IAGSDC® Website Manual

This manual provides overview information for users on creating their profiles, and administering events.

For questions or concerns, contact IAGSDC@dantechsolutions.com

IAGSDC®

Profile Management
Creating a Profile

You must create a profile and log in to the system to access the full range of features. To create a profile:

Select the My Profile tab
Select "create your account and profile"
Fill in the form with your chosen user ID, password, and a valid (working) email address. You must be able to receive email to complete the process.
Click the REGISTER button
Complete the Personal Profile form.

You may supply as much or as little information as you want on this form. We recommend you at least provide a first name. **Do not use a non-working email address**. If you do so, we will not be able to help you with resetting your password, event registrations, or with some of the other advanced features of the site.

You may however choose not to display your email address in your profile. If you do not display your email address, a form will be supplied with your profile on the site to allow others to send email to your registered email address, without showing/giving them the address.

Click SAVE to save your changes. When you do so, you will see your profile displayed as it will appear to other users.

Modifying Your Profile

You can add or modify your personal information, or the settings that govern which parts of your profile are displayed. You may also add a picture to your profile.

You can choose your club affiliations, and you can create and attendance record for the conventions you have been to.

Modify Profile

Make sure you are logged in, then click the Modify Profile tab at the top of the page. From the Change Profile Information section, choose the type of change you wish to make.

In each case, follow the on-screen instructions to change your information.

If you add your club associations, these will be displayed as part of your profile. Your name and a link to your profile will also be added to the club member listing page.

Events

If You Are Not Logged In

You can visit the Events tab without logging in. The current calendar will be displayed. All links except registration will be active.

(To log in, enter your user name and password at the top right of the screen, and click the GO button).

If You Are Logged In

When you visit the Events tab, all details for each event are shown. Where online registration for the event is available, there will be a link to the registration page. To register for such an event, click this link and complete the registration form.

When you are logged in you can add events to the calendar, and you can administer events that you own, or that have been allocated to you by another member.

A grey bar is present under the normal green toolbar (top of page). On the bar are two extra buttons: Add Event, and Admin

Add Event

If you click this link you will see a form that you must complete to add your event to the event calendar. Complete all the relevant information, and click SUBMIT. If you do not have all the information yet, don't worry; you can come back at any time and add/change this information.

Making Your Event Visible

For an event to be visible on the IAGSDC calendar, your event must be approved by the Event StepMom, **AND** you must change the event's status to ACTIVE.

When you add the event and click submit, the event information is automatically forwarded to the Event StepMom for approval. You are then taken to the event update screen. From there, you can change the status to Active.

Administration Of Event

To administer an event, click the Admin link, then select the event from the list provided.

You will see a menu listing the areas you are allowed to administer. If you are the event owner, you will automatically be able to access all the menus.

The possible menu items are:

Event Detail and Status
Update Security/Access
Registration
Finance
Housing
Meals
Tours

Manage Temporary Members

Before making your event public, make sure you have set the pricing scale, and have added details of meals and tours.

Menu: Event Detail and Status

This option allows you to change the information that you entered when you created the event. You can use this item to change the venue, payment, caller, location, and other information associated with the event.

You can also upload a registration form and event flyer at this location.

Most of the changes occur immediately and do not affect the visibility of the event on the event calendar.

Changing Event Dates:
If you change the dates for your event, it will automatically be referred back to the event Stepmom for approval. This ensures events do not accidentally overlap. Your event will not appear on the calendar until the event has been re-approved.

Changing Event Status:
If you change the status of the event to INACTIVE, it will not display on the calendar, even if it has been approved by the Stepmom. Use this setting to temporarily 'hide' the event while you make changes.

If you change the status to DELETE, and the current date is after the last day of the event, the system administrator can delete the event without contacting you. Please make sure you set this after your event, once you have downloaded any records you need of registrations etc.

Menu: Update Security/Access

Initially, the event owner is the only person with access to this menu. Use this feature to add other team members to the management team for your event. You can assign other users to be the owner, or to have specific areas of responsibility such as you.

Menu: Registration

This menu gives you access to information about the registrations for your event. This will only be active if you are allowing registrations through the IAGSDC web form.

