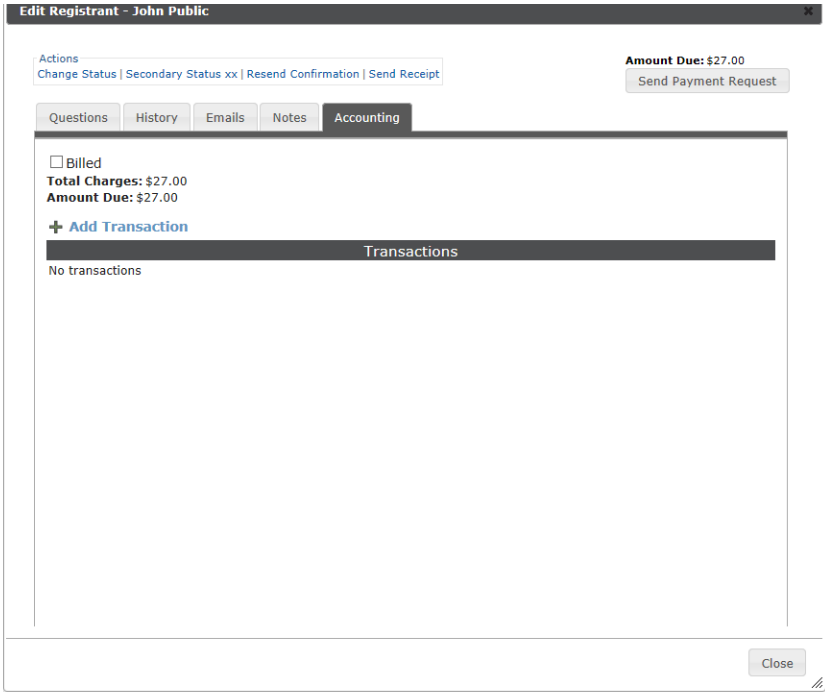
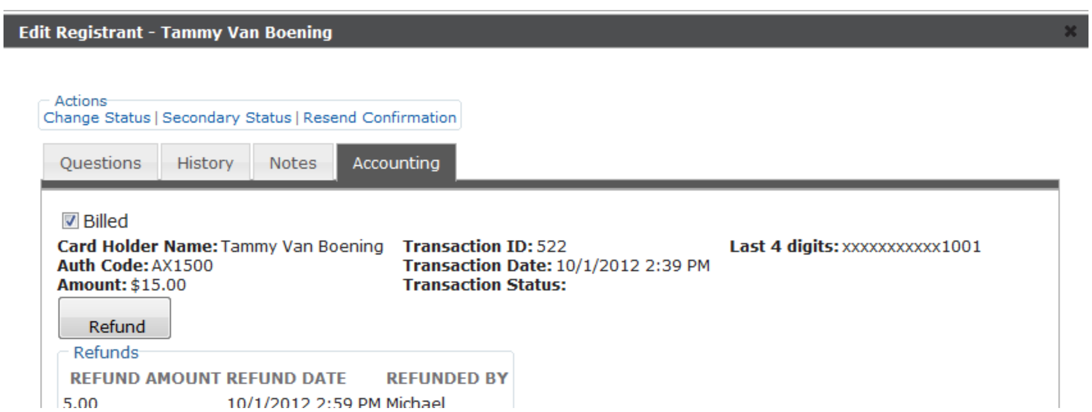


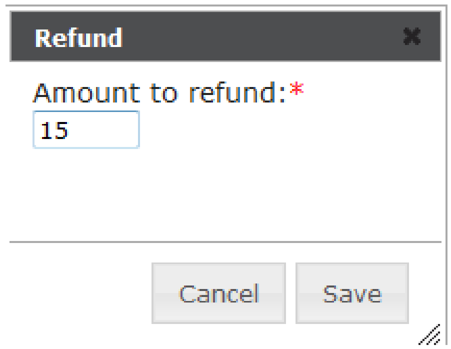
Figure 3-30: Edit Registrant dialog box, Accounting tab with credit card payment processing enabled



For details about enabling credit card payment processing, see the EMS Regics Installation Instructions.

1. Do one or more of the following as needed:
   - Select Billed to indicate that the registrant has been billed for the event.
   - If available, for a credit card transaction, click Refund to open the Refund dialog box and process a refund for the transaction.

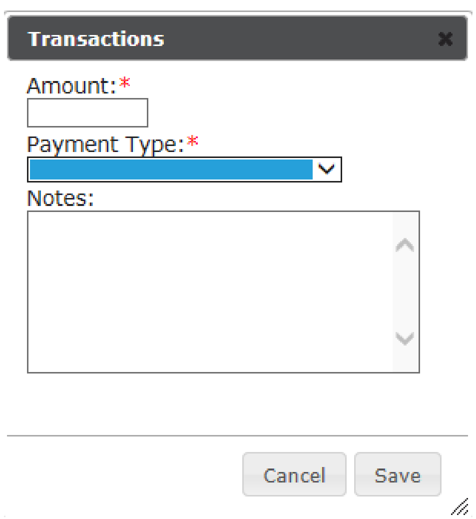
Figure 3-31: Refund dialog box



When the Refund dialog box first opens, the Amount to refund is set by default to the full purchase price. If a partial refund has already been issued, then the Amount to refund is set to the remaining balance. You can always edit these values.

   - Click Add Transaction to open the Transactions dialog box and enter a new transaction (amount, payment type, and optionally, notes) for the registrant.

Figure 3-32: Transactions dialog box



   - Under Actions, click the Edit icon or Delete icon next to an existing transaction to edit or delete an existing transaction for the registrant, respectively.

2. Click Save to save the changes to the registrant record, and then continue with any other editing of the registrant record as needed; otherwise, click Close return to the Manage Participants page.

To change the status for multiple event registrants

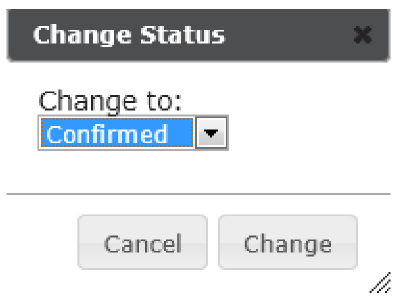
1. Select the blank check box for a registrant or registrants.

To select all event registrants, select the blank check box next to the Registration ID column header.

2. Under Actions, click Change Status.

   The Change Status dialog box opens.

Figure 3-33: Change Status dialog box



3. Select the new status for the registrants.

Select the Inactive status to flag invalid registrations for the Testing phase or the Live phase.

4. Click Change.

   The status of the selected registrants is updated immediately on the Manage Participants page.

To send an email to one or more participants

To send an email to a participant, the participant must have a valid email address.

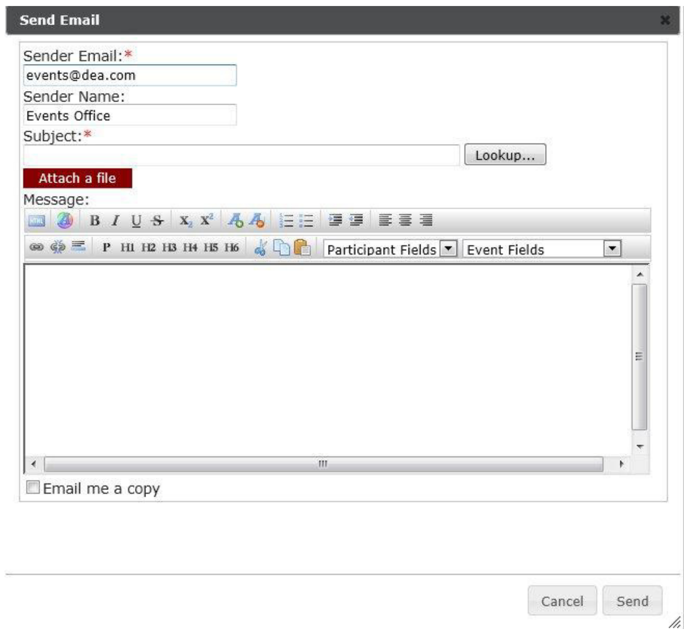
1. Select the blank check box for a participant or participants.

To select all participants that are currently displayed, select the blank check box next to the Registration ID column header. If you have multiple pages of participants to select, you must repeat this step on each page.

2. Under Actions, click Send Email.

   The Send Email dialog box opens. The Sender Email field and Sender Name field are automatically populated with default values set by your EMS Regics administrator, but you can edit these values.

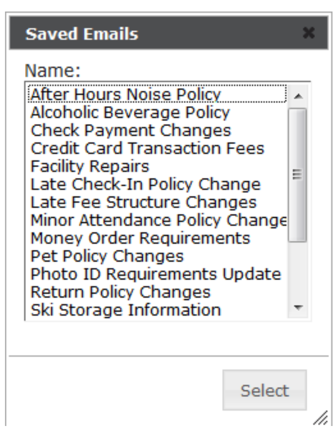
Figure 3-34: Send Email dialog box



3. Do one of the following:

   - Click Lookup to open a Saved Emails dialog box. This dialog box lists all the global emails messages that have been configured in your EMS Regics system. Select the appropriate message, and then click Select. You can use this message as-is, or you can modify the message as needed.

Figure 3-35: Saved Emails dialog box



   - Enter a subject and message for a one-time email message.

4. Optionally, do one or more or all of the following as needed:
   - Use the options on the formatting toolbar to format the body of your message.
   - Select from a list of Participant Fields and/or Event Fields to be included in the message. If you include Participant Fields and/or Event Fields in the message, then the message is personalized based on the values in the selected fields for each message recipient.
   - Select Email me a copy to have a copy of the email sent to your email address that is on file with the application (the email address that you used to log in to EMS Regics).
   - Click Attach File to open a Choose File to Upload dialog box and then browse to and select the file that is to be sent as an attachment with the email.

Any modifications that you make to a global email message apply only to this email. The global email message itself remains unchanged. For information about configuring a global email message, see *"Managing Global Emails" on page 118.*

5. Click Send.

To generate a list of participants' addresses (Address List report)

The Address List includes both physical addresses and email addresses.

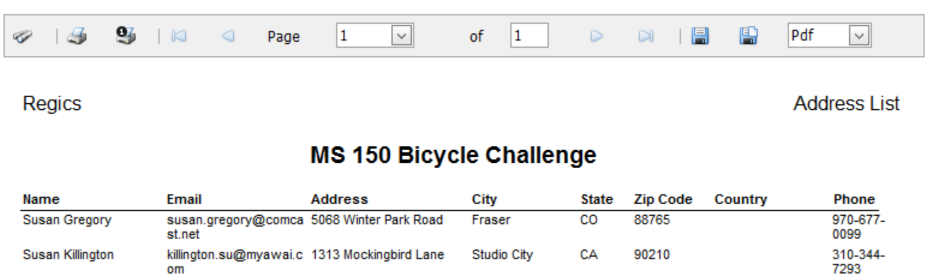
1. Select the blank check box for a participant or participants.

To select all participants, select the blank check box next to the Registration ID column header. If you have multiple pages of participants to select, you must repeat this step on each page.

2. Under Actions, click Address List.

   The Address List report opens. The report lists the name for each participant as well as the participant's email an physical addresses.

Figure 3-36: Address List report example



Regics Address List

MS 150 Bicycle Challenge

Name	Email	Address	City	State	Zip Code	Country	Phone
Susan Gregory	susan.gregory@comcast.net	5068 Winter Park Road	Fraser	CO	88765		970-677-0099
Susan Killington	killington.su@myawai.com	1313 Mockingbird Lane	Studio City	CA	90210		310-344-7293

The Address List report has options for printing the onscreen preview, exporting the list fields to a file such as a PDF, and so on. Place your mouse pointer on a toolbar button to open tooltip text for the button.

To generate a Participant Snapshot report

A *Participant Snapshot report* displays *all* the responses from all the participants for an event or survey for the time period up to and including the current day's date and time.

To generate a Snapshot report that also includes summary information for the relevant event or survey (the Event Snapshot report or the Survey Snapshot report), you must generate the report from the Dashboard. See *"Managing Event Registration Forms and Surveys from the Dashboard" on page 69.*

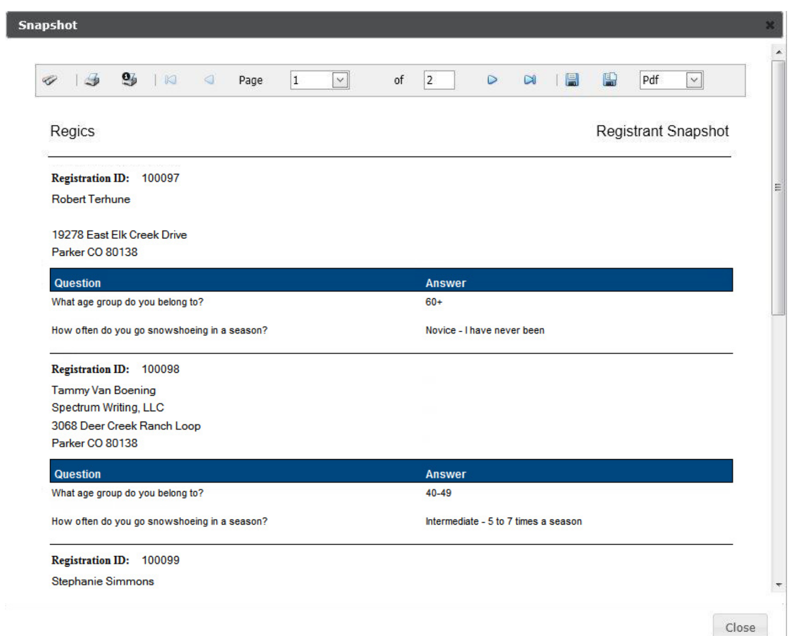
1. Select the blank check box for a participant or participants.

To select all participants, select the blank check box next to the Registration ID column header. If you have multiple pages of participants to select, you must repeat this step on each page.

2. Under Actions, click Snapshot.

   The Participant Snapshot report opens.

Figure 3-37: Participant Snapshot report example



The Participant Snapshot report has options for printing the onscreen preview, exporting the list fields to a file such as a PDF, and so on. Place your mouse pointer on a toolbar button to open tooltip text for the button.

To export a list of participants to a file

You can export of list of participants for an event or survey to a PDF file (Export to PDF), to an Excel file (Export to XLS) or to a comma-separated values file (CSV).

1. Select the blank check box for a participant or participants.

To select all participants, select the blank check box next to the Registration ID column header. If you have multiple pages of participants to select, you must repeat this step on each page.

2. On the Format dropdown list, select the format to which you are exporting the participant list. (PDF is the default value.)
3. Click Export.

   A message opens, asking you if you want to open the file or save the file.
4. Do one of the following:
   - To view the file online (you cannot rename or save the file), click Open.
   - To save the file to a location of your choice (you can also rename the file), click Save.

Managing Group Tabs

You use Group tabs to organize your registration forms and surveys. By default, EMS Regics initially has only two tabs and these tabs are titled Events and Surveys. You can rename these two tabs and you can also create additional tabs. You can also delete a tab if the tab does not hold any registration forms or surveys, including those that occurred in the past.

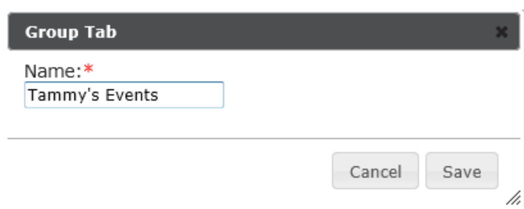
You cannot rename or delete the All Group tab or the My Events Group tab.

To rename a Group tab

1. Open the Group tab that you are renaming.
2. On the Dashboard, under Group tab, click Edit.

   The Group tab dialog box opens. The name of the currently opened tab is displayed in Name field.

Figure 3-38: Group tab dialog box



3. Edit the name of the tab.
4. Click Save.

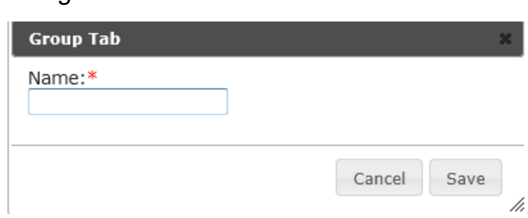
   The tab name is updated immediately on the Dashboard.

To create a Group tab

1. On the Dashboard, under Group tab, click Add.

   The Group tab dialog box opens. The Name field is blank.

Figure 3-39: Group tab dialog box



2. Enter the name of the tab.

3. Click Save.

   The Event Registration/Survey page is updated immediately with the new tab.

To delete a Group tab

1. Open the Group tab that is being deleted.

The Delete option is available for the Group tab only if the opened tab contains no registration forms or surveys. If the tab is blank, but the Delete option is not available, click Show Past to refresh the tab with all forms or surveys with a date that occurred before the current day's date and then delete these forms or surveys.

2. Delete all registration forms or surveys (including past forms or surveys) from the tab.

You can delete an event or survey only if it is inactive. See "To delete an inactive event registration form or survey" on page 75.

3. With the Group tab open, under Group Tab, click Delete.

   The Group tab is deleted immediately from the Dashboard.

Chapter 4
EMS Regics System Administration - Configuration

This chapter details the configuration functions that are available in EMS Regics.

This chapter covers the following topics:

- "Managing Registrant/Respondent Fields" on page 108.
- "Managing Payment Types" on page 112.
- "Managing Global Emails" on page 118.
- "Managing Global Confirmation Messages" on page 122.
- "Managing Secondary Statuses" on page 126.
- "Managing Item Level Tax Rates" on page 128.

Managing Registrant/Respondent Fields

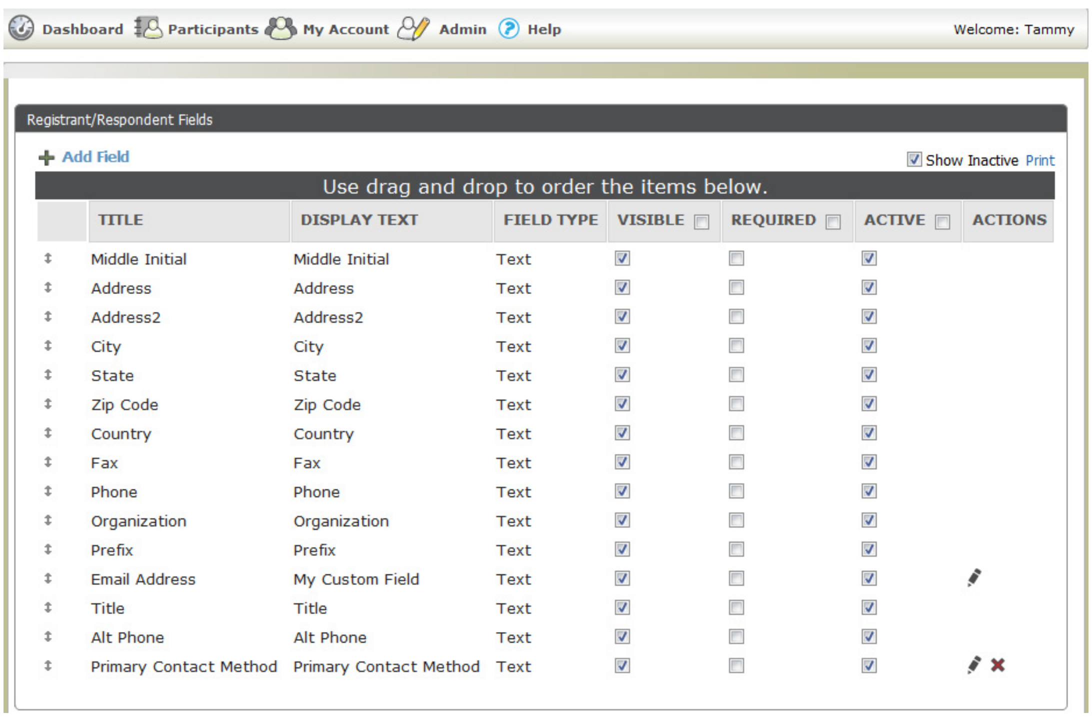
The registrant/respondent fields in the global list of fields can be displayed and/or required on any and all event registration forms and surveys. Managing registrant/respondent fields consists of adding new registrant/respondent fields to the global list of fields, editing registrant/respondent fields, and deleting registrant/respondent fields. You can also print a list of registrant/respondent fields (the Registrant Fields report or the Respondent Fields report).

To add a registrant/respondent field

1. On the EMS Regics menu, click Admin > Configuration > Registrant/Respondent Fields.

   The Registrant/Respondent Fields page opens. This page lists all the *active* registrant/respondent fields that can be displayed and/or required for any event registration form or survey.

Figure 4-1: Registrant/Respondent Fields page

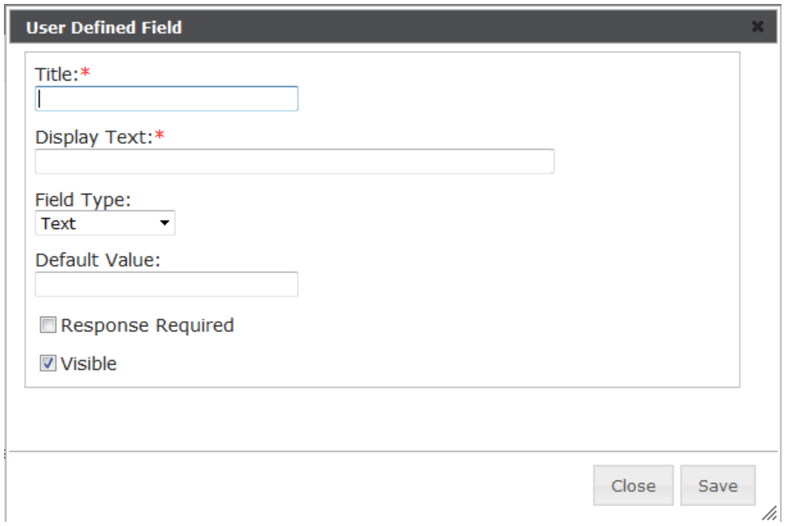


2. Optionally, to show all registrant/respondent fields, whether active or inactive, select Show Inactive.

3. Click Add Field.

   The User Defined Field dialog box opens.

Figure 4-2: User Defined Field dialog box



4. Enter the information for the registrant/respondent field.

Table 4-1: User Defined Field dialog box fields

Item	Description
Title	The title/name for the registrant/respondent field that is displayed in the Title field on the Registrant/Respondent tab.
Display text	The field text that is displayed on the event registration form or survey.
Field Type	The type for the user-defined field, for example, a Text field, a Text field with a defined area, a Date field, and so on. See Table 2-4 on page 38. **Note:** For a List, Radio button field, or Check Box field, you can edit a list item within the question and you can order your list items within the question.The Description field holds a maximum of 500 characters.
Default Value	The default value for the field. A participant can always edit this value.
Response Required	Select this option if a participant must enter information in the field before they can register for the event or complete the survey.
Visible	Selected by default. Clear this option to remove the field from an event registration form or survey.

5. Click Save.
6. Click Close to close the dialog box and return to the Registrant/Respondent Fields page.

To edit a registrant/respondent field

1. On the EMS Regics menu, click Admin > Configuration > Registrant/Respondent Fields.

   The Registrant/Respondent Fields page opens. See Figure 4-1 on page 108.

2. Optionally, do one or more of the following for a field:

   - Change the Visible, Required, and/or Active status for a field.
   - If an Edit icon is displayed next to the field, click the icon to open the User Defined field dialog box and edit the information for the field as needed.

.See Table 4-1 on page 109.

3. Do one or both of the following:

   - If you edited any information in the User Defined field dialog box, click Save on the dialog box and then click Close to close the dialog box and return to the Registrant/Respondent Fields page.
   - If you changed the Visible, Required, and/or Active Status for a field, then click Save at the bottom of the Registrant/Respondent Fields page.

To delete a registrant/respondent field

You can delete a registrant/respondent field only if no data has been entered into the field for any registration form or survey. If you can delete a registrant/respondent field, then a Delete icon is displayed next to it on the Registrant/Respondent Fields page.

1. On the EMS Regics menu, click Admin > Configuration > Registrant/Respondent Fields.

   The Registrant/Respondent Fields page opens. See Figure 4-1 on page 108.

2. Click the Delete icon next to the registrant/respondent field that is to be deleted.

   A message opens, asking you if you are sure that want to delete the registrant/respondent field.

3. Click OK.

   A second message opens, stating that the selected registrant/respondent field was deleted.

4. Click OK.

   The second message closes. The field is deleted immediately from the Registrant/Respondent Fields page.

To print a list of registrant/respondent fields

1. On the EMS Regics menu, click Admin > Configuration > Registrant/Respondent Fields.

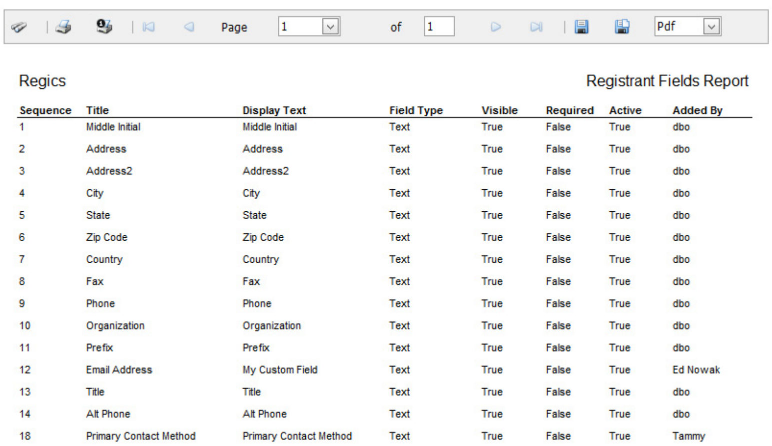
   The Registrant/Respondent Fields page opens. This page lists all the *active* registrant/respondent fields that can be displayed and/or required for any event registration form or survey. See Figure 4-1 on page 108.

2. Optionally, to include all inactive registrant/respondent fields in the report, select Show Inactive.

3. Click Print.

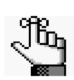
   The Registrant Fields/Respondent Fields report opens. The onscreen report lists all the active and if applicable, inactive registrant/respondent fields in your EMS Regics system.

