

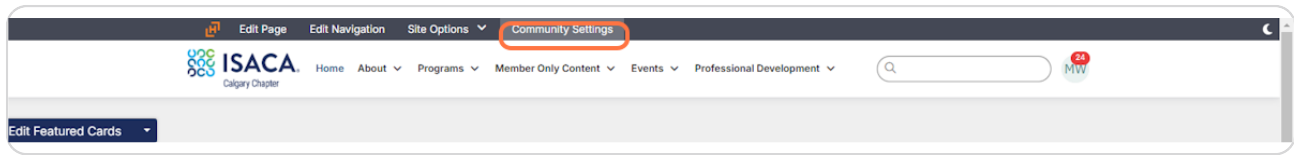
Creating an Engage Registration Event

23 Steps [View most recent version on Tango.us](#) 

Created by	Creation Date	Last Updated
Shaina Tuttle	Nov 06, 2024	Nov 06, 2024

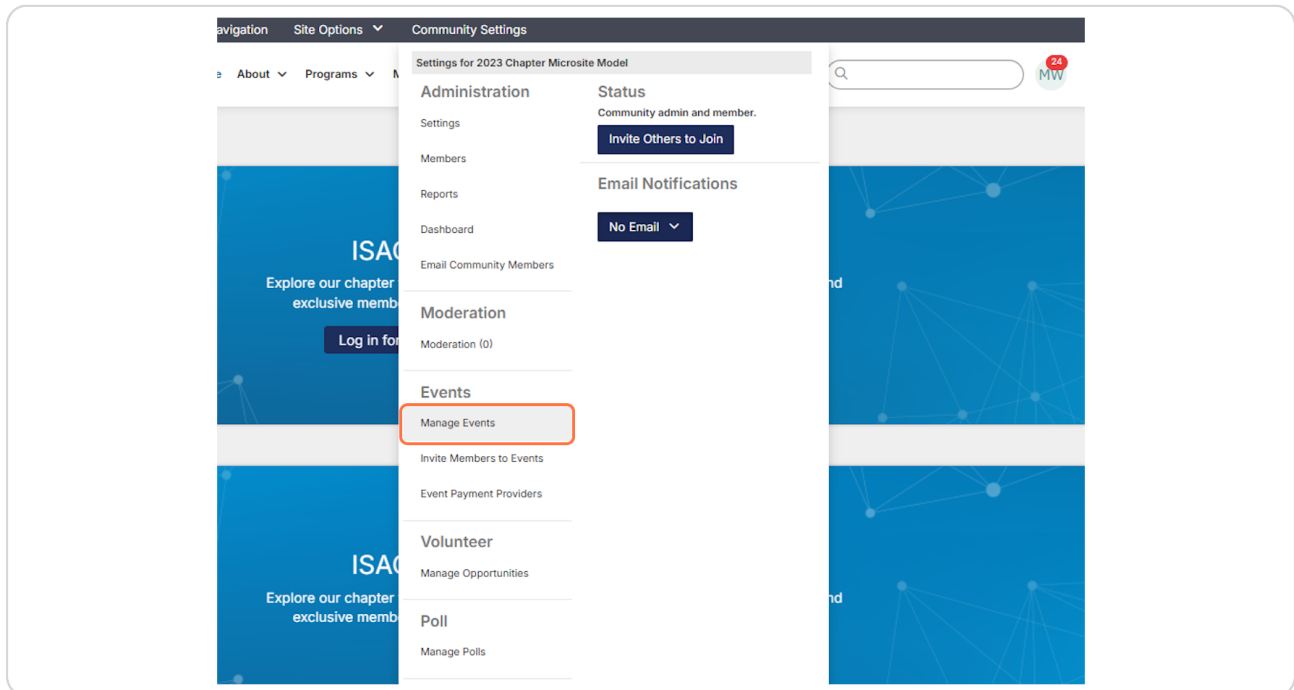
STEP 1

Click on Community Settings in the site admin toolbar.



