Harvard University
Online Registration User's Guide

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Overview

The Events Office has contracted with Certain Software to provide an online registration and onetime event solution for the University. Individual local units in schools or allied and affiliate organizations may request access to this service. Request from local units must be forwarded to their financial dean's office for approval. Requests from central administration departments or affiliates must be forwarded to the appropriate VP or financial director's office for approval.

This service, Certain Meetings, provides a fast and easy way to provide online registration for your conference or event. With minimal training you can build your event yourself or if you have a very complex event registration, you can contract with Certain Software to build your event for you.

Harvard Event Portal

Harvard and Certain Software, the preferred vendor for online registrations, provide and maintain an event portal. This portal contains information regarding the software, Harvard's policies regarding its use, and references to helpful information on managing events. It also includes a schedule of training available. The portal can be found at:
http://www.events.harvard.edu/profile/web/index.cfm?PKwebID=0x286c266

How to Register

Local units may sign up to use the online registration process by filling out the online request form. Local unit must provide the following:
- Contact information
- GL coding[1] where expenses and income for the event can be posted. Note: It is the responsibility of the local unit to provide object codes and registration cannot be completed unless income and expense object codes are provided.
- Name of the event
- Event dates (start, end, beginning of registration)

Most units will find that they can build events by themselves using the Event Wizard within Certain Meetings. In addition you will need to indicate whether you expect to build the event yourself or if you will require build services from Certain Software. If Certain is building the event, the complexity of the registration will affect the amount of support required. After the event request is forwarded to Certain they will contact the local unit and discuss the event in more detail. They will then present you with an order form that contains a quote for the hours that you will require for your event. If the Local unit is building the event themselves, Cash Management will set up accounts in Certain Meetings.

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[1] If the GL coding is incorrect, It could delay the posting of your income.

A link to the online request site and form can be found on Events' Office website

Request Form

Submitting Department or Organization Profile	
*Required fields are indicated in **bold**.*	
Contact First Name	
Contact Last Name	
Email Address	
Title or Position	
School Name	
Department Name	
Phone Number	
33 Digit Expense Code	
33 Digit Income Code	
Event Information	
Event Name	
Event Start Date	
Event End Date	
Event Venue or Location	
Date Registration to begin	

Please indicate the event options that you'd like to purchase:
○ Category X: No build services from Certain
○ Category A: One online registration form (no event site). Estimated 20 hours

Approval of use

Once the local unit submits the request they will receive a confirmation email with all the information submitted and should then forward the email to the schools financial office, finance director, or financial dean for approval. Once approved, the finance office should forward the email to events@harvard.edu and the Events office will create your account.

Order Form

If Certain Software will be building the event for the local unit, the Certain sales rep will contact the local unit to confirm the scope of support the local unit will require.

If the department plans to build the event themselves:
- The Events Office will contact them to identify individuals that will require access to the online registration tool.
- They must complete the on demand training as outlined in the training section below.

If the local units wants Certain to build their event, they should choose event option "A" (estimated 20 Hours). Certain will contact you and arrive at a specific estimate for your event.

Once the local unit determines their approach, Certain will send the local unit an order form for the charges to be billed. Once received the local unit must sign the order form and fax it to Certain.

Once received, Certain will:

- Send the fully executed order form to the local unit and the Events office.
- Send an invoice to the Events office based on the order form. The Events office will pay invoice and charge the GL coding provided by the local unit on the request form.

Account Setup

Local unit will provide the Events office with contact information of users who will have access rights to the event. The Events office will then set up users identified with individual login IDs. Individuals can be set up to have responsibility in the system in one of the following categories:

- **Event Builder** – Access to all events, create events from scratch or templates, copy events, full add/edit/delete permission for events, access to all registrations and reports.

- **Registration Support** – Access to registration details and reports. Add/edit/delete capability for registrations. (Does not have access to add/edit/delete event setup information.)

- **Reports and Approval** – Access to run reports, view registration details (but not edit) and make changes to registration statuses or properties via "Mass Action" from the report results window. (Does not have access to add/edit/delete registration information.)

- **Reports Only** – Access to run reports and export data to standard formats. (Does not have access to view registration details or make changes to any event information.)

Additional individuals can be set up later by contacting the Events office.

Event Set-up

Events can be set up in classic mode or using the event wizard. The procedure to follow is slightly different for each method. They are detailed in the following sections.

Classic Mode

Each event needs to conform to Harvard standards in the way it is set up. The specific steps in this section allow the Events office to properly identify events so that the income and expenses can be tracked and allocated to the appropriate GL distribution. We have established parameters which must be followed when setting up an event. These parameters are enforced when Certain Software sets up

an event for the local unit and must be followed when the local unit builds their own event.

