

The Events Module for Administrators

Administrative access to the Events module has been granted to the following people:

- Club President
- Head Coach
- Primary practice managers of Survivor and the Early/Mid-day Group
- Manager of the SUP group
- PR/Membership Manager
- Communications Manager
- Health Coaches – for the purposes of taking accurate attendance at practice for contact tracing

To access the Administration Dashboard, go to the bottom left corner of any page of the website at <https://clubsake.com>. Note that there is not currently a way to get back to the website from the Admin Dashboard, so you might consider a right-click and open a new tab if you might still need to refer to the website.

Adding an Event - To start, from the Admin panel, go to Events in the left pane, and click Add Event.

1. **Pick a name for your event.** If it is a recurring practice, pick a name and consistently use it - Survivor Dragon Boat Practice, Competitive Dragon Boat Training, SUP Racing, Early Dragon Boat Session, etc. Be specific - we have several kinds of dragon boat training and we want to make it easy for the membership to see what they are looking for.
2. **Choose your Category.** This will allow people to filter for the events they are looking for. If you need to add a new category, see instructions elsewhere in this document.
3. **Date and time** - remember that this platform runs on military time and European DD/MM/YYYY date format. You can type in 1830 instead of scrolling down to it. Single Date or Date Range is for when you are working with one day or several consecutive days. Specific Dates is for non-consecutive multiple days. For instance, the Tiller Training class that is every Tuesday for a month. TBA is useful because it allows you to otherwise set up the event, but the event won't show on the web site until you put the dates in. This is handy if you are heavily formatting things or finalizing details, and you don't want anyone to see it until you are sure everything looks right.
4. **Date display/override** - this is where we could write dates in American format for clarity. I don't recommend we do this for recurring training sessions because then you will have to change it every time you clone a training (see below).
5. **Venue** is self explanatory. The venues in the list are set up through a separate panel, and likely only a very few people need to know how to do this. It is covered later in this document.
6. **Visible to:** - This controls who can see the event on the web site. Recurring practices should be set to Public, so that the public can see when practices are on our web site. They will not be able to RSVP unless they register, because we control that with another setting below.
7. **Display on Home Page** – This controls whether the event shows in the widget on the home page, which shows the next 5 events on our calendar.

8. **Preview** - is for a short description - the "elevator description." It shows in the event summary, that the user can click to find out more. This might often be the first sentence of what you would put in the full Description. **Description** is for the full description if you have more to say. There is a wide variety of formatting tools, and you can also add links, work with tables, and add photos. There are some tricks for linking and photos, and those will be given in a different help document.
9. **Event Waiver** – If this is a recurring practice, do not put anything here, as those are visible to members only, and members have signed the waiver. We can attach waiver text if, for instance, we run a race or a Dragon Boat 101 that is open for the public to sign up.
10. **Post-Event information** will not be needed for recurring training. Events stay on the calendar in an archive, so you could put some post-event information here for when the date has passed. For instance - we had a great race, save the date next year, you can find this year's race results here (linked.)
11. **Manage Files** – You can attach files that are associated with your event.
12. **Event Registration section** – If RSVP is required, tick Attendees must register. If you want to put content in the confirmation they will be e-mailed when they register, you can put it in the **Registration e-mail text**, which has the same formatting tools we saw above.
13. **Show Attendee List** – If you want registrants to be able to see who else is coming to the event, check this box.
14. **Registration is open to** - This controls who is allowed to register for the event. Recurring training sessions should be set to Members Only.
15. **Payment Status Restriction** – should be set to Paid Members Only for recurring training sessions.
16. **Permitted Membership Types** – There is granular control over who among the paid membership can register. For instance, the SUP manager would check All Payment Classes, but the dragon boat practice managers would only allow the vaccinated classes.
17. **Teams Restriction** – You can additionally narrow registration to specific teams. For instance, it is possible to be a Vaccinated Member, but not eligible for Survivor practices, so Survivor can restrict the RSVPs to just members of the Survivor SAKE team, and also Tillers.

The regular club practices are open to everyone except those that do not have current capsized drill status. Therefore, under teams, select All Teams and then untick the box next to the team for those barred in this category (Ex. 2021 Capsized Restriction).

18. **Max number of attendees** - this is where you set the number if you are limited in how many you can take.
19. **Registrations open** - set a date and time that is immediate.

20. **Registrations close** - the competitive dragon boat practices and Survivor require everyone to RSVP 24 hours ahead, so set the time here accordingly for this event.
21. **This event accepts payment** – If you need to charge for the event you are listing, such as meal tickets to an end-of-season party, or entry fees for a race, checking this box opens the capability to manage tickets. Ticket management is extremely customizable and granular, and if you need to use that function, it's best to meet with the Communications Manager for a walk-through on how those tools work. Payment amounts can be set to zero, in the case of something like the Bridge to Bridge, where we might want tickets for the racing class, but are not charging for entry.
22. **Additional Registration Fields** – This is a place for custom questions. The most common one we use is to give a Comments section so that people can send the coach comments about their RSVP. If you want to do this, put “Comments” in the field name, make it 1 line of text, and make it not required. **Note:** This is an extremely customizable section that can be used to collect any additional information you want from your registrants. There are many options for data entry, and it is possible to rule one question off another, so that the answer to a question controls what other questions they are shown. If you need help on advanced use of this section, talk to the Communications Manager.