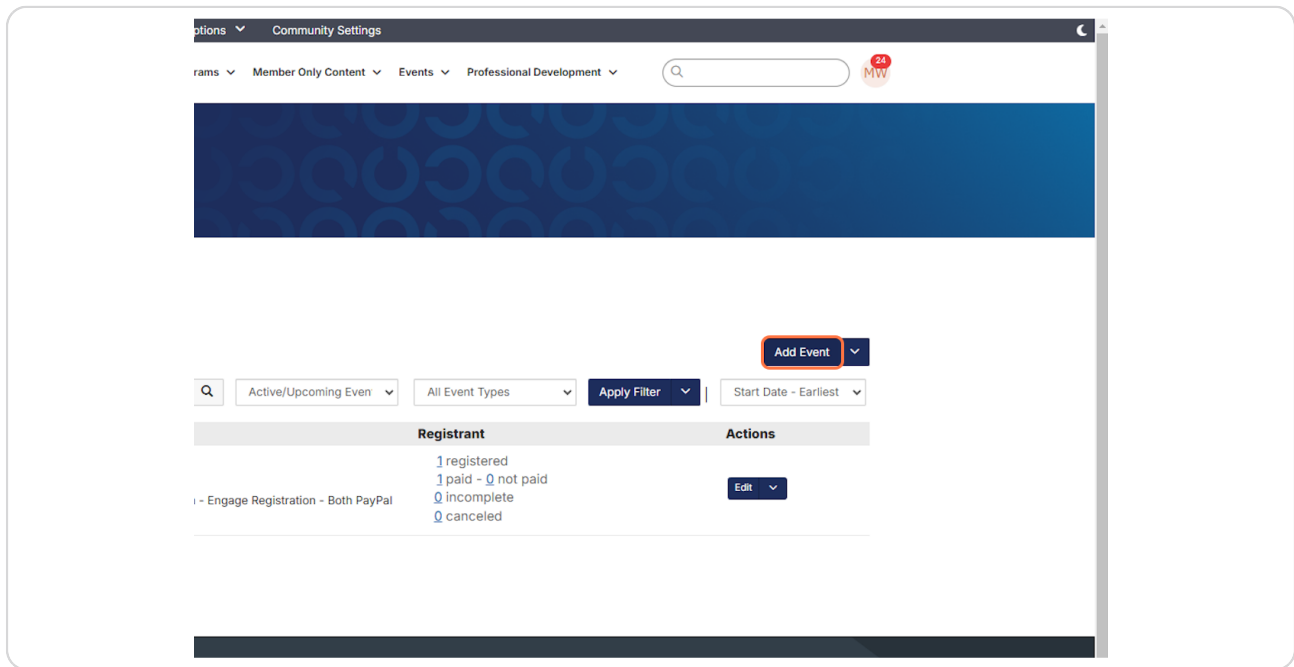
STEP 2

Click on Manage Events



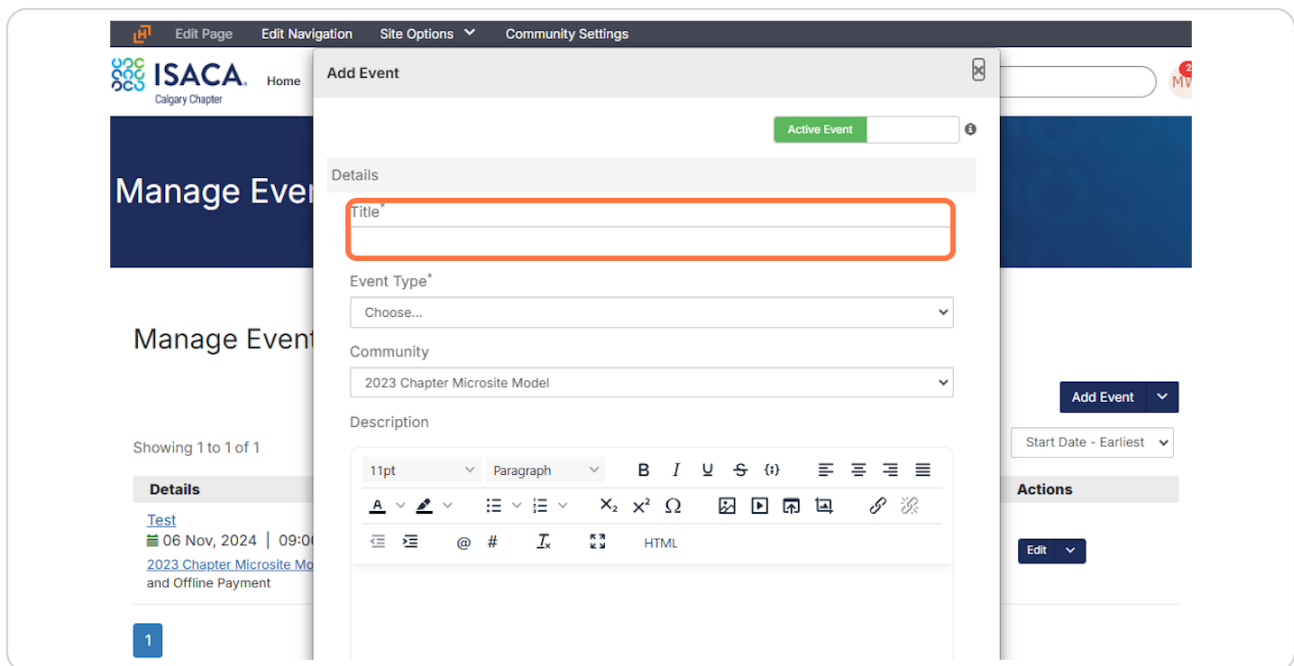
STEP 3

Click on Add Event



STEP 4

Enter the Event Title



STEP 5

Choose your Event Type from the drop down.

Choose from any of the Engage Registration event options.

The screenshot shows the 'Add Event' form in the ISACA Calgary Chapter system. The form is titled 'Add Event' and includes a green 'Active Event' toggle. The 'Details' section contains the following fields:

- Title***: A text input field.
- Event Type***: A dropdown menu with 'Choose...' selected. This field is highlighted with an orange border.
- Community**: A dropdown menu with '2023 Chapter Microsite Model' selected.
- Description**: A rich text editor with a toolbar showing options like font size (11pt), paragraph, bold, italic, underline, link, unlink, list, and image.

On the right side of the form, there are buttons for 'Add Event' and 'Edit', and a 'Start Date - Earliest' dropdown menu. The left sidebar shows the 'Manage Event' section with a 'Details' tab and a list of events, including one titled 'Test' dated '06 Nov, 2024'.

STEP 6

Determine if you want your event to always display in your events list or if you want to hide it after the end date, then choose the appropriate option.

The screenshot shows the 'Add Event' form for the ISACA Chicago Chapter. The form is titled 'Add Event' and has a green 'Active Event' button. It contains several sections: 'Details' with fields for Title, Event Type (Education - Engage Registration - Both PayPal and Offline Payment), Community (2023 Chapter Microsite Model), and a dropdown for 'Display in events list?' (highlighted with a red box). Below this is