Figure 4-3: Registrant Fields report example



Regics — Registrant Fields Report

Sequence	Title	Display Text	Field Type	Visible	Required	Active	Added By
1	Middle Initial	Middle Initial	Text	True	False	True	dbo
2	Address	Address	Text	True	False	True	dbo
3	Address2	Address2	Text	True	False	True	dbo
4	City	City	Text	True	False	True	dbo
5	State	State	Text	True	False	True	dbo
6	Zip Code	Zip Code	Text	True	False	True	dbo
7	Country	Country	Text	True	False	True	dbo
8	Fax	Fax	Text	True	False	True	dbo
9	Phone	Phone	Text	True	False	True	dbo
10	Organization	Organization	Text	True	False	True	dbo
11	Prefix	Prefix	Text	True	False	True	dbo
12	Email Address	My Custom Field	Text	True	False	True	Ed Nowak
13	Title	Title	Text	True	False	True	dbo
14	Alt Phone	Alt Phone	Text	True	False	True	dbo
18	Primary Contact Method	Primary Contact Method	Text	True	False	True	Tammy



The Registrant Fields report has options for printing the onscreen preview, exporting the list fields to a file such as a PDF, and so on. Place your mouse pointer on a toolbar button to open tooltip text for the button.

Managing Payment Types

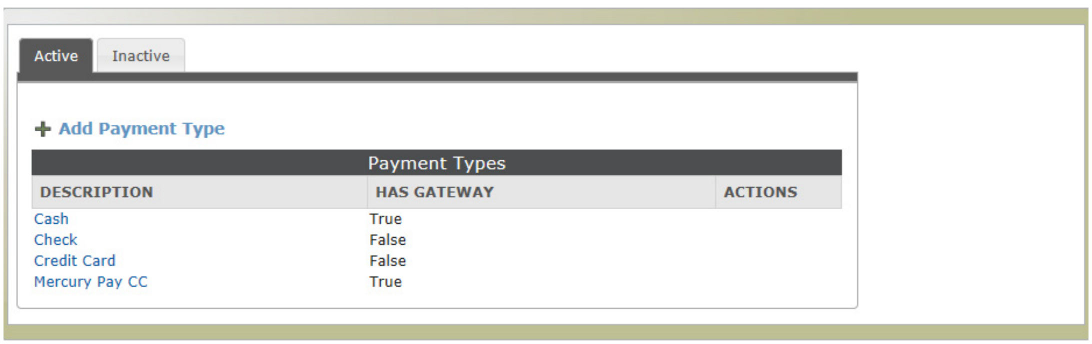
You can add the different payment types that your organization accepts to your EMS Regics system. These payment types are displayed on the Checkout page for an event registration form. In addition, you can add custom questions for a payment type that are also displayed on the Checkout page for a registration form. You can edit a payment type and you can delete a payment type only if it has not been selected on the Checkout page for any event registration form.

To add payment types

1. On the EMS Regics menu, click Admin > Configuration > Payment Types.

   The Payment Types page opens. The Active tab is the tab that opens by default. This tab displays all the active payment types that have been configured in your EMS Regics system.

Figure 4-4: Payment Types page

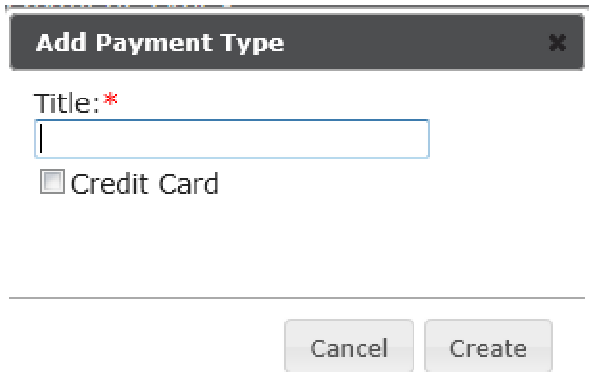


Optionally, to view inactive payment types, open the Inactive tab.

2. Click Add Payment Type.

   The Add Payment Type dialog box opens.

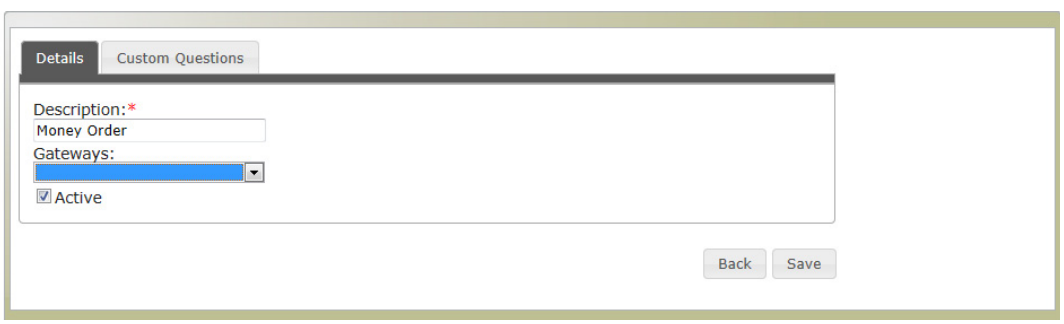
Figure 4-5: Add Payment Type dialog box



3. In the Title field, enter the title/name for the payment type. (This title/name is displayed in the Description field on the Payment Types page.)
4. If the payment type is a credit card, select Credit Card.
5. Click Create.

   The Payment Type Details page opens. The Details tab is the active tab. The title/name that you just entered in Step 3 is displayed in the Description field. By default, the payment type is added as Active.

Figure 4-6: Payment Type Details page, Details tab



6. Do one or both of the following as needed:

   • On the Gateways dropdown list, select the appropriate Gateway for the payment type.

See the EMS Regics Installation Instructions for detailed information about configuring gateways.

   • Open the Custom Questions tab and add one more custom questions for the payment type. See “To add a custom question to a payment type” on page 114.

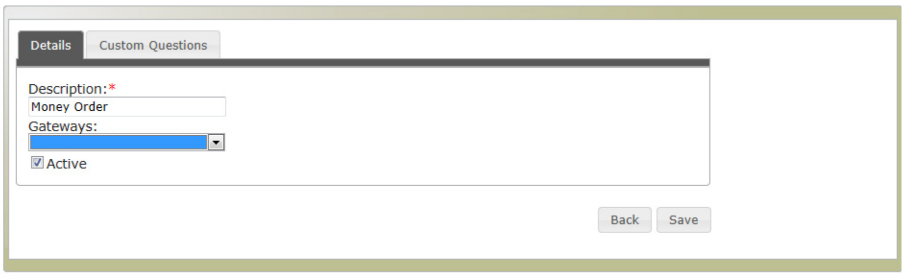
7. Click Save.

   The Payment Type Details page closes. You return to the Payment Types page with the newly added payment type displayed on the page.

To add a custom question to a payment type

1. If you have not already done so, open the payment type for which you are adding the custom questions in the Payment Types details page. (From the Payment Types page, click the title/name of the payment type in the Description column.)

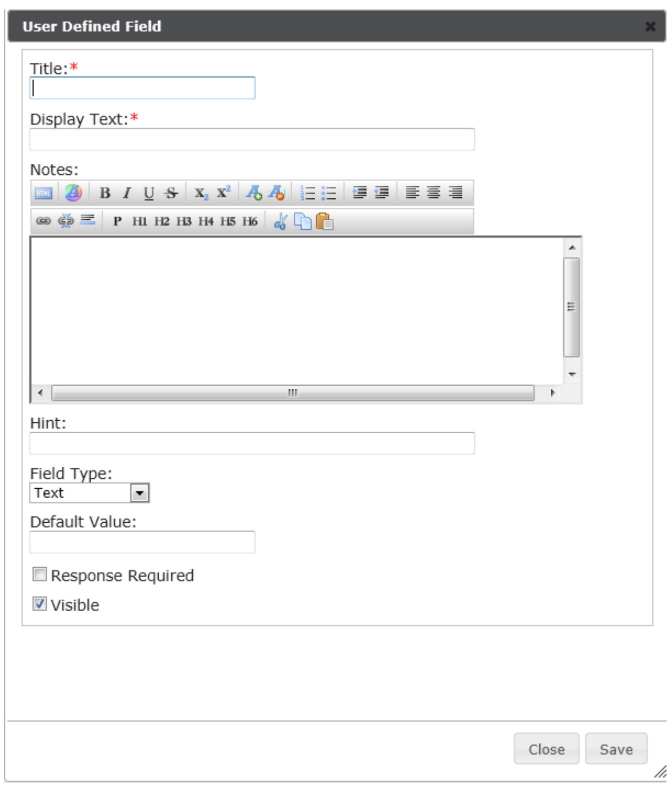
Figure 4-7: Payment Type Details page, Details tab



2. Open the Custom Questions tab, and on the tab, click Add Question.

   The User Defined Field dialog box opens.

Figure 4-8: User Defined Field dialog box



3. Enter the information for the new question.

Required fields are marked with a red asterisk (*).

Table 4-2: User Defined Field dialog box fields

Item	Description
Title	The title/name for the question that is displayed in the Title field on the Custom Questions tab.
Display text	The question text that is displayed on the event registration form or survey.
Notes	Further explanation or information about the section that is displayed immediately above the first question on the event registration form or survey.
Hint	Additional information or clarification that might help the participant answer the question. If a question has a hint, a Hint icon appears next to the question. A participant can click this Hint icon to open and view the hint in its entirety.
Field Type	The field type for the question, for example, a Text field, a Text field with a defined area, a Date field, and so on. See Table 2-7 on page 46. **Note:** For a List, Radio Button, or Check box field, you can edit a list item within the question and you can order your list items within the question. The Description field holds a maximum of 500 characters.
Default Value	The default value for the question. A participant can always edit this value.
Response Required	Select this option if a participant must answer the question before they can register for the event or complete the survey.
Visible	Selected by default, it is an override to the Start Showing/Stop Showing dates. Clear this option to remove the question from event registration form or survey, regardless of the values in the Start Showing/Stop Showing fields.

4. Click Save.

   The User Defined Field dialog box remains open.

5. Repeat Step 3 and Step 4 until you have added as many custom questions as needed, and then click Close to close the dialog box and return to the Custom Questions tab.

6. Click Save on the Payment Type Details page to close the page and return to the Payment Types page.

To edit a payment type

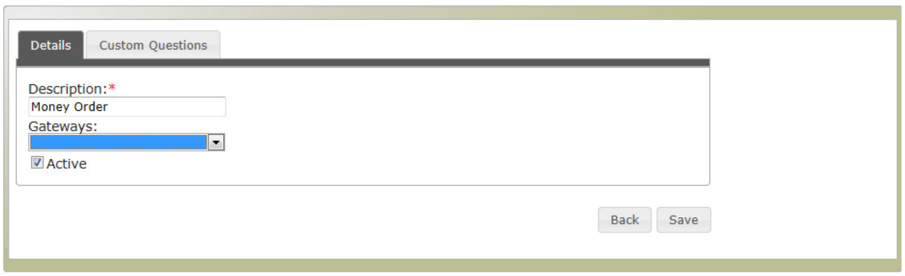
1. On the EMS Regics menu, click Admin > Configuration > Payment Types.

   The Payment Types page opens. The Active tab is the tab that opens by default.

2. In the Description field, click the title/name of the payment type that is to be edited.

   The Payment Type Details page opens. The Details tab is the active tab.

Figure 4-9: Payment Type Details page, Details tab



3. Do one or more of the following as needed:

   - On the Gateways dropdown list, select the appropriate gateway for the payment type, or select a different gateway.

See the EMS Regics Installation Instructions for detailed information about configuring gateways.

   - To inactive a payment type, clear the Active option.
   - Open the Custom Questions tab and do one or more or all of the following as needed:
     - Add one more custom questions for the payment type. See “To add a custom question to a payment type” on page 114.
     - Click the Edit icon next to a custom question to edit the question.
     - Click the Delete icon next to a custom question to delete it.

4. Click Save to save the changes to the payment type and return to the Payment Type page.

To delete a payment type

You can delete a payment type only if it has not been selected on the Checkout page for an event registration form. If you can delete a payment type, then a Delete icon is displayed next to it on the Payments type page.

1. On the EMS Regics menu, click Admin > Configuration > Payment Types.

   The Payment Types page opens.

2. Click the Delete icon next to the payment type that is to be deleted.

   A message opens stating that the selected payment type was deleted.

3. Click OK.

   The message closes. The field is deleted immediately from the Payment Types page.

Managing Global Emails

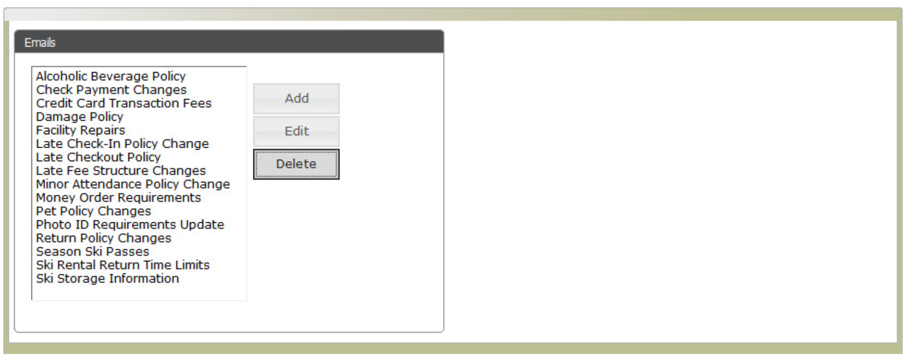
A *global email* is an email that is accessible for any Send Email function in EMS Regics (for example, emailing participants from the Manage Participants page). Managing global emails consists of adding new global emails to your EMS Regics system, editing global emails, and deleting global emails.

To add a global email

1. On the EMS Regics menu, click Admin > Configuration > Emails.

   The Emails page opens. This page lists all the global emails (alphabetically by name) that have been configured for your EMS Regics system.

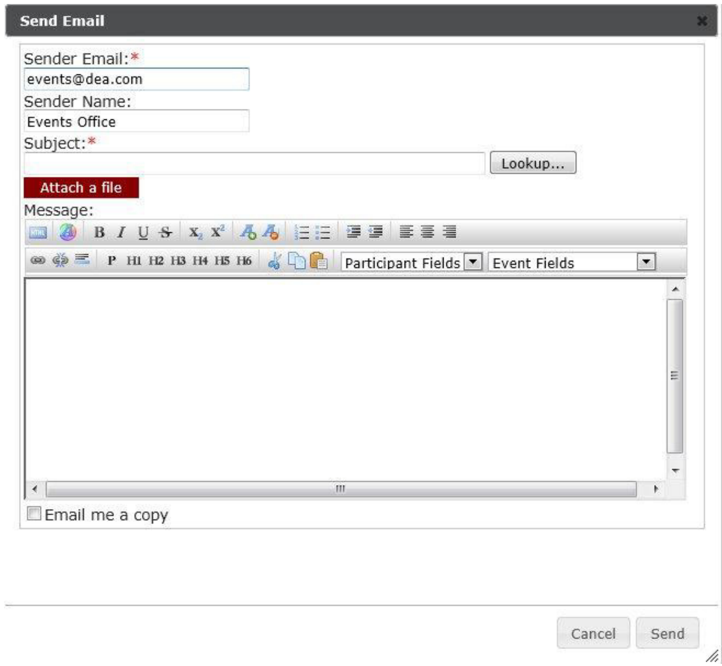
Figure 4-10: Emails page



2. Click Add.

   The Send Email dialog box opens. You use this options on this dialog box to configure the global email. See Figure 4-11 on page 119.

Figure 4-11: Send Email dialog box



3. Add the information for the global email.

Table 4-3: Send Email dialog box fields

Field	Description
Name	The name of the global email. You can use this name to identify the appropriate global email when sending an email to an event or survey participants. See “To send an email to one or more participants” on page 100.
Subject	The subject for the global email. This value that you enter here is displayed by default in the Subject line when the email is sent to an event or survey participant, but a user can always modify this value.
Message	You can use the formatting options on the Message toolbar to format the body of the email as needed (for example, colors, font, and so on). You can also select specific Participant fields and specific Event fields that are to be included in the email. **Note:** If you include Participant Fields and/or Event Fields in the message, then the message is personalized based on the values in the selected fields for each message recipient. A user can always modify any or all of the message as needed.

4. Click Save.

   The Send Email dialog box closes. A message opens indicating that the email was saved.

5. Click OK.

   The message closes. The newly added global email message is displayed on the Emails page.

To edit a global email

1. On the EMS Regics menu, click Admin > Configuration > Emails.

   The Emails page opens. This page lists all the global emails (alphabetically by name) that have been configured for your EMS Regics system. See Figure 4-10 on page 118.

2. Select the global email that you are editing, and then click Edit.

   The Send Email dialog box opens. The dialog box displays all the editable information (name, subject, and message) for the email.

3. Edit the email as needed.

Table 4-4: Send Email dialog box fields

Field	Description
Name	The name of the global email. You can use this name to identify the appropriate global email when sending an email to an event or survey participants. See “To send an email to one or more participants” on page 100.
Subject	The subject for the global email. This value that you enter here is displayed by default in the Subject line when the email is sent to an event or survey participant, but a user can always modify this value.
Message	You can use the formatting options on the Message toolbar to format the body of the email as needed (for example, colors, font, and so on). You can also select specific Participant fields and specific Event fields that are to be included in the email. **Note:** If you include Participant Fields and/or Event Fields in the message, then the message is personalized based on the values in the selected fields for each message recipient. A user can always modify any or all of the message as needed.

4. Click Save.

   The Send Email dialog box closes. A message opens indicating that the email was saved.

5. Click OK.

   The message closes. The global email message is displayed on the Emails page.

To delete a global email

When you delete a global email, it is simply deleted them from the list of available global emails. The deletion does not affect any global emails that have been previously sent to participants.

1. On the EMS Regics menu, click Admin > Configuration > Emails.

   The Emails page opens. This dialog box lists all the global emails (alphabetically by name) that have been configured for your EMS Regics system. See Figure 4-10 on page 118.

2. Select the global email that you are deleting, and then click Delete.

   A message opens, asking you if you are sure that you want to delete the email.

3. Click OK.

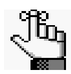
   The message closes. A second message opens, indicating that the selected email was deleted.

4. Click OK.

   The second message closes. The global email is deleted from the global emails list.

Managing Global Confirmation Messages

A *global confirmation message* is a confirmation message that is accessible for any confirmation message function in EMS Regics (for example, configuring confirmation messages). Managing global confirmation messages consists of adding new global confirmation messages to your EMS Regics system, editing global confirmation messages, and deleting global confirmation messages.



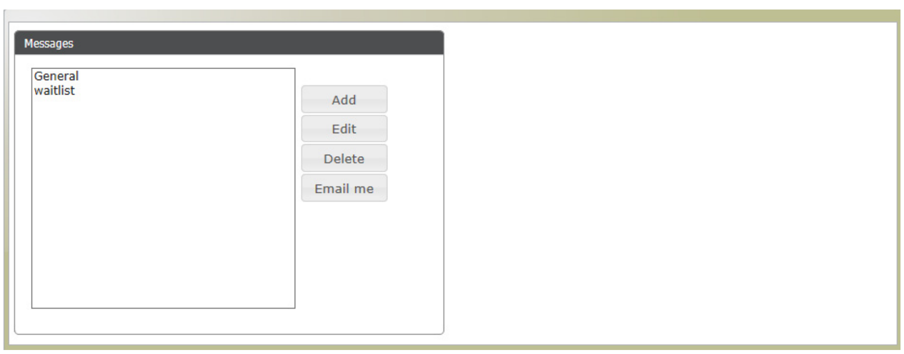
Global confirmation messages include both confirmation messages and cancellation messages.

To add a global confirmation message

1. On the EMS Regics menu, click Admin > Configuration > Confirmation Messages.

   The Messages page opens. This page lists all the global confirmation messages (alphabetically by name) that have been configured for your EMS Regics system.

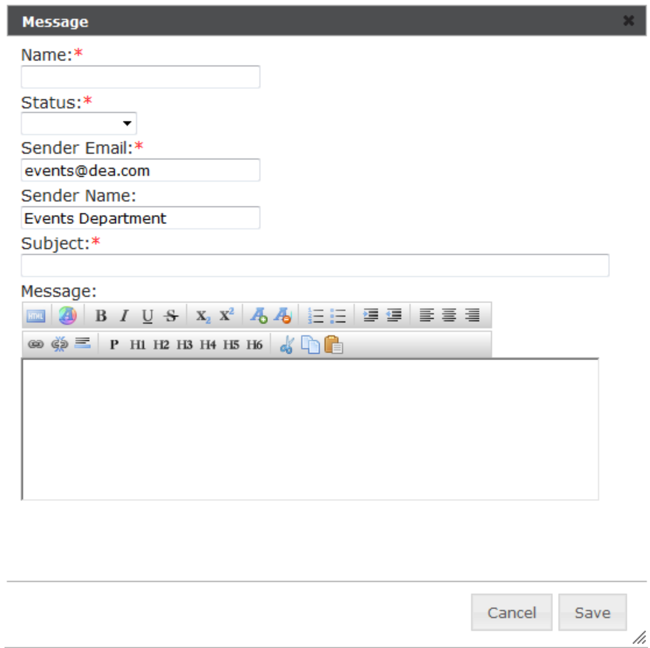
Figure 4-12: Messages page



2. Click Add.

   The Message dialog box opens. You use this options on this dialog box to configure the global confirmation message. See Figure 4-13 on page 123.

Figure 4-13: Message dialog box



3. Add the information for the global confirmation message.

Table 4-5: Message dialog box fields

Field	Description
Name	The name of the global confirmation message. You can use this name to identify the appropriate global confirmation message when configuring a confirmation message for an event or survey. See "To configure a new confirmation message" on page 60.
Status	The participant status (Pending, Confirmed, Cancelled, or Wait list) which determines when this confirmation message is automatically generated and sent to a participant.
Sender Email	The email address that is displayed by default in the Sender field for the confirmation message. You can edit this value. **Note:** Your EMS Regics administrator configures the default Sender Email address.
Sender Name	The name of the sender that is displayed by default in the in the Sender field for the confirmation message. You can edit this value. **Note:** Your EMS Regics administrator configures the default Sender Email address.
Subject	The text that is displayed in the Subject line for the confirmation message.
Message	Use the formatting options at the top of the Message field to format the body (font, color, size, and so on) of the confirmation message.

4. Click Save.

   The Message dialog box closes. A message opens indicating that the message was saved.

5. Click OK.

   The message closes. The newly added global confirmation message is displayed on the Messages page.

6. Optionally, to review the message and verify that you are satisfied with it before it is sent to participants, click Email me.

   The message is sent to the email address that you used to log in to EMS Regics.

To edit a global confirmation message

1. On the EMS Regics menu, click Admin > Configuration > Confirmation Messages.

   The Messages page opens. This page lists all the global confirmation messages (alphabetically by name) that have been configured for your EMS Regics system. See Figure 4-12 on page 122.

2. Select the global confirmation message that you are editing, and then click Edit.

   The Message dialog box opens. The dialog box displays all the editable information for the message.

Table 4-6: Message dialog box fields

Field	Description
Name	The name of the global confirmation message. You can use this name to identify the appropriate global confirmation message when configuring a confirmation message for an event or survey. See “To configure a new confirmation message” on page 60.
Status	The participant status (Pending, Confirmed, Cancelled, or Wait list) which determines when this confirmation message is automatically generated and sent to a participant.
Sender Email	The email address that is displayed by default in the Sender field for the confirmation message. You can edit this value. **Note:** Your EMS Regics administrator configures the default Sender Email address.
Sender Name	The name of the sender that is displayed by default in the in the Sender field for the confirmation message. You can edit this value. **Note:** Your EMS Regics administrator configures the default Sender Email address.
Subject	The text that is displayed in the Subject line for the confirmation message.
Message	Use the formatting options at the top of the Message field to format the body (font, color, size, and so on) of the confirmation message.

3. Click Save.

   The Message dialog box closes. A message opens indicating that the message was saved.

4. Click OK.

   The message closes. The global confirmation message is displayed on the Messages page.

5. Optionally, to review the message and verify that you are satisfied with it before it is sent to participants, click Email me.

   The message is sent to the email address that you used to log in to EMS Regics.

To delete a global confirmation message

When you delete a global confirmation message, it is simply deleted them from the list of available global confirmation messages. The deletion does not affect any global messages that have been previously sent to participants.

1. On the EMS Regics menu, click Admin > Configuration > Confirmation Messages.

   The Messages page opens. This dialog box lists all the global confirmation message (alphabetically by name) that have been configured for your EMS Regics system. See Figure 4-10 on page 118.

2. Select the global confirmation message that you are deleting, and then click Delete.

   A message opens, asking you if you are sure that you want to delete the message.

3. Click OK.

   The message closes. A second message opens, indicating that the selected global confirmation message was deleted.

4. Click OK.

   The second message closes. The global confirmation message is deleted from the global emails list.

Managing Secondary Statuses

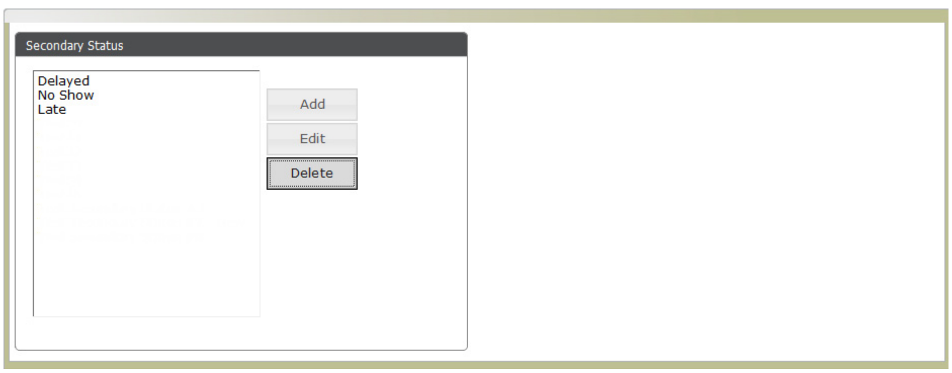
When a participant submits a registration for an event or cancels a registration, a primary status (Confirmed, Cancelled, Pending, or Wait List) is automatically assigned to the participant. A *secondary status* is a status that you can *manually* assign to an event participant. You typically use secondary statuses to manage your event participants in a way that best meets your organization's business needs. For example, if a confirmed registrant does not attend the event, you might want to assign a secondary status of "No Show" to the registrant. After tabulating all the confirmed registrants that were a No Show for the event, you might be better able to carry out planning before you host the event again (for example, the number of available souvenirs, the amount of available food, and so on.) Managing secondary statuses consists of adding new secondary statuses, editing secondary statuses, and deleting secondary statuses.

To add a secondary status

1. On the EMS Regics menu, click Admin > Configuration > Secondary Statuses.

   The Secondary Statuses page opens. This page lists all the secondary statuses that have been configured for your EMS Regics system.

