Welcome to the Nomination Tool Guide for Lanyon Conference™, part of the Lanyon Smart Events™ Cloud event management technology suite from Lanyon Solutions, Inc. The Nomination Tool helps you manage people who are invited to register for your event.

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Introduction

Welcome to the *Nomination Tool Guide* for Lanyon Conference™, part of the Lanyon Smart Events™ event management technology suite from Lanyon Solutions, Inc. The Nomination Tool helps you manage people who are invited to register for your event. In most cases, nomination is used with an internal event.

Your sales staff or other authorized people at your company (the nominators) use the Nomination Tool to submit names and company information for people whom they would like to be invited to register for your event (the nominees). Other staff members (such as company executives or sales managers) use the Nomination Tool to approve or reject individual nominees. Nominators or approvers can then send email messages to approved nominees that invite them to register for your event.

This document explains how the Nomination Tool helps you manage nominations for your event. It gives examples of how the Nomination Tool might be used, and explains how to set up the Nomination Tool. This document also describes nominator tasks and the nominee approval process, and explains the reports that you can use to review Nomination Tool data.

**NOTE**

The Nomination Tool uses elements of the Conference Registration module, including registration codes and registration statuses. Registration must be set up for your event before you set up the Nomination Tool. (For more information about the Registration module, see the *Registration Guide*.)

This introduction section explains these topics:

- Nomination Tool Overview
- Planning Your Nomination Setup

Nomination Tool Overview

The Nomination Tool lets your sales staff or other authorized people at your company submit names of people to be considered as potential attendees at your event. The people doing the submitting are called nominators. The people whose names are submitted are called nominees.

Once nominations are made, other staff members (such as company executives or sales managers) can access the Nomination Tool to approve or reject individual nominees. Registration codes are used to determine how many nominations can be made, and how many approved nominees can be invited to your event.

After nominees have been approved, either the nominators or the approvers can send email messages from the Nomination Tool that invite approved nominees to register for your event.
The following table summarizes the tasks each member of the nomination team completes for your event:

<table>
<thead>
<tr>
<th>These team members</th>
<th>Can do these tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>System Administrator</strong></td>
<td>Sets up the Nomination Tool and activates the event as an internal event. (For instructions, see Setting Up the Nomination Tool on page 14.)</td>
</tr>
<tr>
<td><strong>Registration Manager</strong></td>
<td>1. Identifies people who can nominate potential event attendees. 2. Sets up registration codes for each nominator to disperse to nominees (nominees then use the codes to register for your event). (For instructions, see Setting Up Registration Codes for Nominees on page 24.)</td>
</tr>
<tr>
<td><strong>Nominators</strong></td>
<td>1. View the registration codes assigned to them to see how many potential event attendees they can nominate. Nominees use the codes when they register for your event. (For an example, see Figure 2: Nomination—code review on page 5.) 2. Submit potential event attendees. (For an example, see Figure 3: Nomination—nominee addition on page 6.) 3. Monitor the status of their nominees to see which have been approved or rejected. (For an example, see Figure 4: Nomination—nominee status review on page 7.) 4. After approval: a. Send email invitations to approved nominees. (For an example, see Figure 7: Nomination approval—invitation email on page 10.) b. Send registration reminders to nominees who have not registered. (For instructions, see Sending a Registration Reminder on page 56.)</td>
</tr>
<tr>
<td><strong>Approvers</strong></td>
<td>1. Review nominated attendees and accept or reject each one. (For an example, see Figure 6: Nomination approval—review and approve on page 9.) 2. Send email invitations to approved nominees. (For an example, see Figure 7: Nomination approval—invitation email on page 10.) 3. Send registration reminders to nominees who have not registered. (For instructions, see Sending a Registration Reminder on page 56.)</td>
</tr>
</tbody>
</table>

**NOTE**

For more information on how the Nomination Tool works, see Planning Your Nomination Setup on page 11.
This section explains these topics:

- Overview of Nomination
- Overview of Nomination Approval

**Overview of Nomination**

People who have been identified as nominators access the Nomination Tool by clicking a link on the My Portal page or by accessing the Nomination Tool URL for your event. A Nomination Tool URL might look like this:

https://YourEvent.com/nomination/nominationSearch.do

Once the Nomination Tool has been accessed, nominators submit names and contact information for people whom the nominators want to invite to attend your event.

To help you understand the nomination process, the following figures show sample web pages, and indicate the areas that you can set up.

**Figure 1: Nomination—login and initial search**

The nominator logs in to the Nomination Tool.

**Setup Choice**

You specify who can make nominations. (For details, see *Adding a Registration Code Owner* on page 27.)

The nominator can search to see if his or her potential nominee is already in the system.

**NOTE:** Users can use the left navigation bar to access various parts of the Nomination Tool.
Figure 2: Nomination—code review

The Browse Nominees area lets nominators see their assigned registration codes and whether they have been used.

If the potential nominee is not in the system, the nominator clicks one of these buttons to add the potential nominee.

Setup Choice
You make each nominator the owner of specific registration codes that you create. (For details, see Setting Up the Nomination Tool on page 14.)
After clicking the button to add a nominee, the nominator completes the information fields. (For details, see Making a Nomination on page 44.)

Setup Choice
You can add custom fields to this page. (For details, see Adding Custom Fields to the Nomination Tool on page 32.)

If the email address that the nominator enters already exists in your system, this message displays and the fields are loaded with the information stored in the system.

If a registration code has been assigned the maximum number of times, the nominator receives an error message. If other registration codes are available, the nominator can choose another code for this nominee and resubmit the nomination.
Figure 4: Nomination—nominee status review

A nominator can click the red X beside a nominee’s name to remove the nomination if that nominee has not yet been approved.

**NOTE:** Removing a nomination does not remove the nominee’s record from the system.

Information about any nominations the nominator has made display at the bottom of the page. Nominators can log in at any time to review the status of their nominees. (For details, see Reviewing a Nominee’s Status on page 48.)
Overview of Nomination Approval

You can designate a nominee approver to decide which nominees should be approved and invited to your event. Like the nominator, the approver accesses the Nomination Tool by clicking a link on My Portal or by accessing the Nomination Tool URL for your event. A Nomination Tool URL might look like this:

https://YourEvent.com/nomination/nominationSearch.do

In the Nomination Tool, approvers search for each nominee they are assigned, and approve or reject the nominees.

**NOTE**

If desired, you can assign a default nominee status of Approved. If you do this, all nominees are automatically approved in the system. This means that a nominee approver is not necessary.

To help you understand the nomination process, the following figures show sample web pages, and indicate the areas that you can set up.

Figure 5: Nomination approval—login and search

![Nomination Tool login and search](image)
Approvers can also click to view details about the nominee, view the status history, and export all nomination details (name, email, company name, registration code, status, and whether the nomination email has been sent).

**NOTE:** To change a status other than Pending, the approver must click the red X to delete the nominee from the Nomination Tool and add the nominee again.
Once nominees are approved, the approver can mark the boxes and click to send email invitations for your event to the nominees.

Nominators and approvers can view all status changes for a nominee by clicking the History link for that nominee.

The date and time the invitation was sent is recorded in the Nomination Tool.

After an approver clicks to send an invitation, the Email Preview dialog opens. The approver can then click to send the email.
Planning Your Nomination Setup

Before setting up the Nomination Tool, you may want to learn more about the various pieces that make up the nomination process. This can help you more easily plan your setup.

For example, you should understand how registration codes relate to registration code groups. You should also know what registration code statuses mean, and how nominator and approver roles are assigned.

In addition, considering how your nomination process will work can help you set up the Nomination Tool.

This section explains the following topics:

- Conference Elements Used in the Nomination Tool
- Planning Your Nomination Process

Conference Elements Used in the Nomination Tool

The Nomination Tool uses the following Conference elements:

- **Registration codes.** A registration code helps to identify nominees. With registration codes, you can do the following:
  - Identify which nominees come from which nominators.
  - Assign nominees to a specific registration path.
  - Monitor which nominees register after being nominated.
  - Control how many nominees can register using the code.
  - Assign nominators to be owners of the code. (Nominators can edit codes that they own.)
  - Assign approvers to the code. (Approvers can approve nominees who are assigned the code.)
  - Assign custom field values to all people who register using the code.