a 'Display in search results?' dropdown. The 'Description' section has a rich text editor with a toolbar and a text area. At the bottom, there is an 'Optional link for an external website with more details about this event.' field with a dropdown menu and a text input.

STEP 7

Determine if you want your event to always display in the search results or if you want to hide it after the end date, then choose the appropriate option.

The screenshot shows the 'Add Event' form in the SACA system. The form is titled 'Add Event' and has a green 'Active Event' button. The form includes the following fields:

- Title***: A text input field.
- Event Type***: A dropdown menu with the option 'Education - Engage Registration - Both PayPal and Offline Payment'.
- Community**: A dropdown menu with the option '2023 Chapter Microsite Model'.
- Display in events list?**: A dropdown menu with the option 'Display event until the end date, then hide it'.
- Display in search results?**: A dropdown menu with two options: 'Display event until the end date, then hide it' (highlighted with a red box) and 'Display event until the end date, then hide it'.
- Description**: A rich text editor with a toolbar and a text area.
- Optional link for an external website with more details about this event.**: A text input field with a placeholder 'http://' and a button 'externalsite.com OR www.e'.

The form is part of a larger interface with a sidebar on the left and a top navigation bar. The sidebar includes links to 'Home', 'Add Event', and 'ISACA Chicago Chapter'. The top navigation bar includes links to 'Edit Page', 'Edit Navigation', 'Site Options', and 'Community Settings'.

STEP 8

Add in a detailed event description.

