

localist

**LOCALIST
USER
GUIDE**

**'CANES
COMMUNITIES**

**UM'S MASTER CALENDAR
& EVENTS SYSTEM**

*CREATE &
PROMOTE
EVENTS*

*TRACK &
MANAGE
REGISTRATION*

*POST-EVENT
DATA
MANAGEMENT
& REPORTS*

*GROUPED BY
'CANES
COMMUNITY*



**UNIVERSITY
OF MIAMI**

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WHAT IS LOCALIST

Localist is the University's master calendar, providing a total view of what is happening at the University of Miami. 'Canes Communities can promote their events by entering them on the site. Localist is also the primary registration platform for any group looking to host a simple and user-friendly registration form.

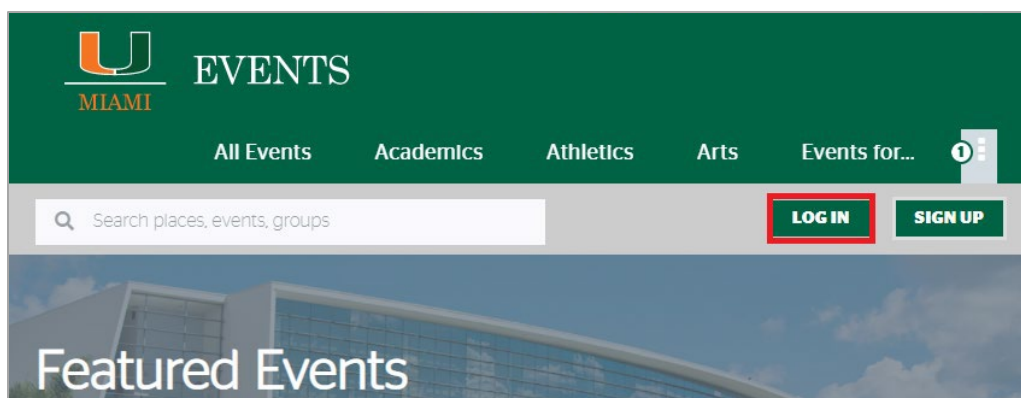
USER GUIDE TIPS

- Items in **Bold** denote a section/window/view in the system.
- Items in ***Bold + Italics*** denotes an action to be taken, a button to be selected.
- Items in a ***Bold, Underlined, and blue font*** are links within the document or links to remote sites. Some features are in the process of being fixed or edited in the Localist system. A **Work in Progress** box is shown to specify those items. As Localist administrators resolve the issues, the solution will be noted in the document.
- **Event creation timeline.** After creating the event and notifying the RE Liaison, please keep in mind the approval process timeline:
 - For **paid events**: 96 hours (4 days) – 2 days for event ticket setup, 2 days for RE Liaison approval.
 - For **free events**: 48 hours (2 days) for RE Liaison approval.

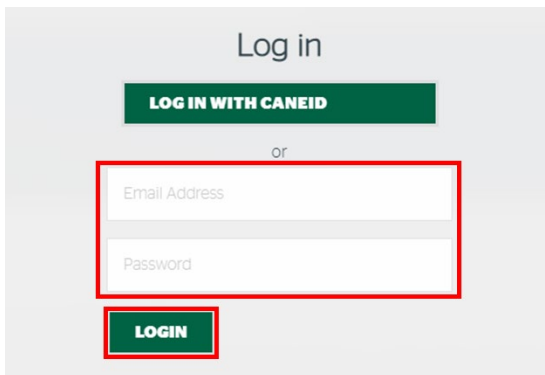
ACCESSING LOCALIST & CREATING AN EVENT

Follow the steps below to manage the creation and lifecycle of an event in Localist.

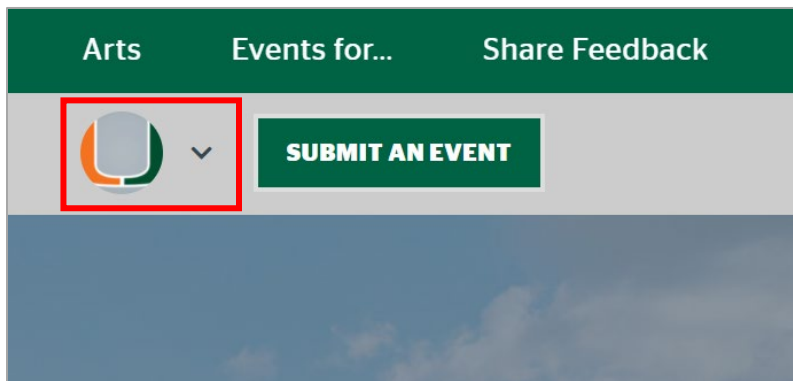
1. Open your **Internet Browser**.
2. In the address bar type events.miami.edu.
3. Click **Log In** at the top right of the screen.



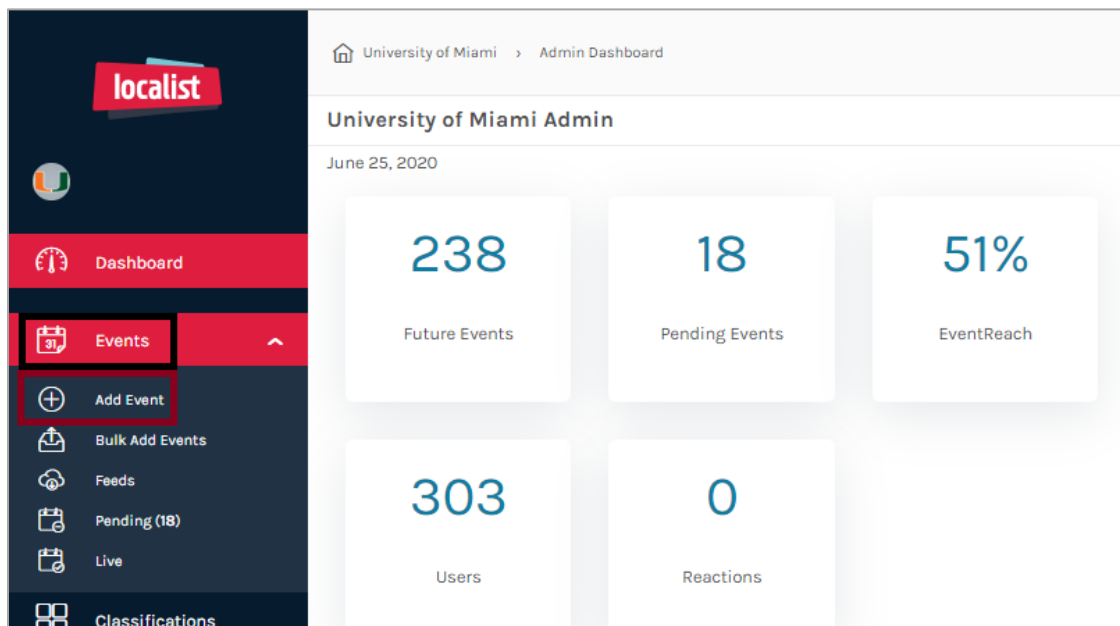
4. Enter your **'Canes Community login credentials** and select the **Login** button.



5. Click the dropdown arrow at the top right of your screen and select **Administration**.



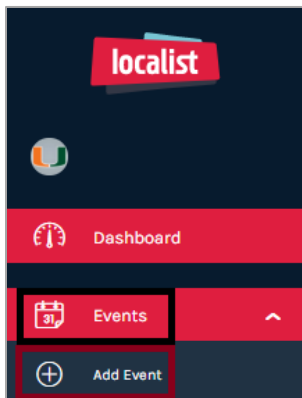
6. You will land on the **University of Miami Admin** Dashboard for Localist.



ADDING AN EVENT – EVENT DETAILS TAB

Make sure the **Event Date** is the final chosen date before creating the event. Changing a date later will remove registered guest details.

1. Along the left menu, select **Events** then **Add Event**.



2. At the top you will see a check box for **Publish Immediately**, *uncheck* that option. If you leave this checked the event will go on the calendar as soon as it is saved, and it won't have all the necessary components. If this box is unchecked, it will go to the pending queue for later approval by your Regional Engagement (RE) Liaison.

Add an Event

Create a new event on the calendar.

Event Details
Event Details
Tickets & Registration

Publish Immediately

Name REQUIRED

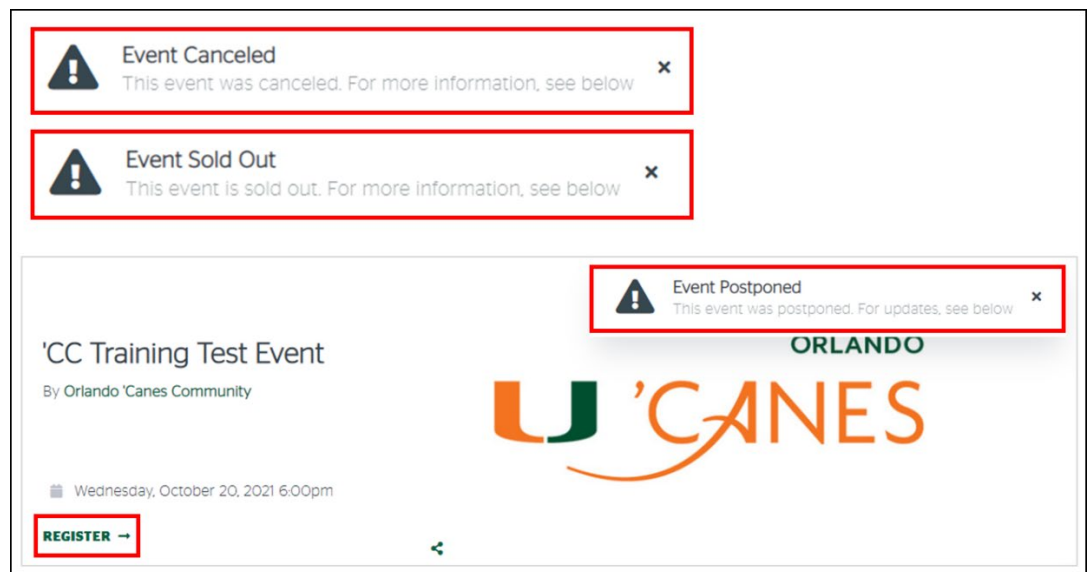
Description

Status

3. Enter an event **Name**. Due to viewing space on the registration page, please follow this naming format: **Region + 'Canes + Event Description**. Exclude the word Community. Underscores cannot be used in an event name. Name samples below:
 - Broward County 'Canes Virtual Social Hour.
 - Broward County 'Canes Football Game Watch: Miami vs. FSU.

Note: Once an event is Published, **DO NOT** change the event name. An automated process is taking place behind the scenes between Localist and iBIS (Customer Relationship Management platform) that will create a duplicate of the event if the name is changed.

4. Enter the event **Description**. The site promotes events with descriptions longer than 160 characters.
 - **Description hint:** To show proper line spacing between paragraphs, hit the enter key (hard return) twice.
5. **Status** can be left as **Live**. Other options are:
 - **Cancelled:** Use this status if an event is cancelled after getting published or if a date needs to change. This will remove the Register → button from the registration page.
 - **Postponed:** **Do not use this option.** Once this status is selected a message is prompted on the registration page, but it does not prevent guests from registering, causing more issues, and increasing the number of registered guests you will have to contact.
 - **Sold-Out:** Option available to change status when an event reaches an unexpected or its maximum capacity. Note, event capacity can be specified on the [Tickets & Registration](#) section. A sample of the Status pop-up messages are shown below:



- When an event is sold out, and depending on "In Demand" interest, we recommend you change the **Event Description** in the registration page. Here is a **Sold-Out Sample Message** to replace on [Event Description](#) section.