- **Registration code groups.** A registration code group helps you track and organize registration codes. With registration code groups, you can do the following:
  - Put several registration codes into a single registration code group.
  - Assign nominators to be owners of the code group. (Nominators can edit code groups that they own.)
  - Assign approvers to the code group. (Approvers can approve nominees who are assigned any of the codes in the group.)
  - Assign custom field values to all people who register using any of the codes in the group.
• **Registration statuses.** Registration statuses help you track the nominee approval process. With registration statuses, you can do the following:
  – Determine which nominees can register for your event. (Only nominees with a status of Approved can register.)
  – Set a default status for all nominees who register with an assigned registration code. (For example, you could assign all nominees the Pending status.)

• **Security roles.** Within the Conference system, security roles are used to determine who can function as nominators and who can act as approvers.

A security role is a set of permissions that can be assigned to people in the Conference system. In most cases, when someone is assigned to be a registration code owner or approver or a code group owner or approver, that person is automatically given the appropriate security role.

**NOTE**

If you find you need to manually assign a security role to a person record, see “Assigning a Security Role to an Individual” in the “Security” chapter of the *Administrator Guide*.

The following security roles are related to the Nomination Tool:

– **RegGroup Owner.** This security role lets people nominate potential attendees who are assigned codes in specified registration code groups.

– **RegGroup Approver.** This security role lets people approve nominated attendees in specified registration code groups.

– **RegCode Owner.** This security role lets people nominate potential attendees who are assigned specific codes, and access reports about the nominees and the registration codes.

– **RegCode Approver.** This security role lets people approve nominated attendees, and access reports about the nominees and the registration codes.

(For more details about the permissions assigned by default to these security roles, see “Default Security Roles and Permissions” in the “Security” chapter of the *Administrator Guide.*)
Planning Your Nomination Process

Before you begin setting up the Nomination Tool, you may want to consider the following:

- Who do you want to be able to nominate potential event attendees?
  All nominators must have people records in the Conference system.
  (For more information, see Creating People Records for Nomination Staff on page 17.)

- How do you want to organize your nominators? Will you use registration code groups, or only registration codes? How many registration codes and code groups do you want to use?
  – A registration code group contains registration codes with similar uses.
  – A single registration code can be assigned to multiple nominees.
  – Nominators must be assigned as owners of each registration code group and code that you use for nominating.
  (For more information on registration code groups, see Setting Up Registration Code Groups for Nominations on page 19. For more information on registration codes, see Setting Up Registration Codes for Nominees on page 24.)

- Must nominees be approved before they are invited to your event?
  – If approval is required, approvers must have people records in the Conference system and must be assigned to each registration code group and registration code you are using.
  (For more information, see Adding a Registration Code Group Approver on page 23 and Adding a Registration Code Approver on page 28.)
  – If approval is not required, you should set the registration code status to Approved so that nominees who register with that registration code are automatically approved and registered for your event.
  (For more information, see Setting the Default Registration Status for a Registration Code on page 29.)

- What information do you want to gather about your nominees?
  You can add custom fields to gather more than the default information.
  (For more information, see Adding Custom Fields to the Nomination Tool on page 32.)

- Do you want to allow more people to be nominated than can actually register?
  (For more information, see Limiting the Number of Nominees Who Can Register with a Code on page 42.)

- Do you want to customize the invitation email?
  (For more information, see Modifying the Nomination Invitation Email on page 35.)
Setting Up the Nomination Tool

NOTE
Before setting up the Nomination Tool, you must have already set up Registration for your event. Otherwise, approved nominees will be unable to register for your event.

You or your Registration Manager choose nominators who can suggest potential nominees. You or your Registration Manager also choose nominee approvers to approve the nominees. Nominators or approvers can then send email messages to the approved nominees, inviting them to register for your event. People who have the nominator and approver roles must have people records in the Conference system.

Before your nominators and approvers can use the system to work with nominees, you must complete some setup tasks. For example, you must enable registration statuses and set up the registration codes assigned to the nominated attendees.

Registration code groups and registration codes can help you organize and manage event nominees. Registration statuses help registration code owners and approvers see what they need to do to with nominee records.

When you use the Nomination Tool, you activate Internal Event features in the Conference Administrator (Admin Tool) so that you can use registration statuses.

This section explains these tasks:

- Activating Internal Event Features
- Creating People Records for Nomination Staff
- Setting Up Registration Code Groups for Nominations
- Setting Up Registration Codes for Nominees
- Adding Custom Fields to the Nomination Tool
- Modifying the Nomination Invitation Email
- Giving People Access to the Nomination Tool
- Advanced Nomination Tool Setup
Activating Internal Event Features

You must activate the internal event features of the Admin Tool before using the Nomination Tool. This lets registration statuses in the Nomination Tool change from Approved to Registered when a Nomination Tool registration code is used.

NOTE
In most cases, employees nominate attendees for internal events. However, even if your event is not internal, you should activate the Internal Event features. Otherwise, registration statuses do not display for nominees.

When internal event features are activated, the registration codes on people records in the Admin Tool display the following:

- The registration code name
- The registration code group the code belongs to
- The code's owners
- The code's approvers
- The number of nominees who can be assigned the code
- The number of nominees who have been assigned the code
- The number of nominees who can register with the code
- The number of nominees who have used the code to register
- The current registration status of the person
If internal event features are *not* activated, the registration codes on people records display fewer details. Below is an example:

**Registration Codes**

Return To Registration

Jill Abelar

The following Registration Codes are associated with this account

<table>
<thead>
<tr>
<th>Registration Code</th>
<th>Group</th>
<th>Owners</th>
<th>Approvers</th>
<th>Capacity</th>
<th>In Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>EarlyRegDiscount</td>
<td>General Attendee</td>
<td></td>
<td></td>
<td>100</td>
<td>1</td>
</tr>
</tbody>
</table>

A registration code for an external event (above) shows fewer columns than a registration code for an internal event (below). You must activate internal event features to display the circled columns.

**Registration Codes**

Return To Registration

Jill Abelar

The following Registration Codes are associated with this account

<table>
<thead>
<tr>
<th>Registration Code</th>
<th>Group</th>
<th>Owners</th>
<th>Approvers</th>
<th>Capacity</th>
<th>In Code</th>
<th>Registered Capacity</th>
<th>Registered In Code</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nom 243</td>
<td>Sales Event</td>
<td>500</td>
<td>1</td>
<td>500</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>Pending</td>
</tr>
</tbody>
</table>

To activate internal event features

1. On the left navigation bar, point to **Setup**, find the **Initial Setup** heading, and click **Event Info**.
The Event Information page displays. Below is a partial example:

2. Mark the Internal Event box.

3. At the bottom of the page, click Update.

Creating People Records for Nomination Staff

During the nomination process, designated people (the nominators) can nominate potential attendees. Other designated people (the approvers) can then approve the nominees. After approval, nominees are invited to register for your event.

The people designated to work with nominees must have people records in the Conference system. If a person record does not exist, you can create one in one of two ways:

- You can create each person record individually (as explained in this task).
- If you have many people records to create, you can import data from an external source. (For more information, see “Importing People Data” in the “People Records” chapter of the Registration Guide.)

NOTE

Event attendees will also have people records in the system. You do not typically need to create records for attendees. Approved nominees who register for your event will create their own people records during registration.
To create people records for nomination staff

1. On the left navigation bar, point to People, go to the People area, find the General heading, and click Add People.

   The Add People page displays.

2. Fill out any needed contact information.

   First Name, Last Name, and Primary Email are the only required fields on this page.

   **NOTE**

   The email address associated with a person record is what uniquely identifies that person within the Conference system. Once an email address is associated with a particular person record, it cannot be used as the email address on any other record.

3. If desired, enter a **username** for this person record

   If you do not enter a username, the system will create one.

   The system sends this person an email message that includes the username and a temporary password. When the person first logs in, he or she can change both the username and the password.

4. Click **Add**

   The system creates the person record. After you set up registration codes and groups, you can assign this person to be a nominator or nominee approver by assigning this person to a registration code or group.
Setting Up Registration Code Groups for Nominations

You can create registration code groups to help you organize and track nominee registration codes. (For example, you could have a registration code group for each type of nominee, or for each nominator. This would let you track what types of people are being nominated, or which staff members have nominated the highest number of potential event attendees.)

Registration code groups are useful for event reporting, and can be used to assign custom field values to nominees who register using a code that is part of the group.