The screenshot shows the 'Manage Event' details page for the ISACA Chicago Chapter. The 'Details' section is active, and the 'Description' field is highlighted with a red border. The form includes fields for Title, Event Type, Community, and display options. The Description field has a rich text editor toolbar with options for font size, paragraph style, bold, italic, underline, link, unlink, list, and image. Below the editor is a text area for the description. The form also includes an optional link for an external website and an event image field.

Details

Title*

Event Type*

Community

Display in events list?

Display in search results?

Description

Optional link for an external website with more details about this event.

Event Image

This image is used on the events list and the event details page. Landscape images measuring at least 1200px x 600px are ideal.

STEP 9

If you are limiting the number of attendees for your event, enter that number here. If you are not limiting the number of attendees, please skip this step.

ISACA Calgary Chapter Home

Manage Event

Showing 1 to 1 of 1

Details

[Test](#)

06 Nov, 2024 | 09:00

[2023 Chapter Microsite Mo](#)

[and Offline Payment](#)

1

Optional link for an external website with more details about this event.

Event Image

[Select Image](#)

This image is used on the events list and the event details page. Landscape images measuring at least 1200px x 600px are ideal.

Maximum number of registrants?

Number of event credits?

Custom Input for Registration	Include	Required
	☐	☐
	☐	☐
	☐	☐
	☐	☐
	☐	☐
	☐	☐

Actions

[Add Event](#)

[Edit](#)

STEP 10

If you are issuing event credits for this event, enter them here. If you are not issuing event credits, please skip this step.

Calgary Chapter

Manage Event

Manage Event

Showing 1 to 1 of 1

Details

[Test](#)

06 Nov, 2024 | 09:00

[2023 Chapter Microsite Mo](#)

[and Offline Payment](#)

1

Optional link for an external website with more details about this event.

Event Image

[Select Image](#)

This image is used on the events list and the event details page. Landscape images measuring at least 1200px x 600px are ideal.

Maximum number of registrants?

Number of event credits?

Custom Input for Registration	Include	Required
	☐	☐
	☐	☐
	☐	☐
	☐	☐
	☐	☐
	☐	☐
	☐	☐

Actions

Start Date - Earliest

STEP 11

If the chapter is requesting any additional information for the event from attendees (like wanting to capture ISACA Member ID) complete the custom input for registration section. You can choose to make this step in the registration process optional (include) or required.

The screenshot shows the 'Manage Event' interface. The 'Custom Input for Registration' section is highlighted with an orange border. It contains a table with two columns: 'Include' and 'Required'. Below the table are two checkboxes: 'Include input for registrant to state special needs?' and 'Include badge name input for registrant?'. The 'ISACA Chicago Chapter' logo is visible in the bottom left corner.

Maximum number of registrants?

Number of event credits?

Custom Input for Registration	Include	Required
	☐	☐
	☐	☐
	☐	☐
	☐	☐
	☐	☐
	☐	☐
	☐	☐
	☐	☐
	☐	☐
	☐	☐
	☐	☐

Include input for registrant to state special needs? ☐ No

Include badge name input for registrant? ☐ No

STEP 12

Set up the Date and Time information for your event.

ISACA Calgary Chapter

Manage Events

Showing 1 to 1 of 1

Details

[Test](#)
06 Nov, 2024 | 09:00
[2023 Chapter Microsite Mo](#)
and Offline Payment

1

Date & Time

Start Date* 07 Nov, 2024

End Date* 07 Nov, 2024

09:00 17:00

Timezone* Choose...

Location

How will people attend this event?

Include input for registrant to state special needs? No

Include badge name input for registrant? No

Note: Event presenters and other registration options can be added after the event is saved from the Manage Events page actions button.

Add Event

Start Date - Earliest

Actions

Edit

STEP 13

Update the location information for your event. You can choose in-person with a physical address, online with log in instructions, or an hybrid event and choose both options.

