

Step 1: SysAid Request

How will I know when there's a new event?

All BBNC registrations are submitted via SysAid. There is one SysAid opened per event. The simplest way to title Event SetUp SysAids are according to their TeamHOPE event code.

example: THMD-100806KC (Walk for Tess)

What should a SysAid contain?

When a TH Manager submits a BBNC registration SysAid, it should contain:

1. The url of the affiliate page it belongs to.

example: <http://www.pancan.org/Volunteer/md/baltimore/index.html>

2. Excel Spreadsheet with Pricing Information

This form should have already been approved by TH Director & Accounting.

3. MS Word doc Event Set Up

All information should be filled in & approved by TH Director.

For your password and directions on how to use the SysAid System, please see IT.

Correctly filed Details Tab

iilent SysAid v3.1.3 Account: pancan User: khein Time: 8/22/06 11:15 AM Home Send Message Help Logout

ilient Keep IT Simple

Help Desk - Service Request # 1014

System
Help Desk
List
Matrix
Phone Call
New SR
Mobile
Search
Activities
Analyzer
Preferences
Downloads
End User Portal

General Details | Description | Solution | Activities | Messages | History

Category: Website | Team Hope

Title: THMD-100806KC- Walk for Tess

Status: Open

Urgency: Normal

Priority: Normal

Due Date:

Asset: PANCAN-D21 | Change | Show Details | Remote Control

Submit User: jangel | JoAnn Anqeli x105

Request User: jangel | JoAnn Anqeli x105 | Change

Assigned To: khein

Admin Group: Team Hope

Parent ID:

Child SRs:

Include in Knowledgebase

Actions: Remote Control | Send Message | Search Knowledgebase

OK Cancel Apply

Correctly filed Description Tab

The screenshot shows the iLient SysAid interface for a Help Desk request. The top navigation bar includes the iLient logo, version 3.1.3, account information (pancan, User: khein), time (8/22/06 12:27 PM), and links for Home, Send Message, Help, and Logout. The main content area is titled "Help Desk - Service Request # 1014" and features several tabs: General Details, Description (selected), Solution, Activities, Messages, and History. The Description tab contains a text area with the following content:

Can you please set up a website and ONLINE REGISTRATION for this event (10/8/06)?

I think I sent this over already (Request #971), but I don't think I did it correctly. Can you cancel the other one?

<http://www.pancan.org/Volunteer/md/baltimore/index.html>

JoAnn Angeli (8/18/06 8:37 AM): I sent the wrong ONLINE REGISTRATION FORM.

I will send the correct one attached to the e-mail I just received.

SORRY ABOUT THAT!

Below the text area is an "Add a note" button and a list of attachments:

- Event Registration Form - SHORT.xls
- Online Event Setup Form - LONG.doc
- Online Event Setup Form - LONG.doc

There are "Delete" and "Add" buttons for the attachments. The "Location" dropdown menu is set to "El Segundo". At the bottom, there are "Remote Control", "Send Message", and "Search Knowledgebase" links, along with "OK", "Cancel", and "Apply" buttons.

Additional Documents

Most TeamHOPE Events will also have their own Offline Registration/ Offline Pledge forms.

These forms are not submitted with the SysAid for the BBNC Event Set Up - they are filed in a separate SysAid so that they can be attached to the affiliate page for that TeamHOPE region.

As the splash page is connected properly, you will need to refer to the affiliate page in order to get the link for those documents, which is why the Event Set Up SysAid requires the url be included in the request.

What if the SysAid is incomplete?

If any of the above elements are missing or incorrect, the **Messages** tab can be used to communicate with the TeamHOPE Manager for that event.

To respond to your messages and have the answers added to the log for the SysAid, the TH Manager need only reply to the email generated by the HelpDesk. At the same time, they can attach any needed documents to their reply email and those elements will automatically be added to the SysAid request for later reference.

Step 6: Customizing Parts

How do I make the parts unique to my event?

There are certain aspects of the parts of your event's pages which have to be tailored so that the actions taken in registrations, donations, etc are linked solely to your event in our database. By changing the part itself, these changes will be repeated in every instance of the part. This means that we'll only need to make these changes once, and then every time that part appears in the registration, it will always have those corrections.