When a registration code is created, it is assigned to a registration code group. Therefore, you should create any desired registration code groups before you create registration codes. Any person who has a registration code associated with his or her person record is automatically a member of the registration code group to which that registration code belongs.

As you create a registration code group, you add owners and approvers. A registration code group owner can edit a group and the codes assigned to a group. A registration group approver can approve or reject nominated event attendees who have been assigned registration codes in specified code groups.

**IMPORTANT**

This task explains only those setup options that are specific to registration code groups that you want to use with the Nomination Tool. For additional setup instructions, see “Registration Code Groups” in the “Registration Codes” chapter of the Registration Guide.

This section explains these tasks:

- Defining Basic Registration Code Group Attributes
- Adding a Registration Code Group Owner
- Adding a Registration Code Group Approver

**Defining Basic Registration Code Group Attributes**

Before you can add details or registration codes to a registration code group, you must create the group.

To define basic registration code group attributes

1. On the left navigation bar, point to People, go to the People Setup area, find the Registration Codes heading, and click Groups.
The Registration Code Groups page displays, listing all existing registration code groups. Below is an example:

### Registration Code Groups

A registration code group can have multiple owners and/or approvers. Owners are able to view reports for the registration group(s) they own and assign registration codes within their group to people. Approvers are able to change the status of assigned registration codes.

<table>
<thead>
<tr>
<th>Name</th>
<th>Order</th>
<th>Description</th>
<th>Quantity</th>
<th>Owners</th>
<th>Approvers</th>
<th>Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exhibitor</td>
<td>1</td>
<td>Exhibitor</td>
<td>999999999</td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>General Attendee</td>
<td>2</td>
<td></td>
<td>10000</td>
<td></td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>Generated Reg Codes</td>
<td>3</td>
<td>Generated Reg Codes</td>
<td>100000000</td>
<td></td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>Hotel Requests</td>
<td>4</td>
<td>Hotel Requests</td>
<td>101</td>
<td></td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>Press</td>
<td>5</td>
<td>Press</td>
<td>10000</td>
<td></td>
<td></td>
<td>5</td>
</tr>
<tr>
<td>Speaker</td>
<td>6</td>
<td>Speaker</td>
<td>10000</td>
<td></td>
<td></td>
<td>6</td>
</tr>
<tr>
<td>SPO</td>
<td>7</td>
<td>SPO</td>
<td>10000000</td>
<td></td>
<td></td>
<td>7</td>
</tr>
<tr>
<td>TRO</td>
<td>8</td>
<td>TRO</td>
<td>10000000</td>
<td></td>
<td></td>
<td>8</td>
</tr>
<tr>
<td>Content Role</td>
<td>9</td>
<td>Content Role Description</td>
<td>10000</td>
<td></td>
<td></td>
<td>9</td>
</tr>
</tbody>
</table>

If desired, use the drop-down lists in the Order column to change the way the registration code groups display on this page.

2. Do one of the following:
   - If you are creating a new registration code group, click **Add a Reg Code Group**.
   - If you are editing an existing registration code group, click the name of the code group you want to edit.

   The Registration Groups - Attributes page displays.

3. If necessary, click the **Registration Group** tab.

### Registration Groups - Attributes

Define the core attributes of this Registration Group.

- **Group Name**
- **Description**
- **Quantity**
- **Display Order**
4. Complete the following fields:
   - **Group Name.** Enter a name for the code group.
   - **Description.** Enter a description of the code group.
   - **Quantity.** Enter the maximum number of nominees who can be assigned registration codes from this code group.
     One registration code can be used for multiple nominees. Therefore, this number can be larger than the number of registration codes you create.
   - **Display Order.** Choose a number from the drop-down list to identify where this code group will display in lists of all code groups (for example, in Registration Code Groups reports).

   **NOTE**
   This setting does not affect the way code groups display on the Registration Code Group page. To change the Registration Code Group page display order, use the drop-down fields in the Order column.

5. Do one of the following:
   - If you have finished building your code group or plan to finish building it later, click **Save - Finish**.
   - To continue building your code group, click **Save - Next** and continue with one of the following tasks:
     - **Adding a Registration Code Group Owner** on page 21
     - **Adding a Registration Code Group Approver** on page 23

**Adding a Registration Code Group Owner**

Registration code group owners can edit their code groups and the codes assigned to those groups. They can also nominate potential attendees.

**Before You Begin**

Verify that any staff members who will be registration code group owners have people records in the Conference system. If they do not, you must add them. (For instructions, see **Creating People Records for Nomination Staff** on page 17.)
To add a registration code group owner

1. Do one of the following:
   - To create a new registration code group, complete the steps in Defining Basic Registration Code Group Attributes on page 19.
   - To edit an existing registration code group, click the name of the group on the Registration Code Groups page.
     (To access this page, point to People on the left navigation bar, go to the People Setup area, find the Registration Codes heading, and click Groups.)

2. Click the Owners tab.
   The Registration Groups - Owner(s) tab displays.

   **Registration Groups - Owner(s)**
   Choose owners for the Registration Group.

   ![Registration Groups - Owner(s) tab image]
   Current Owners:
   No owners have been defined for this Registration Group

   **Registration Group Owner Search**
   Search for the person that you would like to be the owner of this Registration Group.

   ![Registration Group Owner Search form]

3. Enter search criteria for the person you want to assign as the code group owner.

4. Click Search.

5. When the results display, click Add next to the name of the person that you want to make an owner of this code group.
   The person’s information displays in the Current Owners section.

6. Do one of the following:
   - If you have finished building your code group or plan to finish building it later, click **Save - Finish**.
   - To continue building your code group, click **Save - Next** and continue with **Adding a Registration Code Group Approver** on page 23.
Adding a Registration Code Group Approver

A registration code group approver is an authorized staff member who approves or rejects potential event attendees who have been assigned codes in his or her code group. Only approved nominees can register for your event.

Before You Begin

Verify that any staff members who will be registration code group approvers have people records in the Conference system. If they do not, you must add them. (For more information, see Creating People Records for Nomination Staff on page 17.)

To add a registration code group approver

1. Do one of the following:
   - To create new registration code group, complete the steps in Defining Basic Registration Code Group Attributes on page 19.
   - To edit an existing registration code group, click the name of the group on the Registration Code Groups page.
     (To access this page, point to People on the left navigation bar, go to the People Setup area, find the Registration Codes heading, and click Groups.)

2. Click the Approvers tab.

   The Registration Groups - Approver(s) tab displays.

   3. Enter search criteria for the person you want to assign as the code group approver and click Search.

   4. When the results display, click Add next to the name of the person that you want to make an approver of this code group.

   5. Click Save - Finish.
Setting Up Registration Codes for Nominees

After you set up registration code groups, you add registration codes to that group. Nominee registration codes identify who nominated each nominee and assign a nominee to a registration path. Registration codes can also be used to assign custom field values to nominees who register for your event.

Each staff member who nominates a potential event attendee must assign a registration code to that potential attendee. A single registration code can be assigned to multiple nominees.

You set a quantity for a registration code when you set its basic attributes. This quantity defines the number of nominees who can use this code. You can also set a registered quantity for a nominee registration code. The registration code quantity and the registered quantity let you assign a code to a certain number of people but allow only a smaller number of people to actually use the code to register. People who try to register after the registered quantity is met are placed on a waiting list (the registration status is set to Waitlisted).

You can also assign a default status to a registration code. (For example, assigning a default status of Pending automatically marks all nominees who are assigned the code as ready to be approved) Only a registration status of Approved allows a nominee to access the registration site for your event.

Once you finish setting up a code, you must make it available for use in the Nomination Tool

NOTE

If necessary, you can add an existing registration code to a registration code group. (For more information, see “Assigning an Existing Registration Code to a Registration Code Group” in the “Registration Codes” chapter of the Registration Guide.)

IMPORTANT

This task explains only those setup options that are specific to registration codes that you want to use with the Nomination Tool. For additional registration code setup instructions (such as managing package prices for a registration code), see “Registration Codes” in the “Registration Codes” chapter of the Registration Guide.

For additional registration setup tasks, see the “Registration Setup” chapter of the Registration Guide.