The screenshot displays the ISACA event management interface. The left sidebar includes the ISACA logo, 'Home', and a 'Manage Event' button. The main content area shows event details for '07 Nov, 2024' with a start time of '09:00' and an end time of '17:00'. A 'Timezone*' dropdown menu is set to 'Choose...'. The 'Location' section is highlighted with an orange box and contains a dropdown for 'How will people attend this event?' (set to 'Choose...') and a 'Country' dropdown (set to '(Country)'). Below this is the 'Contact Information' section with fields for 'First Name', 'Last Name', 'Phone', and 'Email', along with an 'Insert My Contact Information' button. The right sidebar features an 'Add Event' button, a 'Start Date - Earliest' dropdown, and an 'Actions' section with an 'Edit' button.

STEP 14

When choosing an in-person event with a physical address, these are the options that will populate. If your event is online, you can disregard this step.

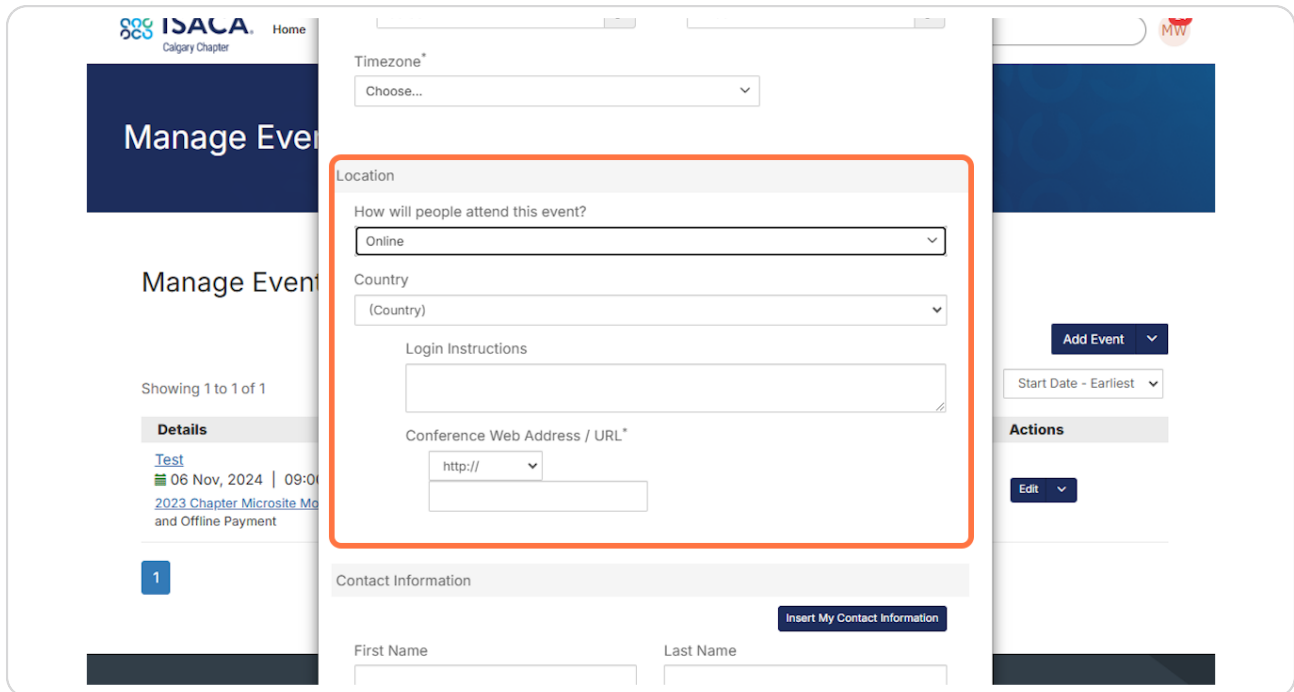
The screenshot shows a web interface for managing an event. The main heading is "Manage Event". Below it, there's a sub-heading "Manage Event" and a status "Showing 1 to 1 of 1". A "Details" section is visible, showing a calendar icon, the date "06 Nov, 2024", and time "09:00". Below this, there's a link "2023 Chapter Microsite Mo" and text "and Offline Payment". A blue button with the number "1" is also present. The "Location" section is highlighted with an orange box and contains the following fields:

- Timezone* (dropdown menu with "Choose..." option)
- How will people attend this event? (dropdown menu with "Physical Address" selected)
- Country* (dropdown menu with "(Country)" selected)
- Venue* (text input field)
- Address 1* (text input field)
- Address 2 (text input field)
- City* (text input field)
- Zip (text input field)

Below the "Location" section is the "Contact Information" section, which includes fields for "First Name" and "Last Name", and a button "Insert My Contact Information". The bottom of the page features the "ISACA Chicago Chapter" logo and a "Privacy & Terms" link.