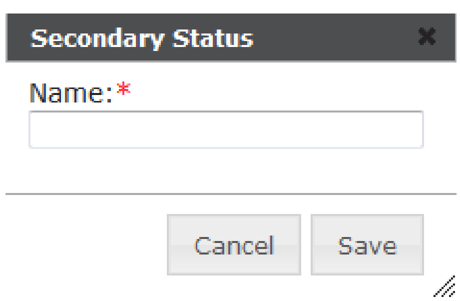
Figure 4-14: Secondary Statuses page



2. Click Add.

   The Secondary Status dialog box opens.

Figure 4-15: Secondary Status dialog box



3. Enter a name for the secondary status, and then click Save.

   The Secondary Status dialog box closes. The secondary status is displayed on the Secondary Statuses page.

To edit a secondary status

1. On the EMS Regics menu, click Admin > Configuration > Secondary Statuses.

   The Secondary Statuses page opens. This page lists all the secondary statuses that have been configured for your EMS Regics system. See Figure 4-14 on page 126.

2. Select that secondary status that you are editing, and then click Edit.

   The Secondary Status dialog box opens. The name of the selected secondary status is displayed in it.

3. Edit the name for the secondary status, and then click Save.

   A message opens, indicating that the secondary status was saved.

4. Click OK.

   The message closes. The secondary status is displayed on the Secondary Statuses page.

To delete a secondary status

When you delete a secondary status, the status is deleted not only from the list of available secondary statuses, but also from registrants to whom it was already assigned. Also, the history of this deletion is not displayed on the History tab for the registrant's record, so make very sure that you want to delete the secondary status before you do so.

1. On the EMS Regics menu, click Admin > Configuration > Secondary Statuses.

   The Secondary Statuses page opens. This page lists all the secondary statuses that have been configured for your EMS Regics system. See Figure 4-14 on page 126.

2. Select that secondary status that you are deleting, and then click Delete.

   A message opens, asking you if you are sure that you want to delete the secondary status.

3. Click OK.

   A second message opens, indicating that the secondary status was deleted.

4. Click OK.

   The second message closes. The secondary status is deleted from the Secondary Statuses page.

Managing Item Level Tax Rates

You can add the different item level tax rates (for example, city tax, state tax, and so on) that your organization requires for processing payments in your EMS Regics system. You can also edit a tax rate and you can delete a tax rate. Tax rates on *previous* registrations remain the same if you edit or delete these rates. Going forward, only new registrations are affected.

To add a tax rate

1. On the EMS Regics menu, click Admin > Configuration > Tax Rates.

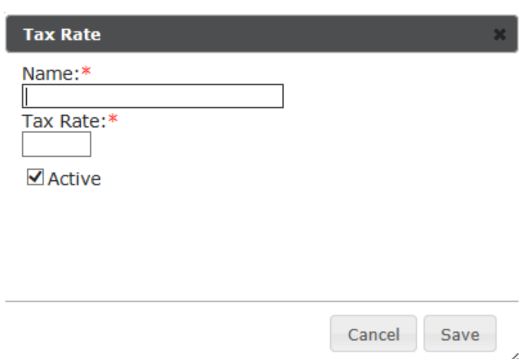
   The Tax Rates page opens. This page lists all the tax rates that have been configured for your EMS Regics system.

Figure 4-16: Tax Rates page

2. Click Add.

   The Tax Rate dialog box opens.

Figure 4-17: Tax Rate dialog box



3. Enter the name for the tax rate and the numerical value for the rate.

Decimal points are allowed. Percentage is assumed for the tax rate.

4. Click Save.

   The Tax Rate dialog box closes. The tax rate is displayed on the Tax Rates page.

To edit a tax rate

1. On the EMS Regics menu, click Admin > Configuration > Tax Rates.

   The Tax Rates page opens. This page lists all the tax rates that have been configured for your EMS Regics system. See Figure 4-16 on page 128.

2. Select that tax rate that you are editing, and then click Edit.

   The Tax Rate dialog box opens. The name of the selected tax rate is displayed in it.

3. Edit the name for the secondary status, and then click Save.

   A message opens, indicating that the secondary status was saved.

4. Click OK.

   The message closes. The secondary status is displayed on the Secondary Statuses page.

To delete a tax rate

1. On the EMS Regics menu, click Admin > Configuration > Tax Rates.

   The Tax Rates page opens. This page lists all the tax rates that have been configured for your EMS Regics system. See Figure 4-16 on page 128.

2. Select that tax rate that you are deleting, and then click Delete.

   A message opens, asking you if you are sure that you want to delete the tax rate.

3. Click OK.

   A second message opens, indicating that the tax rate was deleted.

4. Click OK.

   The second message closes. The tax rate is deleted from the Tax Rates page.

Chapter 5
EMS Regics System Administration - General Administration

This chapter details the general administrative functions that are available in EMS Regics.

This chapter covers the following topics:

Managing EMS Regics System Parameters

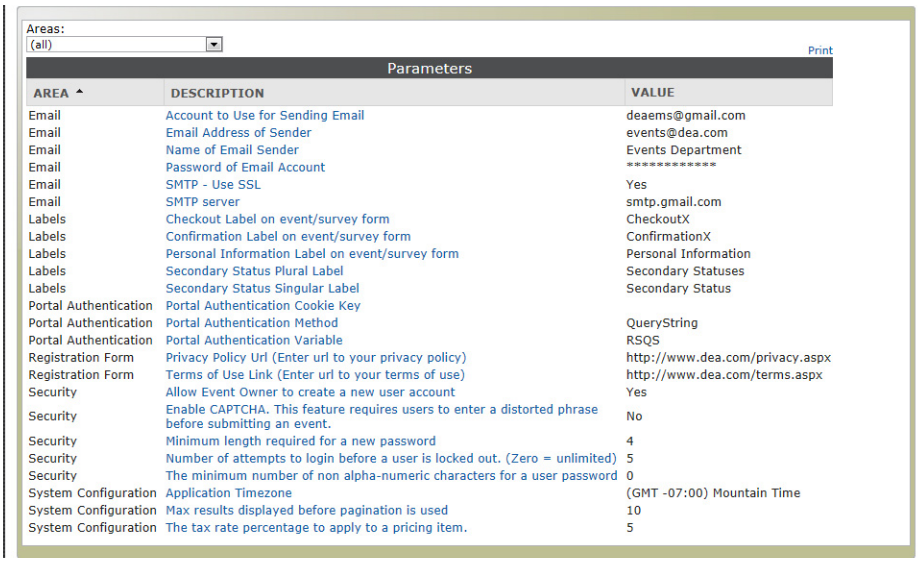
System parameters are global settings that affect the basic functioning of EMS Regics for all users. As the EMS Regics administrator user, you are responsible for managing the values for the EMS Regics system parameters. You can also view the history for a system parameter.

To manage EMS Regics system parameters

1. On the EMS Regics menu, click > Admin > System Administration > Parameters.

   The System Parameters page opens. This page lists all of the system parameters for your EMS Regics system (grouped by area) and the current value for each parameter.

Figure 5-1: System Parameters page



AREA	DESCRIPTION	VALUE
Email	Account to Use for Sending Email	deaems@gmail.com
Email	Email Address of Sender	events@dea.com
Email	Name of Email Sender	Events Department
Email	Password of Email Account	************
Email	SMTP - Use SSL	Yes
Email	SMTP server	smtp.gmail.com
Labels	Checkout Label on event/survey form	CheckoutX
Labels	Confirmation Label on event/survey form	ConfirmationX
Labels	Personal Information Label on event/survey form	Personal Information
Labels	Secondary Status Plural Label	Secondary Statuses
Labels	Secondary Status Singular Label	Secondary Status
Portal Authentication	Portal Authentication Cookie Key	
Portal Authentication	Portal Authentication Method	QueryString
Portal Authentication	Portal Authentication Variable	RSQS
Registration Form	Privacy Policy Url (Enter url to your privacy policy)	http://www.dea.com/privacy.aspx
Registration Form	Terms of Use Link (Enter url to your terms of use)	http://www.dea.com/terms.aspx
Security	Allow Event Owner to create a new user account	Yes
Security	Enable CAPTCHA. This feature requires users to enter a distorted phrase before submitting an event.	No
Security	Minimum length required for a new password	4
Security	Number of attempts to login before a user is locked out. (Zero = unlimited)	5
Security	The minimum number of non alpha-numeric characters for a user password	0
System Configuration	Application Timezone	(GMT -07:00) Mountain Time
System Configuration	Max results displayed before pagination is used	10
System Configuration	The tax rate percentage to apply to a pricing item.	5

For a complete list of system parameters (definition and value) grouped by Area, see *Appendix A, "EMS Regics System Parameters," on page 181.*

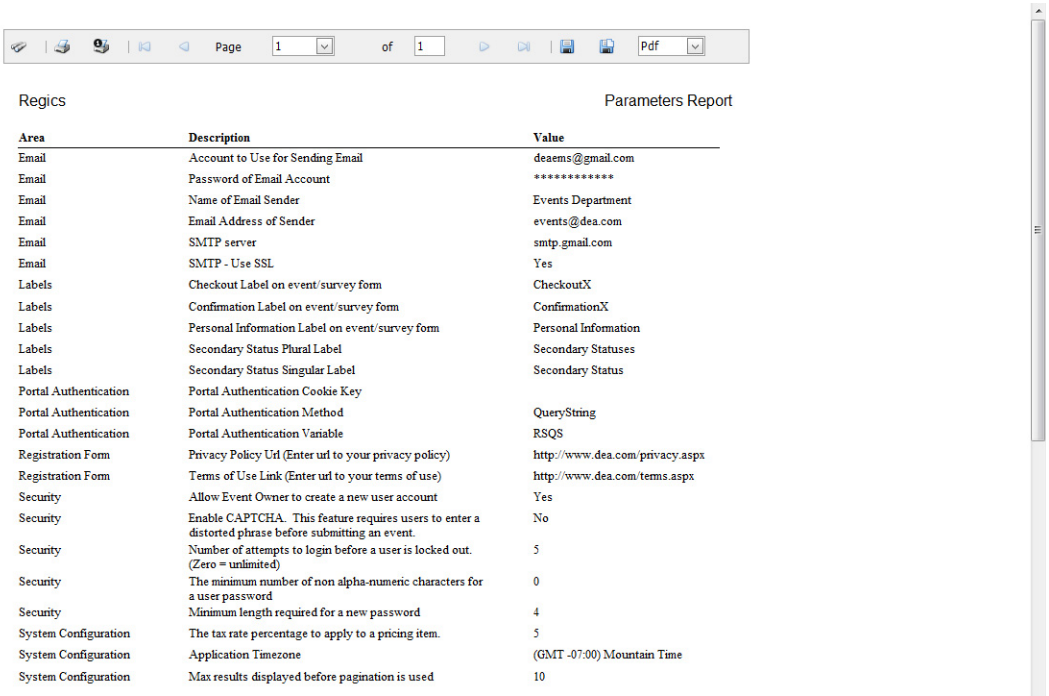
2. Optionally, to display only those system parameters for a specific area, open the Areas dropdown list and select the area.

3. Do any or all of the following as needed:

   - To print a list of parameters for the parameter area that is currently displayed (the Parameters report), click Print.

     The Parameters report opens. The report lists the parameter area, the parameter name, and the current value for the parameter. The report has options for printing the onscreen preview, exporting the list fields to a file such as a PDF, and so on. See Figure 5-2 on page 134.

Figure 5-2: Parameters report example

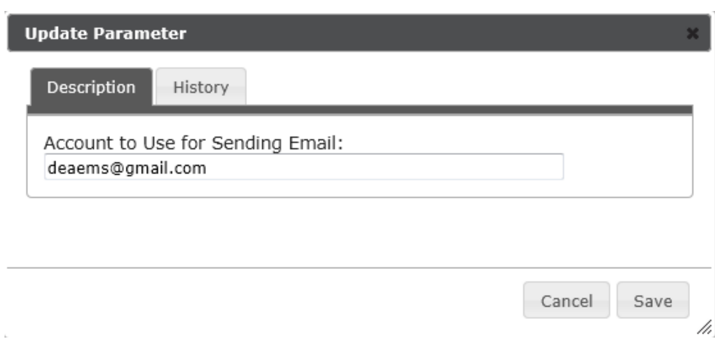


Regics | Parameters Report

Area	Description	Value
Email	Account to Use for Sending Email	deaems@gmail.com
Email	Password of Email Account	************
Email	Name of Email Sender	Events Department
Email	Email Address of Sender	events@dea.com
Email	SMTP server	smtp.gmail.com
Email	SMTP - Use SSL	Yes
Labels	Checkout Label on event/survey form	CheckoutX
Labels	Confirmation Label on event/survey form	ConfirmationX
Labels	Personal Information Label on event/survey form	Personal Information
Labels	Secondary Status Plural Label	Secondary Statuses
Labels	Secondary Status Singular Label	Secondary Status
Portal Authentication	Portal Authentication Cookie Key	
Portal Authentication	Portal Authentication Method	QueryString
Portal Authentication	Portal Authentication Variable	RSQS
Registration Form	Privacy Policy Url (Enter url to your privacy policy)	http://www.dea.com/privacy.aspx
Registration Form	Terms of Use Link (Enter url to your terms of use)	http://www.dea.com/terms.aspx
Security	Allow Event Owner to create a new user account	Yes
Security	Enable CAPTCHA. This feature requires users to enter a distorted phrase before submitting an event.	No
Security	Number of attempts to login before a user is locked out. (Zero = unlimited)	5
Security	The minimum number of non alpha-numeric characters for a user password	0
Security	Minimum length required for a new password	4
System Configuration	The tax rate percentage to apply to a pricing item.	5
System Configuration	Application Timezone	(GMT -07:00) Mountain Time
System Configuration	Max results displayed before pagination is used	10

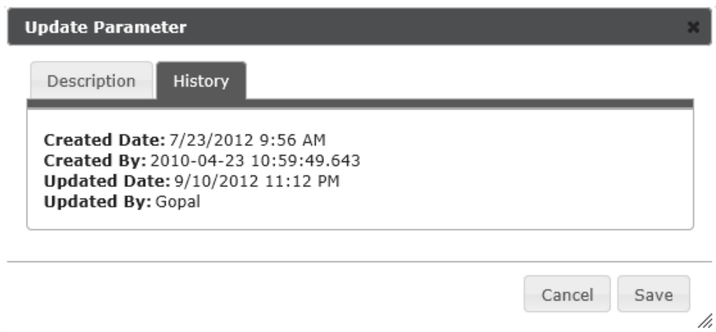
- To change the value for a system parameter, click the parameter Description to open the Update Parameter dialog box. In the Description field, change the value for the parameter, and then click Save.

Figure 5-3: Update Parameter dialog box



- To view the history for a parameter, open the History tab. The History tab is a view-only tab that shows the original creation date of the parameter and the name of the user who created the parameter. The tab also shows last date that the parameter was edited as well as the name of the user who last edited the parameter.

Figure 5-4: History tab



Managing your EMS Regics License

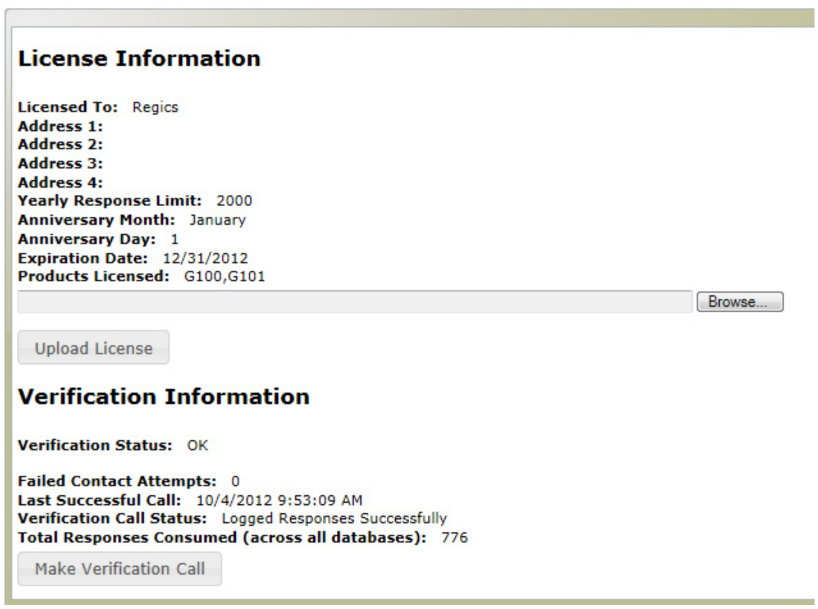
As the EMS Regics administrator, you can manage the license information for you organization's implementation of EMS Regics. You can view your current license information, and if needed, upload a new license file, and/or make manual a verification call to dea.com to validate the license.

To manage your EMS Regics license

1. On the EMS Regics menu, click > Admin > System Administration > License.

   The EMS Regics License page opens. The page displays all the information for your current EMS Regics license as well as critical verification information.

Figure 5-5: EMS Regics License page



2. Optionally, do one or more of the following as needed:
   - To upload a new license file, click Browse to open the Choose File to Upload dialog box and browse to and select the new license file. After you select the file, click Upload to load the file for your EMS Regics application.
   - To manually validate your EMS Regics license, click Upload Verification Call. A call is made to dea.com to validate the license.

Typically, verification calls are made to dea.com to validate your EMS Regics license; however, in the event that you need to manually validate the license, for example, the connection to dea.com was interrupted for an extended period of time, then you can use the Make Verification Call function to validate the license.

Managing Help Text in EMS Regics

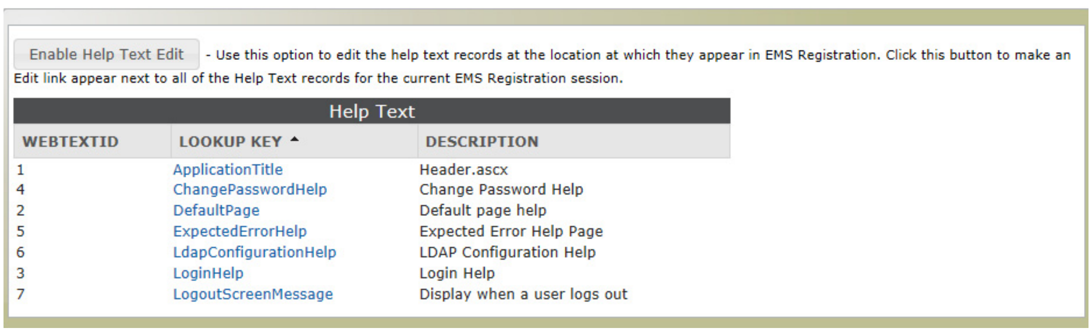
As an EMS Regics administrator user, you can customize messages in key areas of your system that provide organizational specific information or hints to your users about using EMS Regics. For example, you might want to place help text above on the Change Password page that explains your organization's password rules. You have two options for managing help text in EMS Regics—from the Help Text function on the Admin menu, or by clicking an Edit link that appears next to the help text on an EMS Regics page.

To manage help text in EMS Regics

1. On the EMS Regics menu, click > Admin > System Administration > Help Text.

   The Help Text page opens.

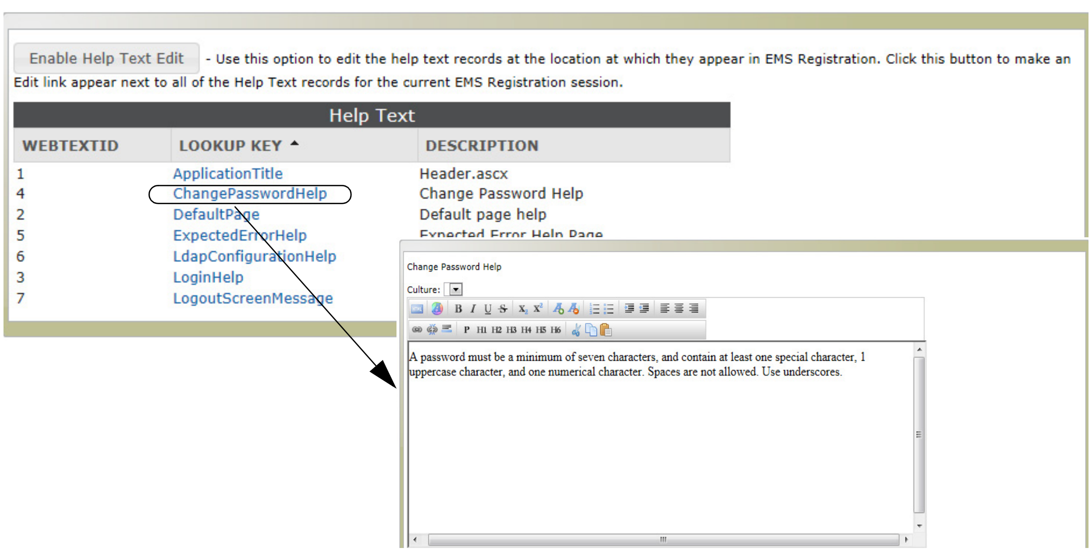
Figure 5-6: Help Text page



1. To customize the help text in your EMS Regics system, do one or both of the following:

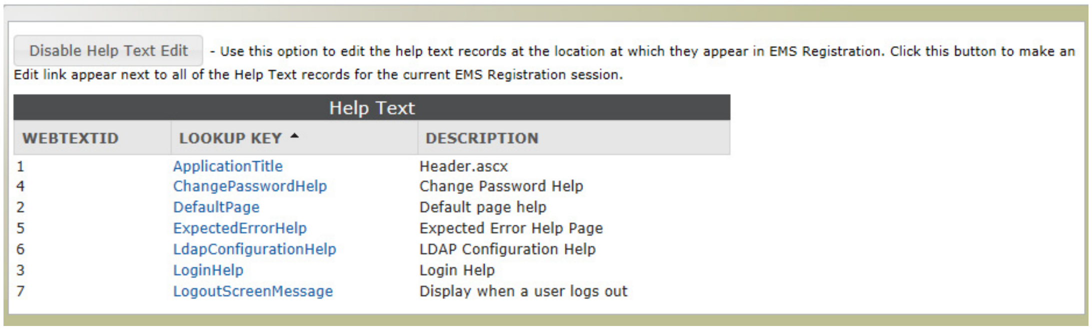
   - Click the Lookup Key link for the help text to open the page for editing the help text.

Figure 5-7: Page that opens for editing help text in a selected area of EMS Regics



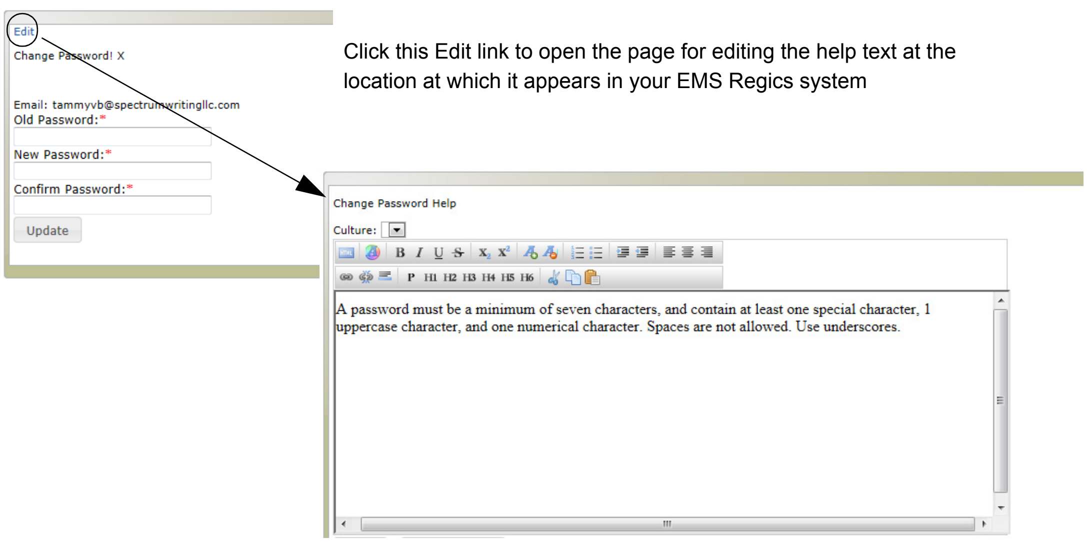
- Toggle Enable Help Text. The message “Help Text Mode is now enabled” opens (click OK to close the message), and the toggle now reads “Disable Help Text Edit.

Figure 5-8: Enable Help Text toggle - Help Text Mode enabled



An Edit link is now displayed next to all the Help Text records for the current EMS Regics session. Click this Edit link to open the page for editing the help text at the location at which it appears in your EMS Regics system.

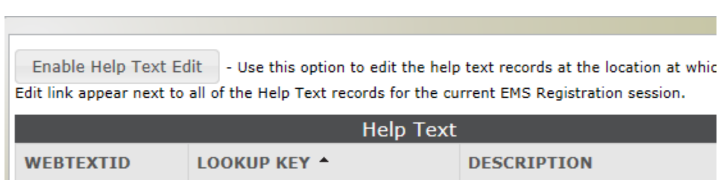
Figure 5-9: Editing the help text at the location at which it appears in your EMS Regics system



2. Optionally, to disable Help Text mode, toggle Disable Help Text Edit.

   The message “Help Text Mode is now disabled” opens (click OK to close the message), and the toggle now reads “Enable Help Text Edit.

Figure 5-10: Help Text Mode Enabled



Searching for Transactions

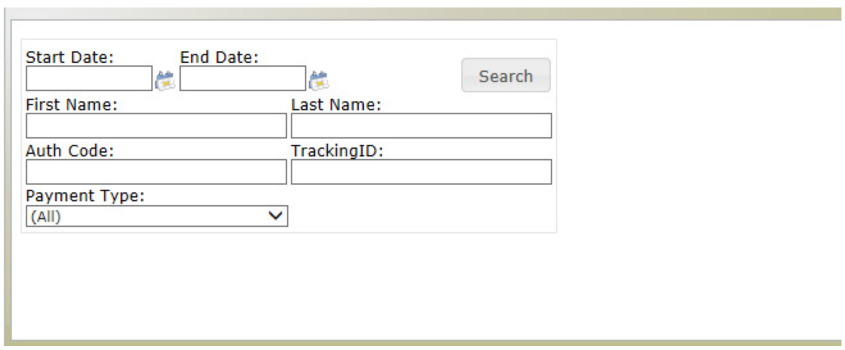
You can the Transactions browser to search for specific transactions based on various criteria such as the transaction date, the transaction ID, the authorization code, the first and/or last name of the event registrant and/or the payment type.