SOLD OUT

Thank you for your interest in the **EVENT NAME!**

We have been overwhelmed with interest in this event and have reached registration capacity. *Due to COVID-19 guidelines for large gatherings and social distancing, we won't be offering walk-up registration at the event.*

The **REGION** 'Canes Community will be planning additional events and we hope that you will consider joining us for a future Game Watch or Community events. We look forward to connecting and welcoming your participation with the **REGION** 'Canes Community!

If you have any questions, please contact the **REGION** 'Canes Community at REGIONcanes@miami.edu

- **Note:** If an event's date changes, once the status is updated:
 - Follow the steps on [Exporting Confirmed Tickets](#) to save registered guest details. Once the new date is entered in the event details section the registered guest details will be deleted from the system.
 - Send an email to registered guests informing them of the event update. Let them know you will add their registration to the new event date.
 - Manually upload the saved guest list to the updated event record by following the steps under [Create Ticket \(Mobile version\)](#) or [Create Ticket \(PC version\)](#).

Work in Progress - Localist is working on a tool to perform massive uploads of guests lists to updated events.

6. Under **Schedule** enter the event **Start Date**, **Start Time**, and **End Time**.

End Time importance - Why it is important to always enter an event End Time:

- The **Register Button** – **Currently will disappear within the first hour of the event if no End Time is entered. This will not allow walk-ins to register online.**
- The **Organizer Check In** button **will disappear at exactly the end of the first hour.**
- When guests register, the calendar appointment sent with their registration will have a default timeframe set to one hour.

7. Under **Repeating** select the dropdown button and choose **Never**. For events with recurrences select the appropriate option.

Schedule

Start Date REQUIRED

Start Time

End Time

Repeating

Summary Tue, Sep 1, 2020, 6:00pm - 8:00pm

Include Above in Schedule

CONFIRMED DATES

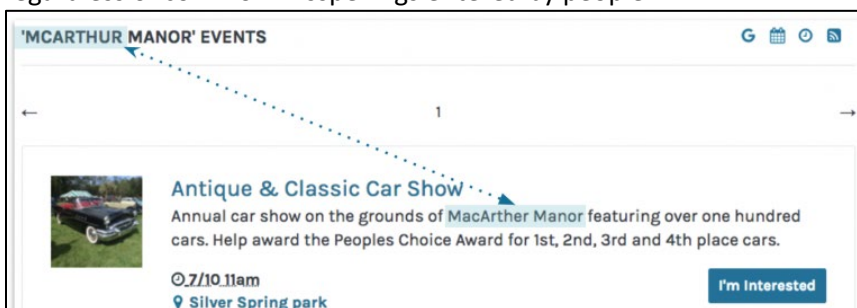
Tue, Sep 01, 2020 6:00 PM - 8:00 PM
✎ 🗑

8. Under **Location**, for event **Experience** choose between **Hybrid**, **In-Person** or **Virtual** based on your event. Each selection enables the following fields by default:
 - **Hybrid** - Event Place, Room, Zoom Integration, Dial-In Instructions, Steam URL, and Stream Embed Code.
 - **In-Person** - Event Place and Room.
 - **Virtual** – Community (contains time zone selection), Zoom Integration, Dial-In Instructions, Steam URL, and Stream Embed Code.
 - Time Zones included in **Community** field are: Central, Mountain, and Pacific Time Zones. For Eastern time zones the system allows us to select the campus where the event is taking place; Coral Gables, Miller School, and Rosenstiel School Campuses.
9. For in-Person and Hybrid events, under **Event Place** type the building name for on-campus events or a business name for off-campus events.
10. New fields will be enabled once the **Event Place** is entered. Those are the Address, Directions, and Community fields.
 - On-Campus events: Enter the on-campus **Address** and under **Directions**, if necessary, add any campus related instructions to guide our guests properly.
 - Off-Campus events: Enter the off-campus **Address**, there is no need to write directions since Google maps will be enabled in the registration page.
11. Under **Community** select the appropriate time zone based on your community. Eastern time zone does not need to be specified since that is the default setting in Localist.
Please note – once the event is saved, the **Community** field disappears but the time zone setting remains selected. You won't be able to change the time zone after the event is saved.
12. Use the **Room** field to type out the room location. Entering an address for in-person events will generate a google maps on the registration page.

Location	
Experience	In-Person
Event Place	WP Test Kitchen ✕
Address ?	8687 Melrose Ave, West Hollywood, CA 90069
Directions	
Room	
Community	Pacific Time Zone

13. If you are having a virtual event, request the creation of the **Zoom meeting** or **Zoom webinar** from your RE Liaison once the event is created as mentioned on [step 20](#) under [TICKETS & REGISTRATION TAB](#). Free accounts only allow the creation of 30-to-40-minute Zoom meetings.
14. Under **Photo**, select your **'Canes Community – U 'Canes Logo**. The site recommends pictures be 690x480 resolution, all our 'Canes community logos have been formatted to that size.
15. Under **Classifications**, select the **Event Type** and **Topic** that most accurately represents your event. Items under Classification are keywords and tags that can be filtered on your calendar when guests are looking for a type of event.
16. Under **Audience**, select all that fit your event.
17. If the event is sports related, enter the most accurate **Athletics & Sport** category.
18. If the event is related to the UM Ever Brighter Campaign, please select the appropriate **Campaign Theme**.
19. Under **Groups** select your **'Canes Community region** from the dropdown list. **If a Group is not entered the event will not appear on your dashboard. The RE team will require the help from UM's Conference Services department to find and categorize the meeting accordingly.**

20. Under **Additional Details**, for **Keywords** enter any common misspellings for your event, hitting enter after each word to add it to the list. This will allow for events to show up in the search bar regardless of common misspellings entered by people.



21. **Tags** can be attached to an event to help connect and find similar events.
22. Add a **Hashtag** for social media if you would like. Only one hashtag can be used per event.
23. **Event Website** leave this field **blank** to avoid confusion when adding extra links on the registration page. Extra links might divert the registrant’s attention from the intended purpose.
24. The **Vanity URL** leave this field **blank**. This automatically generates once you save the event.
 - If you want to shorten the URL name, feel free to change it. This step is not necessary since our standard is that we embed the link on a button or a “Click here” text. Below is an example of the benefit of editing the Vanity URL from an event with a long name, only and if you are sharing the full link is being shared.

SAMPLE EVENT

- **Event Name:** Maria Schneider Celebrates Earth Day! —Henry Mancini Institute Orchestra
- **Default Vanity URL:** maria_schneider_celebrates_earth_dayhenry_mancini_institute_orchestra.
- **Default Event registration link:** [Link disabled for manual]
https://events.miami.edu/event/maria_schneider_celebrates_earth_dayhenry_mancini_institute_orchestra.
- **Updated Vanity URL:** Maria_Schneider_celebrates_earth_day.
- **Updated Event registration link:** [Link disabled for manual]
https://events.miami.edu/event/Maria_Schneider_celebrates_earth_day.

Please note: Changing the name of an event does not automatically change the Vanity URL. Important to notice when an event has a major name change or when copying old event templates to create new events. Also, updating **Vanity URL’s** is not essential when sharing events on social media accounts. Follow the steps under [Sharing Your Event on Social Media](#) to share any upcoming events.

25. The **Owner** field should be automatically filled in based on your login account.

Additional Details

Keywords ? Type a keyword and press Enter

Tags ? Type a tag and press Enter

Hashtag ?

Event Website

Vanity URL ?

Owner

26. Under **Event Insights** deselect the checkbox next to **Request post event feedback from attendees**.

Work in Progress - Currently Localist has a very basic and generic survey created that is sent post event. Localist is working on making the fields editable to customize our survey questions based on our events and community needs.

The screenshot shows a section titled 'Event Insights' with a help icon. Below it, there is a checkbox labeled 'Request post event feedback from attendees'. The checkbox is currently unchecked, and a red square highlights it.

27. Under **User Engagement** deselect **Allow User Activity** to disable comments and photos.
28. Deselect **Allow User Interest**, this will disable the “I’m Interested” button.

The screenshot shows a section titled 'User Engagement'. It contains two checkboxes: 'Allow User Activity' and 'Allow User Interest'. Both checkboxes are currently unchecked, and each is highlighted with a red square.

29. For **Visibility**, leave the event on **Public** for it to be seen on the website by anyone. Other options available will not be used by the 'Canes Communities. **Unlisted** makes it only accessible by those with the direct link. **Restricted** allows you to control who sees. **Note:** The automated integration process between UM’s internal systems only supports Public or Restricted events.

The screenshot shows a section titled 'Visibility'. It includes an 'Exclude from Trending' checkbox which is unchecked. Below that is a 'Visibility' dropdown menu with a help icon, currently set to 'Public'.

30. Before continuing to **Tickets and Registration**, select **Save Changes**.

TICKETS & REGISTRATION TAB

For **Paid events**, this step will be completed by **UM Development Services**. Proceed to notify your RE Liaison as specified on [step 20](#) below. For **Free events**, to add the **Register** → button to the event registration page, scroll to the top of the event.

1. Select the **Tickets & Registration** tab.
2. For Localist Registrations – Leave the **Use Localist Register** check box selected to set up tickets and pricing within Localist (*Required for all 'Canes Community Events*).

3. Select the **Add Ticket** button.

Note: Multiple tickets can be added for events with various prices and/or multiple locations. Multiple locations will only work if the event is taking place at the same time to cover different areas (i.e., north, and south part of town). Events with sub-events (i.e., beach cleanup followed up by a lunch or happy hour) need to have different registration links created since UM's internal systems does not allow registering a constituent for an event more than once.

The screenshot shows the 'Tickets & Registration' section of a web application. It includes a 'Use Localist Register' button (callout 2), a 'Tickets' table with columns for NAME, STATUS, # SOLD, and PRICE, and two buttons: 'Add Ticket Type' and 'Add Ticket' (callout 3). A 'Tickets & Registration' tab is highlighted in the top right (callout 1).

4. Enter a **Ticket Name**, (i.e., Complimentary – for free events).
Note: Unless there are different Ticket Types created, there is no need to enter anything under Description.
5. Select the **Ticket Type** based on specific event. Available options are **In-Person** and **Virtual**. If the event is specified as **Hybrid** in the Event Details section, select **In-Person**.
 - o The **In-Person** option will enable the creation of the **QR code** needed for registration during in-person events. The RE Liaison will enter Zoom meeting details once created. Those details will be sent via the email confirmation after guests register.
6. Under **Price Type** leave the default as **Fixed**.
7. Under **Fees** change from default to **Organizer Pays fees**.
8. Enter **Price** based on event. If the event is free, leave the default as **0.00**.
 - o **Note:** Paying events will be set up by **UM Development Services**. **Once the request is submitted to them, all financial components will be entered within 48 hours.**

Display of Tickets & Registration fields

The screenshot shows a form for displaying ticket registration fields. It includes a table with columns for NAME, STATUS, # SOLD, and PRICE. Below the table are several input fields: Active (checkbox), Ticket Name (REQUIRED), Description, Ticket Type, Ticket Type Message, Price Type, Fees, and Price. The 'Additional ticket options' link is visible at the bottom.