If you use the Comments custom field, once the event is listed, you may want to edit the event, move to the bottom of the resulting page, and select Comments under “Show Field on Event Summary.” This makes it so that on the RSVP summary, you can see any comments without having to drill into details. If you are cloning multiple events, this has to be done with each instance, as the custom fields are not hooked into the system otherwise.

23. Click Add Event and your practice is listed.

Cloning Events – The Events module does not allow you to list recurring events. The logic behind it assumes that if you add multiple days for an event, you are having that event across all days, and people cannot sign up for just one day. Therefore, all events have to be entered one at a time. Never fear! You can add repetitive events by cloning.

To do this, click Events in the left pane. A list of events will be displayed in the center of the page. Click any event that you are trying to clone a repeat for – a recent one is best. In the resulting window, click “Clone Event” in the right pane. **Note:** When you know you are going to be cloning an event, make sure you set up the mother event so that as little as possible needs to be changed per clone. If you have text in the Tuesday practice that is different from the text in the Saturday practice, be sure you clone the Tuesday practice only to other Tuesdays. Normally, you will need to change:

1. The start and end date. Do not worry about the red flag that happens after you change the start and before you change the end. It will resolve itself once you make sure both dates are changed.
2. If your practice has a requirement for RSVP lead time, you will also need to change the Registrations Close date.
3. Registrations Open date may also need to be changed if you are coming back to Clone/Add more practices after the date that was previously set has passed.
4. Remember to edit that comment feature at the bottom once the practice is listed (See #22 above)

Other Notes about the Events Module:

- When you click Events, a summary list of all of the upcoming events will be displayed. You can filter by selecting a category in "Filter By" and click Go.
- Details will show the date, time, and location of that event, and a list of the attendees. Note that Maybes and Nos will not show as numbers on the summary list, but when you view the details, you will see them. Clicking Details is the same as clicking the name of the event.
- Edit lets you edit the details for that event.
- View Live will open a separate tab that opens the event on our web site, so that you can see how it will look to a person coming in to sign up.
- **Right pane options**
 - **Add Registration** - lets you manually add a member to practice that has not RSVP'd themselves.
 - **Email Attendees** - lets you e-mail the people that have RSVP'd.
 - It will be important that you select "Email members who have unsubscribed from general communications." Members have the ability to opt out of automatic system e-mails. We as administrators have to tell the system we want to reach everyone when we are taking the time to specifically communicate with them.
 - Message box has the same formatting tools as other site areas that allow formatting.
 - You can preview the e-mail before sending
 - You can save the e-mail as a template if it is one you send frequently.
 - **SMS Attendees** is a supplemental service that we have not paid for, so do not try to do that.
 - **Invite Members** – if you want to notify and invite specific members to your event.
 - **Mark Attendance** - This is how to mark attendance for contact tracing, and it is self-explanatory. Health Coaches have access to the Events module for this purpose.
 - **Event Reports** - allows you to set parameters and pull a .csv with the data you request, which can be opened as a spreadsheet. You can run reports on any data that is collected as part of an event registration, including the custom fields and ticketing, which would be handy for race management or something like menu choices at a party.
 - **Manage Officials** – this is a way that you can give control to member(s) for a specific event. The most common use case for this would be a coach that is out of town for vacation, and they have an assistant coach that is managing the team while they are gone. Another use case might be giving a captain access to a race so that they can manage and e-mail the attendees without having full access to membership data.
 - When you click Manage Officials, on the resulting screen, begin typing the Member's name. A box will pop up below with the member's full name, and you can click it. If the autofill doesn't happen, it's most likely because the member you are giving access already has administrative access granted for Events, so there is no need to give them special access.
 - Assign a level of access according to the descriptions given. Most often, that will be Level 2.
 - **Import Registrations** – it is possible to import registrants from a spreadsheet. This would be exceedingly rare in our organization, though it is possible it could be useful if we were to manage a race.

Left Pane Options

- **Categories** - If you feel you need a different category for your event listing, this can be done by clicking Events > Categories. At the bottom of the resulting screen, click Add Category and click Go. Once the Category is added, you can choose if you want it to show on the web site or not, as a way to filter down events.
- **Reporting** – this is different from right pane reporting. Right pane reports on the event you have selected. Left pane reports are for broader reports. For instance, you could pull a report on Dragon Boat 101 events and see how many attended across a season. Or you could pull a practice record for Masters Women from April to September, and it would show how many practices each member attended in that time period.
- **Settings** – these are controlled by the Communications Manager

Creating Venues

Creating a venue requires administrative permission for the Account module. That access is currently given to the Head Coach, her primary assistant coach, the President, and the Communications Manager. If you do not have this access, ask somebody who does to add the venue for you. To add a Venue:

- Click Account at the top-right corner of the Administration Dashboard.
- Click Venues, which is the second-to-last icon in the 4th column.
- Click Add Venue
- Give it a name and put in its address.
- For the Map embed code, you can leave this blank and Google will do its best from the address. If you want to embed the actual location:
 - Open Google Maps in your browser and search for the address
 - When the result presents, click Share
 - In the resulting window, click Embed a Map
 - Copy the html link
 - Paste it into RevSPORT in this box.
- Under Venue Categories, select the ones that apply. Being specific about this means lists are as short as possible in context.
- The rest is self-explanatory.