To search for transactions

1. On the EMS Regics menu, click Transactions.

   The Transactions page opens.

Figure 5-11: Transactions page



2. Enter your search options.

   - Leave all search fields blank to search for all transactions of all types by all participants in your EMS Regics system.
   - Start Date/End Date:
     - Start Date only—Search for all credit card transactions from the Start Date up to and including the current day's date.
     - End Date only—Search for all credit card transactions up to and including the End Date.
     - Start Date and End Date—Search for all credit card transactions that occurred within the specified date range.
   - First Name, Last Name, and Email—Your search is limited to the exact order of the characters in the string, but the string can appear anywhere in the search results. The search is not case-sensitive. For example, if you enter **Son** in the Last Name field, then search results can include John**son**, **Son**deheim, and so on.
   - Auth Code/Transaction ID—Your search is limited to the exact order of the characters in the string, and the search results must begin with the string. For example, if you enter **65** in the Auth Code field, then search results can include **65**001, **65**002, but not 00165.

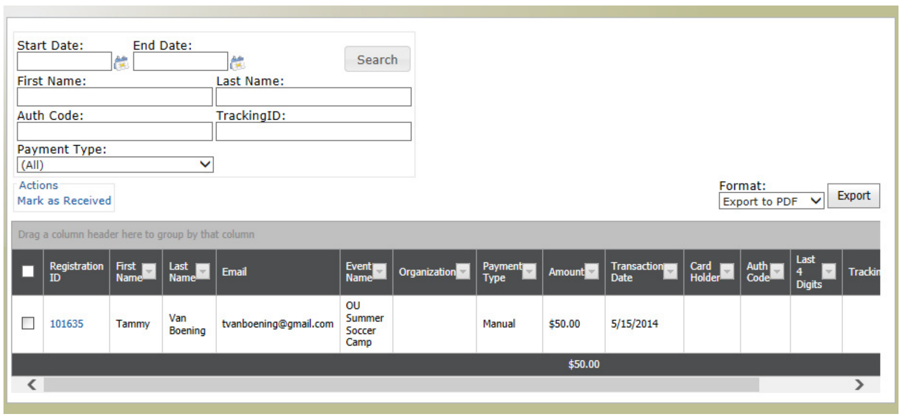
- Payment type—Select a payment type from the available options.

If a specific payment type is not available, contact your EMS Regics administrator. For more information about configuring payment types, see *"Managing Payment Types" on page 112.*

3. Click Search.

   A list of participants who meet all the search criteria that you specified is displayed on the Credit Card Transactions page.

Figure 5-12: Transactions page with search results



4. Optionally, do any of the following as needed:

   - Rearrange the search results to better suit your working needs.

See *"An EMS Regics Browser Page" on page 22.*

- Select one or more transactions, and then click Mark as Received.

To select all transactions that are currently displayed, select the blank check box next to the Registration ID column header. If you have multiple pages of transactions to select, you must repeat this step on each page.

If you inadvertently mark Received for a participant who still owes a payment, then you must clear the Billed option on the Accounting tab of the Edit Registrant dialog box for the registrant. See *"Managing Participants" on page 91.*

- Export the list of transactions:

  1. On the Format dropdown list, select the format to which you are exporting the list of participants. (PDF is the default value.)

2. Click Export.

   A message opens, asking you if you want to open the file or save the file.

3. Do one of the following:

   - To view the file online (you cannot rename or save the file), click Open.
   - To save the file to a location of your choice (you can also rename the file), click Save.

Chapter 6

EMS Regics System Administration - Security

This chapter details the security functions that are available in EMS Regics.

This chapter covers the following topics:

Overview of Users in EMS Regics

An *Administrator user* for EMS Regics has full site privileges and full access to all the event registrations forms and surveys that have been defined in your organization's EMS Regics system. A *Standard user* in EMS Regics does not have full site privileges in EMS Regics; however, a Standard user does have varying degrees of access to event registration forms and surveys depending on how the user account has been set up, including privileges for creating new event forms or surveys, managing participants, and delegating events to other standard users. A Standard user account can also be assigned to a *group*.

Delegating accounts

Standard user accounts can also be set up so that Standard users can create their own events or surveys in your organization's EMS Regics system. Standard users can edit any and all aspects of the event registration form or surveys that they create, including the participant information. Standard users with permission to create their own events/surveys can also grant event access to other standard users. These delegate Standard user accounts can have the same varying degrees of access—Run Reports, Manage Attendees, and/or Edit—to event registration forms and surveys as any other Standard user account.

Groups

Instead of setting up individual user accounts and assigning access on a user by user basis, a user account can be assigned to a *group*. Event access is assigned at the group level so that all members of a group have the same access. Frequently, groups are used for delegate accounts to make the management of certain events easier. For example, if you are the Marketing Director for your organization, your Administrator user can create a Marketing group in your organization's EMS Regics system and set you up as a Standard user with the ability to create your own events and surveys. You can then assign the members of your marketing department to the Marketing group in EMS Regics, and all members of this group can manage the marketing events that you create on your behalf.

Managing Users in EMS Regics

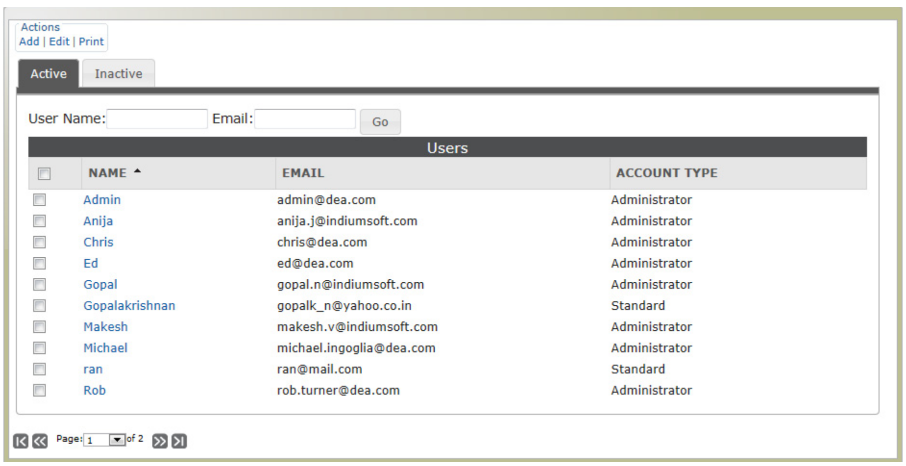
Managing users in EMS Regics consists of adding new user accounts, editing user information, and deleting user accounts. You can also print a list of all active or inactive users in your EMS Regics system (the User report).

To add a user account

1. On the EMS Regics menu, click Admin > Security > Users.

   The Users page opens. The Active tab is the open tab. This tab lists all of the currently active user accounts (Administrator and Standard) for your organization’s EMS Regics system.

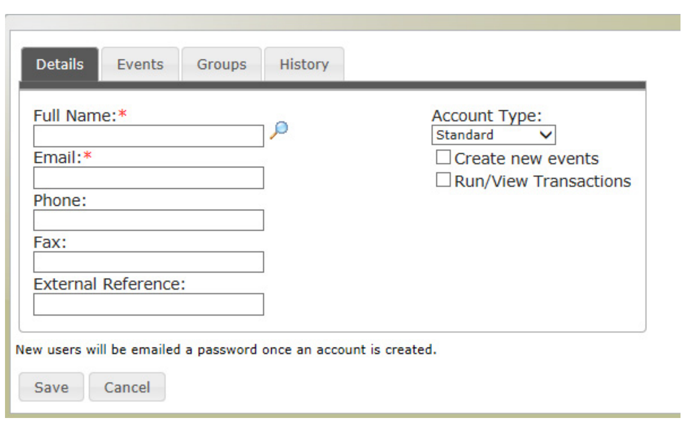
Figure 6-1: Users page, Active tab



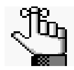
2. Under Actions, click Add.

   The Add User page opens. This page contains a series of tabs for adding the detailed information for the new user account.

Figure 6-2: Add User page



3. Add the information for the new user account. See:
   - “Details tab” below.
   - “Events tab” on page 149.
   - “Groups tab” on page 151.



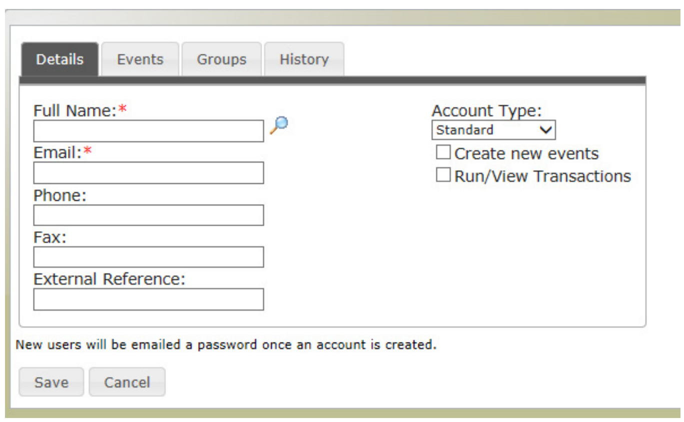
This step list the tabs in the order in which they appear on the Add User page; however, you can enter the information for the user account in any order that meets your business needs.

4. Click Save.

   The Add User dialog box closes. You return to the Users page. After you create the user account, the user is automatically sent an email with the account password.

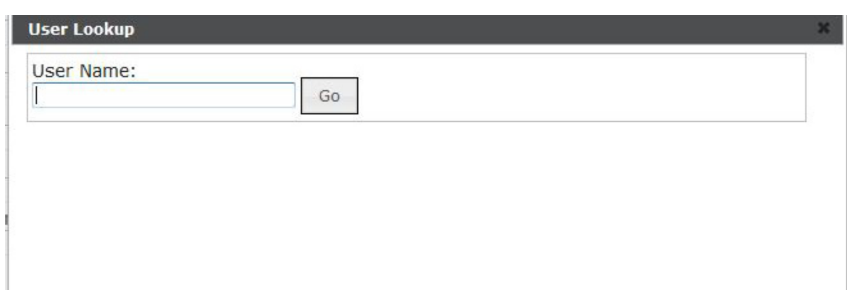
Details tab

Figure 6-3: Add User page, Details tab



1. Do one of the following:
   - To create a user account for a user who already exists in your organization’s Global Address List:
     - Click the Lookup Users icon  to open the User Lookup dialog box.

Figure 6-4: User Lookup dialog box



- In the User Name field, enter the criteria by which to search for a user, and then click Go. To search for all users, leave the User Name field blank.

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*Your search is limited to the exact order of the characters in the string, but the string can appear anywhere in the search results and the search is not case-sensitive. For example, if you enter **And**, search results can include **And**y Wells, De**and**ra Smith, and so on.*

  - Click the User Name for the appropriate user to close the User Lookup dialog box and return to the Details tab. The tab is populated with the information for the selected user.

- To create a new user account, at a minimum, you must enter the Full Name and Email for the user. (Phone, Fax, and External References are optional.)

2. Under Account Type, select Standard or Administrator.

   - If you select Administrator, then you can continue adding information for the new account as needed. See:
   - “Events tab” on page 149.
   - “Groups tab” on page 151.
   - If you select Standard, then, go to Step 3.

3. Do one or both of the following:

   - If the Standard user is to be able to create new events and also grant access to these events to other standard users, then select Create new events. (See “Delegating accounts” on page 145.) Leave this option blank if the user is to have access to only those pre-defined events that you specify for the account.

For standard users to be able to grant access to their events to new standard user accounts, then the EMS Regics system parameter “Allow Event Owner to create a new user account” must also be enabled. See Appendix A, “EMS Regics System Parameters - Security,” on page 186.

   - If the Standard user is to be able to view and process transactions associated with events that they create, or events that you specified for the user’s account, then select Run/View Transactions; otherwise, leave this option blank.

If you enable the Run/View Transactions option for a Standard user account, then a Transactions option is displayed on the EMS Regics menu after the user logs in.

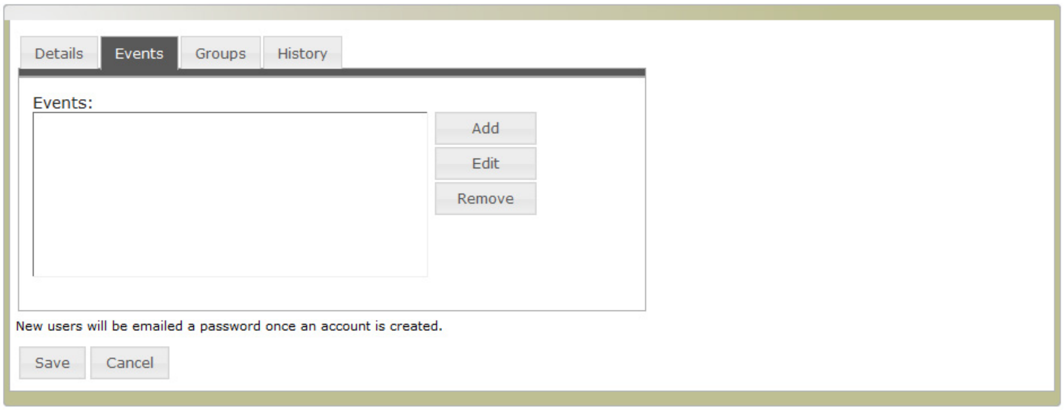
4. Continue adding the information for the user as needed; otherwise, if you are done with configuration, click Save.

   The Add User dialog box closes. You return to the Users page. After you create the user account, the user is automatically sent an email with the account password.

Events tab

By definition, an Administrator user has full site privileges and full access to all of the event registrations forms and surveys that have been defined in your organization's EMS Regics system. Therefore, the Events tab is available only when you are adding or modifying a Standard user account. You use the options on this tab to specify the pre-defined events (registration forms or surveys) to which the user can have access. You can also specify the different options that are to be available to the user on a per event basis.

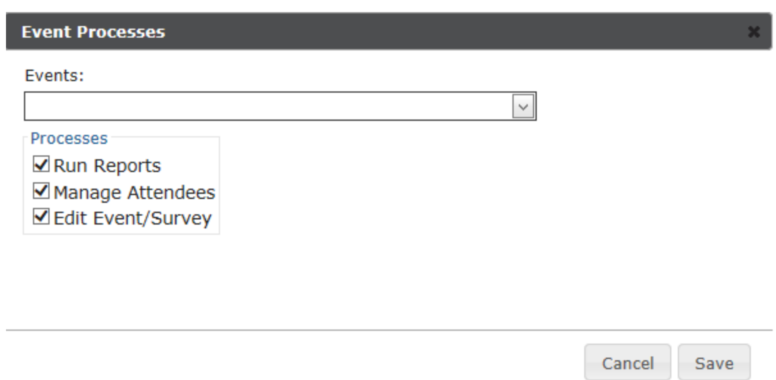
Figure 6-5: Add User page, Events tab



1. Click Add.

   The Event Processes dialog box opens. You use this to dialog box to select the pre-defined events to which the user can have access.

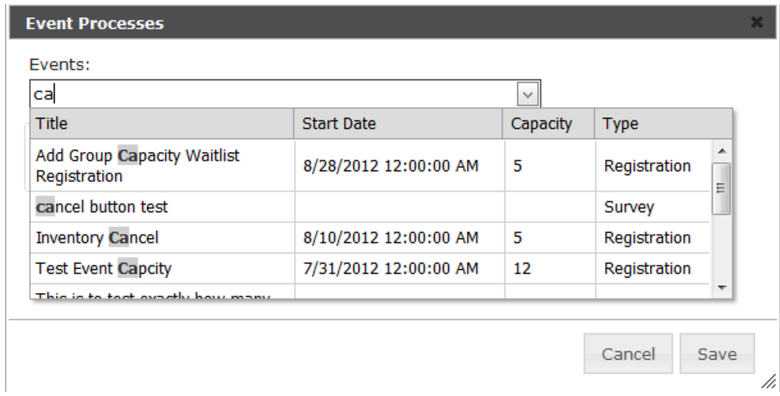
Figure 6-6: Event Processes dialog box



2. In the Events dropdown list, scroll to and select an event to which the user is to have access. See Figure 6-7 on page 150.

*You can also search for the event and the results are displayed as you enter the search string. For example, entering **Ca** in the Events field results in the events that begin with or contain "Ca" being displayed in the Event Processes dialog box.*

Figure 6-7: Automatically displayed search results in the Events Processes dialog box



3. Clear the process options—Run Reports, Edit, and/or Manage Attendees—that are *not* to be available to the user for the selected event.

By default, all three options are selected for an event. You can always edit the selected options for a user account event, and you can always remove an event from a user account. See *Table 6-1 on page 150.*

Table 6-1: Standard User event permissions

Access	Description
Run Reports	With Run Reports access, a Standard user has access to all the reports (Common and Financial) for specific registration forms or surveys that are defined in your organization's EMS Regics system. The Standard user can also view a list of participants for an event or survey, and change a participant's status, send email to a user, or both. The Standard user, however, does not have any other type of access to the registration form or survey. The Event Snapshot report icon is displayed next to the events or surveys to which the Standard user has Run Reports access.
Manage Attendees	With Manage Attendees access, a Standard user has full editing access to the participant information for specific registration forms or surveys that are defined in your organization's EMS Regics system. The Participants icon is displayed next to the events or surveys to which the Standard user has Manage Attendees access.
Edit	With Edit access, a Standard user has full editing access to specific registration forms or surveys that are defined in your organization's EMS Regics system. The Standard user can edit any and all aspects of the event registration form or survey, with the exception the participant information. (To be able to edit the participant information for these events, the Manage Attendees permission must also be assigned to the user.) The Edit icon is displayed is displayed next to the events or surveys to which the Standard user has Edit access.

4. Click Save.

   The selected event is displayed on the Events tab.

5. Repeat Step 2 through Step 4 until you have added all of the needed events to the user account.
6. Continue adding the information for the user as needed; otherwise, if you are done with configuration, click Save.

   The Add User dialog box closes. You return to the Users page. After you create the user account, the user is automatically sent an email with the account password.

Groups tab

Only Administrator users can add, modify, or delete groups in EMS Regics. Standard users, however, who have the ability to create their own events can assign users to groups.

Figure 6-8: Add User page, Groups tab

1. Do one of the following:
   - To search for all groups that are available in your EMS Regics system, leave the Find field blank, and then click Go.

     A list of all available groups is displayed in the Groups pane.
   - To search for a specific group to which to add the user, enter you search criteria in the Find field, and then click Go.

*Your search is limited to the exact order of the characters in the string, but the string can appear anywhere in the search results and the search is not case-sensitive. For example, if you enter **cam**, search results can include **Cam**pus Tours, **Cam**tasia Learning Group, and Digital **Cam**era Basics.*

A list of all available groups that meet your search criteria is displayed in the Groups pane.

Only Administrator users can create, modify, and delete groups in EMS Regics. If you cannot find a specific group, contact your EMS Regics administrator.

2. In the Groups pane, select the group, or CTRL-click to select the multiple groups to which you are adding the user, and then click the Add button > to add the groups to the Selected pane.

To remove a group from a user account, in the Selected pane, select the group, or CTRL-click to select the multiple groups from which you are removing the user, and then click the Remove button < to return the groups to the Groups pane.

3. Continue adding the information for the user as needed; otherwise, if you are done with configuration, click Save.

   The Add User dialog box closes. You return to the Users page. After you create the user account, the user is automatically sent an email with the account password.

To edit a user account

1. On the EMS Regics menu, click Admin > Security > Users.

   The Users page opens. The Active tab is the open tab. This tab lists all of the currently active user accounts (Administrator and Standard) for your organization's EMS Regics system. See Figure 6-1 on page 146.

2. Select the user account that you are editing.

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*If the list is long, you can also search for a user. In the User Name field or the email field, enter your search criteria and then click Go. Your search is limited to the exact order of the characters in the string, but the string can appear anywhere in the search results and the search is not case-sensitive. For example, if you enter **And** in the Name field, search results can include **And**y Wells, De**and**ra Smith, and so on.*

3. Under Actions, click Edit.

   The Add User page opens. This page contains a series of tabs for editing the information for the user account. See Figure 6-2 on page 146.

4. Optionally, before you modify the user account, open the History tab to view a history of the user account.

   The History tab is a view-only tab that shows the original creation date of the user account and the name of the user who created the account. The tab also shows last date that the account was edited as well as the name of the user who last edited the account. See Figure 6-9 on page 153.

Figure 6-9: History tab for a user

5. Modify the information for the Standard user as appropriate.

   See:

   - "Details tab" on page 147.
   - "Events tab" on page 149.
   - "Groups tab" on page 151.

If you are creating a delegate account, then you should modify the information only on the Events tab or the Groups tab.

6. Click Save.

To delete a user account

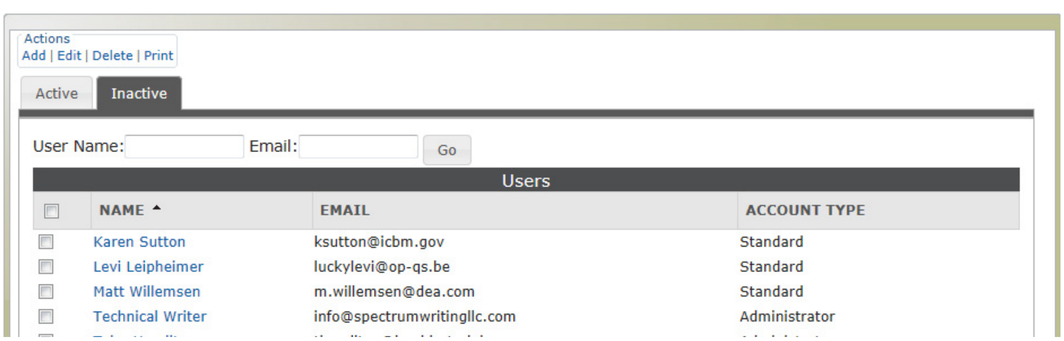
You can delete a user account only if it is an inactive account and if the user is not referenced by any event. If the account that you are deleting is referenced by any events, then you must first select a different user to assign to these events before you can delete the user account.

1. On the EMS Regics menu, click Admin > Security > Users.

   The Users page opens. The Active tab is the open tab. This tab lists all of the currently active user accounts (Administrator and Standard) for your organization's EMS Regics system. See Figure 6-1 on page 146.

2. Open the Inactive tab.

Figure 6-10: Users page, Inactive tab

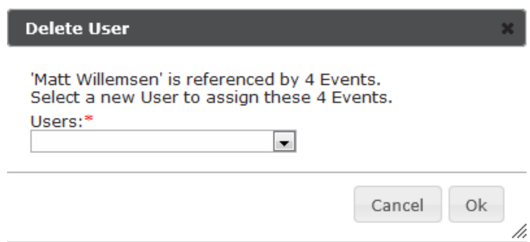


3. Select the user account that you are deleting.
4. Under Actions, click Delete.

   Two results are possible:

   - If the user account is not referenced by any events, then a dialog box opens, asking you if you sure that you want to delete the selected user. Click OK in this dialog box to delete the user account.
   - If the user account is referenced by any event, then a Delete User dialog box opens. This dialog box states the user is referenced by <x> number of events and informs you that you must select a different user for these events before you can delete the selected user account.

Figure 6-11: Delete User dialog box



5. Select a different user, and then click OK.

   The Delete User dialog box closes and the selected user account is deleted.

To print a list of users

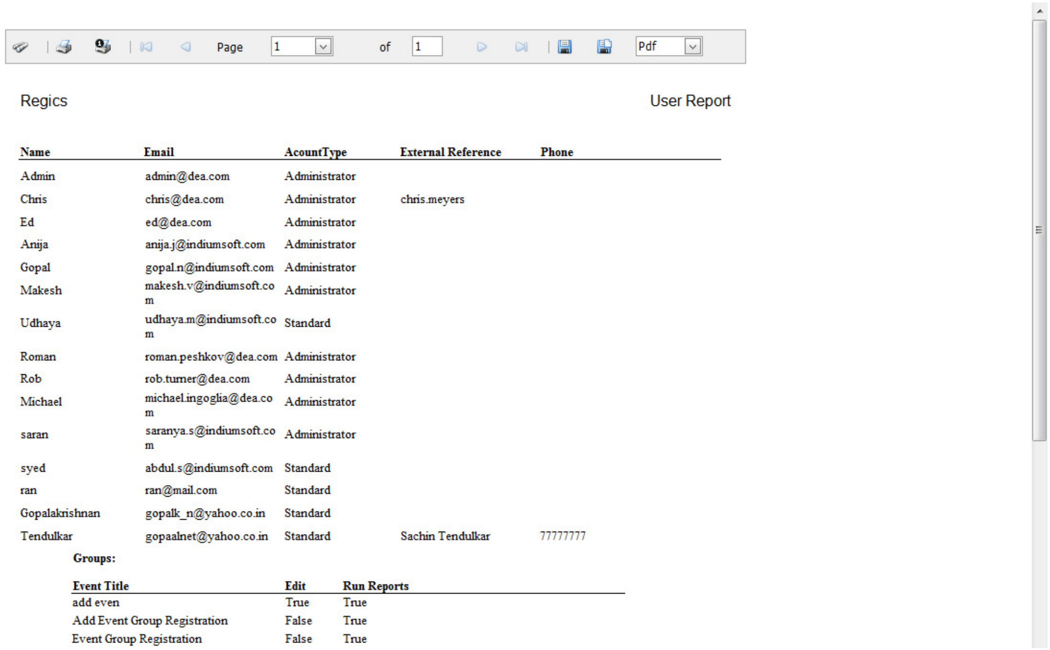
You can print a list of all active users in your EMS Regics system, or you can print a list of all inactive users.

1. On the EMS Regics menu, click Admin > Security > Users.

   The Users page opens. The Active tab is the open tab. This tab lists all of the currently active user accounts (Administrator and Standard) for your organization's EMS Regics system. See Figure 6-1 on page 146.
2. If needed, open the Inactive tab. See Figure 6-10 on page 153.
3. Click Print.

   The User report opens. The report lists all the active or inactive users in your EMS Regics system. The report lists the following information for the users—the user name, the user's email address, the user Account Type (Standard or Administrator), and the user's phone number. It also lists any groups of which the user is a member as well as the event permissions for the group. See Figure 6-12 on page 155.