NAME	STATUS	# SOLD	PRICE
Complimentary	Active	0	\$0.00

Active

Ticket Name **REQUIRED**

Description

Ticket Type

Ticket Type Message

Price Type

Fees

Price

[Additional ticket options](#)

Attendee Questions

9. **For events with a ticket fee:** As an F.Y.I., the mandatory fields to be entered by the RE Liaison under **Attendee Questions** are shown below. These are required to match payment within iBIS.

The screenshot shows a form titled "Attendee Questions" with five required fields, each with a "REQUIRED" label and a hamburger menu icon to its left. The fields are: Street Address, City, State, Zip Code, and Are you an Alumni of the University of Miami?. A red rectangular box highlights the entire form area.

10. **For Complimentary events:** During the registration process, we want to capture if a registered guest is a UM alumnus or not:
- Click on **Add Attendee Question**.
 - In the **Question** field type **Are you an Alumni of the University of Miami?**
 - Select the **check box** next **to Require Response**.
 - Click on the **Update Question** button.

The screenshot shows the "Attendee Questions" management interface. A red box labeled "1" highlights the "Add Attendee Question" button in the top right. Below, the question text "Are you an Alumni of the University of Miami?" is shown in a red box labeled "2". The "Require Response" checkbox is checked and highlighted with a red box labeled "3". An "Update Question" button is visible in the bottom right.

Note: If the event has limited space capacity, there are different ways to add restrictions on how tickets are purchased.

11. Enter **Event Capacity** under the **Event Registration Settings**. Once the capacity is reached, Localist will not allow for additional tickets to be purchased.

The screenshot shows the "Event Registration Settings" form. The "Event Capacity" field is highlighted with a red box and contains the value "50". Below it are two other settings: "Reset Quantities Per Instance" and "Registration Notifications", both with unchecked checkboxes.

12. Or choose to limit the number of tickets one person can purchase at a time. Select the **Additional Ticket Options** under the **Tickets** section.



13. That will expand a window showing **Ticket Availability Dates** and **Settings**. Enter a number based on your preferred restriction.

SETTINGS

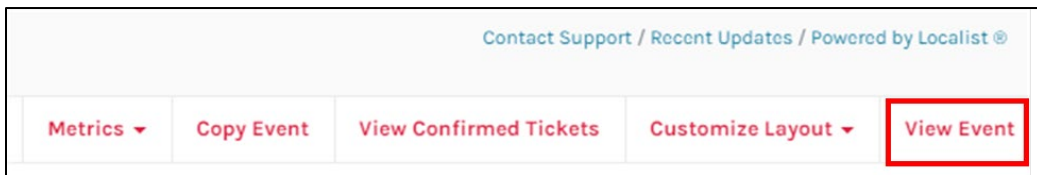
Hidden

Tickets Available

Min. Quantity Per Sale

Max. Quantity Per Sale

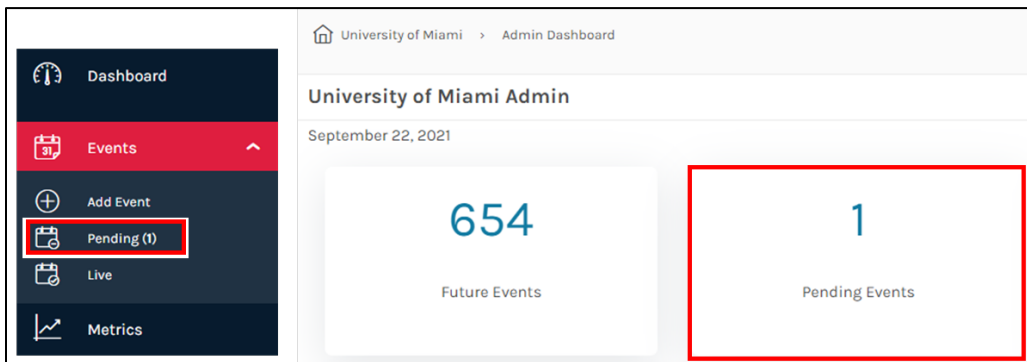
14. Select the **Save Complimentary** button (the button name changes based on Ticket Name).
15. All the previous steps generate the **Register** or **Buy Tickets** button(s) to the event site. The button will be enabled once the event is approved by your RE Liaison.
16. Click the **Save Changes** button at the bottom right of the screen to save your event.
17. To view how the event will display at the registration page, select the **View Event** button on the top right corner of your screen. This button will be enabled once the event is saved and can be selected/accessed at any time to view the creation progress.



18. Non-approved events will prompt you that the event is **waiting admin approval** and the **Register/Buy Tickets** button will not be enabled. **Scroll down** to review all event details. Use the web browser **back button** to continue editing your event or select the green **Admin Event Editor** button at the bottom of the page. If no edits need to be made, select any other area in your dashboard to exit the event edit mode.



19. Your event will be listed in the **Pending/Pending Events** section of your **Dashboard**.



20. **Notify** your **RE Liaison** of your event creation. Provide them with the following details:

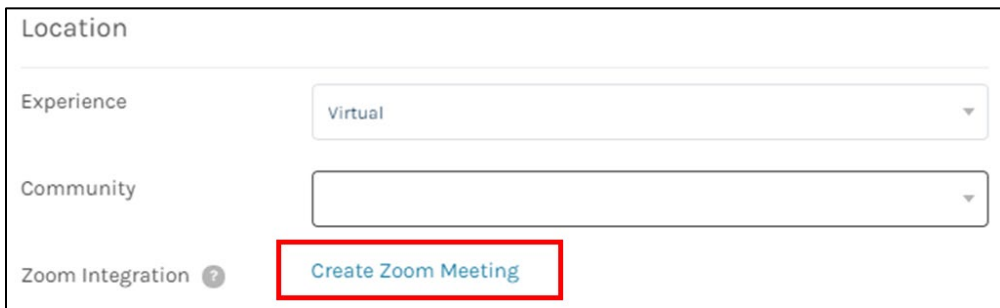
- **Event Date and Name**
- **Type of Zoom link needed:** Zoom Meeting or Zoom Webinar (*only for virtual events*)
- **Ticket Type:** Free or Paid event
- **Ticket Price(s)**

Remember **approval timeline** from RE Liaison: 48 hours-free events, 96 hours-paid events.

ZOOM MEETING OR ZOOM WEBINAR CREATION BY RE LIAISON

Request your **Events Team Liaison** for the creation of a Zoom Webinar. **Please note: For Paid events, the Zoom meeting/webinar link needs to be completed prior to requesting support from Development Services.** For the creation of a Zoom Meeting follow these steps:

1. **Log** into Localist, **search** and **click** on the new event. This will take you to the **Edit an Event** window.
2. For **Virtual** and **Hybrid** events, next to **Zoom Integration** select **Create Zoom Meeting**.



3. This will generate the meeting registration link and details under the **Dial-In Instructions** box as well as a stream link in the **Stream URL** box.
4. **Remove** the details from the **Dial-In Instructions** box and **paste** them in a separate document. This information will be entered later under **Ticket Type Message** below.

- In the **Dial-In Instructions** box type **“Zoom meeting details will be sent once you’ve registered”**, this will guarantee only registered guests have the Zoom link in the registration email.

Location

Experience ▼
Virtual

Community ▼

Zoom Integration Delete Zoom Meeting

Dial-In Instructions ?

Styles ▼
B I U
:≡
🔗
🗨️
🖼️
📄
🔍 Source

Zoom meeting details will be sent once you register

Stream URL ?

Stream Embed Code ?

- Select the **Tickets & Registration** tab.
- Under **Tickets** select the **Edit Ticket** pencil button.

NAME	STATUS	# SOLD	PRICE	
☰ General Admission	Active	0	\$0.00	<div style="border: 2px solid red; padding: 2px;"> ✎ 🗑️ </div>

- For **In-Person** events, under **Ticket Type Message** enter the Zoom meeting details saved to a separate document under **step 4** above.

Ticket Type ?
In-Person

Ticket Type Message

Zoom Meeting Link - <https://miami.zoom.us/j/87587587558>;
 Meeting ID: 848 700 0311; Passcode: 208337

Note: Separate the **Zoom Link**, **Meeting ID**, and **Passcode** with a semi colon [;] Localist won't recognize hard return in email. Sample of email below:

Zoom Meeting Link - <https://miami.zoom.us/j/87587587558>; Meeting ID: 848 700 0311; Passcode: 208337

General Admission

9. For **Virtual** events the **Event URL** section will be enabled, paste the **Zoom link**.
10. Under **Ticket Type Message** enter the **Meeting ID** and **Passcode**.

Ticket Type ?	Virtual
Event URL	https://miami.zoom.us/j/87587587558
Ticket Type Message	Meeting ID: 848 700 0311; Passcode: 208337

RE LIAISON – TICKET & REGISTRATION SETUP FOR PAID EVENTS

When processing paid events, please enter the following fields under **Attendee Questions** as shown below before sending an email to the Development Services Liaison.

Once completed, send an email to our Development Services Liaison requesting the creation of the ticket with the paying component. Follow the steps in the document named **Localist Paid Ticket & Registration Creation** in the Regional Engagement SharePoint folder named Events/Templates-Manuals.

EVENT APPROVAL BY RE LIAISON

1. Log into events.miami.edu using your **CaneID**.
2. Access your **Administration** site and select the **Pending Events** section.



3. All events pending approval will be listed on your dashboard.

4. **Click** on the **event name** to review all details. Make any necessary edits/changes.

Pending Events
Events that are awaiting approval on the calendar.

Batch Actions ▾ 1 1 to 2 of 2 events

<input type="checkbox"/>	NAME	DATE	PLACE	EVENTREACH	OWNER	
<input type="checkbox"/>	'CC Training Test Event	8/24/2021 - 12/5/2021	Live! at the battery atlanta	0%	orlandocanes...377	Approve Reject

5. Under the **Classification** section, scroll down to the **Departments** area, select **Alumni Association** from the pulldown. This will allow the event to appear in the Alumni App and UM Events website.
6. Once all necessary updates are made, select the **Save Changes** button.
7. Select the **checkbox** to the left of the event name and click on the **Approve** button to the right of the event name.

Pending Events
Events that are awaiting approval on the calendar.