This section explains these tasks:

- Defining Basic Registration Code Attributes
- Adding a Registration Code Owner
- Adding a Registration Code Approver
- Setting the Default Registration Status for a Registration Code
- Making a Registration Code Available in the Nomination Tool
Defining Basic Registration Code Attributes

Before you can add details to a registration code, you must define its basic attributes. For example, you can assign the code to a registration code group, or choose the attendee type that will be assigned to people with this registration code. You can limit the number of nominees who can use this code, and set an expiration date for the code.

To define basic registration code attributes

1. On the left navigation bar, point to People, go to the People Setup area, find the Registration Codes heading, and click Manage.

   The Registration Codes page displays a list of all existing registration codes. Below is an example:

   ![Registration Codes Table]

2. Click Add a Reg Code.
The Create Reg Code page displays.

3. If necessary, click the **Registration Code** tab.

### Create Reg Code

<table>
<thead>
<tr>
<th>Registration Code</th>
<th>Price Points</th>
<th>Rules</th>
<th>Owners</th>
<th>Approvers</th>
<th>Advanced</th>
</tr>
</thead>
</table>

#### Registration Code Attributes

- **Registration Path**: Default Path
- **Submitter**: Audrey Fellows
- **Code**: Enter an alpha-numeric code or, to have the system generate a code, click **Generate Code**.
- **Registration URI**: This is the URL associated with this Registration Code.
  
  To enable, enter a URI in the field above
- **Description**: Enter a description of the code.
- **Registration Group**: Exhibitor
- **Attendee Type**: -- Select One --
  
  Please take note that changing the group may affect the quantity.
- **Quantity**: 0 of 99933052 remaining in this group
- **Expiration Date**: Not Applicable
- **Current Owner(s)**:

4. Complete the following fields:

- **Code**. Enter an alpha-numeric code or, to have the system generate a code, click **Generate Code**.

  Nominators assign this code to nominees. The code is used in Registration when nominees register for the event. The code displays on the Registration Codes page in the Admin Tool.

  **NOTE**

  When a code is entered in the Code field, the system automatically associates it with a registration URI. If you need to break this association, clear the Registration URI field.

- **Registration URI**. To automatically assign this registration code to a nominee when he or she clicks a link to register, enter a URI to use as the registration link for this registration code. (Your Lanyon Business Analyst will help you create the URI to enter in this field)

  When the code is assigned, the system also assigns the nominee the attendee type associated with the code. The attendee type determines which registration path the nominee will follow.

- **Description**. Enter a description of the code.
• **Registration Group.** Select the registration code group to which this code will belong.

• **Attendee Type.** Select the attendee type that will be assigned to people with this registration code.

• **Quantity.** Enter the number of nominees who can use this code.

  The red text under this field indicates how many spots are available in the selected registration code group. You cannot make the quantity of this code more than the quantity available in the group.

  *(For more information about code groups, see Setting Up Registration Code Groups for Nominations on page 19.)*

• **Expiration Date.** If this code must be used by a specific date, unmark the **Not Available** check box and enter the date.

  The code expires at the beginning of the date you enter. *(For example, if the code is good through July 15th, enter July 16th as the expiration date.)*

5. Click **Save.**

### Adding a Registration Code Owner

A registration code owner can nominate potential attendees and access reports about the nominees and the code. Registration code owners can also edit the registration codes they own.

**Before You Begin**

Verify that any staff members who will be registration code owners have people records in the Conference system. If they do not, you must add them. *(For more information, see Creating People Records for Nomination Staff on page 17.)*

**To add a registration code owner**

1. Do one of the following:
   - To create a new registration code, complete the steps in **Defining Basic Registration Code Attributes** on page 25.
   - To edit an existing registration code, click the name of the code on the Registration Codes page.

     *(To access this page, point to People on the left navigation bar; go to the People Setup area, find the Registration Codes heading, and click Manage.)*

     The Edit Reg Code [code name] page displays.

2. Click the **Owners** tab.
The Registration Codes - Owner(s) tab displays.

3. Enter search criteria for the person you want to assign as the code owner and click Search.

4. When the results display, click Add next to the name of the person that you want to make an owner of this code.

   The person’s name displays in the Current Owners section.

Adding a Registration Code Approver

Registration code approvers are authorized to approve or reject nominated event attendees who are assigned specific codes. Only those nominees who are approved are invited to register for your event. Registration code approvers can also access reports about registration codes and registered attendees.

NOTE

If you assign a default status of Approved to a registration code, all nominees who use the code will be marked as approved. No separate approval process is necessary.

Before You Begin

Verify that any staff members who will be registration code approvers have people records in the Conference system. If they do not, you must add them. (For more information, see Creating People Records for Nomination Staff on page 17.)

To add a registration code approver

1. Do one of the following:
   - To create a new registration code, complete the steps in Defining Basic Registration Code Attributes on page 25.
   - To edit an existing registration code, click the name of the code on the Registration Codes page.
(To access this page, point to People on the left navigation bar, go to the People Setup area, find the Registration Codes heading, and click Manage.)

The Edit Reg Code [code name] page displays.

2. Click the Approvers tab.

The Registration Codes - Approver(s) tab displays.

3. Enter search criteria for the person you want to assign as the code approver and click Search.

4. When the results display, click Add next to the name of the person that you want to make an approver of this code.

   The person's name displays in the Current Approvers section.

Setting the Default Registration Status for a Registration Code

Registration statuses let you track whether nominees have been approved or have registered for your event. Only a nominee with an Approved registration status can register for your event.

You need to assign a default registration status to each registration code. The default status is applied to the nominee in the Nomination Tool when the nomination is made. In most cases, you should use Pending as the default status. Assigning a default status of Pending automatically marks all nominees as ready to be approved.

NOTE

If you do not plan to include individual nominee approval in your nomination process, you can assign a default registration status of Approved to allow all nominees access to your registration site. However, nominators or approvers must still send invitations to each nominee.
Registration statuses in the system include the following:

- **Approved.** The nominee has been approved. An email invitation to register can be sent, and the person can register for your event.

  **NOTE**
  
  An Approved status automatically changes to Registered when a nominee completes his or her registration.

- **Registered.** The nominee has registered for the event.

- **Pending.** The nominee has been suggested and needs to be approved or rejected in the system.

- **Waitlisted.** The number of allowed registrations for this nominee’s registration code has been reached. This nominee is on a waiting list and may be added as a registrant when space at your event is made available.

  **NOTE**
  
  The system uses this registration status for reporting purposes. If a registration code becomes available (for example, a nominee rejects the invitation to your event or a registered nominee cancels), an approver must change a waitlisted nominee’s status manually and send a registration invitation to that nominee.

- **Rejected.** The nominee has been rejected by a registration code approver or registration code group approver.

- **Declined.** The nominee has indicated that he or she is not able to attend your event.

- **Cancelled.** The nominee registered for your event, but has since determined that he or she is not able to attend your event.

  **NOTE**
  
  Except for the Pending status, statuses cannot be changed in the Nomination Tool. To change one of these statuses, the approver must click the red X next to the nominee’s name to take back the nomination and nominate the potential attendee again.

**To set the default registration status for a registration code**

1. On the left navigation bar, point to **People**, go to the **People Setup** area, find the **Registration Codes** heading, and click **Manage**.

   The Registration Codes page displays.

2. Click the name of the code you want to edit.

   The Edit Reg Code [code name] page displays.

3. Click the **Advanced** tab.
The Registration Code – Advanced tab displays.

4. In the **Default Status** field, choose the status from the drop-down list that you want to assign to any nominee who is assigned this code. In most cases, you should choose Pending.

5. Click **Save**.

Making a Registration Code Available in the Nomination Tool

Once you set up a registration code for nominees, that code must be set to display in the Nomination Tool. This lets nominators, owners, and approvers access and work with the registration codes.

If multiple registration codes are set to display, people who are registration code owners can choose which code to apply to a nominee. People can also search for nominees who have been assigned a specific registration code.

To make a registration code available in the Nomination Tool

1. On the left navigation bar, point to **People**, go to the **People Setup** area, find the **Registration Codes** heading, and click **Manage**.
   
   The Registration Codes page displays.

2. Click the name of the code you want to edit.
   
   The Edit Reg Code [*code name*] page displays.

3. Click the **Advanced** tab.
The Registration Code – Advanced tab displays.

4. Mark the Display in Nomination Tool box.
5. Click Save.

Adding Custom Fields to the Nomination Tool

If desired, you can add custom fields to the Nomination Tool. For example, you can add custom fields to the Nomination page that help you gather more information about nominees during the nomination process. Below is an example:
You can also use custom fields on the Nomination Search page to help registration code owners and approvers find nominees more easily.