Figure 6-12: User report example



Page 1 of 1 Pdf

Regics User Report

Name	Email	AcountType	External Reference	Phone
Admin	admin@dea.com	Administrator		
Chris	chris@dea.com	Administrator	chris.meyers	
Ed	ed@dea.com	Administrator		
Anija	anija.j@indiumsoft.com	Administrator		
Gopal	gopal.n@indiumsoft.com	Administrator		
Makesh	makesh.v@indiumsoft.co m	Administrator		
Udhaya	udhaya.m@indiumsoft.co m	Standard		
Roman	roman.peshkov@dea.com	Administrator		
Rob	rob.turner@dea.com	Administrator		
Michael	michael.ingoglia@dea.co m	Administrator		
saran	saranya.s@indiumsoft.co m	Administrator		
syed	abdul.s@indiumsoft.com	Standard		
ran	ran@mail.com	Standard		
Gopalakrishnan	gopalk_n@yahoo.co.in	Standard		
Tendulkar	gopaalnet@yahoo.co.in	Standard	Sachin Tendulkar	77777777

Groups:

Event Title	Edit	Run Reports
add even	True	True
Add Event Group Registration	False	True
Event Group Registration	False	True

The User report has options for printing the onscreen preview, exporting the list fields to a file such as a PDF, and so on. Place your mouse pointer on a toolbar button to open tooltip text for the button.

Managing Groups in EMS Regics

As an Administrator user, instead of assigning event access to user accounts on a user by user basis, you can create a group that has the event access defined at the group level. All users who are assigned to a group then have the same event access privileges. You can also edit the information for a group and delete a group. You can also print a list of all the groups in your EMS Regics system (the Group report).

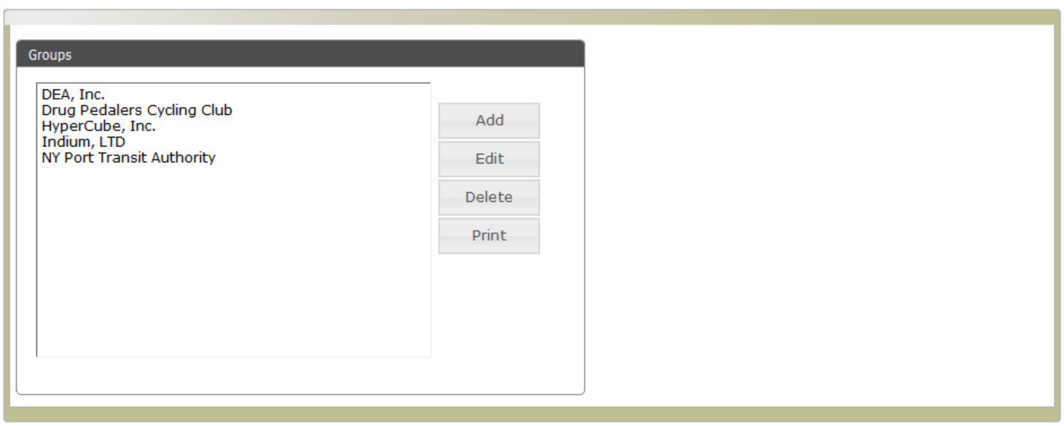
Only Administrator users can add, modify, or delete groups in EMS Regics. A Standard user, however, who has the ability to create their own events, can assign users to groups.

To add a group

1. On the EMS Regics menu, click Admin > Security > Groups.

   The Groups page opens. This page lists all of the available groups in your EMS Regics system.

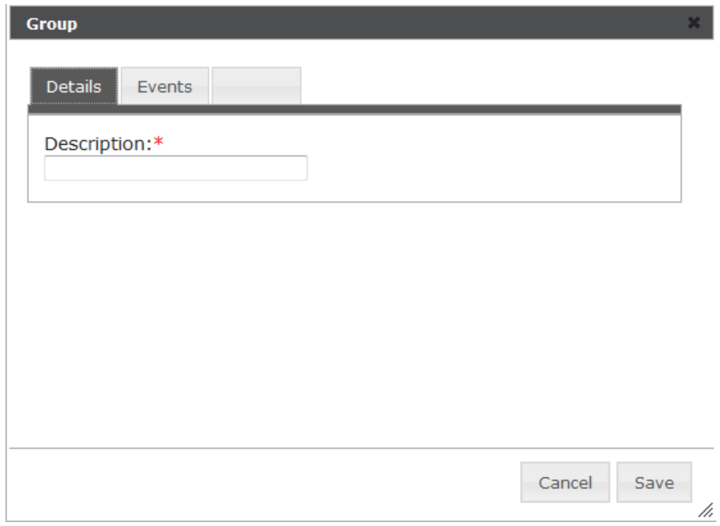
Figure 6-13: Groups page



2. Click Add.

   The Group dialog box opens. You use the options on this dialog box to name the group and to specify the events to which the new group is to have access. See Figure 6-14 on page 157.

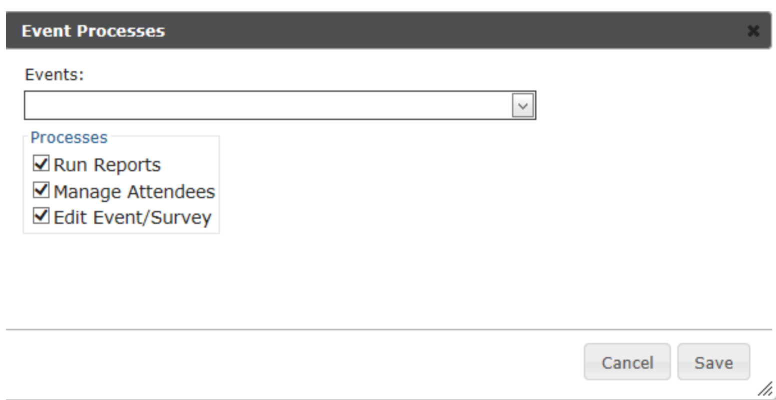
Figure 6-14: Group dialog box



3. In the Description field, enter the name for the new group.
4. Open the Events tab, and on this tab, click Add.

   The Event Processes dialog box opens. You use this to dialog box to select the pre-defined events to which the group can have access.

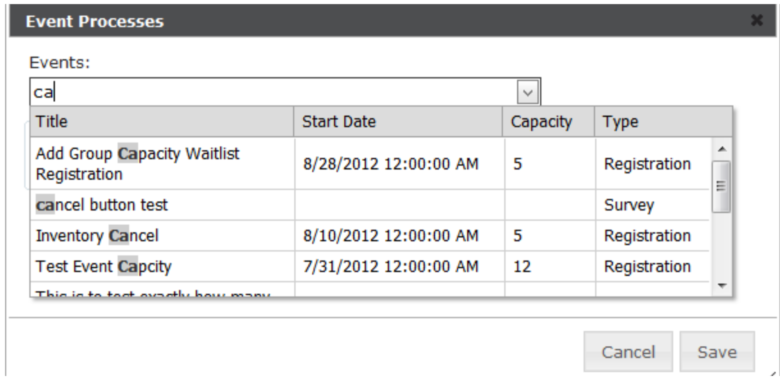
Figure 6-15: Event Processes dialog box



5. In the Events dropdown list, scroll to and select an event to which the group is to have access.

You can also search for the event and the results are displayed as you enter the search string. For example, entering ***Ca*** *in the Events field results in the events that begin with or contain "Ca" being displayed in the Event Processes dialog box. See* *Figure 6-16 on page 158.*

Figure 6-16: Automatically displayed search results in the Events Processes dialog box



6. Clear the process options—Run Reports, Edit, and/or Manage Attendees—that are *not* to be available to the user for the selected event.

By default, all three options are selected for an event. You can always edit the selected options for a group account event, and you can always remove an event from a group account.

Table 6-2: Group event permissions

Access	Description
Run Reports	With Run Reports access, a Standard user has access to only the participant information for specific registration forms or surveys that are defined in your organization's EMS Regics system. The Standard user can view a list of participants for an event or survey, and change a registrant's status, send email to a user, or both. The Standard user, however, does not have any other type of access to the registration form or survey. The Participants icon is displayed next to the events or surveys to which the Standard user has Run Reports access.
Manage Attendees	With Manage Attendees access, a Standard user has full editing access to the participant information for specific registration forms or surveys that are defined in your organization's EMS Regics system.
Edit	With Edit access, a Standard user has full editing access to specific registration forms or surveys that are defined in your organization's EMS Regics system. The Standard user can edit any and all aspects of the event registration form or survey, with the exception the participant information. (To be able to edit the participant information for these events, the Manage Attendees permission must also be assigned to the user.) The Edit icon is displayed is displayed next to the events or surveys to which the Standard user has Edit access.

7. Click Save.

   The selected event is displayed on the Events tab.

8. Repeat Step 5 through Step 7 until you have added all of the needed events to the group account.

To edit a group

When you edit a group, you can also view the history for the group.

1. On the Admin menu, click Security > Groups.

   The Groups page opens. This page lists all of the available groups in your EMS Regics system. See Figure 6-13 on page 156.

2. Select the group for which you are modifying the information, and then click Edit.

   The Group dialog box opens. See Figure 6-14 on page 157.

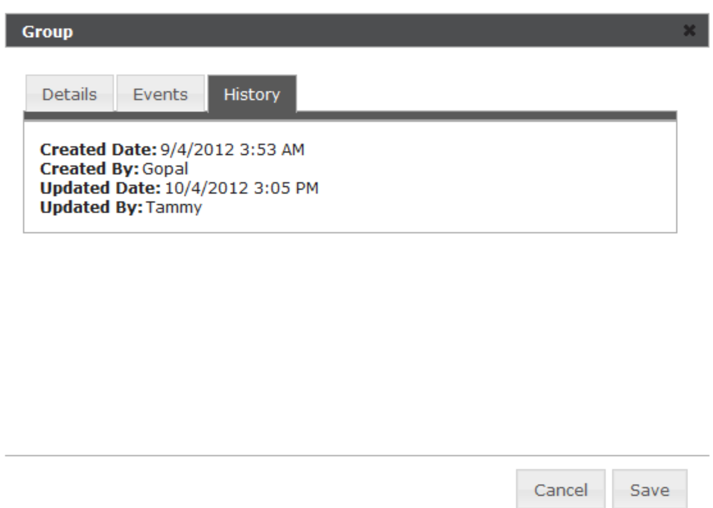
3. Edit any and all information for the group:
   - In the Description field, edit the group name.
   - Open the Events tab to display the list of all events to which the group has access
     - To remove an event, select the event, click Remove, and then click Save.
     - To change the group privileges for a specific event, select the event, and then click Edit. In the Event Processes dialog box, select or clear the reporting and editing options as needed, and then click Save.

4. In the Group dialog box, click Save.

5. Optionally, to view the history of the group, open the History tab.

   The History tab is a view-only tab that shows the original creation date of the group and the name of the user who created the group. The tab also shows last date that the group was edited as well as the name of the user who last edited the group.

Figure 6-17: History tab for a group



To delete a group

1. On the Admin menu, click Security > Groups.

   The Groups page opens. This page lists all of the available groups in your EMS Regics system. See Figure 6-13 on page 156.

2. Select the group that you are deleting, and then click Delete.

   A message opens, asking you if you are sure that you want to delete the group.

3. Click OK.

   The message closes, and a second message opens, indicating that the group was deleted.

4. Click OK.

   The second message closes. The group is deleted and is no longer displayed in the Groups dialog box.

To print a list of groups

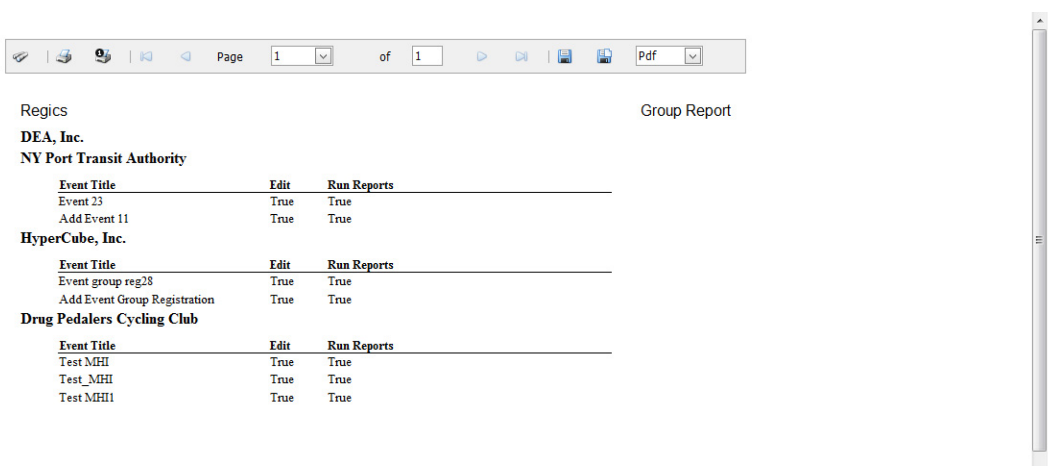
1. On the Admin menu, click Security > Groups.

   The Groups page opens. This page lists all of the available groups in your EMS Regics system. See Figure 6-13 on page 156.

2. Click Print.

   The Group report opens. The report lists all the groups in your EMS Regics system. The report lists the group name and event permissions for each group.

Figure 6-18: Group report example


Page 1 of 1 Pdf

Regics — Group Report

DEA, Inc.

NY Port Transit Authority

Event Title	Edit	Run Reports
Event 23	True	True
Add Event 11	True	True

HyperCube, Inc.

Event Title	Edit	Run Reports
Event group reg28	True	True
Add Event Group Registration	True	True

Drug Pedalers Cycling Club

Event Title	Edit	Run Reports
Test MHI	True	True
Test_MHI	True	True
Test MHI1	True	True

The Group report has options for printing the onscreen preview, exporting the list fields to a file such as a PDF, and so on. Place your mouse pointer on a toolbar button to open tooltip text for the button.

Resetting a Participant’s Password

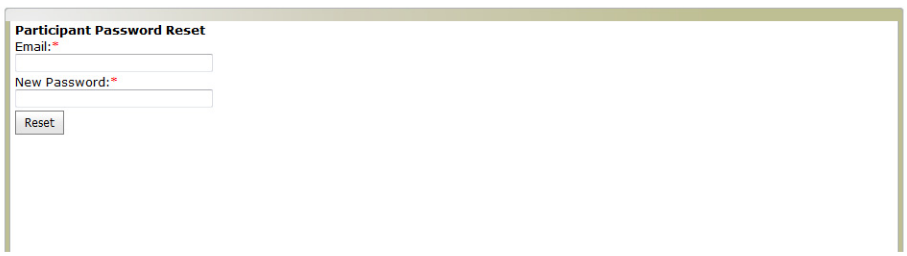
After a participant registers for an event, or submits a survey, a Reset Password option is always available from the event registration form or survey. When a participant clicks this link, a new password is *automatically* generated and sent in an email to the participant’s email address that is on record in EMS Regics. An option to *manually* reset a participant’s password is also available in EMS Regics.

To manually reset a participant’s password

1. On the Admin menu, click Security > Participant Password Reset.

   The Reset Participant Password page opens.

Figure 6-19: Reset Participant Password page



2. In the Email field, enter the participant’s email address.

If you need to look up the participant’s email address, you can search for the participant’s record. *See “Managing Participants” on page 91.*

3. In the New Password field, enter the participant’s new password.

EMS Regics does not place any restrictions on the password that you enter. It is up to you to adhere to any password restrictions that your organization might have.

4. Click Reset.

   You must manually provide the new password to the user.

Chapter 7
EMS Regics Reports

EMS Regics contains two different categories of standard reports—Common and Finance—to assist you in monitoring and maintaining your organization's event registration forms and/or surveys, and if applicable financial transactions. You can also create custom reports that define custom criteria for searching for information in your organization's EMS Regics database.

This chapter covers the following topics:

- "Generating Standard Reports" on page 164.
- "Generating and Managing Custom Reports" on page 168.

Generating Standard Reports

EMS Regics contains two different categories of standard reports—Common and Finance—to assist you in monitoring and maintaining your organization's event registration forms and/or surveys, and if applicable financial transactions. You generate these reports for an event registration form or survey from the Event Dashboard. You also have the option of exporting these standard reports to a file. Finally, you can also create a custom URL for several of these standard reports and then forward this URL to any user so that you can share real-time EMS Regics data with the user.

If you are running EMS Regics in Internet Explorer 8, you must enable the following setting: Tools -> Internet Options -> Security -> Custom Level -> Downloads -> Automatic prompting for file downloads. Enabling this setting ensures that you can generate reports or export a file to a list.

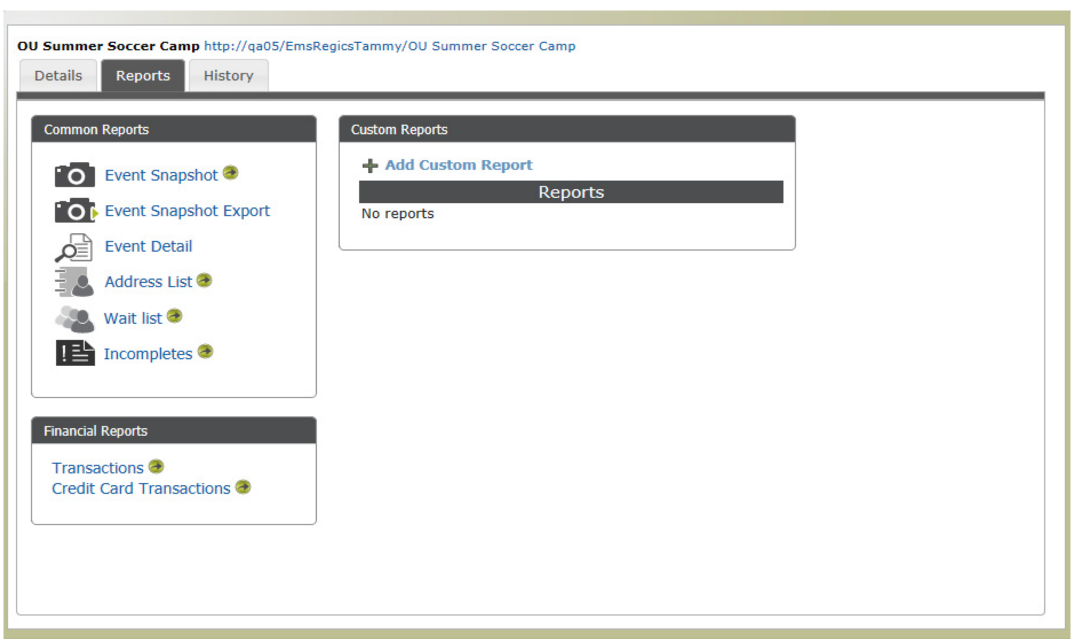
To generate a standard report

1. Search for and open the event registration form or survey in the Event Dashboard.

   See "To search for an event registration form or survey and open it in the Event Dashboard" on page 78.

2. Open the Reports tab.

Figure 7-1: Event Dashboard, Reports tab (for an event)



3. Click the link for the report that is being generated and/or exported.

Every standard report has options for printing the onscreen preview, exporting the list fields to a file such as a PDF, and so on. Place your mouse pointer on a toolbar button to open tooltip text for the button.

Report	Description
Common Reports	
Event Snapshot Survey Snapshot	• To generate a Snapshot report of up to and including the current day's date, leave Add date range blank, and then click Run. • To run a Snapshot report for a specific date range, click Add a date range, and then enter a Start date *and* an End date, and then click Run.
Event Snapshot Export Survey Snapshot Export	A message opens, asking you if you want to open or save the EventSnapshotDetail or SurveySnapshotDetail file. (The file is exported in a Microsoft Excel (.xls) format.) Do one of the following: • To view the file online, click Open. (You can rename and save the file to a location of your choice after you open it.) • To save the file to a location of your choice (you can also rename the file), click Save.
Event Detail Survey Detail	A message opens, asking you if you want to open or save the EventDetailReport or SurveyDetailReport file. (The file is exported in a comma-separated values (.csv) format.) Do one of the following: • To view the file online, click Open. (You can rename and save the file to a location of your choice after you open it.) • To save the file to a location of your choice (you can also rename the file), click Save.
Address List	Available only for events. An onscreen report is generated that displays the address information (physical and email) for the event registrants.
Wait List	Available only for events. An onscreen report is generated that displays all the potential participants who have been placed on the Wait List for the selected event.
Incompletes	An onscreen report is generated that lists the all the participants (grouped by Registration ID) who have not completed their registrations and/or surveys for an event.
Financial Reports	
Transactions report	Available only for events. An onscreen report is generated that displays all the transactions, including credit card transactions, that have taken place for all the event registrants. The report has options for printing the onscreen preview, exporting the list fields to a file such as a PDF, and so on. Place your mouse pointer on a toolbar button to open tooltip text for the button.
Credit Card Transactions report	Available only for events. An onscreen report is generated that displays specifically all the credit card transactions that have taken place for the all the event registrants.

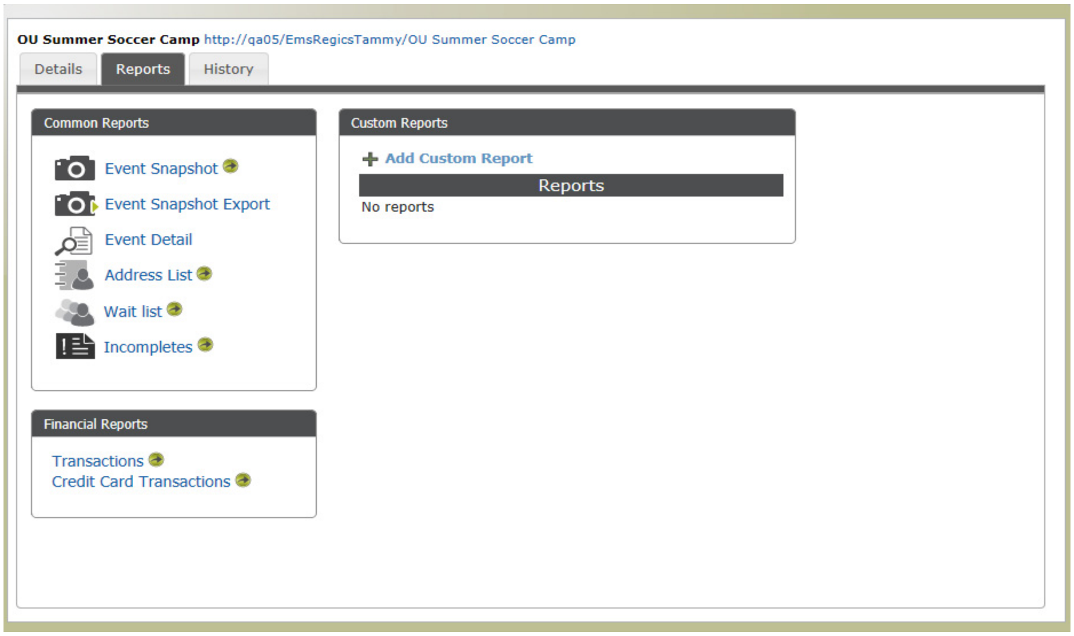
To share standard reports with a user

1. Search for and open the event registration form or survey in the Event Dashboard.

   See "To search for an event registration form or survey and open it in the Event Dashboard" on page 78.

2. Open the Reports tab.

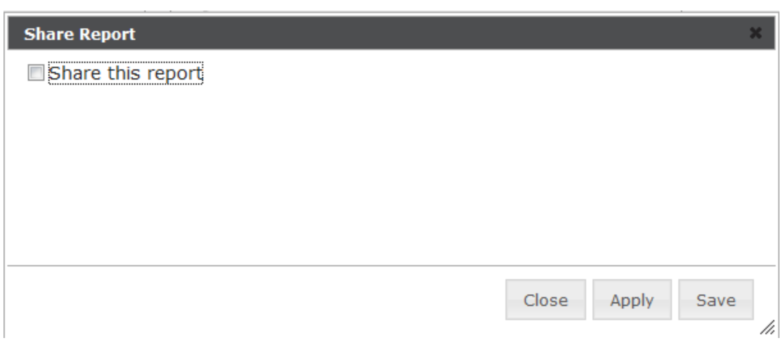
Figure 7-2: Event Dashboard, Reports tab (for an event)



3. Next to the report that is to be shared, click the Share icon .

   A Share Report dialog box opens.

Figure 7-3: Share Report dialog box



4. Click Share this report to create a report link that can be shared with others.

   The Share tab is updated with three fields:

   - Report Link—The automatically generated URL for the report. You can forward this URL to any user so that you can share real-time EMS Regics data with the user.

Optionally, you can click View next to this link to open an onscreen preview of the custom report. The report that you see when you click View is identical to the report that a user sees when they open the report from this URL. The report has options for printing the onscreen preview, exporting the list fields to a file such as a PDF, and so on. Place your mouse pointer on a toolbar button to open tooltip text for the button.

   - Report Password—Optional. If you want to limit the online access to this shared report, then you can enter a report password. You must remember to forward this password as well as the URL for a user to have access to the report.
   - Report Format—The format in which the report is displayed when the user opens the report. By default, HTML is selected, but you can select a different format.

5. Do one of the following:

   - Click Save to save these changes and close the Share Report dialog box. You remain on the Reports tab.
   - Click Apply to save the report without closing the Share Report dialog box. You can make any changes for sharing the report as needed before saving these changes.
   - Click Close to close the Share Report dialog box without saving any changes and return to the Reports tab.

Generating and Managing Custom Reports

A Custom Reports function is available from the Reports tab on the Event Dashboard. You can use this function to create custom reports for retrieving user-defined information from your EMS Regics database for a specific event registration form or survey. You can create a new custom report or you can create a custom by copying an existing custom report and editing the copied report as needed. When you create a custom report, you can name and save the report so that you can generate the report at any time that you choose, and after generating the report, you can export the report to a file and/or print the report. You can also edit a custom report and delete a custom report, and you can view the history for a custom report. Finally, you can also create a custom URL for any custom report and then forward this URL to any user so that you can share real-time EMS Regics data with the user.

