UM’S MASTER CALENDAR & EVENTS SYSTEM

CREATE & PROMOTE EVENTS

TRACK & MANAGE REGISTRATION

POST-EVENT DATA MANAGEMENT & REPORTS

GROUPED BY ‘CANES COMMUNITY
# Localist User Guide

## Managing Events

### TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>WHAT IS LOCALIST</td>
<td>2</td>
</tr>
<tr>
<td>USER GUIDE TIPS</td>
<td>2</td>
</tr>
<tr>
<td>ACCESSING LOCALIST &amp; CREATING AN EVENT</td>
<td>2</td>
</tr>
<tr>
<td>ADDING AN EVENT – EVENT DETAILS TAB</td>
<td>4</td>
</tr>
<tr>
<td>TICKETS &amp; REGISTRATION TAB</td>
<td>10</td>
</tr>
<tr>
<td>ZOOM MEETING OR ZOOM WEBINAR CREATION BY RE LIAISON</td>
<td>14</td>
</tr>
<tr>
<td>RE LIAISON – TICKET &amp; REGISTRATION SETUP FOR PAID EVENTS</td>
<td>16</td>
</tr>
<tr>
<td>EVENT APPROVAL BY RE LIAISON</td>
<td>16</td>
</tr>
<tr>
<td>SHARING YOUR EVENT ON SOCIAL MEDIA</td>
<td>18</td>
</tr>
<tr>
<td>COPYING AN EVENT</td>
<td>19</td>
</tr>
<tr>
<td>EVENT CHECK IN METHODS</td>
<td>21</td>
</tr>
<tr>
<td>PCI Compliance (Payment Card Industry Data Security Standards)</td>
<td>21</td>
</tr>
<tr>
<td>MOBILE / TABLET CHECK IN OPTIONS</td>
<td>22</td>
</tr>
<tr>
<td>New Order Event Email</td>
<td>22</td>
</tr>
<tr>
<td>Mobile Internet Browser</td>
<td>22</td>
</tr>
<tr>
<td>LAPTOP COMPUTER CHECK IN OPTIONS</td>
<td>26</td>
</tr>
<tr>
<td>Computer Internet Browser</td>
<td>26</td>
</tr>
<tr>
<td>New Order Event Email</td>
<td>29</td>
</tr>
<tr>
<td>CHANGING REGISTERED GUEST NAMES</td>
<td>30</td>
</tr>
<tr>
<td>UPDATING NAMES ON MOBILE DEVICES</td>
<td>30</td>
</tr>
<tr>
<td>UPDATING NAMES ON LAPTOP COMPUTERS</td>
<td>33</td>
</tr>
<tr>
<td>ADDING COMPLIMENTARY GUESTS TO EVENTS</td>
<td>35</td>
</tr>
<tr>
<td>CREATING QR CODES FOR ONSITE EVENT REGISTRATION</td>
<td>36</td>
</tr>
<tr>
<td>EXPORTING CONFIRMED TICKETS</td>
<td>38</td>
</tr>
<tr>
<td>POST EVENT WRAP UP</td>
<td>41</td>
</tr>
<tr>
<td>STEPS FOR THE RE LIAISON</td>
<td>41</td>
</tr>
<tr>
<td>RE LIAISON TO-DO’s</td>
<td>41</td>
</tr>
<tr>
<td>TIPS</td>
<td>41</td>
</tr>
<tr>
<td>FREQUENTLY ASKED QUESTIONS</td>
<td>42</td>
</tr>
</tbody>
</table>

*Updated: January 20, 2022*
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 **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.

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:

![Status Pop-ups](image)

- 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.
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.
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.
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 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.
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.

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.

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.

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.

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**.
   - 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**.  
   - **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**

<table>
<thead>
<tr>
<th>NAME</th>
<th>STATUS</th>
<th># SOLD</th>
<th>PRICE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complimentary</td>
<td>Active</td>
<td>0</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

**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.

![Attendee Questions]

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.

![Attendee Questions]

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.

![Event Registration Settings]
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.

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**.

   ![Create Zoom Meeting](image)

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.
5. 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.

6. Select the **Tickets & Registration** tab.

7. Under **Tickets** select the **Edit Ticket** pencil button.

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

**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:
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.

<table>
<thead>
<tr>
<th>Ticket Type</th>
<th>Virtual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event URL</td>
<td><a href="https://miami.zoom.us/j/87787587558">https://miami.zoom.us/j/87787587558</a></td>
</tr>
<tr>
<td>Ticket Type Message</td>
<td>Meeting ID: 848 700 0311; Passcode: 208337</td>
</tr>
</tbody>
</table>

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.

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.

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.

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.

![Sample View when selecting to share the event](image1)

![Sample View of shared event](image2)

**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](image3)
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**.

![Copy Event Button](image)

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.

![Event Copied](image)

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.

![Confirmed Dates](image)
Sample of view if original date is not deleted:

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

![Dates](image)

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

![Select Date](image)

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.

```
Scan Tickets
```

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

```
Block
Allow
```

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

```
Scan Tickets
Position the QR code clearly within the guides. Scanning and matching will happen automatically.

Switch Camera
```

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

```
ALREADY CHECKED IN: Alejandra Gomez (DQ2KWFT) is already checked in
Position the QR code clearly within the guides. Scanning and matching will happen automatically.
```

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.

![Create Ticket and Check In]

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.

![Create Ticket]

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.

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

![Event Name](image)

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.

![Event Registration Confirmation](image)

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

![Organizer Check In](image)
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. **Checked In** guests will have a light blue background and the **Check In** button will change to gray and say **Cancel 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**.

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

Create Ticket and Check In

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.

Create Ticket

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**.
4. 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 Events**.

5. 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.

8. The ticket details will appear. Please update the **Attendee Name** and **Attendee Email** to properly update our database. Select **Save Changes**.
9. 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.

![Resend Ticket button](image)

**UPDATING NAMES ON LAPTOP COMPUTERS**

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

![Dropdown arrow](image)

3. 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 Events**.

![Admin Dashboard](image)
4. A list of events will be displayed. **Select** the desired event.

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

6. This will display your **Confirmed Tickets** attendee list. Find the guest’s name you need to update and click on the **blue Confirmation** number.
8. 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.

**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.

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

2. The New Ticket window will open. Enter the Ticket Type, Attendee Name and Attendee Email.
3. Once completed select the Save Changes button.
4. 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]

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

![Contact Support / Recent Updates / Powered by Localist ®]

---

**CREATING QR CODES FOR ONSITE EVENT REGISTRATION**

1. **Open** Google Chrome.
2. **Paste** the **Event Registration Link** in the address bar.
3. 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**.

![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.

   ![View Confirmed Tickets](image)

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.

   ![Confirmed Tickets](image)

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.
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**.

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