In addition to gathering information or helping in a search, custom fields can display text, such as additional instructions to Nomination Tool users.

The default fields on the nomination form include the following:

- Company
- First Name
- Last Name
- Job Title
- Email Address
- Registration Code

The default nominee search fields include the following:

- First Name
- Last Name
- Company
- Email Address
- Registration Code
- Status
- Registration Status
- Nominated by [login name]
- Nomination Invitation Email Sent
Before You Begin

Create any custom fields you want to add to the Nomination Tool. (For more information, see “Creating Custom Fields” in the “Custom Fields” chapter of the Administrator Guide.)

To add custom fields to the Nomination Tool

1. On the left navigation bar, point to Setup, find the Custom Fields heading, and click Locations.
   The Custom Field Locations page displays.
2. Choose Nomination Tool from the Filter by Category drop-down list.
3. Do one of the following:
   • To add custom fields to the Nomination page, click Add Nominee.
   • To add custom fields to the Nomination Search page, click Nomination Search.
   The Custom Field Locations - [location name] page displays.
4. From the Available Fields list, select the custom fields that you want to add to the Nomination Tool.
   You can select multiple custom fields at one time by holding the CTRL key while clicking the custom field.

   IMPORTANT
   The Available Fields list shows all custom fields in the system. Choose only those fields that are appropriate for the Nomination Tool page where you are adding the fields.

5. Click Add.
   The fields you chose display at the bottom of the screen.
6. Click Finish to save your changes and return to the page where you added the fields.
   (For more information, see “Assigning Fields to Custom Field Locations” in the “Custom Fields” chapter of the Administrator Guide.)

Modifying the Nomination Invitation Email

The system includes a default email that the system sends when a nominator invites nominees to participate in your event. The email is formatted as follows:

**NOTE**

If you want any information you gather in the Nomination Tool using custom fields to display on people records in the Admin Tool, you must also add the custom fields to a custom field location in the Attendee User Records (Admin) group. (For example, add the custom fields to the Attendee Info or User Profile custom field locations.)
Nominators click a button on the Nomination Search screen to send the Nomination Invitation email after a nominee has been approved. Below is an example:

Dear [Nominee Name],
You have been invited to [Event Name].
Username: [username]
Password: the password you chose when you logged in. If you have forgotten your password please click forgot password on the login screen.

Please let us know if you will be attending:
Accept Invitation  Decline Invitation

(For information on adding your logo to this email, see “Including a Standard Header and Footer on Email Messages” in the “Emails” chapter of the Administrator Guide.)

If desired, you can make changes to the Nomination Invitation email.

To modify the Nomination Invitation email

1. On the left navigation bar, point to Setup, find Email Messages heading, and click Manage.
   The Predefined Emails page displays.
2. Click Nomination Invitation Email.
The Modify Email page for the invitation displays.

3. You can make changes in the following fields:
   - **Name**: Enter a name for this email.
   - **Description**: Enter a description of the email.
   - **Send To**: Choose whether to send the email to the nominee's primary, secondary, or both primary and secondary email addresses.
   - **Security Roles**: Select all security roles that should be able to send this email.

4. Scroll to the **Email Messages** section and click **Nomination Invitation Email**.
The Modify Email Message page displays.

5. You can make changes in the following fields:
   - **From Address.** Enter the email address that you want to display as the sender of this message.
   - **Personal Name.** Enter the name that you want to display as the sender of this message.
   - **CC List.** Enter any email addresses that you would like to receive copies of this email whenever it is sent. Separate multiple addresses with a semicolon (;).
• **Subject.** Enter the subject of the message.
• **Body.** Make any desired changes in the body of the message.

(For help in formatting your text, see “Formatting Email Message Text” in the “Emails” chapter of the *Administrator Guide.*)

6. Click **Create.**
7. Click **Update.**

### Giving People Access to the Nomination Tool

After you have set up the Nomination Tool, you need to give your nominators access to it. You can either send nominators the URL for the Tool or, if nominators can access the My Portal page, you can add the Nominations widget to the page. If you will use approvers, they must also be granted access to the Nomination Tool.

### Before You Begin

Gather the email addresses for your nominators and approvers.

### To give people access to the Nomination Tool

1. Assign the people who will use the Nomination Tool as Reg Code Owners or Reg Code Approvers.

   (For more information, see *Adding a Registration Code Group Owner* on page 21 and *Adding a Registration Code Approver* on page 28.)

   **NOTE**

   People with the System Administrator role can also access the Nomination Tool.

2. Do one of the following:

   **To grant access using a URL**
   - Send the necessary people the URL for your Nomination Tool.
   - For example, send an URL in this format:
     - https://your_event_domain/nomination/sso.do

   **To grant access using the My Portal page**
   - 1. From the left navigation bar, point to People, go to the People Setup area, find the General heading, and click My Portal Preferences.
   - 3. In the Choose which widgets show on My Portal section, mark Nominations.
   - 4. Click Update.

   (For more information about My Portal, see “Setting Up the My Portal Page” in the “General Event Administration” chapter of the *Administrator Guide.*)
Advanced Nomination Tool Setup

The Nomination Tool includes several advanced features. For example, you can use custom fields in the Nomination Tool to gather additional information about nominees, post instructions to Nomination Tool users, or make searches for nominees more efficient. You can also limit how many nominees can use a single registration code.

This section explains these tasks:

- Assigning Values and Registration Codes Based on Email Domain
- Limiting the Number of Nominees Who Can Register with a Code

Assigning Values and Registration Codes Based on Email Domain

You can create rules that will automatically assign custom field values or registration codes to people based on their email address domains. A rule can assign a value or code based on a specific domain (such as “@Lanyon.com”) or a specific top-level domain (such as “.gov” or “.edu”).

Any people whose email addresses include the domain used in the rule will have the custom field value or registration code defined in the rule applied to their people records. (For example, you may want to apply the “Government” attendee type automatically to anyone who has “.gov” in their email address.)

NOTE

If a person record exists in the system before a custom field value rule is created, the custom field values can be assigned to those existing people records by synchronizing auto-assigned profile values. (For instructions, see “Synchronizing Records to Auto-Assign Values or Status” in the “General Event Administration” chapter of the Administrator Guide.)

Registration codes applied by email domain cannot be synchronized.

Before You Begin

- To automatically assign custom field values, create the custom fields and custom field values that you want to assign.

- To automatically assign registration codes, create the registration codes and make a note of the registration code group for each code.

NOTE

If you have a large number of rules that will automatically assign custom field values or registration codes to people based on email domain, you can add the rules to the system by importing data from a file. You or another administrator will need to create a template using the “Auto Assign by Email Data” template type. (For more information on creating import templates and performing data imports, see the “Data Imports” chapter of the Administrator Guide.)
To assign a value or registration code based on email domain

1. On the left navigation bar, point to Setup, find the Custom Fields heading, and click Auto Assign by Email.

   The Auto Assign By Email page displays. Below is an example:

   ![Auto Assign By Email](image1)

2. Do one of the following:

<table>
<thead>
<tr>
<th>To add a custom field rule</th>
<th>To add a registration code rule</th>
</tr>
</thead>
</table>
To add a custom field rule

2. In the Email Domain field, enter the email domain you want to use to assign your custom field value.
   You can enter a specific domain (such as "@Lanyon.com") or a top-level domain (such as ".gov").

3. From the Custom Field drop-down list, choose the custom field whose value you want to assign using the specified email domain. Custom field value choices display. Below is an example:

   ![Add New Rule](image)

   **NOTE:** If you choose a text type custom field, you are prompted to enter text.

4. From the Custom Field Value drop-down list, choose the custom field value that you want to assign.

   ![Add New Rule](image)

   3. **Click Add**

      The new rule displays on the Auto Assign By Email page.

To add a registration code rule

2. In the Email Domain field, enter the email domain you want to use to assign the registration code.
   You can enter a specific domain (such as "@Lanyon.com") or a top-level domain (such as ".gov").

3. From the Reg Code Group drop-down list, choose the registration code group containing the registration code that you want to assign using the specified email domain. Registration code choices display. Below is an example:

   ![Add New Rule](image)

4. From the Reg Code drop-down list, choose the registration code that you want to assign.
Limiting the Number of Nominees Who Can Register with a Code

Used in conjunction with the Quantity field on the Registration Code tab, the Registered Quantity of a registration code lets you limit the number of nominees who can actually register using the code.