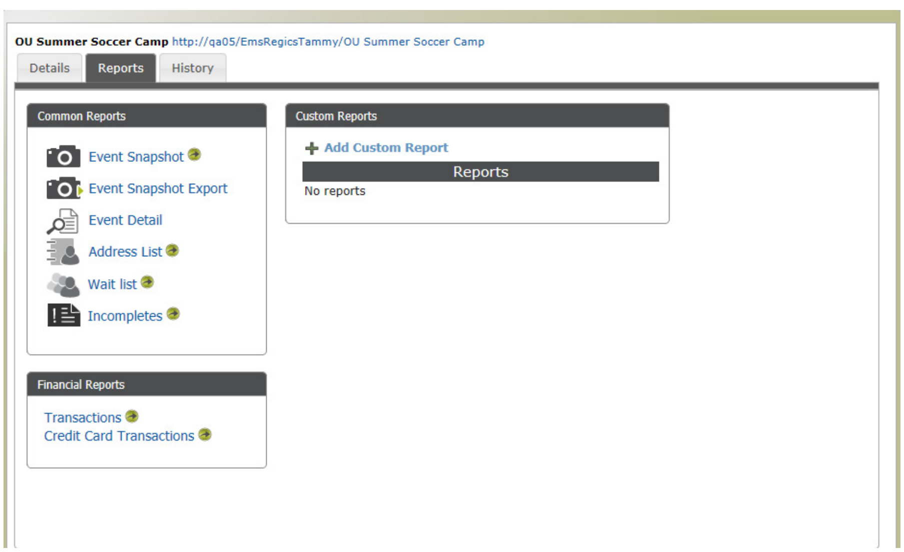
To create a new custom report

1. Search for and open the event registration form or survey in the Event Dashboard.

   See "To search for an event registration form or survey and open it in the Event Dashboard" on page 78.

2. Open the Reports tab.

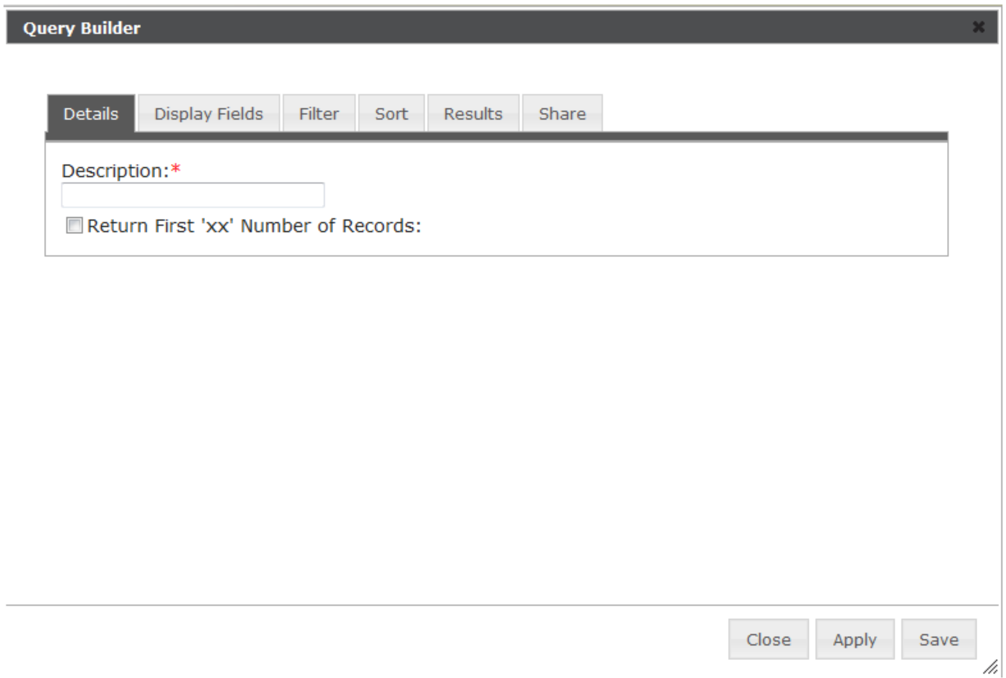
Figure 7-4: Event Dashboard, Reports tab (for an event)



3. Click Add Custom Report.

   The Query Builder dialog box opens. The Details tab is the active tab. You use the options on this dialog box to name and define the custom report.

Figure 7-5: Query Builder dialog box, Details tab



4. Enter the needed information for the query. See:
   - "Details tab" on page 170.
   - "Display Fields tab" on page 171.
   - "Filter tab" on page 172.
   - "Sort tab" on page 173.
   - "Results tab" on page 174.
   - "Share tab" on page 175.

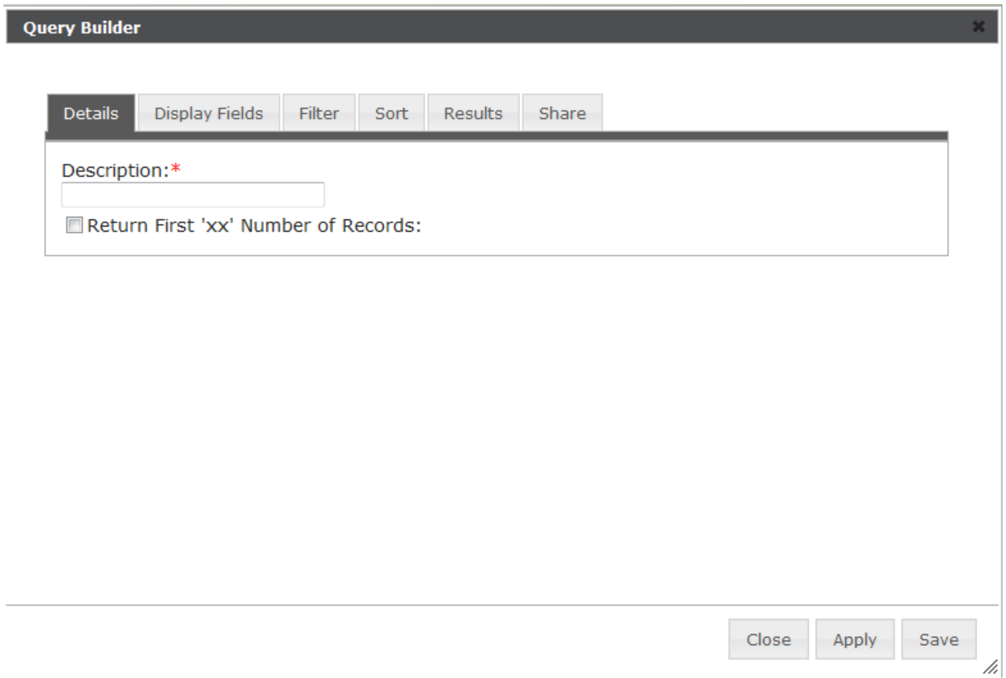
This step list the tabs in the order in which they appear on the Query Builder dialog box; however, you can enter the information for the custom report in any order that meets your business needs.

5. Click Save.

   The Query Builder dialog box closes and the custom report is saved. The report is displayed on the Reports tab under the Custom Reports option. Options are also displayed for editing the report, copying the report, deleting the report, and sharing the report with users.

Details tab

Figure 7-6: Query Builder dialog box, Details tab



1. In the Description field, enter a name or title that describes the report.
2. Optionally, select Return First ‘xx’ number of records, and then enter the maximum number of records that this report is to return.

If you do not select this option, then all participant records that meet the report criteria are returned by the report.

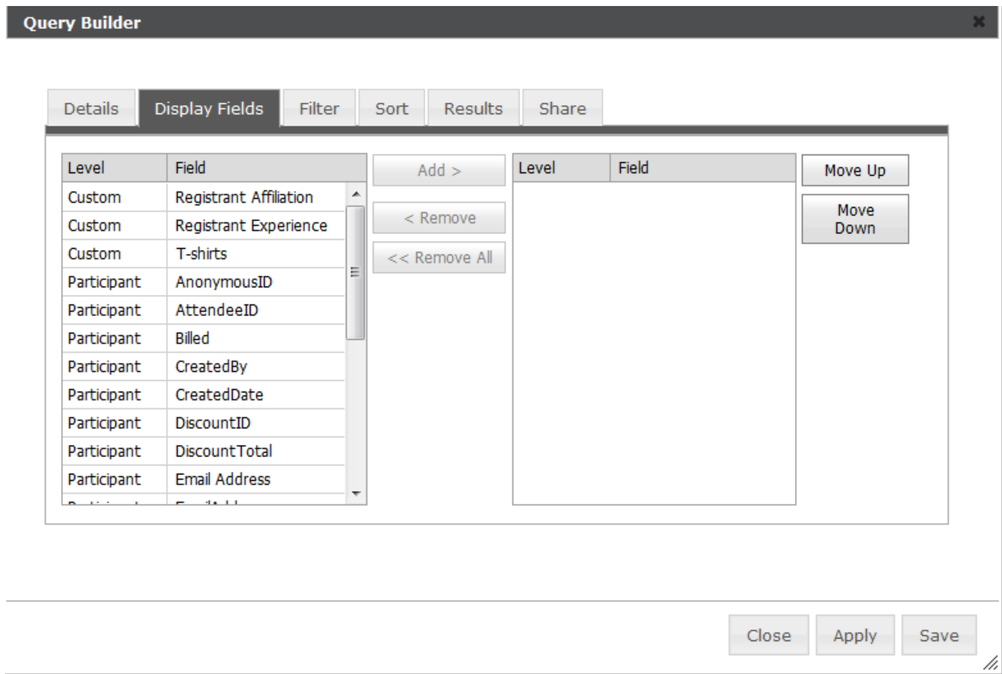
3. Optionally, open the Results tab, and then click Preview to run the report immediately and view the results on the tab.

The results tab is an EMS Browser page. See “An EMS Regics Browser Page” on page 22.

4. Do one of the following:
   - Click Apply to save the custom report without closing the Query Builder dialog box. You can then continue with any other configuration for the custom report as needed.
   - Click Save to close the Query Builder dialog box and save the custom report. The report is displayed on the Reports tab under the Custom Reports option. You can run this report at any later date when needed. Options are also displayed for editing the report, copying the report, deleting the report, and sharing the report with users.

Display Fields tab

Figure 7-7: Query Builder dialog box, Display Fields tab



1. Open the Display Fields tab, and then select the field, or CTRL-click to select the multiple fields that are to be displayed in the report, and then click the Add button (>) to move the selected fields to the Selected list.

If you are copying an existing report, then when the Display Fields tab opens, the Selected list is already populated with a list of fields. You can select one or more of these fields, and then click the Remove button (<) or Remove All button (<<)to move any or all of these fields back to the Available list.

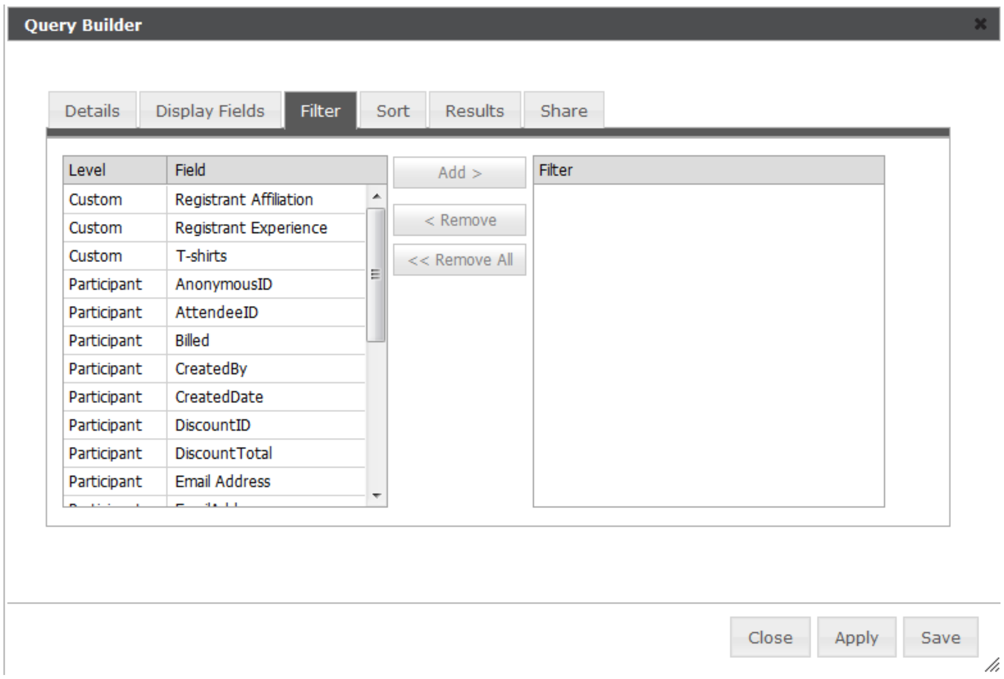
2. The fields are displayed in the report in the order in which they are listed in the Selected list. Optionally, to change the order of the fields, select a field and then click Move Up/ Move Down as needed.
3. Optionally, open the Results tab, and then click Preview to run the report immediately and view the results on the tab.

The Results tab is an EMS Browser page. See *"An EMS Regics Browser Page" on page 22.*

4. Do one of the following:
    - Click Apply to save the custom report without closing the Query Builder dialog box. You can then continue with any other configuration for the custom report as needed.
    - Click Save to close the Query Builder dialog box and save the custom report. The report is displayed on the Reports tab under the Custom Reports option. You can run this report at any later date when needed. Options are also displayed for editing the report, copying the report, deleting the report, and sharing the report with users.

Filter tab

Figure 7-8: Query Builder dialog box, Filter tab



1. Open the Filter Fields tab, and then select each field that is to define the report and click the Add button (>) to move the field to the Filter list.

   For each field that you select, a dialog box opens in which you must specify the allowed values for the field. After you specify the values and click OK, the dialog box closes, and the selected field is moved to the Filter list.

If you are copying an existing report, then when the Filter tab opens, the Filter list is already populated. You can select one or more of these fields and then click the Remove button (<) or the Remove All button (<<) to move any or all of these fields back to the Available list. If you want to use the same Filter fields in the "new" report, but with different values, you cannot change the values directly. You must move the appropriate fields back to the Available list, then select the fields again to change their values.

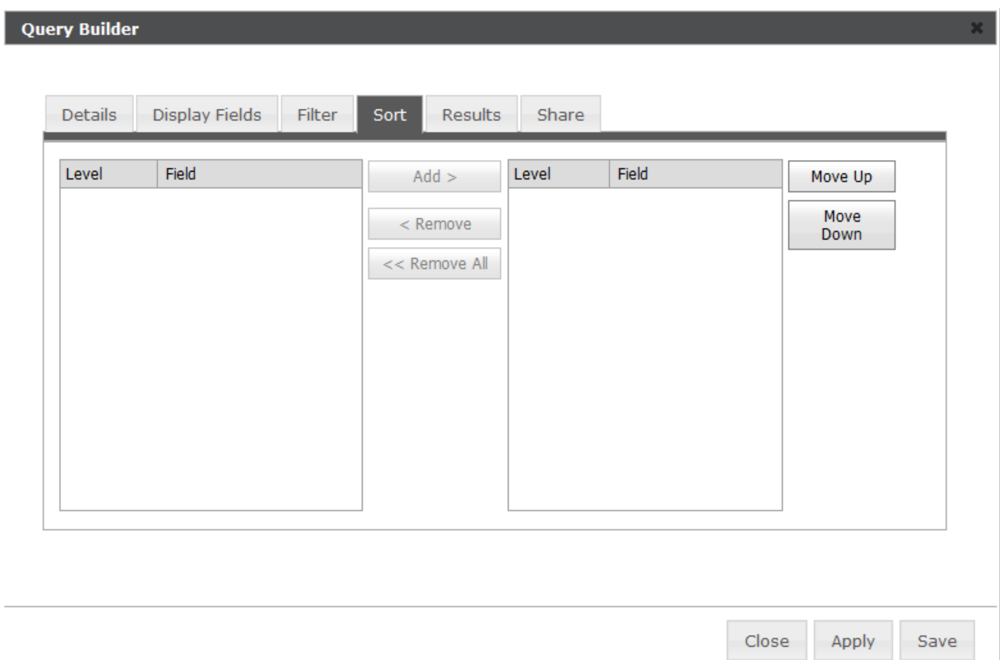
2. Optionally, open the Results tab, and then click Preview to run the report immediately and view the results on the tab.

The Results tab is an EMS Browser page. See *"An EMS Regics Browser Page" on page 22.*

3. Do one of the following:
   - Click Apply to save the custom report without closing the Query Builder dialog box. You can then continue with any other configuration for the custom report as needed.
   - Click Save to close the Query Builder dialog box and save the custom report. The report is displayed on the Reports tab under the Custom Reports option. You can run this report at any later date when needed. Options are also displayed for editing the report, copying the report, deleting the report, and sharing the report with users.

Sort tab

Figure 7-9: Query Builder dialog box, Sort tab



1. Open the Sort tab, select the field or CTRL-click to select the multiple fields by which the report results are to be sorted, and then click the Move button (>) to move the fields to the Selected list.

If you are copying an existing report, then when the Sort tab opens, the Sort list is already populated. You can select one or more of these fields and then click the Remove button (<) or the Remove All button (<<) to move any or all of these fields back to the Available list.

2. The order in which the fields are displayed in the Selected list indicates the order by which the report results will be sorted. Optionally, to change the order of the fields, select a field and then click Move Up/Move Down as needed.

3. Optionally, open the Results tab, and then click Preview to run the report immediately and view the results on the tab.

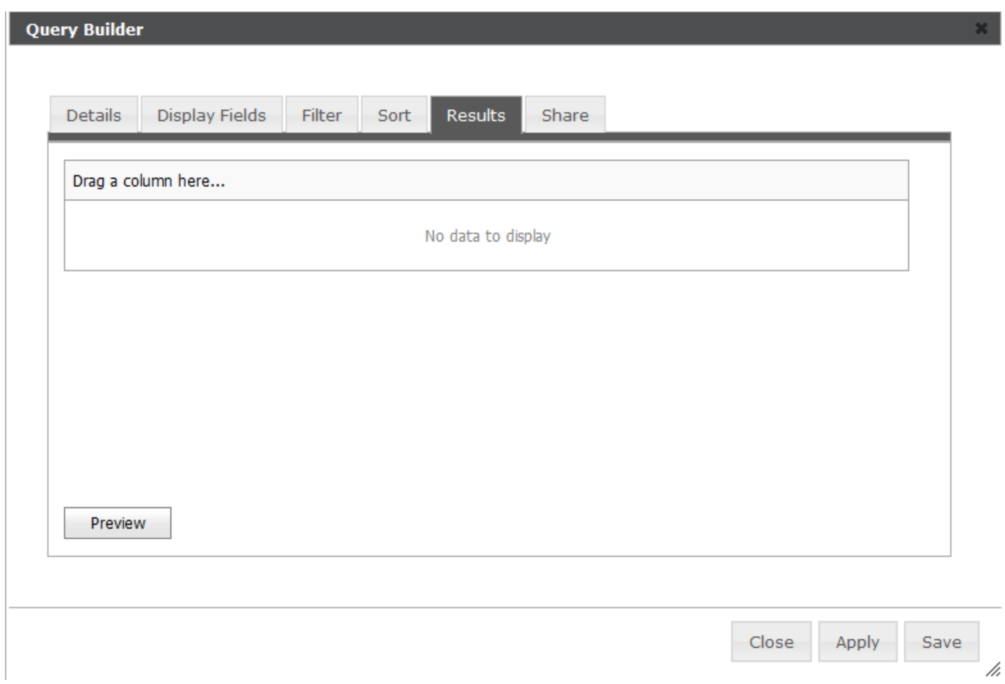
The Results tab is an EMS Browser page. See *"An EMS Regics Browser Page" on page 22.*

4. Do one of the following:

   - Click Apply to save the custom report without closing the Query Builder dialog box. You can then continue with any other configuration for the custom report as needed.
   - Click Save to close the Query Builder dialog box and save the custom report. The report is displayed on the Reports tab under the Custom Reports option. You can run this report at any later date when needed. Options are also displayed for editing the report, copying the report, deleting the report, and sharing the report with users.

Results tab

Figure 7-10: Query Builder dialog box, Results tab



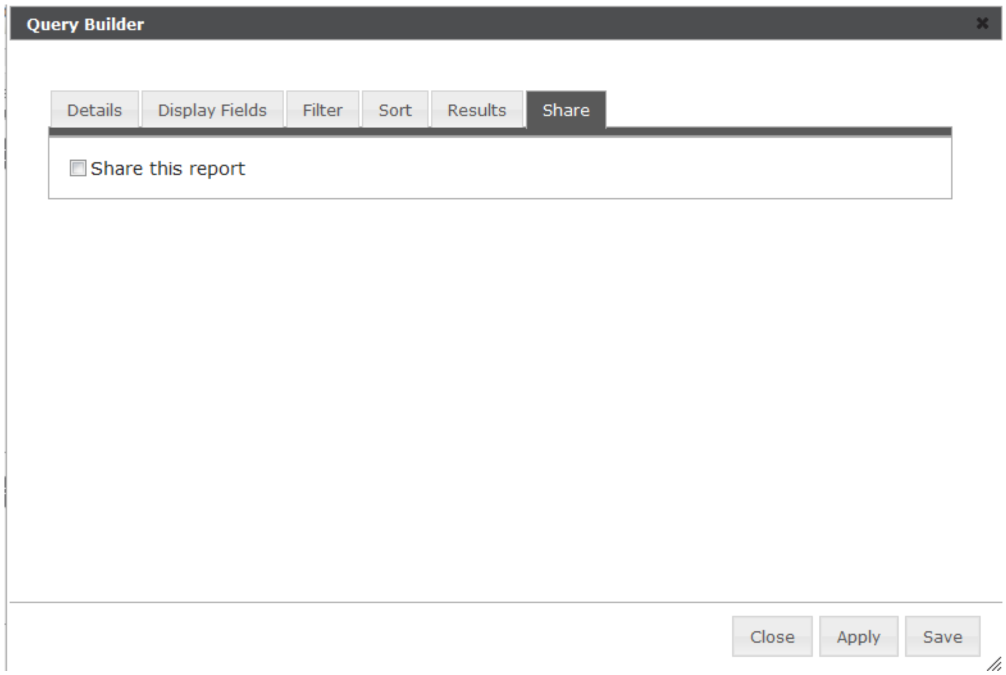
When you are creating or editing a custom report, before you save the report, you can open the Results tab, and then click Preview to run the report immediately and view the results on the tab. You can determine if the results meet your expectations, and them modify the report accordingly before you save report.

The Results tab is an EMS Browser page. *See “An EMS Regics Browser Page” on page 22.*

Share tab

You use the options on the Share tab create a custom URL for the custom report. You can then forward this URL to any user so that you can share real-time EMS Regics data with the user.

Figure 7-11: Query Builder dialog box, Share tab



1. Click Share this Report.

   The Share tab is updated with three fields:

   - Report Link—The automatically generated URL for the report. You can forward this URL to any user so that you can share real-time EMS Regics data with the user.

Optionally, you can click View next to this link to open an onscreen preview of the custom report. The report that you see when you click View is identical to the report that a user sees when they open the report from this URL. The report has options for printing the onscreen preview, exporting the list fields to a file such as a PDF, and so on. Place your mouse pointer on a toolbar button to open tooltip text for the button.

   - Report Password—Optional. If you want to limit the online access to this shared report, then you can enter a report password. You must remember to forward this password as well as the URL for a user to have access to the report.

- Report Format—The format in which the report is displayed when the user opens the report.

2. Optionally, open the Results tab, and then click Preview to run the report immediately and view the results on the tab.

The results tab is an EMS Browser page. See "An EMS Regics Browser Page" on page 22.

3. Do one of the following:
   - Click Apply to save the custom report without closing the Query Builder dialog box. You can then continue with any other configuration for the custom report as needed.
   - Click Save to close the Query Builder dialog box and save the custom report. The report is displayed on the Reports tab under the Custom Reports option. You can run this report at any later date when needed. Options are also displayed for editing the report, copying the report, deleting the report, and sharing the report with users.

To create a custom report by copying an existing report

1. Search for and open the event registration form or survey in the Event Dashboard.

   See "To search for an event registration form or survey and open it in the Event Dashboard" on page 78.

2. Open the Reports tab. See Figure 7-4 on page 168.

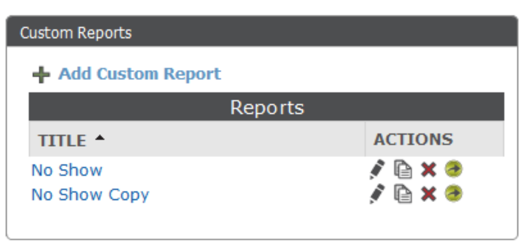
3. Click the Copy icon next to the custom report that you are copying.

   A message opens, indicating that the selected report was copied.

4. Click OK.

   The message closes. A copy of the copied custom report is displayed under the Custom Reports section. The copied report is indicated with the word "Copy" at the end of the title.

Figure 7-12: Copied custom report



5. Click the Edit icon next to the copied custom report.

   The Query Builder dialog box opens. The Details tab is the active tab. See Figure 7-5 on page 169.

6. Edit the copied report as necessary. See:

   - "Details tab" on page 170.
   - "Display Fields tab" on page 171.
   - "Filter tab" on page 172.
   - "Sort tab" on page 173.
   - "Results tab" on page 174.
   - "Share tab" on page 175.

This step list the tabs in the order in which they appear on the Query Builder dialog box; however, you can enter the information for the custom report in any order that meets your business needs.

7. Click Save.

   The Query Builder dialog box closes and the custom report is saved. The report is displayed on the Reports tab under the Custom Reports option. Options are also displayed for editing the report, copying the report, deleting the report, and sharing the report with users.

To edit a custom report

1. Search for and open the event registration form or survey in the Event Dashboard.

   See "To search for an event registration form or survey and open it in the Event Dashboard" on page 78.

2. Open the Reports tab. See Figure 7-4 on page 168.

3. Click the Edit icon next to the custom report that you are editing.

   The Query Builder dialog box opens. The Details tab is the active tab. See Figure 7-5 on page 169.

4. Edit the report as necessary. See:

   - "Details tab" on page 170.
   - "Display Fields tab" on page 171.
   - "Filter tab" on page 172.

- “Sort tab” on page 173.
- “Results tab” on page 174.
- “Share tab” on page 175.

This step list the tabs in the order in which they appear on the Query Builder dialog box; however, you can enter the information for the custom report in any order that meets your business needs.

5. Click Save.

   The Query Builder dialog box closes and the custom report is saved. The report is displayed on the Reports tab under the Custom Reports option. Options are also displayed for editing the report, copying the report, deleting the report, and sharing the report with users.

To delete a custom report

1. Search for and open the event registration form or survey in the Event Dashboard.

   See “To search for an event registration form or survey and open it in the Event Dashboard” on page 78.

2. Open the Reports tab. See Figure 7-4 on page 168.
3. Click the Delete icon next to the custom report that you are deleting.

   A message opens, asking you if you are sure that you want to delete the report.

4. Click OK.

   The message closes. A second message opens, indicating that the selected report was deleted.