Batch Actions ▾ 1 1 to 2 of 2 events

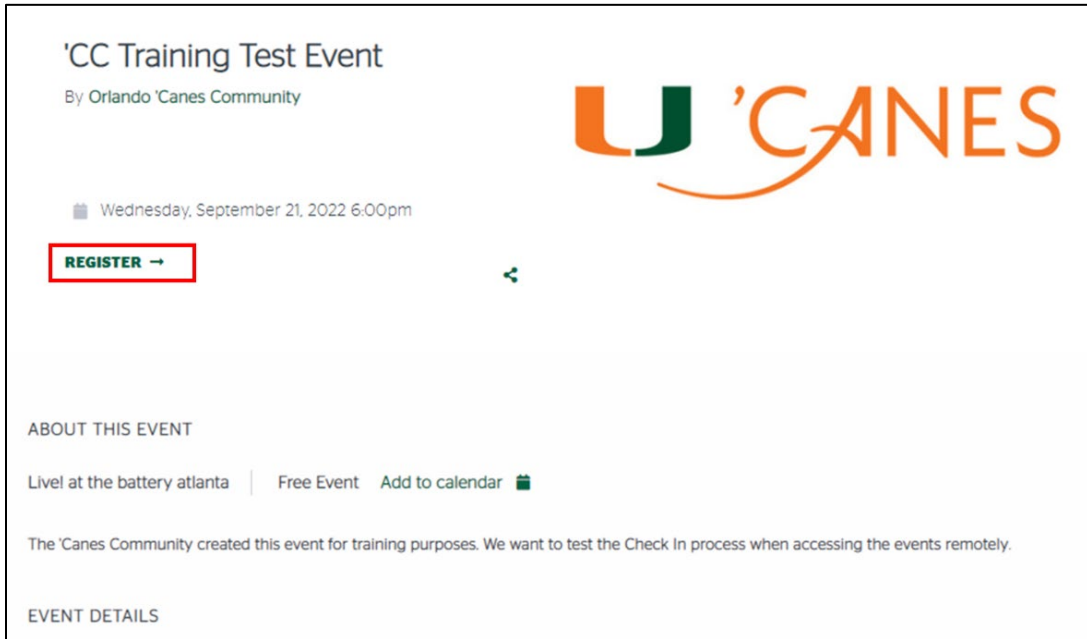
<input type="checkbox"/>	NAME	DATE	PLACE	EVENTREACH	OWNER	
<input type="checkbox"/>	'CC Training Test Event	8/24/2021 - 12/5/2021	Live! at the battery atlanta	0%	orlandocanes...377	Approve Reject

8. The listed event will be highlighted in green, and the checkbox will be marked in red. Once you select another area within the Localist system the event will be removed from the **Pending Events** section.

<input type="checkbox"/>	NAME	DATE	PLACE	EVENTREACH	OWNER	
<input checked="" type="checkbox"/>	'CC Training Test Event	8/24/2021 - 12/5/2021	Live! at the battery atlanta	0%	orlandocanes...377	Approve Reject

9. **Notify** the board leader that created the event and the respective 'Canes Community president once you approve the event.

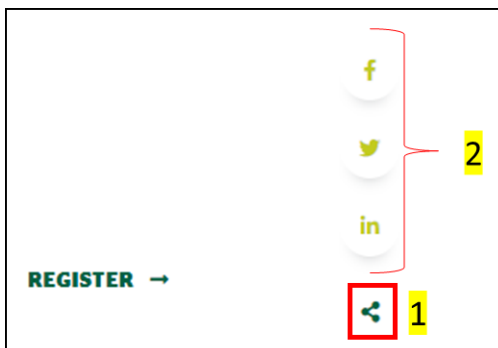
Training Event Sample – with the **Register** → button after approval.



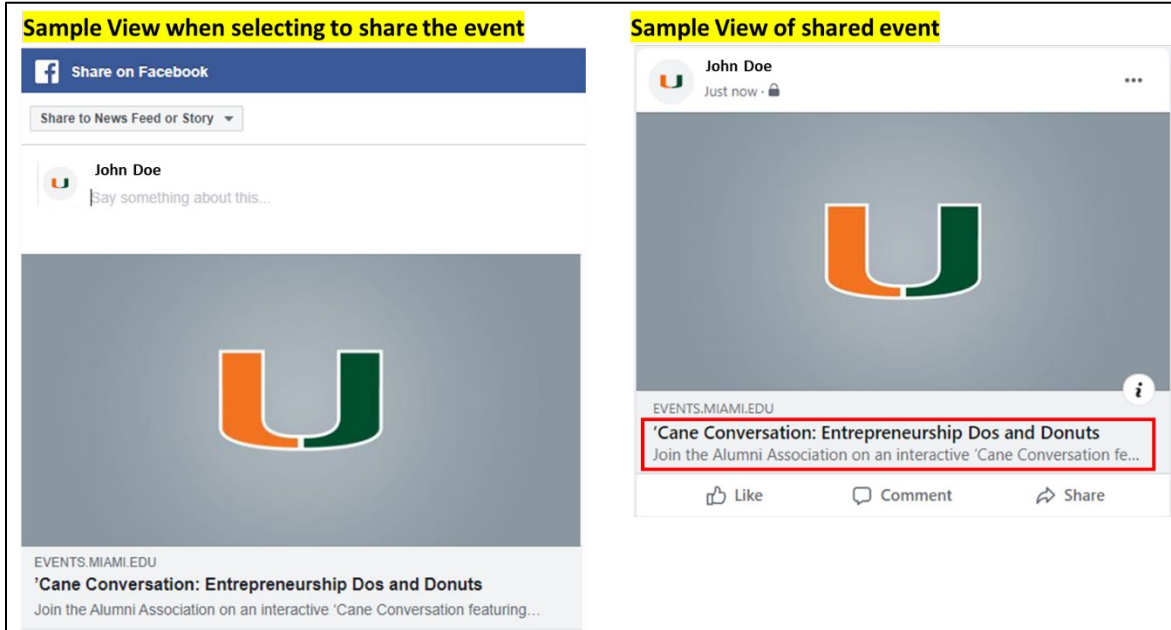
SHARING YOUR EVENT ON SOCIAL MEDIA

Localist allows you to share events on social media platforms such as Facebook, Twitter, and Instagram. Once your event is approved and published, please follow these steps:

1. Access the registration link and select the **sharing icon**. This will show the three platforms enabled in the system.



2. **Select** the desired platform and follow the sharing steps. Below is a sample of the display in Facebook after selecting the Facebook icon. Selecting the event name under the shared event (right) will take interested guests to the Localist registration page.



COPYING AN EVENT

Localist allows you to copy past events to create new events. By copying an event you have a complete template with identical event details and ticket options. Both past and future events can be used as templates to create new community events. Copying an event is very effective for Game Watches that follow the same format.

1. Follow **steps 1 to 6** under [Accessing Localist & Creating an Event](#) and select the **Future Events** section.
2. **Search** for an old event that matches your event criteria within the **Refine Results** section on the right of the screen. Search using any of the options shown. Once you find the event, open it.

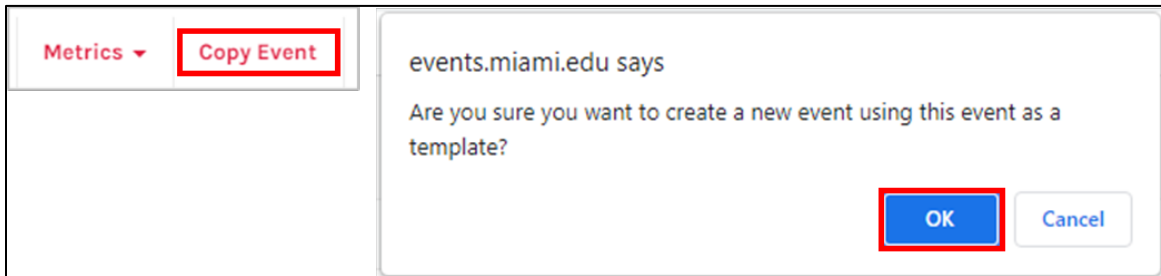
REFINE RESULTS

SEARCH EVENTS

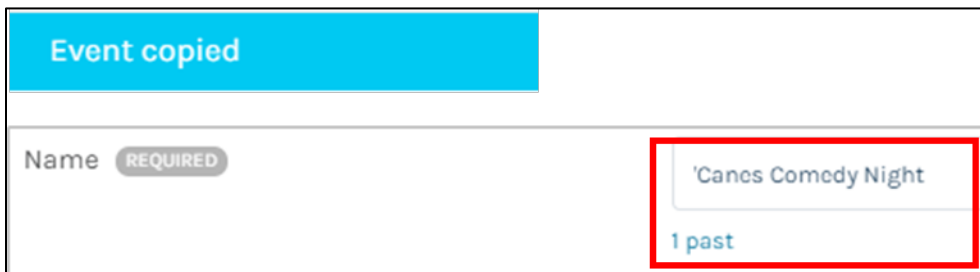
SHOW ONLY

Approved
▼

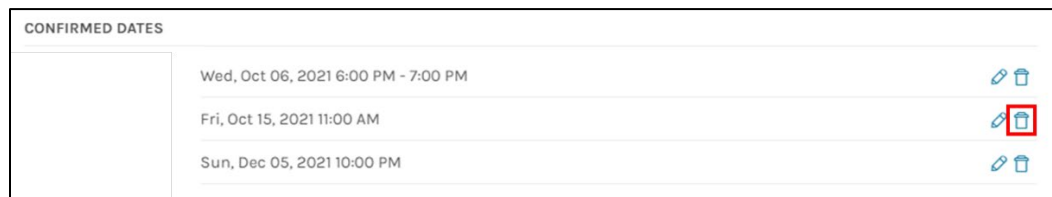
3. Select the **Copy Event** button on the top right of the screen. When prompted if you are sure you want to use this event as a template, select **OK**.



4. Notice the blue ribbon shown at the top of your event with the word **Event copied**. Also notice the word under the Name field, for past events it will say **“past”** with a number, for future events it will say **“future”** with a number. These are the only ways you will identify this is your “New” event since all details, including the date will stay the same.



5. Follow the guidelines under [Adding an Event – Event Details Tab](#). The main fields that require changes are:
 - Event **Name** and **Description**
 - **Start Date, Start Time, and End Time**
 - **Location**
6. If the event was copied from a future event, follow the steps below to remove the original date. If the event is copied from a past event, these steps don't have to be followed:
 - Under **Confirmed Dates**, select the **trashcan** and delete the date of the copied event. If this is not done when guests access the registration link, they will be provided with two different dates.

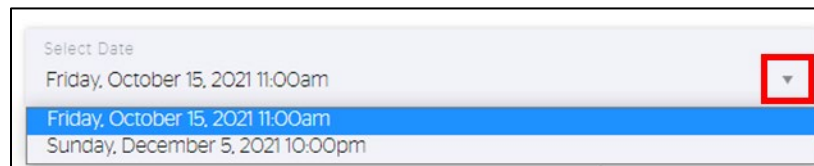


Sample of view if original date is not deleted:

- **Hovering** over the **plus sign (+)** will display the other date.



- Also, when selecting **Buy Tickets**, they will see the two options.



7. Click the **Save Changes** button at the bottom right of the screen to save your copied event.

EVENT CHECK IN METHODS

It is **recommended** that a laptop computer is available at the registration site on the day of the event, especially for paid events. The laptop provides you with a better view when making updates to guest names. These updates are necessary when the main guest purchases multiple tickets under his/her name. During the day of the event, they will notify you of their guest names, updating their information is necessary to properly track donor participation.

The **Organizer Check In** button and **QR code scanning** functionality are not available until 48 hours before the event is set to take place.

Work in Progress - A bug is impacting what the Organize Check In functionality is based on. It should be based only on calendar date and not time. The button should display until midnight on the date of the event. Below is the **temporary solution suggested by Localist**:

1. Once an **Organizer Check In** button becomes enabled, **copy the link address**
 - **Right click** on the **Organizer Check In** button.
 - Select **Copy link address**.
 - **Paste** the address in an email or a document, wherever you can easily access at the time of the event (i.e., <https://events.miami.edu/event/3765/checkin>). This link will allow anyone to access the **Check In** window at any time.