In NetCommunity, choose the Parts button from the lefthand navigation. At the top of the page will be the Filter section. In the Filter section, type in THStateAbbrev. for your event.

Filter List By
Part Type: All [v] Name: thmd [Go]

The results for this search should be eight parts:

- EventCode Header
- EventCode Left Side Nav (Individ)
- EventCode Left Side Nav (Team)
- EventCode Splash Page Content
- EventCode Internal Event Dash
- EventCode Left Side Nav (Individ)
- EventCode Left Side Nav (Team)

Parts Pancreatic Cancer Action Network
Welcome Kathleen Hein

From *Parts*, you create, edit, and delete parts such as a User Login, Donation Form, and User Profile Form. Each part can be reused on multiple pages. You can also assign view, edit, delete, and secure rights to roles.

Filter List By
Part Type: All [v] Name: thmd [Go]

Actions	Name	Description	Part Type	Owner
[New] [Edit] [Delete]	THMD-100806KC Header	MasterEvent Header	Formatted Text and Images	khein
[New] [Edit] [Delete]	THMD-100806KC Left Side Nav (Individ)	MasterEvent Left Btms Individ	Formatted Text and Images	khein
[New] [Edit] [Delete]	THMD-100806KC Left Side Nav (Team)	MasterEvent Left Btms Team	Formatted Text and Images	khein
[New] [Edit] [Delete]	THMD-100806KC Splash Page Content	MasterEvent Splash Content	Formatted Text and Images	khein
[New] [Edit] [Delete]	THMD-100806KC Fundraiser	Walk For Tess Fundraiser	Fundraiser	khein
[New] [Edit] [Delete]	THMD-100806KC Internal Event Dash	Walk for Tess 2006 Internal Event Dash	Fundraiser Dashboard	
[New] [Edit] [Delete]	THMD-100806KC Why (Individ)	MasterEvent Why Individ	Fundraiser Page Element	khein
[New] [Edit] [Delete]	THMD-100806KC Why (Team)	MasterEvent Why Team	Fundraiser Page Element	khein

Results Per Page: 25 [v] Page 1 of 1 [Prev] [Next]

Step 8: Bringing an Event Live Pricing Codes and External Testing

Step 1

When everything has been cleared by TeamHOPE and Accounting, the final step in BBNC is to change the pricing so that it is the actual pricing for the event and not the \$.01 test price.

To do this, log into BBNC.

Following the path **Web Site --> Parts**, search for your event in the filter field using the THStateAbbrev search parameters.

In the listing of parts, look for the part labelled **EventCode Fundraiser**, and then click on the pencil icon to get to the **Edit Part Screen**.

Once in the Fundraiser, scroll down until you get to the pricing table.

Pricing Options							
Include	Unit	Description		Participants/Unit	Allow Anonymous?	Price (Gift Amount)	Receipt Amount
<input type="checkbox"/>	Donation A	Individual Registration	*	1 *	<input type="checkbox"/>	\$20.00	\$0.00
<input type="checkbox"/>	Donation B	Donation B	*	0 *	<input type="checkbox"/>	\$25.00	\$0.00
<input checked="" type="checkbox"/>	TEST-Event1	TEST-Event1	*	1 *	<input type="checkbox"/>	\$0.01	\$0.00

Now, uncheck the Testing price and check the Individual Registration price. This will change the price of registration for anyone who signs up for the event, but will not affect any previous registrations.

Note: If you do not complete this step before the event goes live, registrants who sign up will only pay \$.01 for the event. PanCAN cannot charge them more retroactively. The proper registration price **MUST** be turned on before the event goes live.

Pricing Options							
Include	Unit	Description		Participants/Unit	Allow Anonymous?	Price (Gift Amount)	Receipt Amount
<input checked="" type="checkbox"/>	Donation A	Individual Registration	*	1 *	<input type="checkbox"/>	\$20.00	\$0.00
<input type="checkbox"/>	Donation B	Donation B	*	0 *	<input type="checkbox"/>	\$25.00	\$0.00
<input type="checkbox"/>	TEST-Event1	TEST-Event1	*	1 *	<input type="checkbox"/>	\$0.01	\$0.00

If the pricing standards for the event have been changed, click the Save and Close button to save your changes.