5. Click OK.

   The second message closes. The custom report is deleted from the Event Dashboard.

To view the history for a custom report

The History tab is available for a custom report only if the report has been saved.

1. Search for and open the event registration form or survey in the Event Dashboard.

   See “To search for an event registration form or survey and open it in the Event Dashboard” on page 78.

2. Open the Reports tab. See Figure 7-4 on page 168.

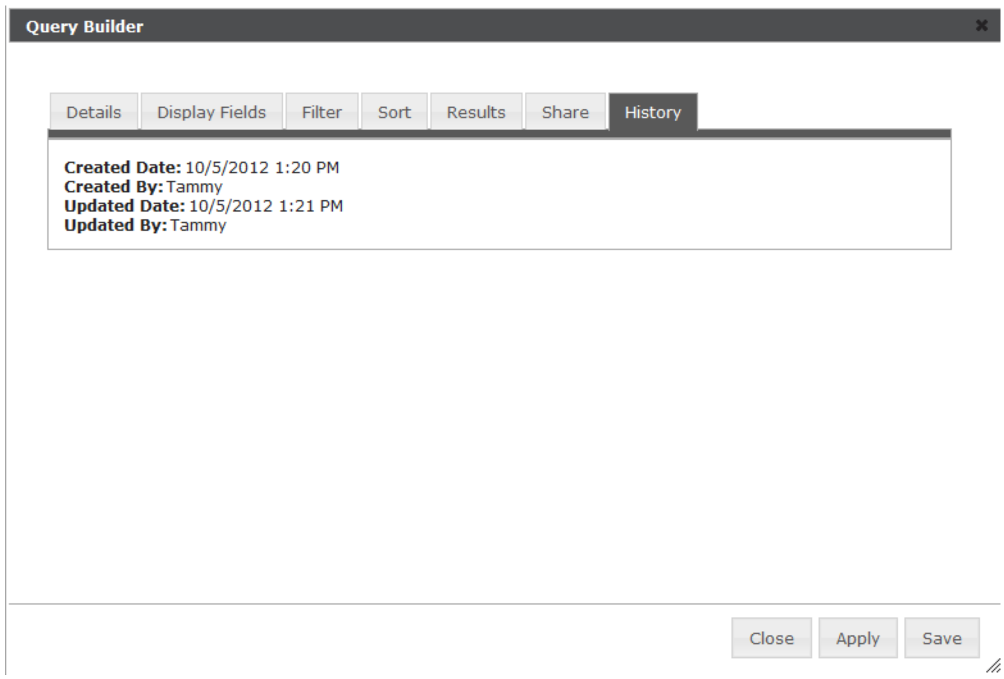
3. Click the Edit icon that is next the saved custom report for which you are viewing the history.

   The Query Builder dialog box opens. The Details tab is the active tab. See Figure 7-5 on page 169.

4. Open the History tab.

   The History tab is a view-only tab that shows the original creation date of the custom report and the name of the user who created the custom report. The tab also shows last date that the report was edited as well as the name of the user who last edited the report.

Figure 7-13: Query Builder dialog box, History tab



To run, export, and/or print a custom report

1. Search for and open the event registration form or survey in the Event Dashboard.

   See "To search for an event registration form or survey and open it in the Event Dashboard" on page 78.

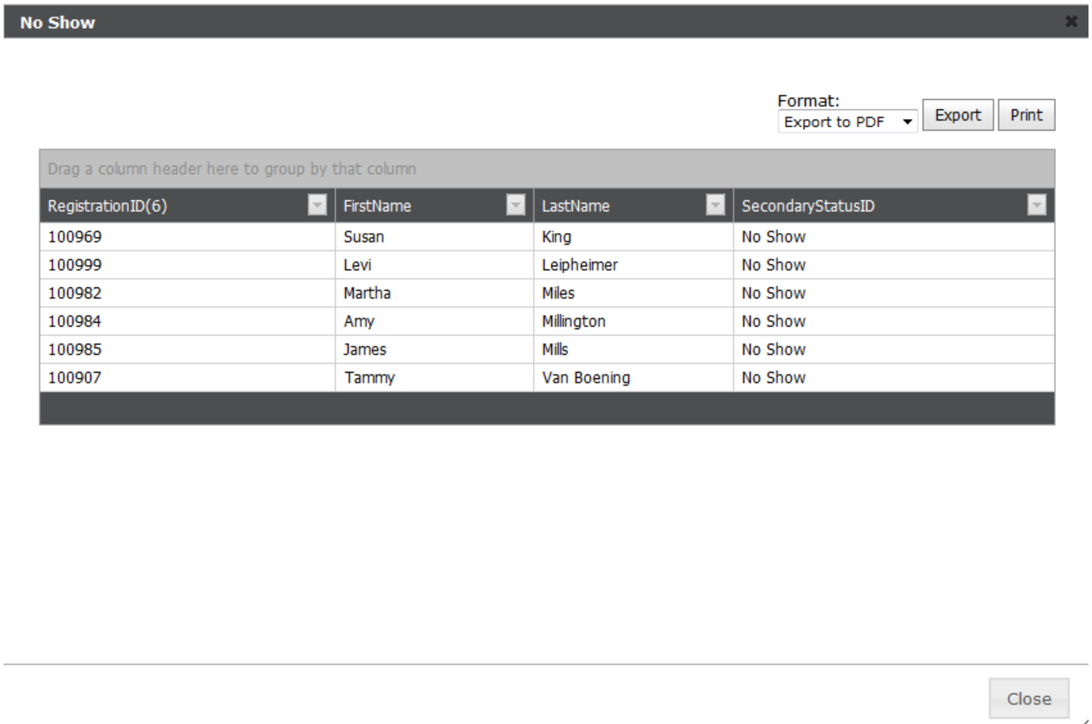
2. Open the Reports tab. See Figure 7-4 on page 168.

3. Click the title of the custom report that you are generating

   The report is generated and displayed onscreen in a standalone Results tab. See Figure 7-14 on page 180.

The Results tab is an EMS Browser page. See *"An EMS Regics Browser Page" on page 22.*

Figure 7-14: Custom report example



RegistrationID(6)	FirstName	LastName	SecondaryStatusID
100969	Susan	King	No Show
100999	Levi	Leipheimer	No Show
100982	Martha	Miles	No Show
100984	Amy	Millington	No Show
100985	James	Mills	No Show
100907	Tammy	Van Boening	No Show

4. Optionally, do one or both of the following:
   - To export the report to a file, on the Format dropdown list, select the file format Available options are PDF (the default value), XLS (the Microsoft Excel format), and CSV (comma separated values format).

     A message opens, asking you if you want to open or save the ReportGrid file. Do one of the following:
     - To view the file online, click Open. (You can rename and save the file to a location of your choice after you open it.)
     - To save the file to a location of your choice (you can also rename the file), click Save.
   - To print the report, click Print. An onscreen preview of the report is generated.

The report has options for printing the onscreen preview, exporting the list fields to a file such as a PDF, and so on. Place your mouse pointer on a toolbar button to open tooltip text for the button.

Appendix A
EMS Regics System Parameters

This appendix details the EMS Regics system parameters that you can configure as the EMS Regics administrator.

This appendix covers the following topics:

EMS Regics System Parameters - Email

Parameter	Description
Account to Use for Sending Email	The email account that is used to send emails to the participants in your EMS Regics system.
Email Address of Sender	The email address that is displayed by default in the Sender Email field for any email that you send to participants in your EMS Regics system. A user can always edit this value.
Name of Email Sender	The name of that is displayed by default in the Sender Name field for any email that you send to participants in your EMS Regics system. A user can always edit this value.
Password of Email Account	The password that is used to access the Account to Use for Sending Email.
SMTP - Use SSL	Indicates whether to use a Secure Socket Layer port with the SMTP email account.
SMTP server	The server for the SMTP email account.
SMTP server port number	The number of the port that the SMPT server uses.

EMS Regics System Parameters - Labels

Parameter	Description
Checkout Label on an event/survey form	The default label for the Checkout section for an event registration form or survey.
Confirmation Label on event/survey form	The default label for the Confirmation section for an event registration form or survey.
Personal Information Label on event/survey form	The default label for the Personal Information section for an event registration form or survey.
Secondary Status Plural Label	System label defined for secondary statuses.
Secondary Status Singular Label	System label defined for secondary statuses.

EMS Regics System Parameters - Portal Authentication

Parameter	Description
Portal Authentication Cookie Key	The value for the portal authentication cookie.
Portal Authentication Method	The method by which portal authentication for your EMS Regics system is carried out.
Portal Authentication Variable	The variable that is used for the selected portal authentication method.

EMS Regics System Parameters - Registration Form

Parameter	Description
Terms of Use Link (Enter url to your terms of use)	The URL to your organization’s Privacy policy. The link to your organization’s Privacy policy is displayed as “Privacy Policy” on the first page of an online event registration form.
Confirmation Label on event/survey form	The URL to your organization’s Terms of Use policy. The link to your organization’s Terms of Use policy is displayed as “Terms of Use” on the first page of an online event registration form.

EMS Regics System Parameters - Security

Parameter	Description
Allow Event Owner to create a new user account	Indicates whether standard users should be able to create other standard user accounts (delegate standard user accounts).
Enable CAPTCHA. This feature requires users to enter a distorted phrase before submitting an event.	Enables additional protection from malicious programs that automatically submit registration forms or surveys by having a user enter a specific distorted phrase on the registration form/ survey that must be verified before the registration form/survey can be submitted.
Force user to change password when creating a user account (Set to no if you are exclusively using LDAP for authentication)	If set to Yes, then after a user logs in for the *first* time to EMS Regics, the user is required to change his/her login password before continuing in the system.
Minimum Length Required for a New Password	The minimum number of characters required for a new participant password.
Number of attempts to login before a user is locked out. (Zero = unlimited)	The number of attempts for a user to log in to an event registration form or survey before the user is locked out. Access to the form or survey must be reset by the EMS Regics system administrator.
The minimum number of non- alphanumeric characters for a user password.	The minimum number of special characters required for a participant password. An underscore is a considered to be a special character, but a space is not.

EMS Regics System Parameters - System Configuration

Parameter	Description
Application Timezone	Sets the time zone for the application to the indicated value
Max results displayed before pagination is used	The maximum number of results to be returned by a search on a single page. After this number is exceeded, pagination is implemented.

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Credit Card Payment Processing in EMS Regics

EMS Regics 3.0

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EVENT MANAGEMENT SYSTEMS
Reserve • Register • Promote

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Dean Evans and Associates LLC
6465 Greenwood Plaza Blvd
Suite 600
Centennial, CO 80111

Credit Card Payment Processing in EMS Regics

Introduction

EMS Regics can integrate with various third party hosted payment page providers to provide a secure, seamless and low-cost option for organizations wanting to add credit card payment options to their registration process without having to worry about credit card security and Payment Card Industry (PCI) rules. Because credit card data isn't actually captured, transmitted or stored by our application, EMS Regics is not classified as a payment application under PCI rules and exempt from PCI compliance standards. Third party hosted payment page solutions, however, are categorized as payment applications and service providers marketing this capability are held to the PCI standards. These providers are required to host their solutions within PCI compliant data centers and their applications must be PA-DSS certified.

This document outlines the EMS Regics credit card payment process, options and configuration steps.

Customer Support

Unlimited toll-free customer support is available to EMS users who have a current Annual Service Agreement (ASA). If you are unable to resolve a problem or answer a question by reading the EMS documentation, contact us at:

Email:	**support@dea.com**
Web:	**www.dea.com**
Phone:	**(800) 288-4565**
Fax:	**(303) 796-7429**

Important: Please note that support for the EMS Regics credit card processing module extends only to the configuration of the EMS Regics specific items below. Please consult your merchant/service provider for any questions or issues related to the setup or support of your provider's hosted payment page option.

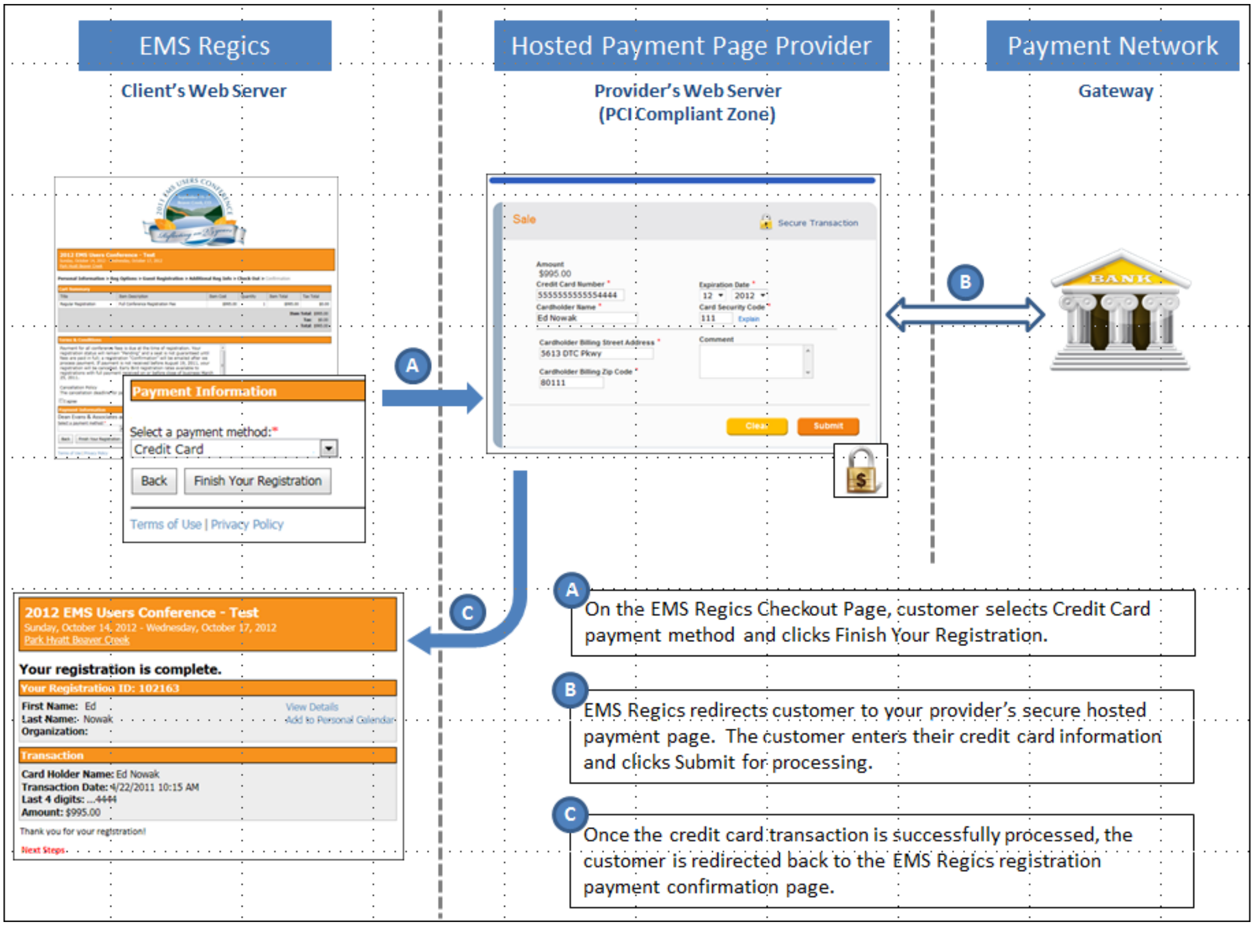
Currently Supported 3rd Party Hosted Payment Page Service Providers

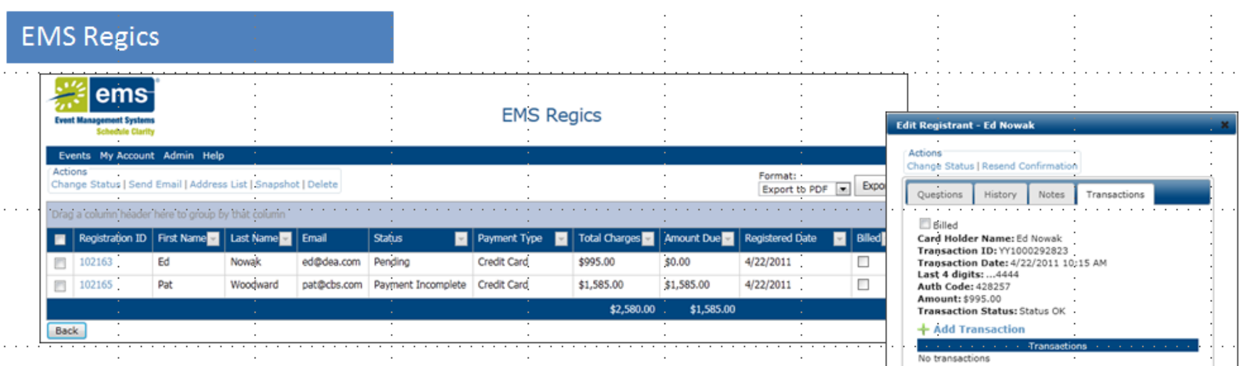
- Authorize.Net
- Intuit
- PayPal***
- TouchNet***
- Nelnet
- MercuryNet***
- Official Payments
- TransFirst
- CASHNet

***Refunds supported

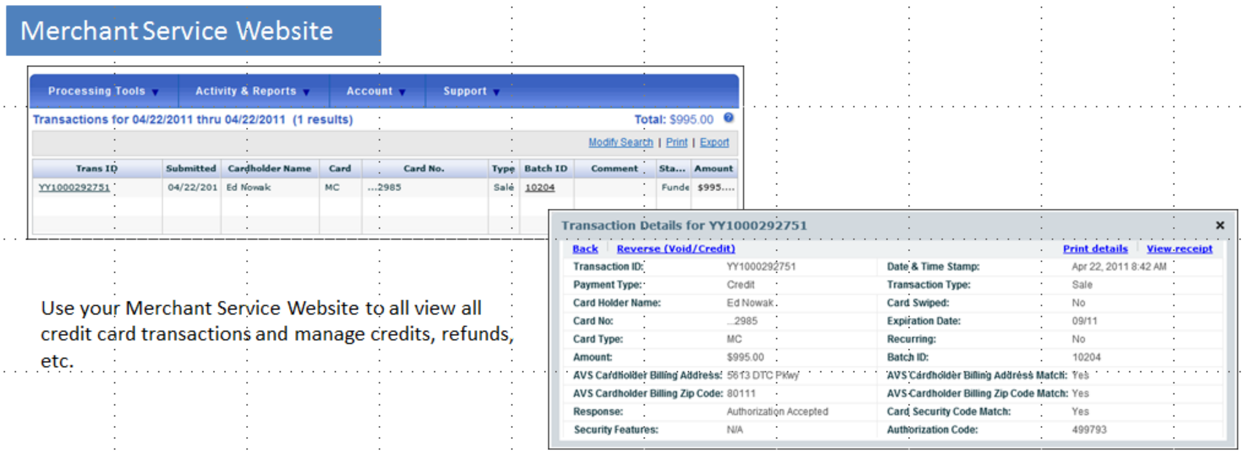
Please contact your Dean Evans and Associates LLC. Account Manager to inquire about integration possibilities with other service providers. **Note: Your service provider must have a hosted payment page option in order for EMS Regics to integrate with their solution.**

How it Works





Use EMS Regics to view and manage registrant/registration information including payment details such as status, payment type and amount due.



Configuring Gateway Connections and Payment Types

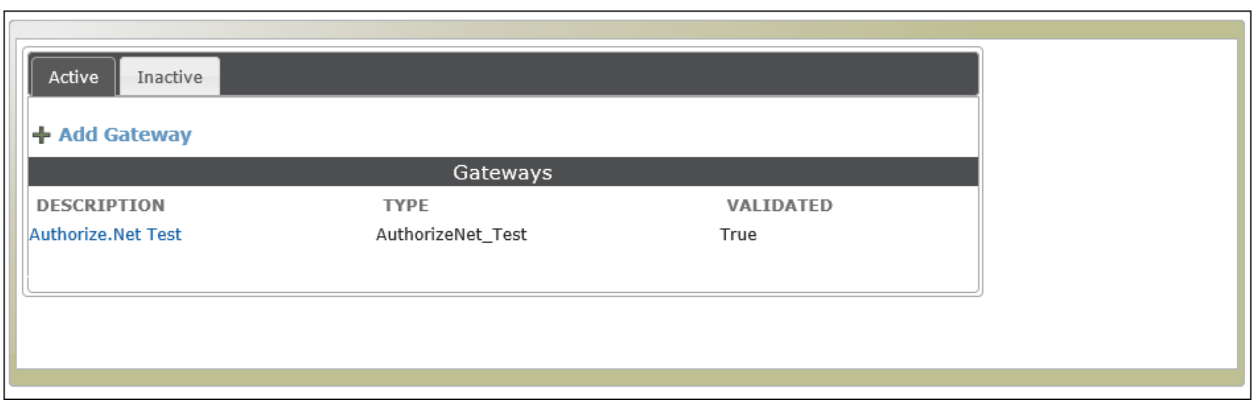
Adding a Gateway Connection

Important: Before beginning the installation process, please verify that you have all of the information necessary to configure your gateway connection. Please see the Gateway Setup Information section for a screenshot of required fields.

1. Install EMS Regics. Please refer to *EMS Regics Installation Instructions* for information on how to install EMS Regics.
2. Log into EMS Regics with an administrator level account.
3. Enter the following URL into your browser:

   http://[ServerName]/EMSRegics/GatewayConfiguration.aspx
   (replace [ServerName] with the name of your web server)

   The following screen will appear:

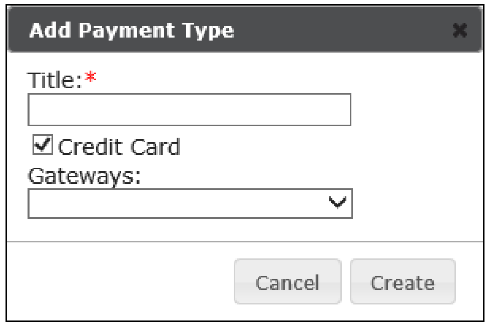


4. Click **Add Gateway**.
5. Select your gateway from the **Choose Gateway** dropdown.
6. Complete the required information. Please see the Gateway Setup Information section for a screenshot of required fields.

7. Click the **Make Verification Call** button. If an error is encountered please contact your merchant/service provider's support department.
8. Click the **Save** button.

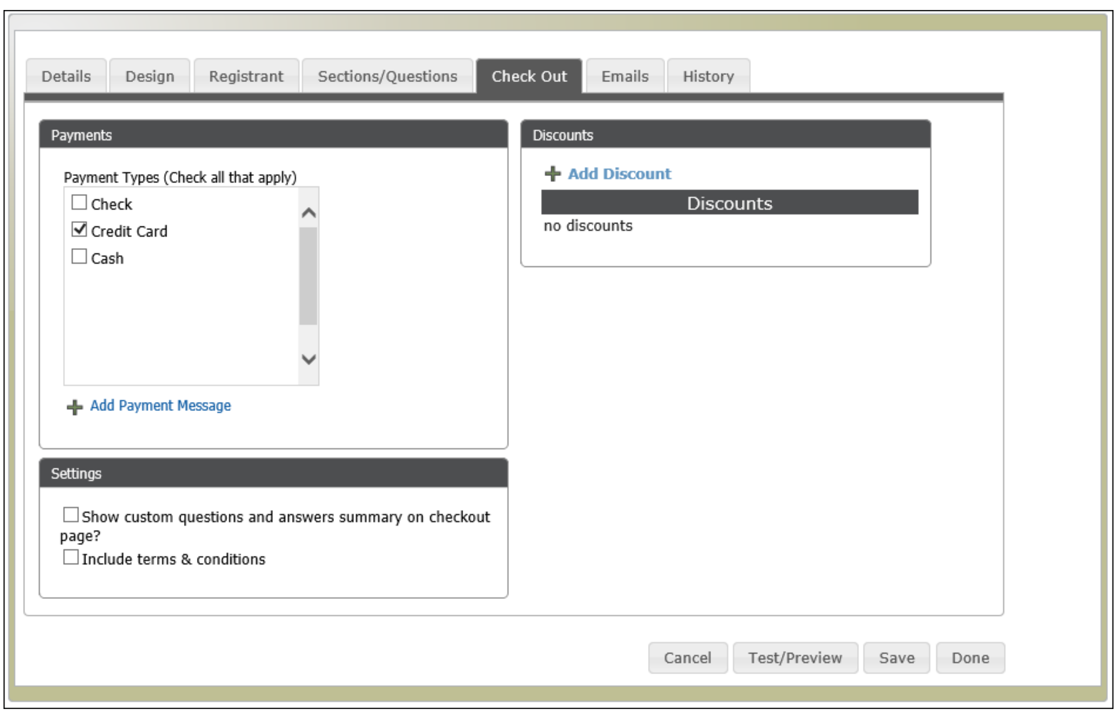
Adding a Payment Type

1. Within EMS Regics, go to **Admin > Configuration > Payment Type**.
2. Click **Add Payment Type**. The following screen will appear:



3. Enter a **Title**.
4. Select the **Credit Card** checkbox.
5. In the **Gateways** dropdown, select the Gateway configured in the previous section.
6. Click the **Create** button.

Once configured, valid payment types are available when creating new events in EMS Regics. Please see the *EMS Regics User Guide* for information on how to create an event.