PCI Compliance (Payment Card Industry Data Security Standards)

Please note: For **Paid** events, any walk-in guest needs to register themselves to the event by using the registration link provided via invitation or with the Event QR code displayed at the event. Due to **PCI Compliance**, the University of Miami and its affiliated groups are not allowed to enter payment details in

any of our systems. Our priority is to ensure our guests' personal information remains secure. By having them process their registration we reduce the risk of identity theft, fraudulent credit activity, etc.

MOBILE / TABLET CHECK IN OPTIONS

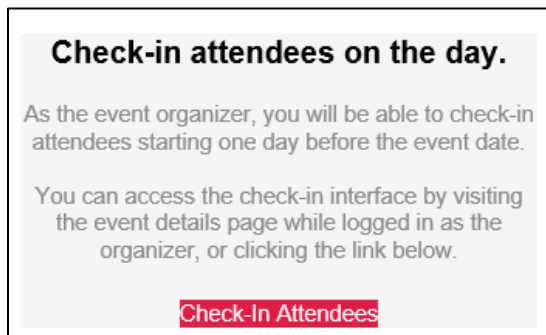
Event organizers can scan the event QR code using any mobile device or tablet with access to Localist and a camera via the Organizer Check In. This can be found on the Event Details page for that specific event. Once a QR code is scanned, attendance will be automatically logged in the Admin Dashboard.

There are different ways to access the mobile Check In options, via the New Order event email or via the Internet Browser.

New Order Event Email

Each attendee registration for an event generates a **New Order** email. The respective 'Canes Community mailbox (event owner) receives each new order notification.

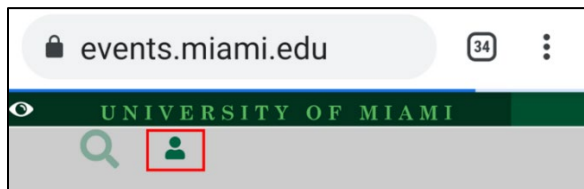
1. **Open** any of the "new order" emails with subject: **New Order for Event name – ID#** (*make sure it is the current event*).
2. Select the **Check-In Attendees** button towards the bottom of the email.



3. You will be directed to the event registration page.
4. Proceed to **steps 2 to 22** below under **Mobile Internet Browser** below.

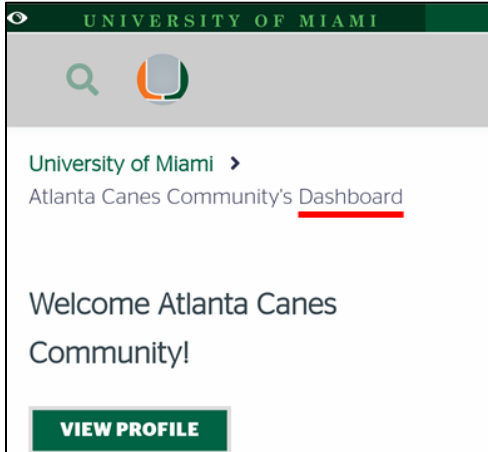
Mobile Internet Browser

1. **Open** your Internet Browser and type events.miami.edu in address bar.
2. Select the **person icon** to log in as shown below.

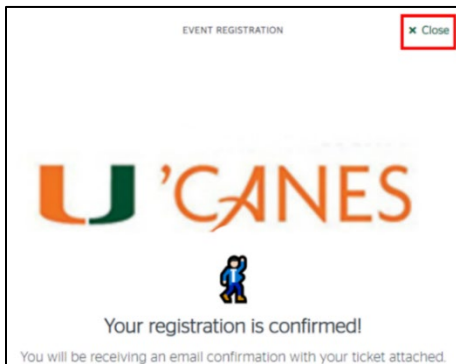


3. Scroll down and select **Log In** next to **I already have an account**.

4. Enter your **'Canes Community login credentials** and click on **Login** button. Your **Dashboard** will appear.
5. **Scroll down** and find your event, click on the **Event Name**.



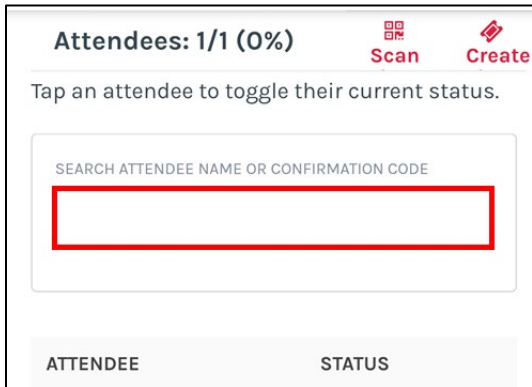
6. You will be directed to the Events registration page. **Note:** if you registered to the event, the **Event Registration** confirmation page will pop up, select the **x Close** button to exit the pop up.



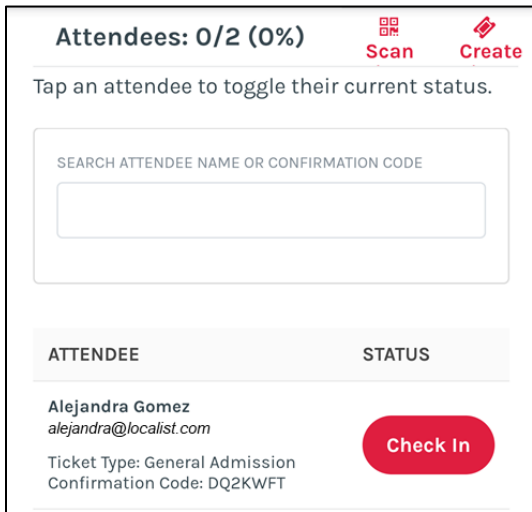
7. Select the **Organizer Check In** button that will appear on the top. This will open a new window with the attendees list.



8. **Scroll down** to find the guest's name, if the registration list is long, you can **Search** for the attendee's first name, last name, email, or event confirmation code in the search bar.

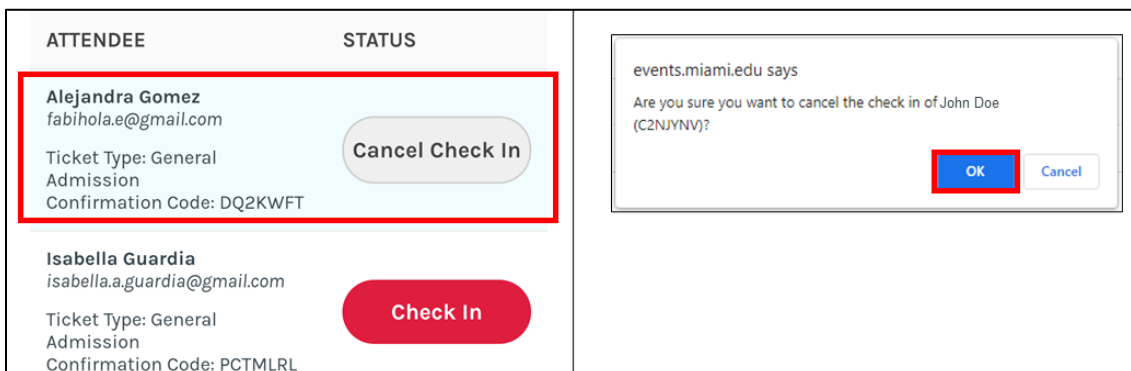


9. Select the red **Check In** button to mark guests upon arrival.

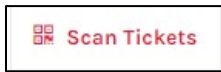


10. **Checked In** guests will have a light blue background and the Check In button will change to say **Cancel Check In**.

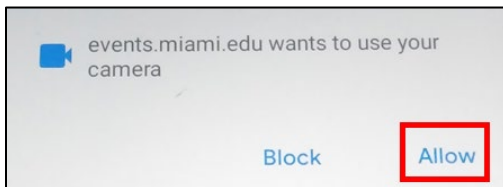
11. You will have the option to **Cancel Check In** if the wrong name was checked in. When selecting that button a prompt will appear confirming cancellation, select **OK**.



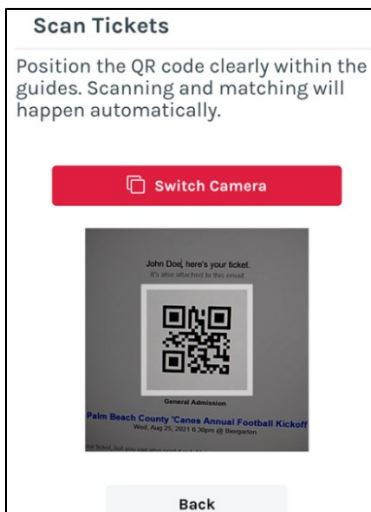
12. If the guests have a QR code, select **Scan Tickets** on the top right corner of the screen.



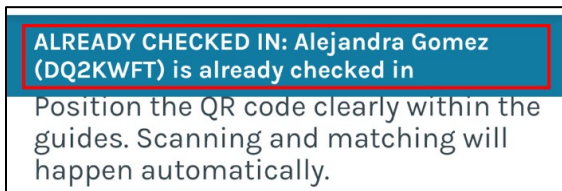
13. First time users will get the following prompt, select **Allow**.



14. The **Scan Tickets** window will open, position the QR code within the guides.

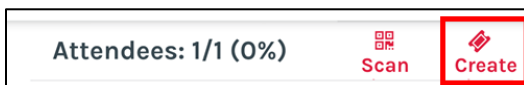


15. The phone will automatically **Check In** the guest and the following blue prompt will be displayed.



16. Select the **Back** button at the bottom of the screen to exit the **Scan Tickets** section. You will be taken back to the list of attendees and the newly scanned names will appear Checked In.

17. To register new guests/walk-ins select **Create** from the top right corner.



18. Enter **Attendee Name** and **Attendee Email**.
19. If there is only one ticket type, the type will be selected automatically. If more than one ticket option is available, select the appropriate one.
20. For guests that are present, select the **Create Ticket and Check In** button.



21. For guests that are invited but have not arrived when the inviter provides you with their name and/or payment just select **Create Ticket**. Check the guest in when they arrive.