STEP 15

When choosing an online event, these are the fields that will populate. Update with your external registration link and any additional log in instructions you would like to provide your event attendees.



The screenshot shows the ISACA Manage Event form. The 'Location' section is highlighted with an orange border. It contains the following fields:

- Timezone***: A dropdown menu with 'Choose...' selected.
- How will people attend this event?**: A dropdown menu with 'Online' selected.
- Country**: A dropdown menu with '(Country)' selected.
- Login Instructions**: A text area.
- Conference Web Address / URL***: A dropdown menu with 'http://' selected, followed by a text input field.

Below the Location section is the **Contact Information** section, which includes fields for **First Name** and **Last Name**, and a button labeled **Insert My Contact Information**.

The left sidebar shows the ISACA logo, 'Home', and a 'Manage Event' button. Below it, a 'Details' section shows a calendar icon, the date '06 Nov, 2024', and a time '09:00'. There is also a link to '2023 Chapter Microsite Mo' and a note about 'and Offline Payment'. A blue box with the number '1' is visible at the bottom of the sidebar.

The right sidebar shows an 'Add Event' button, a 'Start Date - Earliest' dropdown, and an 'Actions' section with an 'Edit' button.

STEP 16

Enter in the Contact Information for the event.

The screenshot shows the ISACA Manage Event interface. The 'Contact Information' section is highlighted with an orange box. It includes a 'Conference Web Address / URL*' field with a dropdown menu set to 'http://'. Below this, there are input fields for 'First Name', 'Last Name', 'Phone', and 'Email'. A button labeled 'Insert My Contact Information' is positioned to the right of the 'Last Name' field. The left sidebar shows the 'Manage Event' title and a 'Details' section with a 'Test' link and event information for '06 Nov, 2024 | 09:00'. The right sidebar has an 'Add Event' button and a 'Start Date - Earliest' dropdown.

STEP 17

If you are collecting registration fees, you would now need to step up pricing.

The screenshot shows the ISACA Manage Event interface with the 'Pricing Options' section highlighted by an orange box. This section includes a dropdown menu set to 'Regular' and a note: 'Pricing may include different rates for Early, Regular, and Late registrations.' Below the dropdown, there are 'Begin Date' and 'End Date' fields with calendar icons. Further down, there is a 'Simple' dropdown menu, a 'Regular Price' field set to '\$ 0.00', and a 'Currency Option' dropdown set to 'US Dollars'. The left sidebar is identical to the previous step. The right sidebar shows the 'Add Event' button and 'Start Date - Earliest' dropdown. At the bottom, there is an 'Email Templates' section with a dropdown menu showing 'Registration' and 'Registration Confirmation'.

STEP 18

There are a few options for dynamic event pricing. This means you can set different fees for Early, Regular, or Late Registrations.

*The "Register Now" link on your event will remove from your event on the "End Date" you select.

The screenshot displays the ISACA event management interface. The main content area is titled "Manage Event" and shows a list of events. The "Details" section for the first event is expanded, showing the date "06 Nov, 2024" and time "09:00". The "Pricing Options" section is highlighted with an orange box. It contains the following fields:

- Pricing Options**: A dropdown menu set to "Regular".
- Regular**: A section with "Begin Date" and "End Date" fields, each with a calendar icon.
- Simple**: A dropdown menu set to "Simple".
- All Registrants**: A section with a "Regular Price" field set to "\$ 0.00".
- Currency Option**: A dropdown menu set to "US Dollars".

Below the Pricing Options section, there is an "Email Templates" section with two options: "Registration Confirmation" and "Registration Cancellation". The "Registration Confirmation" option is selected, and a note states: "Note: Confirmation message sent to registrants of an event."

STEP 19

Further, you can set up dynamic pricing depending on member status, ie member/non-member, student member, etc.