When you initially set up a registration code (as described in Defining Basic Registration Code Attributes on page 25), you enter a quantity that determines the number of nominees who can have the code assigned. The registered quantity you enter (as described in this task) determines the number of nominees who can actually register using the code.

If the registered quantity is reached, subsequent nominees who try to use the code see a message explaining that the registration code has reached capacity. The nominee’s registration status is automatically changed to Waitlisted and the nominee may be added as a registrant when space at your event is made available.

As an example, suppose you are hosting an internal event for clients and potential clients. You want to let your sales representatives nominate up to 1000 potential attendees. However, only the first 500 people who register will actually be able to attend. All approved nominees are sent an invitation which includes a registration code that allows the nominee to register. After the first 500 have registered, other nominees who try to use the code will not be able to register, but are placed on a waiting list. If a registered attendee cancels, you can approve a nominee from the waiting list and resend the registration invitation. To set this up, you would set up a registration code with a quantity of 1000 and a registered quantity of 500.

Before You Begin

If you have not already done so, complete the following:

- For each code that should have limited use, complete the steps in Defining Basic Registration Code Attributes on page 25. You may also want to add a registration code owner (as explained in Adding a Registration Code Owner on page 27) and a registration code approver (as explained in Adding a Registration Code Approver on page 28).

- Activate the internal event features (as explained in Activating Internal Event Features on page 15). The system cannot limit the number of registrants if these features are not activated.

To limit the number of nominees who can register with a code

1. On the left navigation bar, point to People, go to the People Setup area, find the Registration Codes heading, and click Manage.

   The Registration Codes page displays.

2. Click the name of the code you want to edit.

   The Edit Reg Code [code name] page displays.

3. Click the Advanced tab.
The Registration Code – Advanced tab displays.

4. In the **Registered Quantity** field, enter the number of available registrations you want to associate with this code.

The red text next to this field shows the maximum number of people who can be assigned this registration code. Any number entered must be less than the number in red.

If you leave this number at zero (0), all nominees who are assigned this code may use this code.

5. Click **Save**.
Nominator Tasks

Once the Nomination Tool has been set up, nominators can enter names of people or companies to be considered as attendees at your event. You assign each nominator the registration codes to disperse to nominees. Nominees then use the codes to register for your event. The Nomination Tool lets the nominator see how many codes he or she has been assigned and enter nominee information for approval.

Later, the nominee can review nominee statuses to see whether his or her nominees have been approved. After approval, the nominator (or in some cases the approver) can send email invitations through the system. The invitation lets the nominee click a link to register for your event. When a nominee registers using the link, the registration code is automatically applied to the nominee's person record.

This section explains these topics:

- Making a Nomination
- Viewing Code Allocations
- Reviewing a Nominee’s Status
- Viewing a Nominee’s Status History
- Sending an Email Invitation to a Nominee

Making a Nomination

Someone who has been assigned to be a nominator can access the Nomination Tool and suggest people to invite to your event. (An example of this process is shown in Figure 3: Nomination—nominee addition on page 6.)

NOTE

Your Registration Administrator must set up the Nomination Tool before nominators can access it to make nominations. (For instructions, see Setting Up the Nomination Tool on page 14.)

Before You Begin

Nominators must:

- Have people records in the system.
  (For more information, see Creating People Records for Nomination Staff on page 17.)
- Have been assigned as nominators to registration code groups and registration codes, as needed.
  (For more information, see Adding a Registration Code Group Owner on page 21 and Adding a Registration Code Owner on page 27.)
- Have been assigned the registration codes that they can assign to nominees.
- Know how many nominees can be assigned each code. (For more information, see Viewing Code Allocations on page 47.)
To make a nomination

1. Go to the URL for the Nomination Tool and log in.
   
   For example, go to https://[your event domain]/nomination/nominationSearch.do
   
   Your system administrator will give you this URL. Your login information is the same username and password you use to access the Admin Tool
   
   The Nomination Tool displays. Below is an example:

   ![Nomination Tool Screenshot]

2. Do the following to find out if your nominee already exists in the system.

   **To search for a nominee**

   1. Complete any of the following fields:
      - **First Name.** Enter the nominee’s first name.
      - **Last Name.** Enter the nominee’s last name.
      - **Company.** Enter the name of the business the nominee represents.
      - **Email Address.** Enter the nominee’s email address.
   
   2. Click **Search**.

   If the nominee already has a record in the system, information from the nominee’s person record displays at the bottom of the page. A message about the nominee’s status also displays. Below is an example:

   ![Nomination Result Screenshot]

   **NOTE**

   If a registration code has been used the maximum number of times and other registration codes are available, the nominator can choose another code for this nominee and resubmit the nomination.
If the nominee information displays, the task is finished; otherwise, continue to step 3.

3. If the nominee does not have a record in the system, click **Add Nominee** on the left navigation bar.

The Nomination page displays. Below is an example:

4. Complete the following fields:
   - **Company**. Enter the name of the business the nominee represents.
   - **First Name**. Enter the nominee’s first name.
   - **Last Name**. Enter the nominee’s last name.
   - **Job Title**. If desired, enter the nominee’s job title.
   - **Email Address**. Enter the nominee’s email address.
   - **Registration Code**. Enter the registration code you want to assign to this nominee.

5. Complete any custom fields that display on the nomination page.

6. Click **Save**.

**NOTE**

If a registration code has been used the maximum number of times and other registration codes are available, the nominator can choose another code for this nominee and resubmit the nomination.
Viewing Code Allocations

Nominators can use the Nomination Tool to see a list of registration codes they can choose from when nominating potential attendees. For each assigned code, the following information displays:

- **Registration Code.** The name or number that identifies the code.
- **Quantity.** The number of nominees to which the code can be applied.
- **Nominated.** The number of nominees to which the code has been applied.
- **Remaining.** The number of nominations that can still be made using the code.
- **Registration Quota.** The number of registrations that can be completed using the code.

The Registration Quota number is the same as the number in the Quantity column unless you limit the number of nominees that can register using this code. (For more information, see Limiting the Number of Nominees Who Can Register with a Code on page 42.)

- **Registered.** The number of nominees who have registered using the code.
- **Registered Remaining.** The number of nominees who can still register using the code.
- **Cancelled.** The number of nominees who registered using the code but then cancelled their registration.
- **Waitlisted.** If you limited the number of nominees who can register with the code, the number of nominees who tried to register with the code after the quota had been met.

Below is an example of how this information displays:

![Code Allocations Table]

**To view code allocations**

1. Go to the URL for the Nomination Tool and log in.
   - For example, go to https://[your event domain]/nomination/nominationSearch.do
   - Your system administrator will give you this URL. Your login information is the same username and password you use to access the Admin Tool.
   - The Nomination Tool displays.

2. From the left menu bar, click **Allocations**.

3. To display person information at the bottom of the page that is specific for each code, click the links in the Nominated, Cancelled, or Waitlisted columns.
In the example below, to display which nominees were nominated using the testcode registration code, click the 2 in the Nominated column. The information displays below the registration code section.

If desired, you can click **Export** to export the data as a .xls file.

![](image1)

### Reviewing a Nominee’s Status

Nominators can view the approval status of each nominee. After a nominee is approved, the nominator can send an email message inviting the nominee to register for your event. (For more information on emailing invitations, see [Sending an Email Invitation to a Nominee](#) on page 50.)

If a nominee is rejected or declines an invitation, the nominator can nominate someone else.

**To review a nominee’s status**

1. Go to the URL for the Nomination Tool and log in.

   For example, go to `https://[your event domain]/nomination/nominationSearch.do`

   Your system administrator will give you this URL. Your login information is the same username and password you use to access the Admin Tool.

   The Nomination Tool displays.

2. Search for the nominees whose status you want to check.

   Depending on the criteria you enter, you can view one nominee or several.

   The nominees display at the bottom of the page. Below is an example:

   ![](image2)

3. Review the status of each nominee in the **Status** column.
• If the status is **Pending**, the nominee has not yet been approved. Check back at a later time.

• If the status is **Rejected**, you may be able to make additional nominations.

• If the status is **Approved**, you can send the email inviting the nominee to your event. (For more information, see *Sending an Email Invitation to a Nominee* on page 50.)