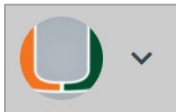


22. To change guest names on registered tickets, follow the steps under [Changing Registered Guest Names](#).

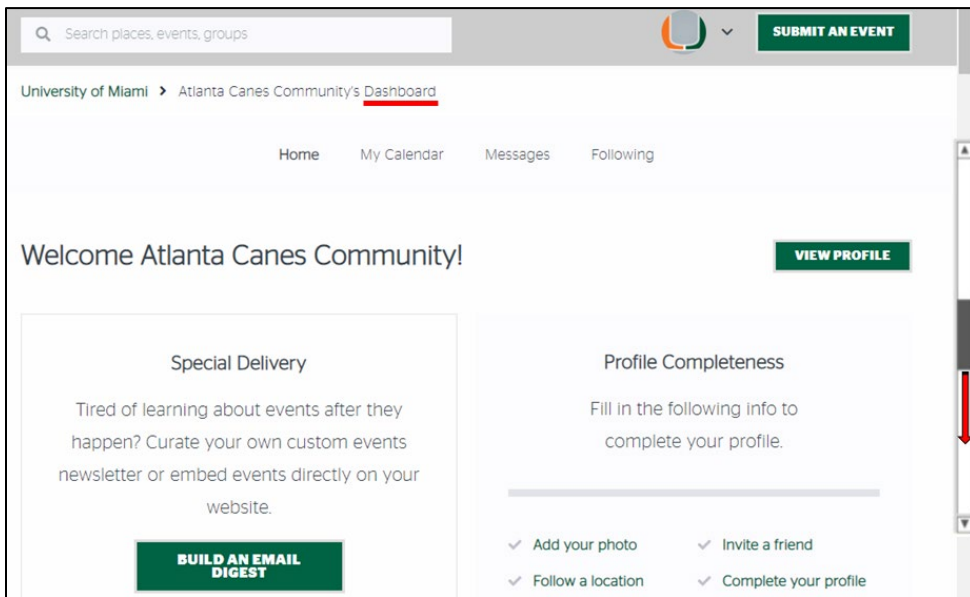
LAPTOP COMPUTER CHECK IN OPTIONS

Computer Internet Browser

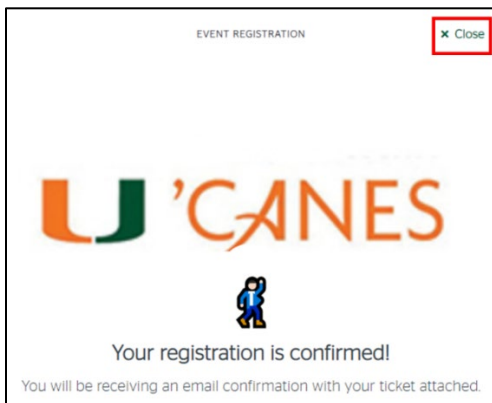
1. **Open** your Internet Browser and type events.miami.edu in address bar.
2. Select the **Log In** button.
3. Enter your **'Canes Community login credentials** and select the **Login** button. You will land in the *University of Miami main events page*.
4. Select **Dashboard** from the **U** dropdown.



5. **Scroll down** and select the event you want to focus on by clicking on the **Event Name**.



6. You will be directed to the Events registration page. **Note:** if you registered to the event, the **Event Registration** confirmation page will pop up, select the **x Close** button to exit the pop up.



7. Select the **Organizer Check In** button that will appear on the top. This will open a new window with the attendees list.



8. Scroll down to find the guest's name, if the registration list is long, you can **Search** for the attendee's first name, last name, email, or event confirmation code in the search bar.

Attendees: 2/7 (0%) Scan Tickets Create Ticket

Tap an attendee to toggle their current status.

SEARCH ATTENDEE NAME OR CONFIRMATION CODE

9. Select the red **Check In** button to mark guests upon arrival. **Checked In** guests will have a light blue background and the **Check In** button will change to gray and say **Cancel Check In**.

ATTENDEE	TICKET TYPE	CONFIRMATION CODE	STATUS
Lane Localist zach@localist.com	Single Ticket	V2LQPNJ	Check In
Lincoln Localist zach@localist.com	2-Person Ticket	CM2VMFN	Cancel Check In
Lionel Localist zach@localist.com	Single Ticket	XYPCFLN	Cancel Check In
Lonny Localist zach@localist.com	Single Ticket	7K7RD3Q	Check In

10. You will have the option to **Cancel Check In** if the wrong name was checked in. When selecting that button a prompt will appear confirming cancellation, select **OK**.

Lincoln Localist zach@localist.com 2-Person Ticket CM2VMFN Cancel Check In

events.miami.edu says

Are you sure you want to cancel the check in of John Doe (C2NJYNV)?

OK Cancel

11. To register new guests/walk-ins select **Create Ticket**.

Create Ticket

12. Enter **Attendee Name** and **Attendee Email**.
13. If there is only one ticket type, the type will be selected automatically. If more than one ticket option is available, select the appropriate one.

14. For guests that are present, select the **Create Ticket and Check In** button.



15. For guests that are invited but have not arrived when the inviter provides you with their name and/or payment just select **Create Ticket**. Check the guest in when they arrive.

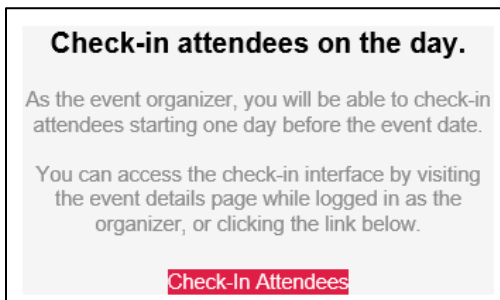


16. To change guest names on registered tickets, follow the steps under [Changing Registered Guest Names](#).

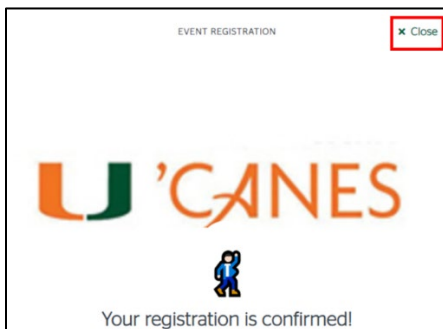
New Order Event Email

When attendees register to an event a **New Order** email is generated. The respective 'Canes Community mailbox (event owner) receives each new order notification.

1. **Open** any of the "new order" emails with subject: **New Order for Event name – ID#** (*make sure it is the current event*).
2. Select the **Check-In Attendees** button towards the bottom of the email.



3. You will be directed to the event registration page. **Note:** if you registered to the event, the **Event Registration** confirmation page will pop up, select the **x Close** button to exit the pop up.



4. Select the **Log In** button.
5. Enter your **'Canes Community login credentials** and select the **Login** button. You will land in the Event registration page once again.
6. Repeat **steps 7 to 16** above under [Computer Internet Browser](#).

CHANGING REGISTERED GUEST NAMES

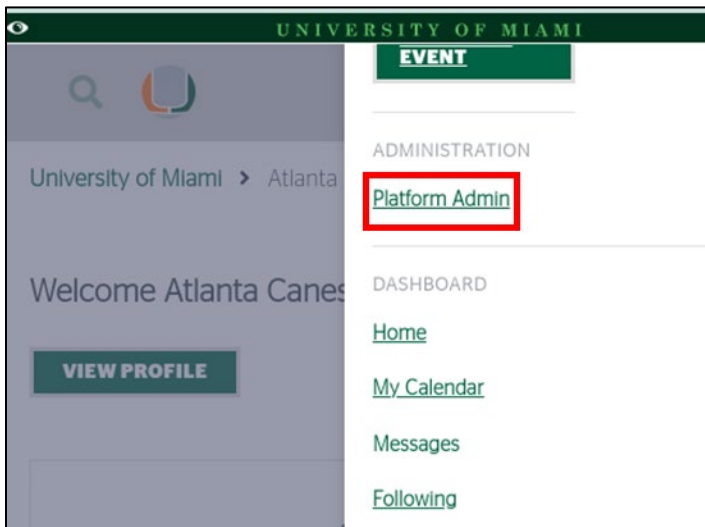
When one guest purchases multiple tickets under his/her name, it is important to update the information with their unique guest's name and email address to properly track donor participation. These are the steps via mobile devices and laptop computers.

UPDATING NAMES ON MOBILE DEVICES

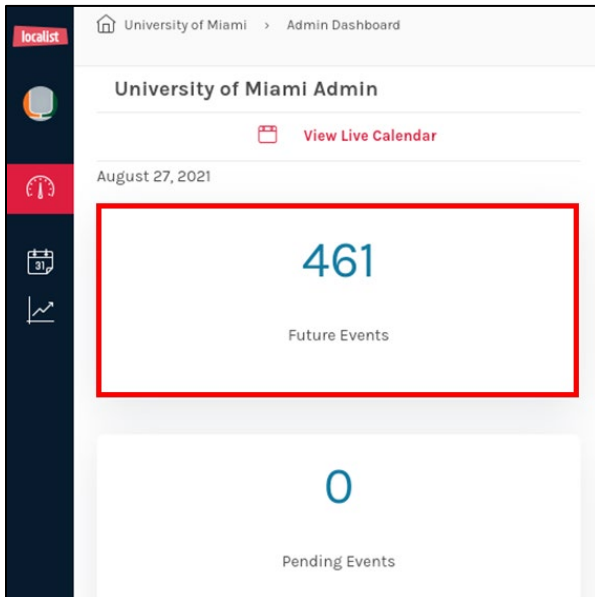
1. **Log In** to Localist Administration following **steps 1 to 6** under [Mobile Internet Browser](#) Check In Options.
2. Select the **U** icon.



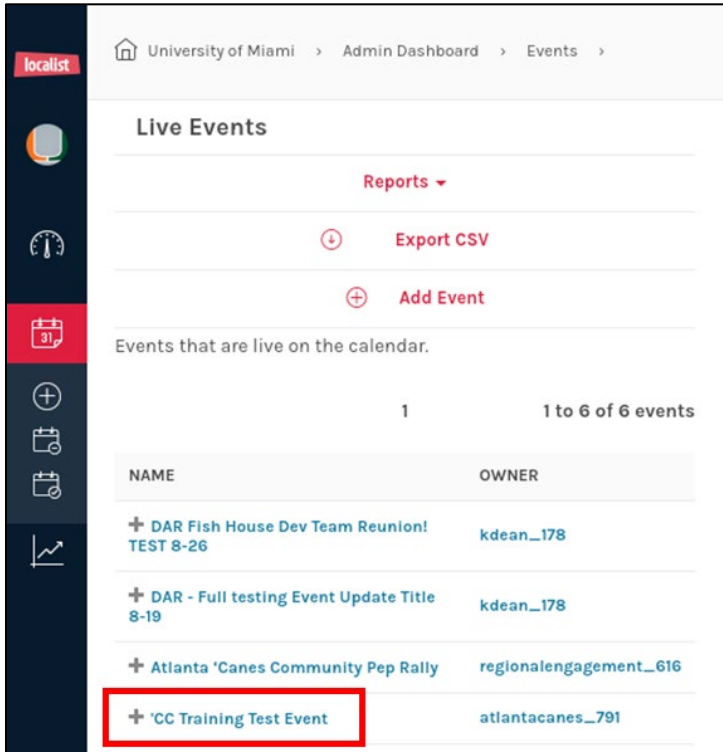
3. A pop up will show up on the right of the screen, select **Platform Admin**.



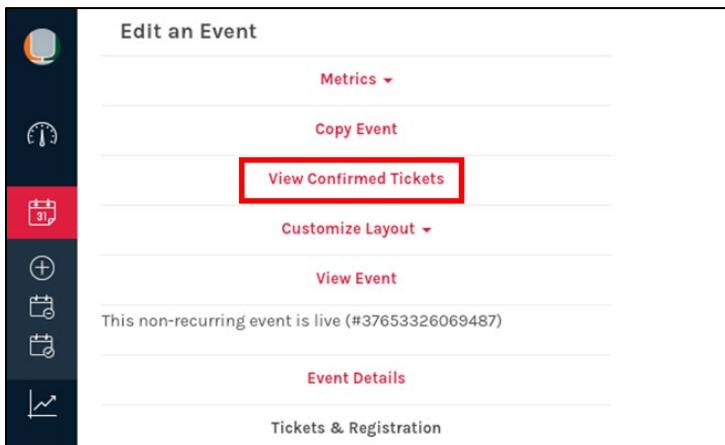
- The **University of Miami Admin Dashboard** will open displaying Future Events, Pending Events, and Event Reach. Each 'CC will only see their community events. Select **Future Evens**.