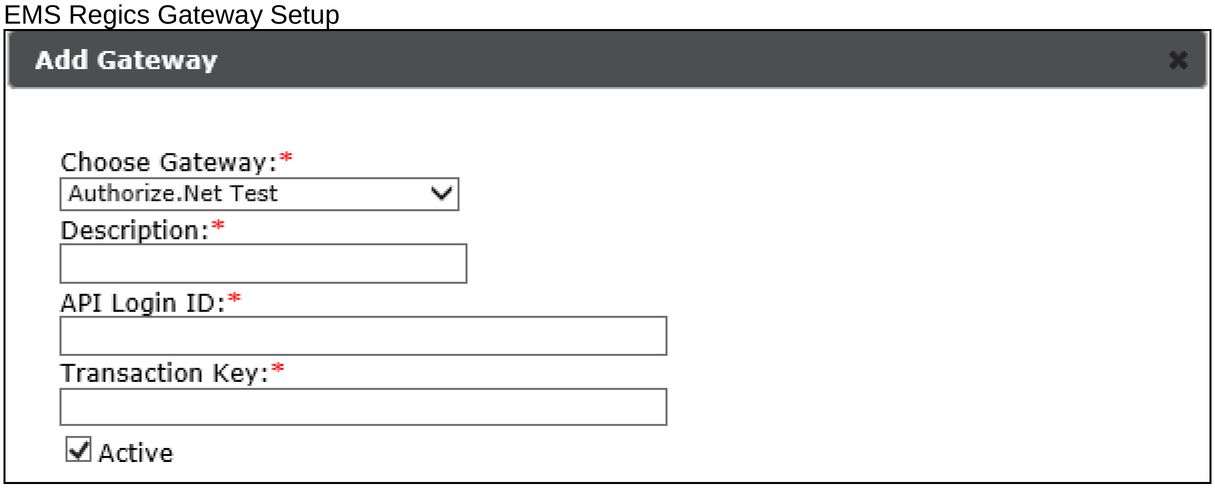


Gateway Setup Information

Authorize.Net

Server Integration Method information:
https://developer.authorize.net/integration/fifteenminutes/#hosted

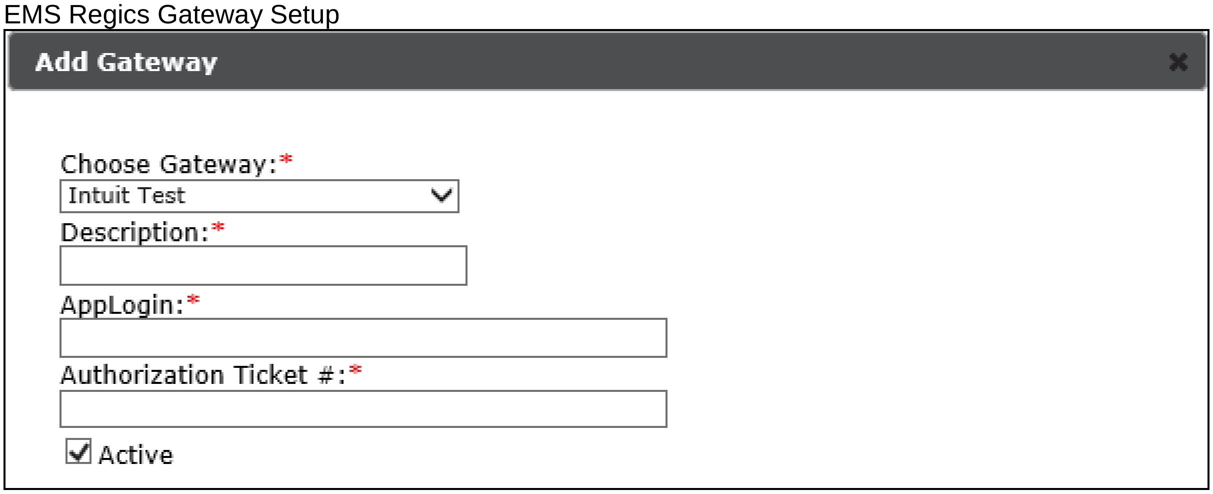
EMS Regics Gateway Setup



Intuit

Hosted Pay Page information:
http://qbsdk.developer.intuit.com/0085_QuickBooks_Windows_SDK/qbms/0010_Hosted_PayPage

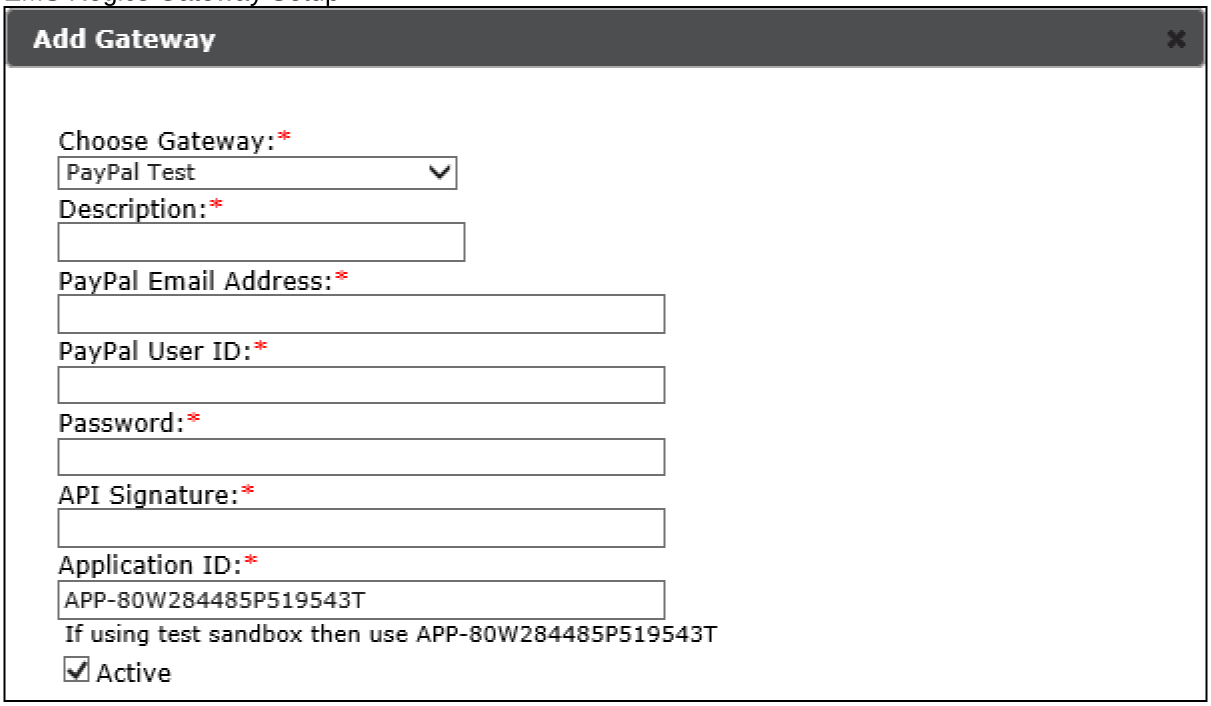
EMS Regics Gateway Setup



PayPal

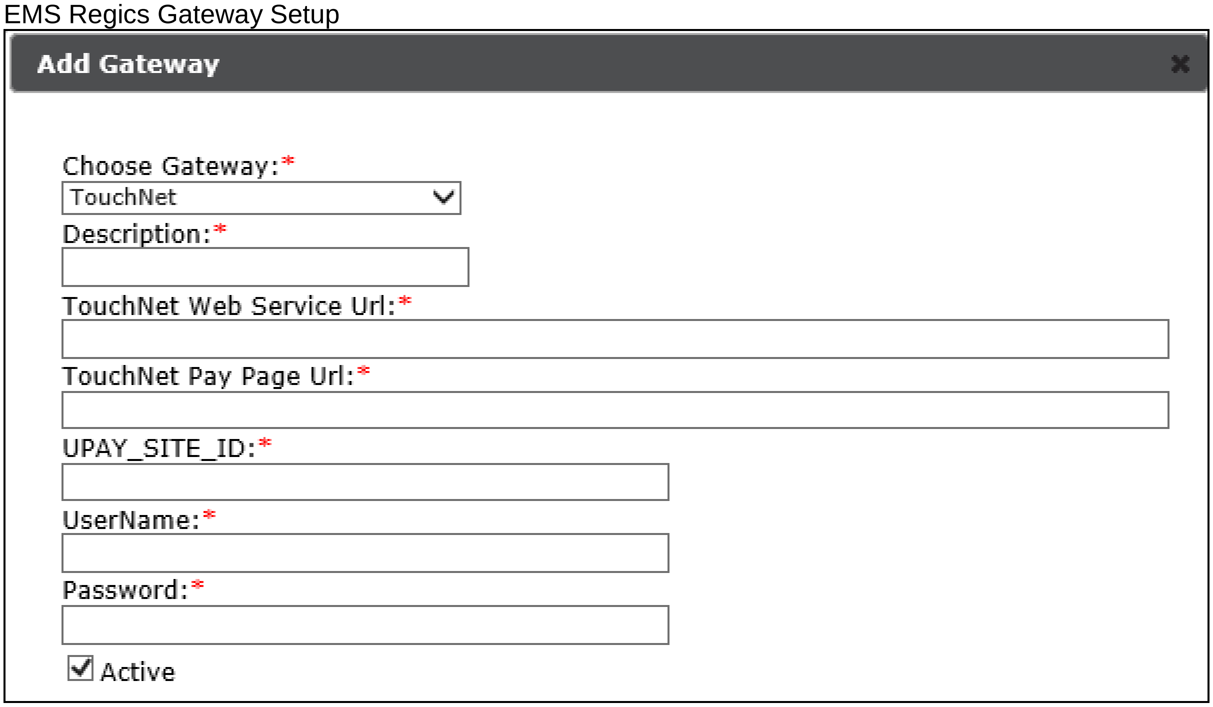
Adaptive Payments information:
https://cms.paypal.com/us/cgi-bin/?cmd=_render-content&content_ID=developer/e_howto_api_APIntro

EMS Regics Gateway Setup



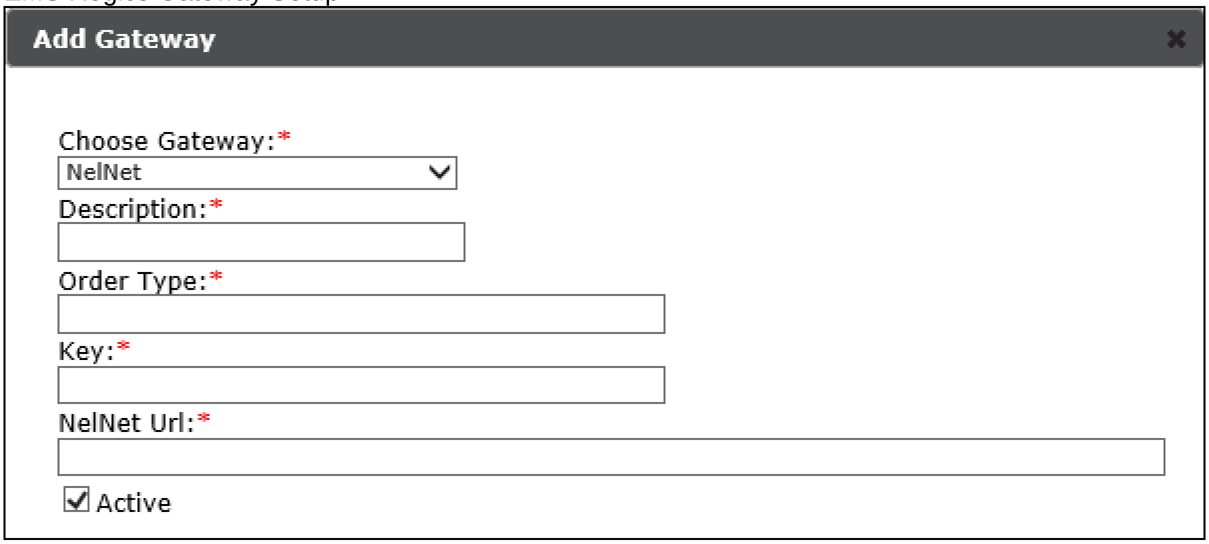
TouchNet

EMS Regics Gateway Setup



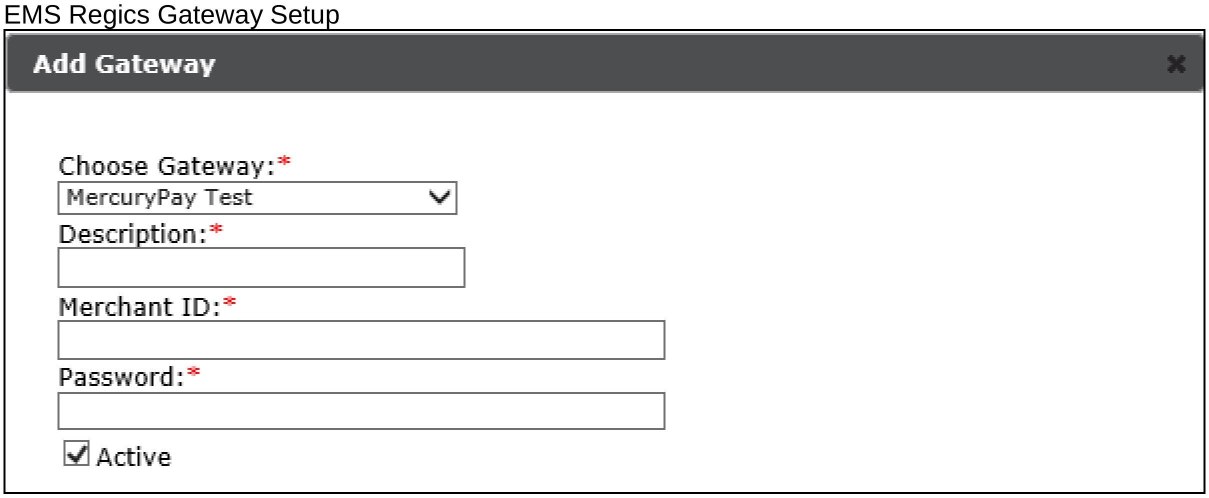
NelNet

EMS Regics Gateway Setup



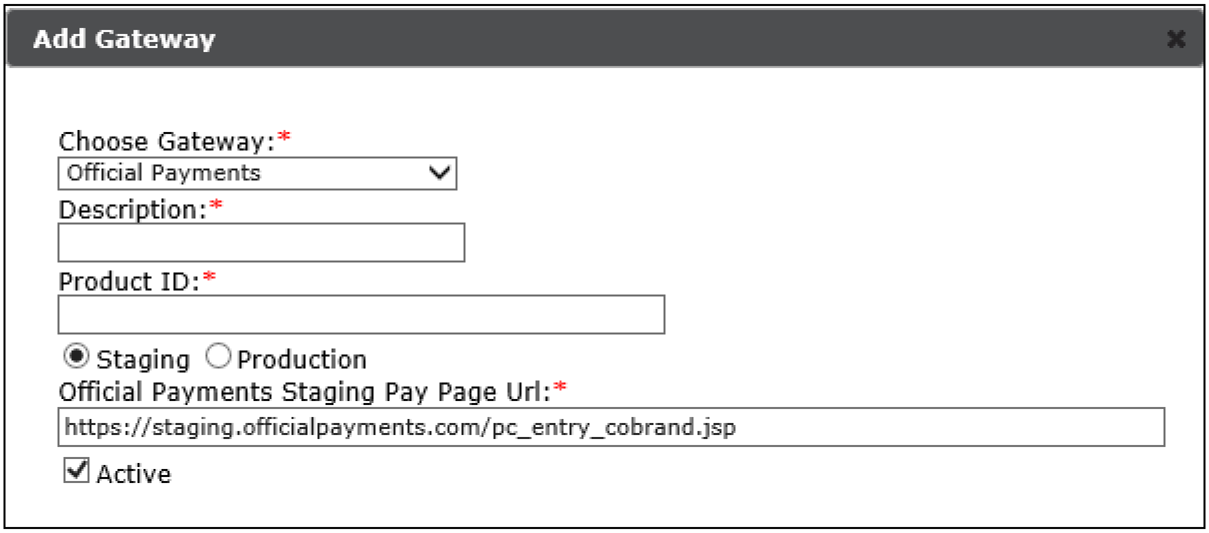
MercuryNet

EMS Regics Gateway Setup



Official Payments

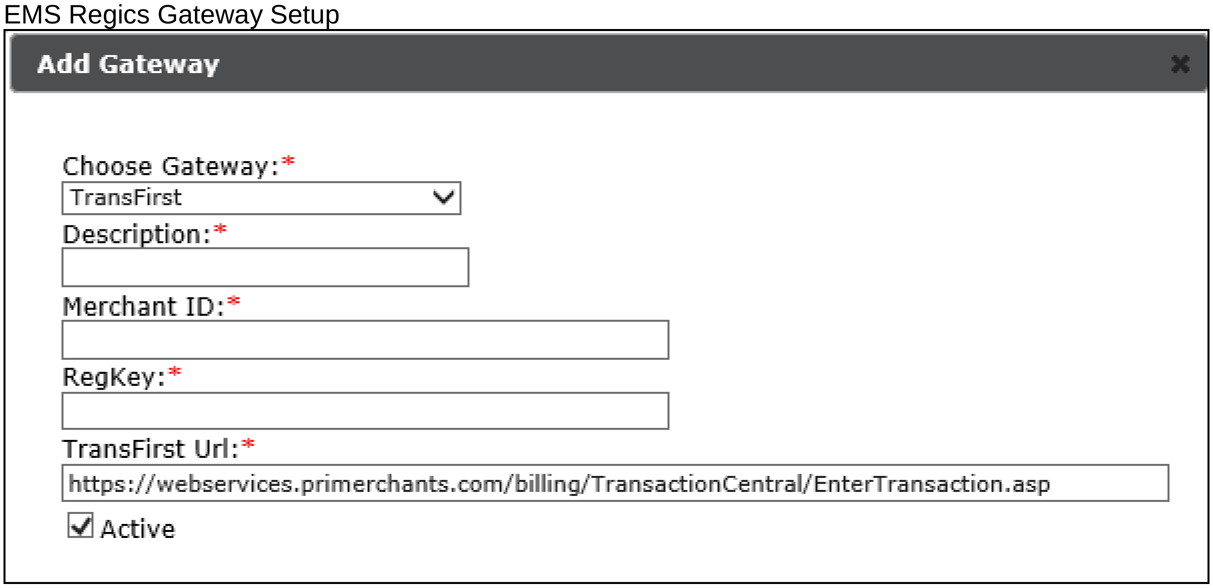
EMS Regics Gateway Setup



TransFirst

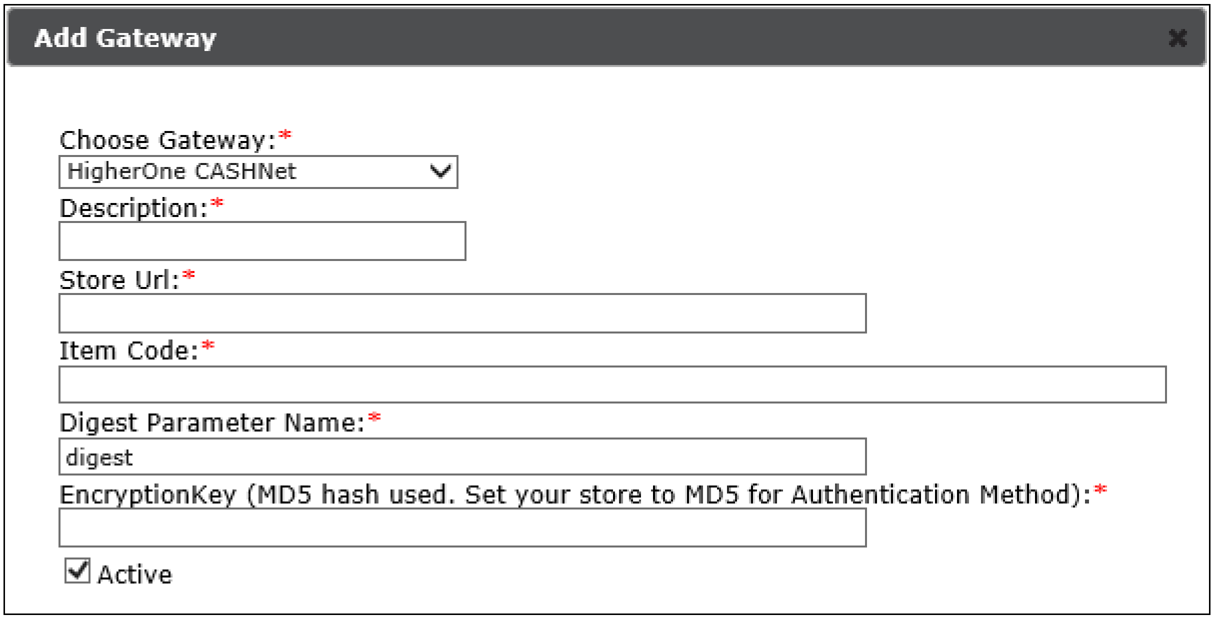
Transaction Express information:
https://www.transfirst.com/products/online-solutions/payment-gateway.htm

EMS Regics Gateway Setup



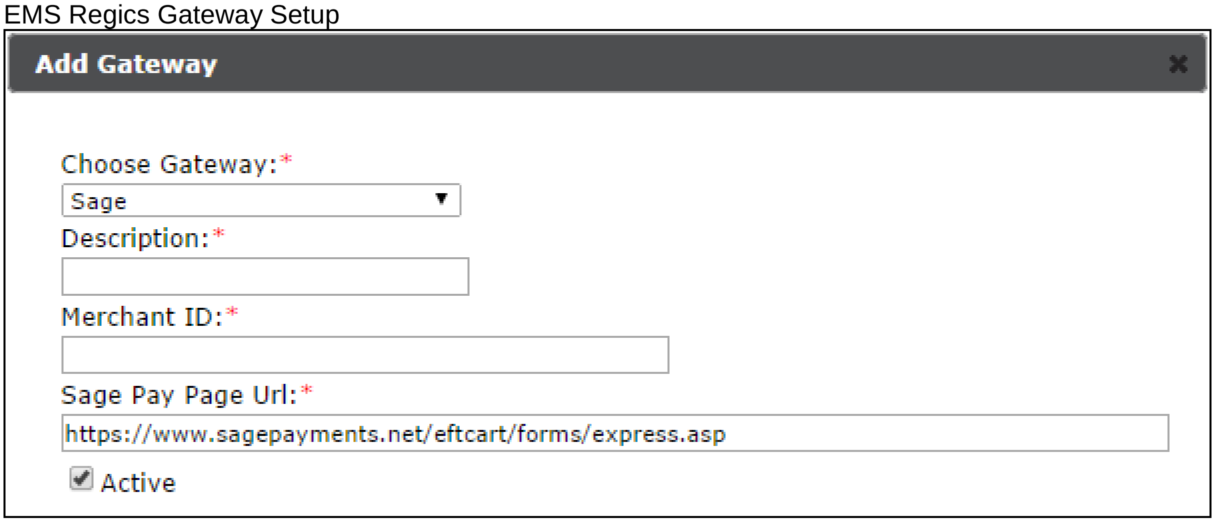
CASHNet

EMS Regics Gateway Setup



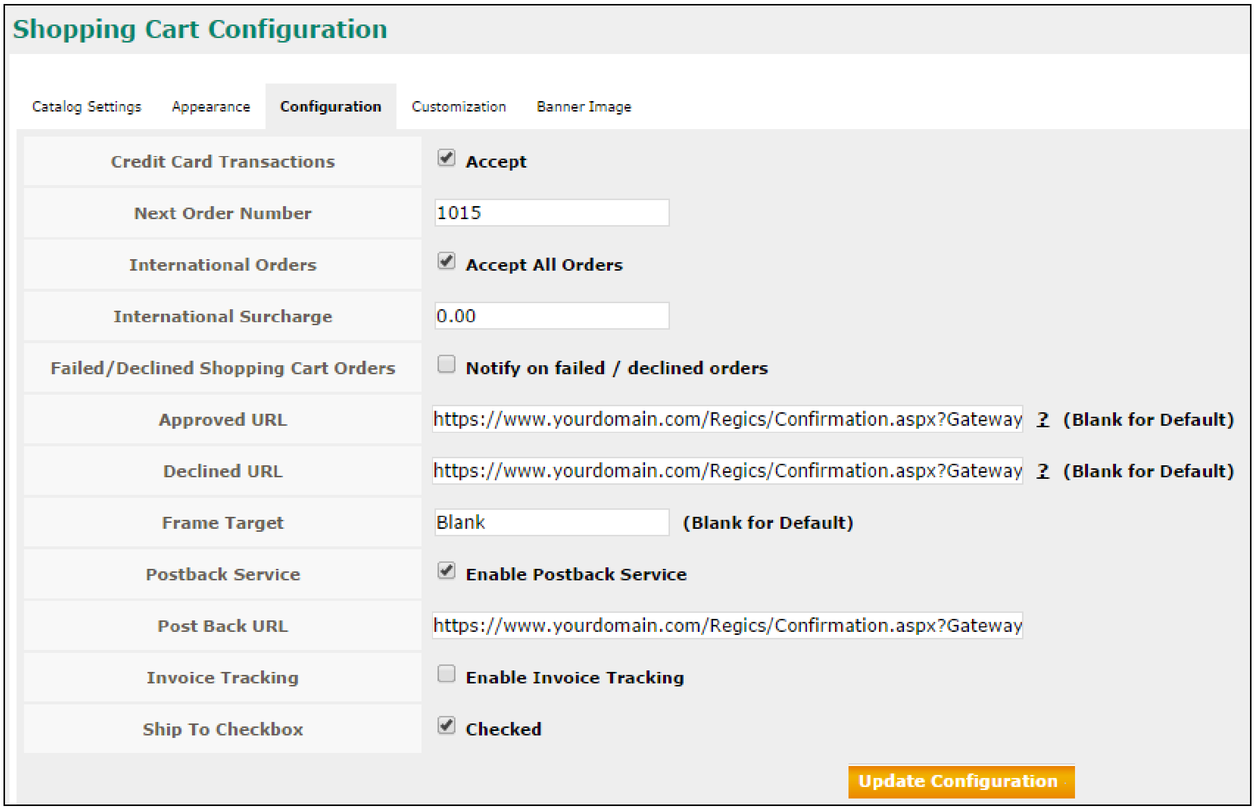
Sage Payment Solutions – Express Pay

EMS Regics Gateway Setup



Setting up the Sage Payment Gateway
1. Login to the Virtual Terminal:
https://www.sagepayments.net/virtualterminal/frmLogin.aspx

2. Go to Shopping Cart>Configuration then select the configuration tab. Paste the below link (with the proper domain) into the Approved URL, Declined URL and Post Back URL.
https://www.yourdomain.com/Regics/Confirmation.aspx?GatewayType=13


Shopping Cart Configuration
Catalog Settings
Appearance
Configuration
Customization
Banner Image
Credit Card Transactions
Accept
Next Order Number
1015
International Orders
Accept All Orders
International Surcharge
0.00
Failed/Declined Shopping Cart Orders
Notify on failed / declined orders
Approved URL
https://www.yourdomain.com/Regics/Confirmation.aspx?Gateway
? (Blank for Default)
Declined URL
https://www.yourdomain.com/Regics/Confirmation.aspx?Gateway
? (Blank for Default)
Frame Target
Blank
(Blank for Default)
Postback Service
Enable Postback Service
Post Back URL
https://www.yourdomain.com/Regics/Confirmation.aspx?Gateway
Invoice Tracking
Enable Invoice Tracking
Ship To Checkbox
Checked
Update Configuration