**NOTE**

You might want to withdraw your nomination of a nominee who has already been approved. (For example, you may learn that someone you proposed as a nominee will be out of town the week of the event, and want to nominate someone else.)

To withdraw a nomination, click the red X beside the nominee’s name. The nominee is removed from the Nomination Tool, but the person record remains in the Conference system.

---

**Viewing a Nominee’s Status History**

A nominator can review the status history for any nominee. The status history includes any comments made regarding the nominee’s status.

**To view a nominee’s status history**

1. Go to the URL for the Nomination Tool and log in.

   For example, go to https://[your event domain]/nomination/nominationSearch.do

   The Nomination Tool displays.

2. Search for the nominees whose status history you want to view.

   Depending on the criteria you enter, you can view one nominee or several.

   The nominees display at the bottom of the page. Below is an example:

   ![Nomination Tool Screenshot](image)

   3. In the Status History column, click **History** for the nominee whose history you want to view.
The Nominee Status page displays. Below is an example:

![Nominee Status](image1)

The bottom of the page displays the dates when the nominee’s status changed and other details, including any comments entered when the status was changed.

**Sending an Email Invitation to a Nominee**

After a nomination has been made and the nominee has been approved, a staff member must invite the nominee to register for your event. Typically, the nominator sends the invitation, although approvers or other staff may also perform this task.

You use the Nomination Tool to send email invitations to approved nominees. The system tracks when these email invitations are sent.

**To send an invitation to a nominee**

1. Go to the URL for the Nomination Tool and log in.
   
   For example, go to `https://[your event domain]/nomination/nominationSearch.do`

   Your system administrator will give you this URL. Your login information is the same username and password you use to access the Admin Tool.

   The Nomination Tool displays.

2. Search for the nominees to whom you want to send an email invitation.

   Depending on the criteria you enter, you can view one nominee or several.
The nominees display at the bottom of the screen.

3. If the nominee has been approved, mark the box beside the nominees to whom you want to send the email invitation.

To mark all boxes, click All above the list of names.

4. Click Send Email.

The Send Email page displays. Below is an example:

5. To view a full page preview of the email, click the Preview link beside the nominee whose email you want to view.

6. When you are ready to send the email, click Send Email at the top of the page.

A status screen displays.
7. If necessary, click **Refresh Results** until a complete status report is made.

8. When you finish reviewing the status report, click **Done**.

   The system returns you to the Nomination Tool.

---

### Managing Nominees

Once your nominees have begun registering for your event, you can do some management tasks. For example, if necessary, you can update the people records of nominators, approvers, and nominees (as explained in “Editing People Records” in the “People Records” chapter of the Registration Guide). You can also update a nominee’s registration status manually, if necessary.

This section explains these tasks:

- **Approving or Rejecting a Nominee**
- **Updating a Nominee’s Registration Status through the Admin Tool**
- **Sending a Registration Reminder**
- **Viewing Nominee Registration Data**

### Approving or Rejecting a Nominee

Once nominations have been made, someone must approve the nominees before they can be invited your event. You should have appointed at least one staff member as the nominee approver.

---

### NOTES

- If you do not want to include an approval step in the nomination process, you can set up the system to automatically apply a default status of Approved to all nominees who register with a specific code. (For more information on setting default statuses, see **Setting the Default Registration Status for a Registration Code** on page 29.)
- After a nominee is approved, someone must send the email invitation so that the nominee can choose whether to register for your event. (For more information, see **Sending an Email Invitation to a Nominee** on page 50.)
- If desired, you can click an Export button to export the data in this section of the Nomination Tool. Below is an example of the resulting .xls file:

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FIRSTNAME</strong></td>
<td><strong>LASTNAME</strong></td>
<td><strong>EMAIL</strong></td>
<td><strong>COMPANYNAME</strong></td>
<td><strong>CODE</strong></td>
<td><strong>STATUS</strong></td>
<td><strong>NOMINATION INVITATION EMAIL SENT</strong></td>
</tr>
<tr>
<td>James</td>
<td>Lanning</td>
<td><a href="mailto:jl@bmycompnys.com">jl@bmycompnys.com</a></td>
<td>testcode</td>
<td>Pending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phil</td>
<td>Maderia</td>
<td><a href="mailto:pm@anyscompnys.com">pm@anyscompnys.com</a></td>
<td>testcode</td>
<td>Pending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>carolee</td>
<td>anythine</td>
<td><a href="mailto:ca@anyscompany.com">ca@anyscompany.com</a></td>
<td>nonzero</td>
<td>Pending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Anna</td>
<td>Yu</td>
<td><a href="mailto:anna@bymynompny.com">anna@bymynompny.com</a></td>
<td>12345315012</td>
<td>Rejected</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
To approve or reject a nominee

1. Go to the URL for the Nomination Tool and log in.

For example, go to https://[your event domain]/nomination/nominationSearch.do

Your system administrator will give you this URL. Your login information is the same username and password you use to access the Admin Tool.

The Nomination Tool displays. Below is an example:

![Nomination Tool Interface]

2. Do the following to find the nominees you want to approve.

<table>
<thead>
<tr>
<th>To search for a nominee</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Complete any of the following fields:</td>
</tr>
<tr>
<td>- <strong>First Name</strong>. Enter the nominee’s first name.</td>
</tr>
<tr>
<td>- <strong>Last Name</strong>. Enter the nominee’s last name.</td>
</tr>
<tr>
<td>- <strong>Company</strong>. Enter the name of the business the nominee represents.</td>
</tr>
<tr>
<td>- <strong>Email Address</strong>. Enter the nominee’s email address.</td>
</tr>
<tr>
<td>- <strong>Nomination Email Sent</strong>. Do one of the following:</td>
</tr>
<tr>
<td>- To search for only nominees who have been invited to register, choose <strong>Yes</strong>.</td>
</tr>
<tr>
<td>- To search for only nominees who have <em>not</em> been invited to register, choose <strong>No</strong>.</td>
</tr>
<tr>
<td>- To search for all nominees in the system, choose <strong>All</strong>.</td>
</tr>
<tr>
<td>- <strong>Registration Code</strong>. Choose a registration code to search for nominees who have been assigned that code.</td>
</tr>
<tr>
<td>- <strong>Status</strong>. Choose a nomination approval status code to search for nominees with a specific approval status.</td>
</tr>
<tr>
<td>- <strong>Registration Status</strong>. Choose a registration status code to search for nominees with a specific registration status.</td>
</tr>
<tr>
<td>- <strong>Nominated by [user name]</strong>. Choose the name of a nominator (registration code owner) to search for nominees who were nominated by a specific nominator.</td>
</tr>
<tr>
<td>2. Click <strong>Search</strong>.</td>
</tr>
</tbody>
</table>

The Nomination Search page expands to show additional fields.
3. Scroll to the bottom of the page where the search results display. Below is an example:

![Nomination Tool Table]

4. In the **Status** column for a nominee, choose to approve or reject the nominee.

**NOTE**

You cannot change an Approved status. Instead, click the red X beside the nominee's name to cancel the approval and “take back the nomination.” The nominee is removed from the Nomination Tool, but the person record remains in the Conference system.

5. Click **Update Statuses**.
Updating a Nominee’s Registration Status through the Admin Tool

In general, a nominee’s registration status updates automatically as nominees are approved in the Nomination Tool or when they register for your event using the registration code provided by the nominator who nominated them. If necessary, you can manually update the registration status of a nominee from the nominee’s person record in the Admin Tool.

**NOTE**

You cannot change an Approved status.

To update a nominee’s registration status through the Admin Tool

1. In the Admin Tool, find and open the person record for the nominee whose registration status you want to edit.
2. In the upper right corner, click *Edit* next to *Reg Code*.
3. In the person’s Registration Codes page displays. Below is an example:

   ![Registration Codes](image)

   Choose from one of the statuses in the Status column’s drop-down list.

4. In the *Status* column, choose the status you want from the drop-down list.
5. Click *Update Statuses*.
6. Click *Close* to return to the person record.
Sending a Registration Reminder

As approvers and nominators monitor nominee registration status, they may notice that specific nominees have not yet responded to the invitation to attend your event. If desired, emails can be sent from either the Nomination Tool or the Admin Tool to remind nominees of your event and re-issue the invitation to register.