- A list of **Live Events** will be displayed. **Select** the desired event.



6. Select **View Confirmed Tickets**.



7. This will display your **Confirmed Tickets** attendee list. Find the guest's name you need to update and click on the **blue Confirmation** number.

Confirmed Tickets for 'CC Training Test Event' [Export CSV](#) [Issue Ticket](#)

A list of issued tickets and attendees.

1 1 to 4 of 4 tickets

ATTENDEE	TICKET	CONFIRMATION	ORDER ID	STATUS	CONFIRMED	
Bella Localist	General Admission	C2NJYNV		Checked In	8/26/2021 5:26pm	Cancel Check In
Fabiola Espinosa	General Admission	CWWLWQD	42681104759	Purchased	8/26/2021 7:39pm	Check In

REFINE RESULTS

SEARCH

SORT BY

Name (A-Z)

8. The ticket details will appear. Please update the **Attendee Name** and **Attendee Email** to properly update our database. Select **Save Changes**.

University of Miami > Admin Dashboard > 'CC Training Test Event > Tickets > Edit Ticket [Contact Support](#) / [Recent Updates](#) / [Powered by Localist](#)®

Confirmation Code **CWWLWQD**

Event Date REQUIRED Friday, August 27 9pm

Ticket Type REQUIRED General Admission

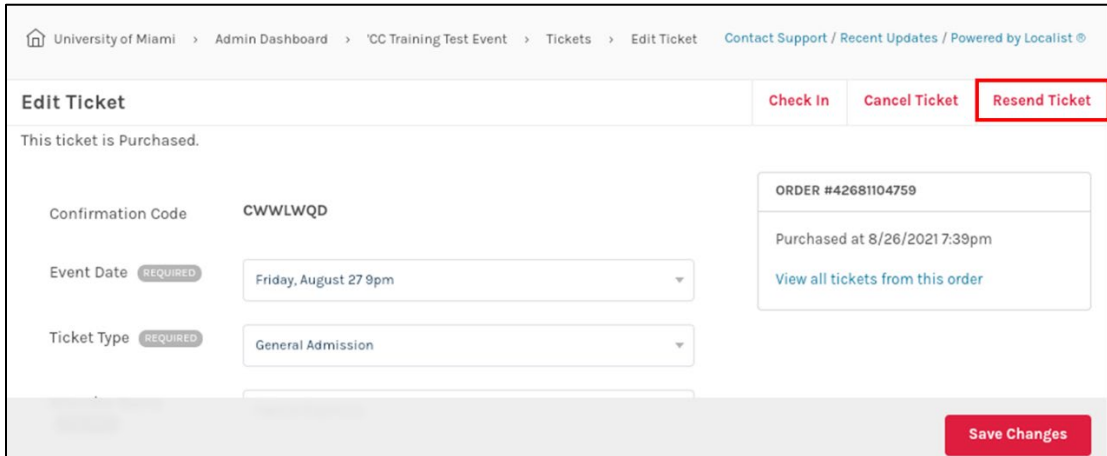
Attendee Name REQUIRED

Attendee Email REQUIRED

Purchased at 8/26/2021 7:39pm

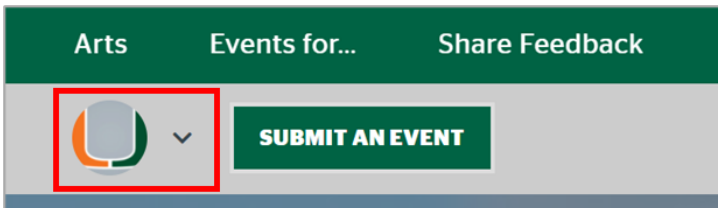
[View all tickets from this order](#)

- If the updated Attendee Name was provided by the inviter while the new guest is not present, select the **Resend Ticket** button and a confirmation email with the **QR code** will be sent to the new guest.

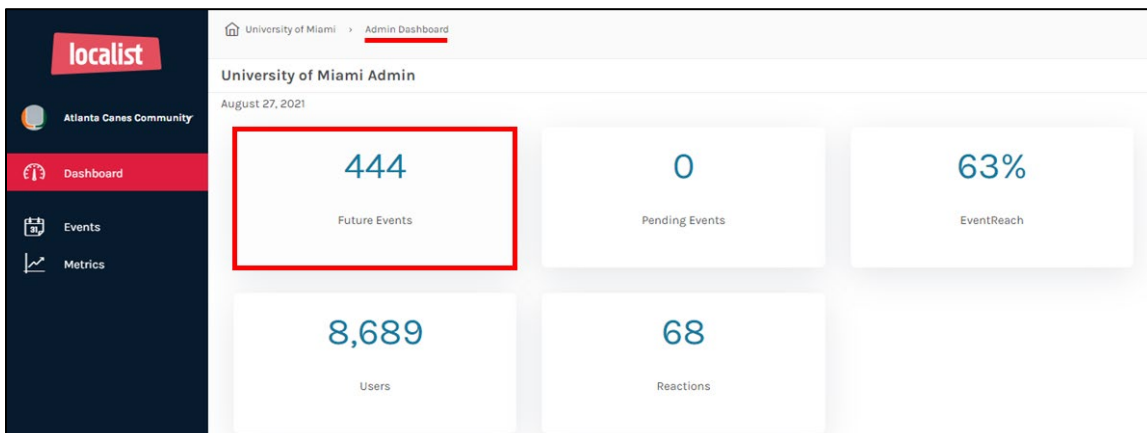


UPDATING NAMES ON LAPTOP COMPUTERS

- Log In** to Localist Administration following **steps 1 to 6** under [Computer Internet Browser](#) Check In Options.
- Click the **dropdown arrow** at the top right of your screen and select **Administration**.



- The **University of Miami Admin Dashboard** will open displaying Future Events, Pending Events, Event Reach, Users, and Reactions. Each 'CC will only see their community events. Select **Future Evens**.



- A list of events will be displayed. **Select** the desired event.

Live Events
Events that are live on the calendar.

1

1 to 6 of 6 events

NAME	DATE	PLACE	EVENTREACH	OWNER
DAR Fish House Dev Team Reunion! TEST 8-26	10/4/2021	Fish House!	0%	kdean_178
DAR - Full testing Event Update Title 8-19	10/1/2021		0%	kdean_178
Atlanta 'Canes Community Pep Rally	9/3/2021	Live! at the Battery Atlanta	64%	regionalengagement_616
'CC Training Test Event	8/24/2021 - 8/27/2021	Watsco Center	45%	atlantacanes_791

- Select **View Confirmed Tickets** on the top right corner of the **Edit an Event** section.

Contact Support / Recent Updates / Powered by Localist ©

Metrics ▾	Copy Event	View Confirmed Tickets	Customize Layout ▾	View Event
-----------	------------	------------------------	--------------------	------------

- This will display your **Confirmed Tickets** attendee list. Find the guest's name you need to update and click on the **blue Confirmation** number.

Confirmed Tickets for 'CC Training Test Event
A list of issued tickets and attendees.

1

1 to 4 of 4 tickets

ATTENDEE	TICKET	CONFIRMATION	ORDER ID	STATUS	CONFIRMED
Bella Localist	General Admission	C2NJYNV		Purchased	8/26/2021 5:26pm Check In
Fabiola Gomez	General Admission	CWWLWQD	42681104759	Purchased	8/26/2021 7:39pm Check In
Fabiola Localist	General Admission	RHR4DWV		Purchased	8/26/2021 5:25pm Check In
Kristin Wherry	General Admission	ZWYMFV6		Purchased	8/26/2021 5:25pm Check In

Edit Ticket

This ticket is Purchased.

Confirmation Code **C2NJYNV**

Event Date REQUIRED

Ticket Type REQUIRED

Attendee Name REQUIRED

Attendee Email REQUIRED

- If the updated Attendee Name was provided by the inviter while the new guest is not present, you can resend their ticket by clicking on the **Confirmation** number again. In the **Edit Ticket** window select the **Resend Ticket** button at the top right corner of the screen.

[Contact Support](#) / [Recent Updates](#) / [Powered by Localist](#) ©

ADDING COMPLIMENTARY GUESTS TO EVENTS

When managing events with a fee or donation, there might be a need to create complimentary tickets for event sponsors, speakers, UM leaders or primary volunteers that are not board leaders. Please follow the steps below to **Issue a Ticket** that will bypass the purchase process on the regular registration page.

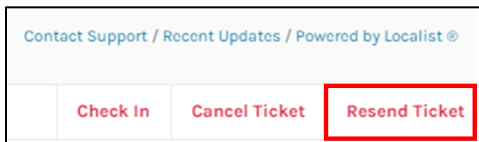
- In the **Confirmed Tickets** page select **Issue Ticket** from the top right corner of the screen.

- The **New Ticket** window will open. Enter the **Ticket Type**, **Attendee Name** and **Attendee Email**.
- Once completed select the **Save Changes** button.

- This will take you back to the **Confirmed Tickets** attendee list. Find the guest's name and select the **Confirmation** number to access the **Edit Ticket** screen and send the new guest their ticket.

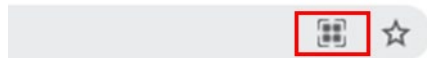
Confirmed Tickets for 'CC Training Test Event						
A list of issued tickets and attendees.						
						1 to
ATTENDEE	TICKET	CONFIRMATION	ORDER ID	STATUS	CONFIRMED	
Bella Localist	General Admission	C2NJYV		Purchased	8/26/2021 5:26pm	Check In
Fabiola Gomez	General Admission	CWWLWQD	42681104759	Purchased	8/26/2021 7:39pm	Check In

- Select the **Resend Ticket** button at the top right corner of the screen.

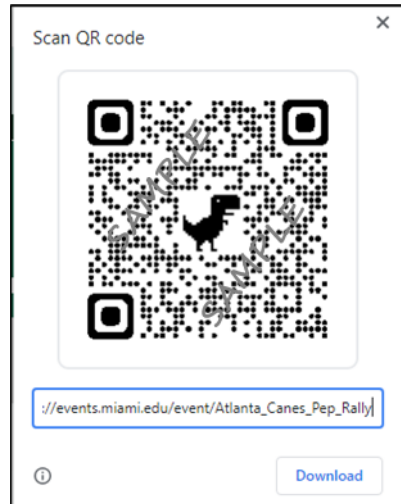


CREATING QR CODES FOR ONSITE EVENT REGISTRATION

- Open** Google Chrome.
- Paste** the **Event Registration Link** in the address bar.
- Once you are in the registration site you have two options:
 - Option 1**
 - Put your cursor in the **address bar**.
 - At the end of the address bar, select the **QR code icon**.

