How to Create an Event in RegOnline

1. To create an event, go to https://www.regonline.com/manager/login.aspx and enter in your Student Group’s Username and Password.

Your student group’s home screen will appear. On the left you will see the “Event Information” toolbar with your folder and a “Template” folder.

2. To quickly begin setting up your event, click on “Template” on the left side of your screen.

Once there, drag and drop the “Event Template” in your group’s folder.

3. Your event’s homepage will appear. This is where you can edit your event details, change the theme, do a test registration, and view your event’s statistic. You can also copy the event at a later date if you are holding something similar.

4. To actually begin editing the template to customize for your event, select “Edit Registration Form.”
5. You are now at the Start Page and can begin creating your event. Fill in all the required information including: Event Title, Registration Form URL (the direct link you can email to your event attendees), Start and End Dates and Times, Location, Contact information, etc.

*Leave the “Event Fee” blank on this page and entering your Event Fee/Ticket as a Merchandise Item later on in the set-up process.

6. On the start page you also have the ability to specify various registrant types, assign registration rules, link to your group’s website and add a header or footer with specific information about the event.
Registrant Types allow you to create separate “categories” of registrants and then display different information to the registrant based on the Type they select. For example, suppose you expect to have members and non-members registering for your Event, by creating separate Registrant Types, attendees will only see the options and questions that are relevant to them.

To create various Registrant Types, click on “Add Registrant Type” and then fill out the pop-up form.

Once you define your Registrant Types, hit “Save & Close” and fill out any additional information on the start page you would like.

7. When you are done adding information to the start page, you can preview your page by clicking on preview at the bottom right, or simply move on to the next part of the form by clicking “Next.”
8. You will now be taken to the Personal Information Page. On this page you can select the various fields you would like to require registrants to fill-out. Simply select your fields by clicking on the boxes. You are able to select whether or not you want each field to be visible, and if it is required. *The template you are working from has the recommended fields pre-selected for you.*

![Recommended Fields](image)

9. In addition to pre-populated fields, you can also create your own custom fields if you would like to ask specific questions of your attendees. For example, if they are an Evening or Weekend program student, or if they have dietary restrictions. Also, you can ask specific questions of the various registrant types you defined earlier in the process.

To create your own custom field, click on “Add custom field.”

![Custom Field](image)

In “Name on Form” type in your question or what you would like to ask attendees to provide. To change the type of field, click on the drop-down icon next to “Check Box” and select the field type you would like. You can make the field multiple choice, 1-line or a paragraph. You can also select whether or not the field is required. If you would like to ask different questions of your different registrant types, click on “View all Registrant Types” to select who answers each question. Once you add your custom field information, click “Save & Close.” You can add as many custom fields for your event as you like.
10. Once you are finished setting up the Personal Information page, click preview to view your form so far and make sure your fields are all appearing correctly, or simply click “Next” to go on to the “Agenda” page.

11. For most event registrations, such as speakers or social events, we suggest skipping this stage and selecting “No, go to the next step.” For complex events, like conferences with breakout sessions, you may want to select “Yes, Add Agenda Item.” If you would like to know more about adding agenda items, contact your group advisor in the Evening Weekend Student Services office.
12. The next step is the Merchandise Page. Here is where you will add the tickets for your events and sell any additional items, like t-shirts or bus tickets. You can also change the title of the page and how it will appear to registrants under “Page Options.” To change the title and price of the event, click on “Event Ticket” and update the amount and “Name on Form” in the pop-up window.

To see additional fields to limit the quantity of items or add a discount code, click on “Advanced.” Once you are done setting up the event or item to sell, click “Save & Close.”
To add additional types of tickets, add meals or bus tickets, sell shirts, etc., click on “Add Merchandise Item” and repeat the above process.

Once you add all of your tickets and items, click on “Preview” to view the Ticket form. Click on “Edit” to close the preview view and continue.

13. This is the checkout page. Here you can update the payment information, add items to the invoice/reciept, or add terms and conditions. To do so, simply click on the highlighted fields. When you are finished, click “Next” to move to the final screen!
14. The final step is the confirmation page. Here you can add a confirmation message by clicking on “Add confirmation message.”

Once you update the message, select “Save & Close” to return to the Event homepage.

15. You are all done creating your event! To test the registration and make sure it runs smoothly and all fields are displayed correctly, click on “Test Register” under Registration Functions.
This will take you through an interface to test your registration. Once completed, you can go back and make any edits you would like.

16. After you review and test your event, you can activate the event on the homepage.
   To do so, click the green activate button.

A window will pop up, and simply select Activate to launch your event. You can also check “Automatically change the status for your event at a later date/time” to select a registration deadline. This will automatically deactivate the link for the event and prevent additional sign-ups.

If at any point you need to change the status of your event you can simply click again on the status bar and update to inactive, full, etc.

17. Once your event is active, you can use the other features of RegOnline to promote your event, pull attendee reports, create labels and badges and send surveys to attendees. After your event is completed you can also run final reports on your event or send out feedback surveys for follow-up.
How to Create a Report in RegOnline

1. Once you complete your event’s set-up and activate it in RegOnline, you can pull reports to help organize and track your event.

2. To create a report, go to the “Reports” tab on the Event Homepage.

3. On the Reports screen there are a number of pre-set reports on the left-hand side. To generate any of the reports, such as an “Event Snapshot,” Registrant List,” etc., simply click on the report you want to create. We also created a “Tickets Sold” report if you used the “Event Template” that will pull your event attendees and tickets for you.

4. To create a custom report that generates all the information you are looking for, click on “Add Custom Report.”
5. A new window will appear, “Edit Custom Report,” that will walk you through the process. First, fill in the “Report Name” and select the format of the report you prefer. Then, click through the tabs at the top to add fields. Note-if you click “OK” it will generate the report, so make sure to use the icons at the top to finish creating the report.

6. To customize the fields in your report, click on the “Fields” tab.

Use the arrows in the middle of the screen to add fields from the “Choose Fields” box to the “Current Field Choices.” To add the custom fields or merchandise items (tickets) you created, select the icon next to “Custom Fields” or “Merchandise.”
7. Next, you can customize how the results are filtered by selecting the “Filters” tab. You can restrict the date of the report, filter by various registration types or statuses, or payment methods.

8. Once your report is fully customized, click on OK and the completed report will appear. You can use the HTML version of the report in regonline to check attendees in, send emails and change an attendee’s status.
9. To edit the report at any time, simply close the report and then click the “Edit” icon on the report homepage to make adjustments. You can change the format, make a copy of the report or share the report as well.