Manage Event

Manage Event

Showing 1 to 1 of 1

Details

[Test](#)

06 Nov, 2024 | 09:00

[2023 Chapter Microsite Mo](#)

[and Offline Payment](#)

1

ISACA

Pricing Options

Pricing may include different rates for Early, Regular, and Late registrations.

Regular

Regular

Begin Date *

End Date *

Simple

Simple

Member / Non-member

Registrant Classes

Student

Member

Non-member

Email Templates

Registration Confirmation

Registration Confirmation

Note: Confirmation message sent to registrants of an event.

Registration Cancellation

Registration Cancellation

Note: Cancellation message sent to registrants of an event.

Registration Invoice

Registration Invoice

Actions

Add Event

Start Date - Earliest

Edit

Policy & Terms

STEP 20

From here, you can create dynamic pricing depending on whose registering for your event.

The screenshot displays the 'Manage Event' interface for the ISACA Calgary Chapter. The 'Pricing Options' section is highlighted with an orange border. It includes the following fields:

- Regular**: A dropdown menu.
- Regular**: A section with 'Begin Date *' and 'End Date *' date pickers.
- Member / Non-member**: A dropdown menu.
- Member**: A section with 'Regular Price *' and a price input field showing '\$ 0.00'.
- Non-member**: A section with 'Regular Price *' and a price input field showing '\$ 0.00'.
- Currency Option ***: A dropdown menu showing 'US Dollars'.

Below the pricing options, there is an 'Email Templates' section with a dropdown menu showing 'Registration Confirmation' and a note: 'Note: Confirmation message sent to registrants of an event.'

STEP 21

These are the email templates populate when choosing any of the Engage Registration Event Types. Site admin should only change the email template to "do not send" if they wish to not send that specific email.

The screenshot shows the 'Manage Event' interface for ISACA Calgary Chapter. The 'Email Templates' section is highlighted with an orange box. It contains a list of email templates that can be selected for different event types. The templates are as follows:

Event Type	Template Name	Description
Registration Confirmation	Registration Confirmation	Note: Confirmation message sent to registrants of an event.
Registration Cancellation	Registration Cancellation	Note: Cancellation message sent to registrants of an event.
Registration Invoice	Registration Invoice	Note: Message including invoice for registration.
Registration Receipt	Registration Receipt	Note: Message containing details and receipt of registration transaction.
Completed Notification	Completed Notification (to admin)	Note: Message sent to event contact when registrants complete a registration.
Canceled Notification	Cancelled Notification (to admin)	Note: Message sent to event contact when registrants cancel a registration.
Event Details Changed Notification	Event Details Changed Notification	Note: Message sent to registrants when event details have been changed.
Reminder Emails	You may configure up to 2 reminder emails to be sent prior to the event start date. If there are 2 reminders, it's recommended they be at least a day apart.	

Reminder Email 1

STEP 22

You have the option to "Send Invitations" once the event is created. If you wish to send the invitations when the event is created, toggle the option to yes. If you wish to create the event & send invitations at a later date, leave the option toggled to no.

It is typically recommended to set this to "no" and to send emails after verifying the public site is rendering the way you want and contains all event details. Also, if you are adding registration choices or session categories, invitations should be sent after those have been added.

06 Nov, 2024 | 09:00
2023 Chapter Microsite M
and Offline Payment

1

the event start date. If there are 2 reminders, it's recommended they be at least a day apart.

Reminder Email 1
Reminder Email 1
Send reminder 5 days before the event

Reminder Email 2
Reminder Email 2
Send reminder 1 days before the event

Record Attendance Reminder
Do not send
Note: Message sent to remind registrants/community members to record their attendance to the event. The reminder is sent an hour before the event starts.

Invitation
Invitation
Note: Message sent to invite contacts to the event.

Share
Share Event
Note: Message sent to share and invite contacts to the event. A value of 'Do not Send' will hide the "Share this Event" block on the event details page and users will be unable to "Share this Event" for the affected event.

Send Invitations
Invite all community members when saved. ☐ No

Save and Continue Save Cancel

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STEP 23

Click on Save

A value of 'Do not Send' will hide the "Share this Event" block on the event details page and users will be unable to "Share this Event" for the affected event.

Send Invitations
Invite all community members when saved. ☐ No

Save and Continue Save Cancel

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