 It is the local unit's responsibility to ensure the setup is completed properly by taking the following steps:

- On the details tab, each event in Certain Meetings has a unique identifier so that all records associated with it can be identified. Harvard's dedicated portal will use a prefix in the form of "locnnnn" where "loc" is the local unit school abbreviation and "nnnn" is a unique number associated with the online registration account. The rest of the event code is determined by the department. The Events office will provide the local unit with the prefix at the time they are set up in the portal.

- On the financial tab you will have the following choices:

The following available payment methods must be selected

☑ Visa ☑ MasterCard ☑ Amex

☑ Collect Billing Address ☑ Match Zip Code ☑ Match Street Number
☐ Require AVS "Yes" Response

☑ Collect CSC Number ☐ Require CSC "Yes" Response

Please note that the single transaction limit must be set. If it is left at zero, no credit card registration can be processed. It may not be set above $25,000.

Event Wizard
The wizard handles most of the details for you. On the payment page check the credit cards you wish to accept. Please check all boxes in the Security and Billing Options.

Use the following payment types to collect payment from attendees.
Card Types
☐ Visa
☑ MasterCard
☑ Amex

Security and Billing Options
☑ Collect Billing Address
☑ Match Zip Code
☑ Match Street Number
☑ Collect CSC Number

Managing Events

The following options are available to manage events:

- Registrants can register online
- Registrants paying by check or money order can send paper registrations to the local unit and the local unit can enter them into the registration system. **Please note that registrants paying by credit card may only register online.**
- Local units can use the software to manage the event and produce reports, lists and badges.
- Local units can use the software for email communication with the registrants before and after the event.

  Full descriptions of the products capabilities are found in its user documentation

Registrations

Testing
When events are first created they will start in a "Testing Status". All registrations created in during this time are also in designated test. You are not charged for these registrations. If payments are made for test transactions they are not processed with the bank and no income will be posted.

Live
When the status of the event is changed to "Live", the status of subsequent registrations will reflect the new status. Old "test" transactions will not be changed. You are charged for all completed registrations once the event has been made "Live". Please note that once the event is made "Live" only Certain Software can move the event back to "Test" Status.

Inactive/Deleted
Certain Meetings allows users to "delete" a live registration. The registration is not actually deleted but is moved into an "inactive" status and is not visible in the standard reports. Registrations may be "deleted" by clicking on the **DELETE** button at the bottom on the screen, while the registration is open for editing. If a registration is duplicated, this is the way to remove the duplicate from the reports and other processing. **Do not mark a registration with live payments as "Inactive".** This will result in loss of the associated income and cause Cash Management problems in reconciling the bank account.

You can view any registrations "deleted" by going to the Home Registration page for an event. At the bottom of the page is the following section.

Type	Total
Deleted Registrations (marked "Not Active")	0
Test Registrations	55
Click to update list of potential duplicates **Warning:** This may take several seconds.	
Potential Duplicates	0
Positive Net Payment received:	
Balance Due	0
Paid but Partially Complete	0
Pending	0
Denied	0
Cancelled	0
Inactive	0
View all payments from inactive regs	

If there are any payments associated with inactive registrations these numbers will not be zero

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Click on "View all payments from inactive regs" to get a list of the registration. By opening the individual registration you will have the option of "Restoring" the registration.

Training

Certain has a portfolio of on Demand training that is available on the Support & Services Tab after you login to their site. You can pick and choose which modules you will need for your situation.   If you are planning to build an event from scratch yourself, it is recommended that you complete all the modules in Event Building I and Event Building II. Each module is 7-15 minutes long.   Typically there is a short video walking you through a process and then the opportunity to practice what you learned.

Local units may optionally pay for customized training or use their support hours to have their assigned account manager provide web based training.

Posting of Revenue

The Events office will post revenue each month for any credit card payments using the GL coding supplied when the account was requested. The local unit must run a monthly report to verify the income posted by the Events office.

The report can be located under Event List:

Templates	Consolidation	Websites	Meeting Requests

Harvard University / Event List / List

Event List

"Income Reports" on the consolidation tab.
There is a separate report for each month. Prior month reports are available for 6 months.