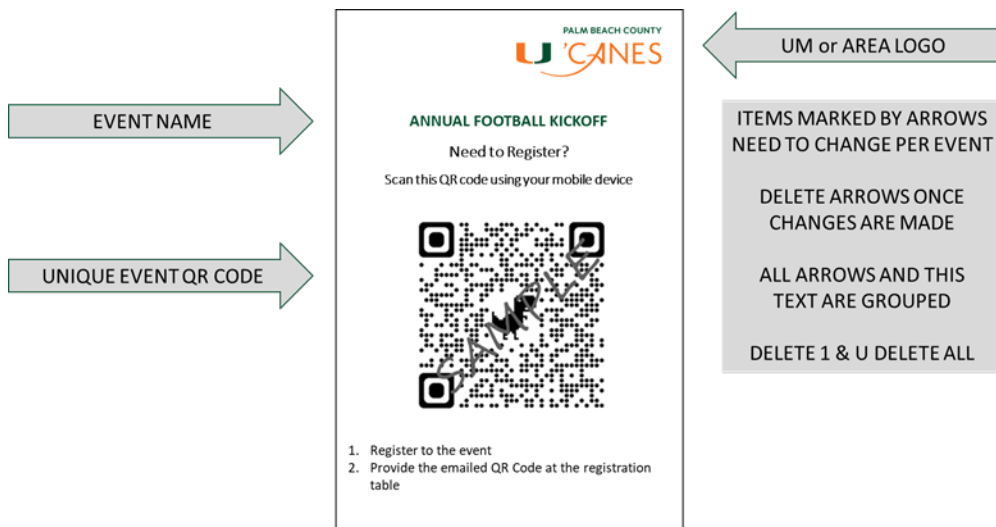


- A pop-up window will open at the top right of the screen providing you with the event QR Code. Leave the default address provided and select the **Download** button.



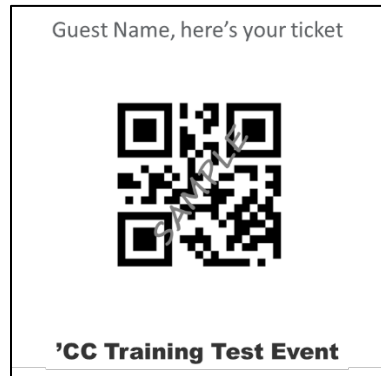
Option 2

- **Right click** anywhere on the registration page and select **Create QR code for this page**.
 - A pop-up window will open at the top right of the screen providing you with the event QR Code. Leave the default address provided and select the **Download** button.
4. **Save** the image in the appropriate event folder and incorporate it into the event design.
 5. **Import** the Event QR Code into the **Event QR Code Design Template** provided by the RE Liaison.



6. **Cut** and **insert** the Event QR Code in a 4"x6" table talker. Place it at the registration table. When walk-ins arrive at the event and ask them to:
 - **Scan** the code.
 - Follow registration link.

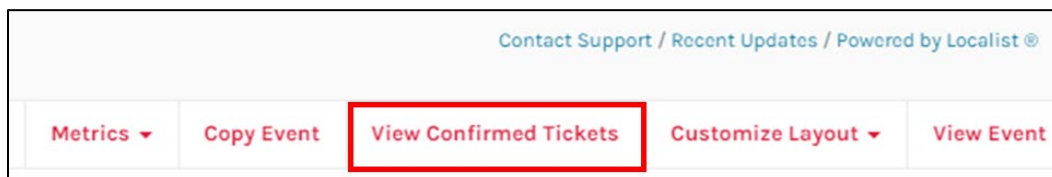
- Have them provide you with the **Registration QR Code** they will receive in a confirmation email from **University of Miami** <noreply@events.miami.edu>.



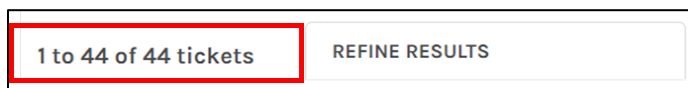
EXPORTING CONFIRMED TICKETS

You can export your registered guest list to verify purchased, cancelled, and/or pending tickets. Exporting the file will allow you to verify the exact number of constituents that have registered to the event, but most importantly it will allow you to get the exact amount fundraised towards that event. A quick search can be performed to verify the count of registered guests by using the **Refine Results** section within Localist. Follow the steps below to export your list:

1. **Open** your event.
2. Select **View Confirmed Tickets** on the top right corner.



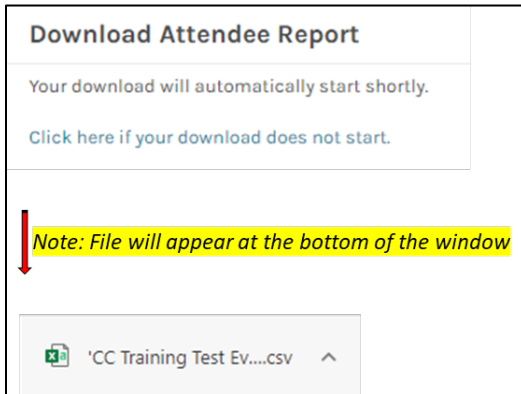
3. The **Confirmed Tickets** for “event name” window will be displayed. The ticket number shown on the right section of the screen includes all registered constituents. Every and any transaction processed, regardless of its status is counted.



4. Select **Export CSV** on the top right corner.



5. You will receive an email in your Region's 'Canes Community mailbox with a *link* to download the *.csv file. The email subject line will include "**Attendee report – Event Name**".
6. After selecting the link within the email, a window will open in Localist labeled **Download Attendee Report**. It will automatically download the file.



7. When opening the file, the fields that will be enabled are shown below. Those highlighted in yellow are important to calculate the number of registered guests. Use the **Status** field to **Count** the number of registered guests. Use the **Status** and the **Grand Total** fields to **Sum** the total of funds raised for the event. Make sure you only count tickets with a **Status** of **Purchased**.

EXPORTED FIELDS	DESCRIPTION	COMMENT
Event Date	Date and time	
Attendee Name	Assigned based on name provided by purchaser/registrant	
Attendee Email	Assigned based on email entered by purchaser/registrant	
Source	Localist (default)	
Ticket	Tickey Type name (i.e., General Admission)	
Confirmation Code	Unique Code assigned to each registered attendee	
Order ID	Generated when tickets have a dollar value	When multiple tickets are purchased in one transaction an order ID duplicates
Status	Cancelled, Checked In, Interested, Purchased	Needed for Count and Sum Formulas
Purchased At	Date and time of purchase	
Checked In At	Will show date and time information once guests are Checked In, on the day of the event	Will be enabled after event
Cancelled At	Always blank regardless of cancellation	
Disputed At	Always blank	
Dispute Won At	Always blank	
Dispute Lost At	Always blank	
Refunded At	Not used so far	
Ticket Amount	Cost of each individual ticket	Price broken down per ticket and not per transaction amount
Discount Amount	\$0 unless a promotion code is used	
Grand Total	Ticket Amount minus Discount Amount.	Price broken down per unique ticket price and not per transaction amount Needed for Sum formula for events with a fee
Applied Promo Code	Name of code used	
Payout Account	Default code at setup of event	
Order Total	Total amount paid per transaction. It adds all tickets purchased	Shows the same amount on every ticket purchased in 1 transaction. Never sum this column to get event total fundraised amount
Order Fees	Credit card transaction fee, always set up as <i>organizer pays fees</i>	
Currency	USD	
Purchaser Name	Name of person that purchased tickets for event. Unique per transaction regardless of number of tickets purchased	
Purchaser Email	Email of person that purchased tickets for event. Unique per transaction regardless of number of tickets purchased and individual emails entered per ticket	
Seen Compliance Level	Set when creating event	
Stripe Charge ID	Default code created by system	

POST EVENT WRAP UP

Once the event ends, volunteer leaders need to follow these steps to provide their Regional Engagement Liaison with an event wrap-up report:

1. If any **Manual Registration Lists** were kept at the event site, make sure to add all the names and email addresses to the Localist event. Follow the steps under [Create Ticket \(Mobile version\)](#) or [Create Ticket \(PC version\)](#).
2. Once you confirm all names have been added and properly marked as **Checked In**, follow **steps 1 to 6** under [Exporting Confirmed Tickets](#).
3. **Email** the *.CSV exported file to your RE Liaison.

STEPS FOR THE RE LIAISON

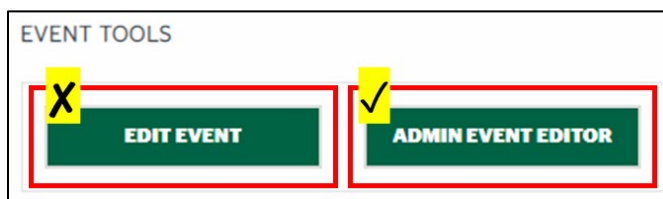
1. Access the Regional Engagement **SharePoint** drive, **Events** → **Templates-Manuals** subfolders
2. Follow the steps in the document named **Instructions - i-BIS Event Record Update**.
3. Use the Excel template named **Post Event iBIS Upload Template** to import the fields from the event file provided by the 'Canes Community leader. Please download the file by following these steps to avoid editing the original template:
 - Select **File** menu
 - Select **Save As**
 - Select **Download a Copy**. Work on the downloaded file and save it to the respective event folder.
4. Follow the steps in the document named **Post Event Upload**.

RE LIAISON TO-DO'S

1. Provide **Event QR Code Design Template** when sending this Localist Guide.
2. Provide each community their unique **Login ID** and **password**.
3. Provide each community their unique **U'Canes Localist Logo**.

TIPS

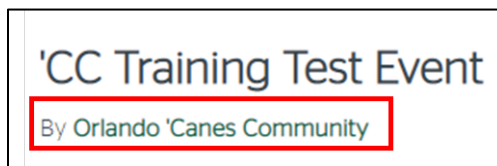
1. **For everyone:** Confirm event Date before creating the event. Changing a date later removes registered guests.
2. **For everyone:** While viewing a sample of your event, under **Event Tools** shown at the bottom of the website, never use the **Edit Event** button, it has limited functions. Feel free to use the **Admin Event Editor** button. It will take you back to the Localist **Edit an Event** section. You can also use the internet browser back button to return to the **Edit an Event** section.



3. **For RE Liaison:** If an event is created under the Liaison’s CanelD account in order for the event to show up on the Regional ‘Canes Community Mailbox account, the **Owner** needs to be changed. Making the change does not affect the “published” status or any of the purchased tickets details.
4. **For RE Liaison:** If multiple ‘Canes Communities work together on an event, only one community can be the owner, this will be the community that will manage the event in Localist. For signature events managed by RE Team, create and manage event using the regionaleengagement@miami.edu log in credentials.
5. **For RE Liaison:** If an event’s visibility needs to be set to **Restricted**, make sure the **Channels** check box is selected. This is a requirement for the automated Localist/iBIS integration.

FREQUENTLY ASKED QUESTIONS

1. Does Localist send out automatic email reminders the day before an event? No.
2. When unregistered guests attend paid events, can we process their registration if they provide us with their credit card or credit card details? No, due to **PCI Compliance** (Payment Card Industry Data Security Standards) the University of Miami and its affiliated groups are not allowed to enter payment details in any of our systems. This ensures that personal information remains secure and reduces the risk of identity theft and fraudulent credit activity.
3. Are automatic emails sent to guests at the end of an event? Only if a selection is made under **Event Post Feedback**. This feature is currently not being used.
4. Why do some events include the **By Group** field under the event name?



Work in Progress - It is a known bug in Localist that the **By Group field** only displays when a location is added. A temporary fix has been done for future events by removing the need for a location for this to display.

5. How are **Time Zones** determined? Time zones are found within the **Community** field under the **Location** section. Once the **Event Place** is entered, the **Community** field will be enabled. After saving the event, the Community field will disappear, but the specified time zone will stay within the event.
6. Do guests have to register to Localist to purchase tickets? No.