To send a registration reminder

1. Determine which nominees should receive registration reminders.
   For example, review the history of a nominee to see how long it has been since the original invitation was sent. (For more information, see *Viewing a Nominee’s Status History* on page 49.)

2. Do one of the following:

<table>
<thead>
<tr>
<th>To send a reminder from the Nomination Tool</th>
<th>To send a reminder from the Admin Tool</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Log in to the Nomination Tool.</td>
<td>1. Log in to the Admin Tool.</td>
</tr>
<tr>
<td>2. Find the record of the nominee who</td>
<td>2. Find and open the record of the</td>
</tr>
<tr>
<td>should receive a registration reminder.</td>
<td>nominee who should receive a</td>
</tr>
<tr>
<td>(For instructions, see *Sending an Email</td>
<td>registration reminder.</td>
</tr>
<tr>
<td>Invitation to a Nominee* on page 50.)</td>
<td>(For instructions, see “Searching for</td>
</tr>
<tr>
<td></td>
<td>People Records” in the “People Records”</td>
</tr>
<tr>
<td></td>
<td>chapter of the <em>Registration Guide.</em></td>
</tr>
<tr>
<td>3. Click the nominee’s name.</td>
<td>3. On the person record header, click</td>
</tr>
<tr>
<td>The Nomination page displays.</td>
<td>Send Email.</td>
</tr>
<tr>
<td>4. Unmark the Nomination Invitation</td>
<td>The User Emails page displays.</td>
</tr>
<tr>
<td>Email Sent box.</td>
<td>4. Click Send Other Emails.</td>
</tr>
<tr>
<td>5. Click Save.</td>
<td>The Send Email page displays.</td>
</tr>
<tr>
<td>6. Repeat steps 2 through 5 for each</td>
<td>5. From the Choose a predefined email</td>
</tr>
<tr>
<td>nominee who should receive a registration</td>
<td>drop-down list, choose Nomination</td>
</tr>
<tr>
<td>reminder.</td>
<td>Invitation Email.</td>
</tr>
<tr>
<td>7. Mark the Send Email box for each</td>
<td>NOTE: You can choose a different email</td>
</tr>
<tr>
<td>nominee who should receive a registration</td>
<td>or alter the Nomination Invitation</td>
</tr>
<tr>
<td>reminder.</td>
<td>email fields, if necessary.</td>
</tr>
<tr>
<td>8. Click Send Email</td>
<td>6. Click Send Email</td>
</tr>
<tr>
<td></td>
<td>7. Click OK to confirm.</td>
</tr>
<tr>
<td></td>
<td>8. Click Close to return to the person</td>
</tr>
<tr>
<td></td>
<td>record.</td>
</tr>
</tbody>
</table>
Viewing Nominee Registration Data

The Conference system provides reports and other methods that you can use to review nomination information. (For example, you can look at a specific registration code to see the nominees to whom that code has been assigned.) You can also view reports that display all registration code use, and that give details about each registration code.

This section explains the following tasks:

- Viewing Registration Code Assignees
- Accessing the Registration Codes Report
- Accessing the Registration Code Details Report

Viewing Registration Code Assignees

You can view a specific registration code to see the nominees who have that code on their people records.

To view registration code assignees

1. From the left navigation bar, point to People, go to the People Setup area, find the Registration Codes heading, and click Manage.
   The Registration Codes page displays any registration codes that have been defined in your system.

2. Click the registration code whose assignees you want to view.
   The Edit Reg Code page displays for the registration code you chose.

3. Click the RegCode Users tab.
   The Users Report for the registration code you chose displays. Below is an example:

   ![Users Report Example]

4. Do any of these things:
   - To print the report, click Print View and use your browser’s print function to print the report details.
   - To export the report as an .xls file, click Export and follow the instructions to open or save the file.
   - To display the record of the person who has been assigned the registration code, click the person’s name.
Accessing the Registration Codes Report

The Registration Codes report shows the registration codes that have been used, along with the owners and approvers of each code. Below is an example:

<table>
<thead>
<tr>
<th>Registration Codes</th>
</tr>
</thead>
<tbody>
<tr>
<td>How many people and who have used a particular reg code?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>In Use</th>
<th>71</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exhibit</td>
<td></td>
</tr>
<tr>
<td>Reg Code</td>
<td>Description</td>
</tr>
<tr>
<td>ACTSDK</td>
<td>Exhibitor Comp</td>
</tr>
<tr>
<td>CRAKAP</td>
<td></td>
</tr>
<tr>
<td>Totals</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>General Attendee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reg Code</td>
</tr>
<tr>
<td>Content Role</td>
</tr>
<tr>
<td>Executive</td>
</tr>
<tr>
<td>General Attendee</td>
</tr>
<tr>
<td>JOMQYW</td>
</tr>
<tr>
<td>NomToolTest</td>
</tr>
<tr>
<td>Sponsor</td>
</tr>
<tr>
<td>VIP</td>
</tr>
<tr>
<td>Totals</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Generated Reg Codes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reg Code</td>
</tr>
<tr>
<td>80k2742</td>
</tr>
<tr>
<td>bspp091027</td>
</tr>
<tr>
<td>foa640604</td>
</tr>
<tr>
<td>mskp702</td>
</tr>
<tr>
<td>vgp6br1023</td>
</tr>
<tr>
<td>Totals</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Press</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reg Code</td>
</tr>
<tr>
<td>Press</td>
</tr>
<tr>
<td>Totals</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Speaker</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reg Code</td>
</tr>
<tr>
<td>Speaker1</td>
</tr>
<tr>
<td>Speaker2</td>
</tr>
<tr>
<td>Speaker3</td>
</tr>
<tr>
<td>Speaker4</td>
</tr>
<tr>
<td>Speaker5</td>
</tr>
<tr>
<td>Speaker6</td>
</tr>
<tr>
<td>Totals</td>
</tr>
</tbody>
</table>
Each time that you access this report, the system gathers current data to create the report and displays the results in the Admin Tool.

**NOTE**

People who register and then cancel are not included in the count of the number of times a registration code has been used.

(To learn about additional report functionality, see the *Reports Guide*.)

**To access the Registration Codes report**

1. On the left navigation bar, point to **Reports** and click **Reports List**.
   
The Reports page displays.
2. Click the **User** tab.
3. Click the **Registration Codes** report.
   
   After a moment, the report displays.
4. Do any of these things:
   
   • To display all the registration codes in the system, click **All**.
   
   • To display only the registration codes that are being used, click **In Use**.
   
   • To print the report, click **Print View** and use your browser's print function to print the report details.
   
   • To export the report as an .xls file, click **Export** and choose whether to open or save the file.
   
   • To add the report to the My Reports widget, click **Add to My Reports**.)
Accessing the Registration Code Details Report

The Registration Code Details report lets you see the details for all of the registration codes for your event. Below is an example:

<table>
<thead>
<tr>
<th>Registration Code Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Back</td>
</tr>
<tr>
<td>Registration Code Details</td>
</tr>
<tr>
<td>Reg Group:</td>
</tr>
<tr>
<td>--All--</td>
</tr>
<tr>
<td>Search</td>
</tr>
<tr>
<td>Print View</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total: 151</th>
</tr>
</thead>
<tbody>
<tr>
<td>CODE</td>
</tr>
<tr>
<td>------------</td>
</tr>
<tr>
<td>Press</td>
</tr>
<tr>
<td>General Attendee</td>
</tr>
<tr>
<td>Sponsor</td>
</tr>
<tr>
<td>Content Rate</td>
</tr>
<tr>
<td>Executive</td>
</tr>
<tr>
<td>VIP</td>
</tr>
<tr>
<td>Speaker1</td>
</tr>
</tbody>
</table>

If desired, you can filter the list to display only information for the codes in a specific registration code group. (To learn about additional report functionality, see the Reports Guide.)

To access the Registration Code Details report

1. On the left navigation bar, point to Reports and click Reports List.

   The Reports page displays.

2. Click the User tab.

3. Scroll to the bottom of the page and click the Registration Code Details report.

   After a moment, the report displays.

4. Do any of the following:
   • To limit which registration codes display in the report, from the Reg Group drop-down list, choose the registration group where the registration code you want to view is assigned.
   • To print the report, click Print View and use your browser's print function to print the report details.
   • To export the report as an .xls file, click Export and choose whether to open or save the file.
   • To add the report to the My Reports widget, click Add to My Reports.
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