Custom Consolidation Reports Income Reports

Format	Report Name	Description (Report Type)	Actions
📊	2014 10 - April 2014 Income Report	You can use this report to verify the income posted by Cash Management. There are separate reports for each month. (Payments and Refunds Across Events) (Payments and Refunds Across Events)	🔍 ✏ ☆
📊	2014 11 -May 2014 Income Report	You can use this report to verify the income posted by Cash Management. There are separate reports for each month. (Payments and Refunds Across Events)	🔍 ✏ ☆
📊	2014 12 - June 2014 Income report	You can use this report to verify the income posted by Cash Management. There are separate reports for each month. (Payments and Refunds Across Events) (Payments and Refunds Across Events)	🔍 ✏ ☆
📊	2015 01 -July 2014 Income Report	You can use this report to verify the income posted by Cash Management. There are separate reports for each month. (Payments and Refunds Across Events)	🔍 ✏ ☆
📊	2015 02 -August 2014 Income Report	You can use this report to verify the income posted by Cash Management. There are separate reports for each month. (Payments and Refunds Across Events)	🔍 ✏ ☆
📊	2015 03 -September 2014 Income Report	You can use this report to verify the income posted by Cash Management. There are separate reports for each month. (Payments and Refunds Across Events)	🔍 ✏ ☆
📄	FY 2009 Income Summary Report	Produces a summary report (PDF) of all events for the last month. (Payments and Refunds Across Events)	🔍 ✏ ☆
📄	FY 2012 Income Summary Report	Produces a summary report of events for Fy12 (Payments and Refunds Across Events)	🔍 ✏ ☆
📄	FY 2013 Income Summary Report	Produces a summary report of events for Fy13 (Payments and Refunds Across Events)	🔍 ✏ ☆
🖨	Harvard Income Report NEW TEST P	(Payments and Refunds Across Events)	🔍 ✏ ☆
📄	Harvard Income Summary Report	Produces a summary report (PDF) of all events for the last month. (Payments and Refunds Across Events)	🔍 ✏ ☆
📊	Income by Account and Fiscal year	(Payments and Refunds Across Events)	🔍 ✏ ☆

The report opens in a separate results window. The report includes the date, the type of transaction, card used, and event code and dollar amount. The main body of the report allows you to click on the row number and go directly to the full record for that registration. The default format is 50 rows per page but you can modify that in the "Display Options" section.

The top of this window allows you to export the report to another format should you find that the result window format does not meet your needs. You can find the six options for exporting on the right side at the top of the window.

The first three choices are more printer friendly and separate the report by event with sub totals for each event, if you have multiple events

• Printable HTML - web page using a printer-friendly format

- Acrobat® (PDF) - format is similar to Printable HTML above except opens report in a .pdf file using Acrobat Reader
- Printable Excel® - opens the Printable HTML table as a .xls file in Excel

The next three will contain column headings but all the data is included without breaks, these formats are good if you will need to import the data into another application or you want to do manipulations on the data without having to deal with the sub-total lines for each report.

- Excel® Spreadsheet - creates a native Excel spreadsheet
- Comma Delimited - .csv file for import into other software
- Tab Delimited Text - easily imported into other software

**Please note that this custom report takes into account the processing cutoff times for bank deposits. Transactions that occur after 11 PM (EST or EDT) on the last day of the month will appear on the following months report. Please note that the times listed on the report are Pacific Time. If you notice a discrepancy between the amount posted to your detailed listing and the amount received, please contact Cash Management. Cash Management is only responsible for posting credit card payments. Local units are responsible for posting revenue for any checks received as payments. GL entries for check deposits should be made in accordance with local policies.

Fees for using Online Registration

There are three categories of fees associated with the use of the online registration tool:

- A per registrant fee of $3.00. This fee is charged to the department <u>each month for every registration completed during that month. Partial registrations are not charged.</u> The Events office will use the GL coding provided by the local unit on the event request form.
- A 2.6% fee[2] for registrations paid by MasterCard or Visa credit cards and a 2.95 % fee for Amex credit card transactions. This fee represents the bank, processors and card association fees.   The Events office will use the GL coding provided by the local unit on the event request form.
- The one time support and build fees of $250.00

The Events office will post each event's fee to the general ledger. The credit card fees will be processed in the same month as the credit card deposits. For Example, if you had $10,000 credit card registrations in July, the credit card fee of $230 would also appear on your detail listing in July.

Departments will contract directly with Certain for event build fees or support and training. These charges are billed by Certain in the month the contract is signed The

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[2] This fee is based on the average total fees we are charged by the bank.   It is recalculated every year and changed if needed.

Events office pays theses invoices charging the GL coding provided on the event request form.

Additional Events

Once set up in the software, departments may use the tool for future events. Events can be copied and modified for future use or new events can be built fresh. When building new events, local units must remember to use the previously assigned prefix for the event code. If Certain Software's support is required to build the event the local unit can contact them directly. Contact information is available on the event portal. The local unit must E-mail The Events office to notify them of the new event, provide them with the Event code and GL distribution string, if different from the coding originally provided.