Options include:

- Display Registrations
- Add a Registration
- Delete a Registration

The Display Registrations link allows you to see the list of users that have signed up for your event. You can also download a CSV file (for import into Excel).

Some users will still register by sending in a paper registration; others will prefer not to use online registration. You can accommodate these users by creating a temporary user account for them and then registering that user to your event. PLEASE!!! Check the existing member information before creating a temporary entry.

You may only delete a registration if the finance section shows that any payments made have been refunded. Only registrations that meet this requirement are listed on the delete page.

When you delete a registration, any tour bookings, housing requests, and meal reservations are also deleted.

If you delete a registration, the user that made the registration will receive an email advising them you have cancelled their registration.

Note that finance information is NOT deleted – the finance log will retain any payments and refunds made.

Menu: Finance

The following options are provided for finance:

- Set Event Fees
- List all attendees
- List attendees with non-zero balance
- Summary of payments/refunds
- Download Financial Data
- Download Audit Log

You should set the event fees before you publish your event on the calendar. When a user payment is recorded, the fee is automatically calculated according to today's date, and the fee table that has been entered.

Set Event Fees
When setting the event fees, make sure you enter the LAST date on which that fee applies. You may enter a different fee for dancers and non-dancers. The description is optional – you may want to put "Pre-event discount", "Early Bird Special" or some other description. The user will see this information when registering.

Payment/Refund For:
This option allows you to amend the information for a registrant. The first time you view this page for each registrant, the total due is calculated on the basis of today's fee. If necessary you can adjust the total due (to allow for late entry of data, special discount rate etc).

Once you have saved the data for a registrant, the Amount Due remains fixed; it will not change to the current fee again. If further adjustments are required, you will have to make these manually.

You can record two checks for each registrant. Most will pay with a single check. Alternatively, you can record a different payment type, or record a notional payment (for example, if someone submitted a certificate as payment). For such payments, either enter the Amount Due as normal, and enter the payment as "certificate" of the same value; or simply set the amount due to zero. You can do the same thing for callers etc.

If you need to provide a refund, enter that amount in the appropriate line.

Make any notes about special payments, adjustments, refunds in the notes box provided.

Taking Payments For Tours
From this screen, you will also move registrants to tours for which they have paid. If there are still seats available when you receive their payment, change the status for their seat to CONFIRMED. If when you receive payment, the tour is already full, you may be able to add them to WAITLISTED instead. If the wait list is full, or there is no wait list, you will have to process a refund for the payment, and mark the seat request as FULL.

List Attendees/non-zero balances
Use these two lists to check the status of payments. You can use the links from the non-zero balances page to view the payment record for the individual. Note that non-zero includes under- and over-paid.

Summary

The summary shows the number of registrants, the total income, and the number that are at zero balance. Note that if someone has OVERPAID, they will have a non-zero balance, and will not be included in that line item.

Housing

The housing list shows registrants that have requested housing, and the person with whom they have been matched. The main listing shows information on allergies, special needs, sex, smoking/non-smoking, and any special requests the dancer made.

To select a host for a registrant, click the update link at the end of the entry.

Ideally, the host should have a profile in the system. To associate them with the registrant, select them from the dropdown menu. If the host is not listed, enter their details manually in the spaces provided.

If a registrant cancels their housing request, click on the update link and then select the delete button.

Tours

Add/Update

You may add new tours to your event at any time, but it is better if you add them before you make the event public. You can also update the details at any time, but remember that if you change the cost on a tour, that will NOT affect prior registrations made by attendees.

When adding a tour, you can choose to include extra capacity (wait list). When an attendee pays for a tour, they will either be given a confirmed seat (up to the maximum available) or a waitlist seat. in the event that the waitlist is also full, the attendee cannot be added to the tour, unless you change the maximum limits.

View Tour Status

This display shows you a summary for each tour. An attendee will be shown as Pending if payment has not been received. Once they have paid, they will either be listed as Confirmed or Waitlisted.

Click on the name of the tour in the summary display to see a list of attendees and their individual status.

Delete Tour

You may only delete a tour if no-one has paid for the tour. To cancel a tour, first set the available seating (and waitlist) to zero. Then go through the list and process all refunds, removing each user's registration for the tour. Finally, come back to the Delete Tour option to remove the tour.