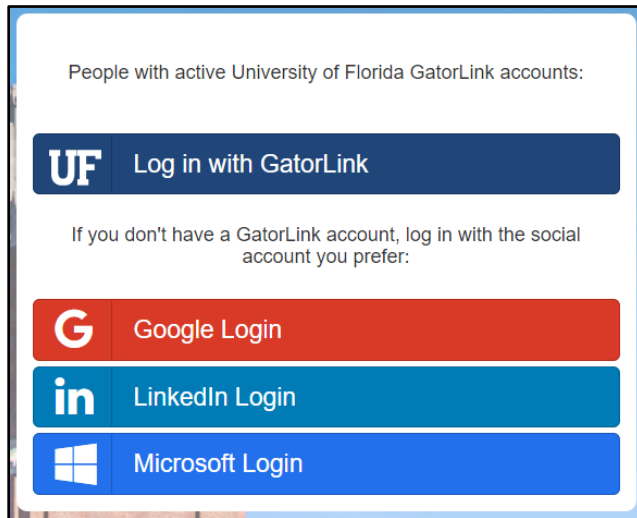
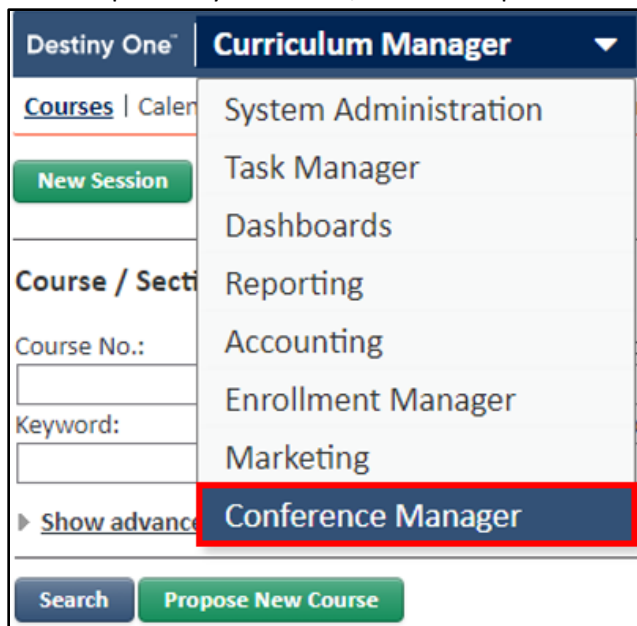


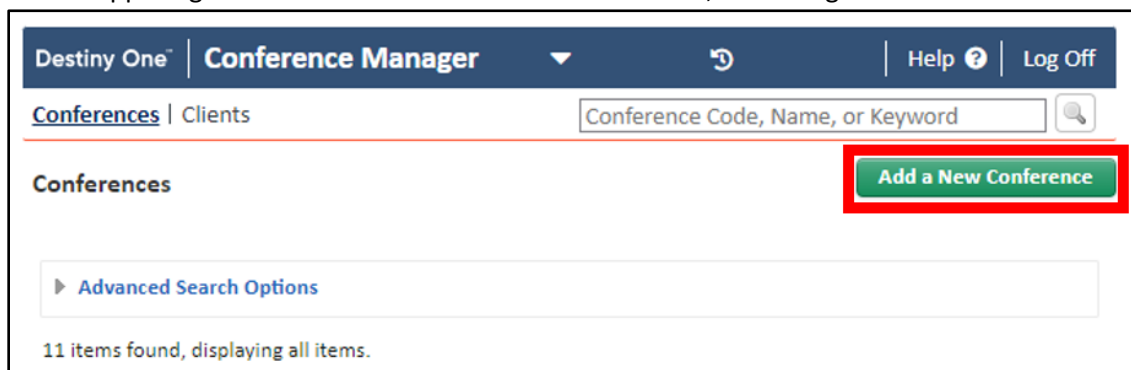
1. Log into Destiny One: [uflsv.destinyone.moderncampus.net](https://uflsv.destinyone.moderncampus.net)



2. At the top left of your screen, use the dropdown menu to select to the "Conference Manager".



3. On the upper right side of the screen below the search box, click the green "Add a New Conference" button.



4. Enter the following required information.

- Conference Name: Name of the event.
- Status: Active opens the event's registrations. Inactive closes the event's registrations.
- Applicability: Internal conferences can only be registered in from the Staff View by an internal user. Public conferences can be registered in from both the Registration Site and the Staff View.
- Conference Start & End Dates: Date(s) of the event.
- Program Office<sup>1</sup>: Select the appropriate unit for your program.
- Costing Unit<sup>2</sup>: Select the appropriate option for your program.

Destiny One | Conference Manager

Conferences | Clients

Conference Code, Name, or Keyword

Add a new conference

Add a new conference

Conference Name: \*

Location:

Status: \* Active

Applicability: \* Public

Conference Start & End Dates: \* to \*

Client:

Corporate Admin Portal: ☐ Show this conference in the portal

Keywords:

Program Office: \*

Costing Unit: \*

Registration Email:

Conference site:

Learning Management System: ☐

**View from selecting Learning Management System option**

Learning Management System: ☒

LMS ID: \*

LMS Type: \*

<sup>1</sup> Program Office: Groupings used for internal organization with regard to responsibility and financial reporting.

<sup>2</sup> Costing Unit: A subsection of a Program Office and is used as a more specific level of organization for courses, certificates, programs, bundles, search filtering, reporting, and budgeting.

5. Enter information as needed for the following optional features:
  - a. Location: Location of the event (ex: venue physical location or virtually hosted). This field will only appear on internal documents.
  - b. Client: This is the contact information for the main event client. **Note:** Clients needs to be setup prior to being added to a conference.
  - c. Corporate Admin Portal<sup>3</sup>: Toggle option to shows this conference in the Corporate Admin Portal.
  - d. Keywords: Both the simple and advanced conference searches in the Conference Manager module will reference the keywords defined here, as well the Conference Search for Registration page. **Note:** Use commas to separate keywords.
  - e. Registration Email: This is the email address that can be displayed with the event page for direct contact for any questions on the event. It can be included in emails to the participants. If this is left blank, all communications that reference a contact email address will default to your school's email address as defined on the School page.
  - f. Conference site: This is the main registration event landing page for the conference. This value can be used to direct a person to the main conference site after registration or in email communications.
  - g. Learning Management System: Links the event to Canvas.
  - h. Conference Notes: Internal communications about the conference.
  - i. Conference Logo: The image you upload will be included in emails and printouts for the participants in the conference. The image should be no bigger than 670 pixels wide by 100 pixels high. If you do not upload a logo, the space saved for the logo will be hidden in emails and printouts; there is no default logo.
6. Once all information is entered, click the navy "Save" button at the bottom of the page. If there is an error, it will be displayed at the top of the screen. Your progress will not be saved until all errors are corrected.

Conference logo: Choose File No file chosen

Upload the image to be used as the conference logo in emails and printouts. Image dimensions should be within 670 pixels wide by 100 pixels high. Oversized images might be cut off.

Save
Cancel

Example of an Error Notification

Validation error.

You must correct the following errors to continue:

- Conference Name must be specified.
- Start Date must be specified.
- End Date must be specified.
- Program Office must be specified.
- Costing Unit must be specified.

<sup>3</sup> Corporate Admin Portal: Allows a group exclusive access to view their members, add and delete members, and enroll their members in course sections and bundles.

7. On the left side of the screen, click the “Registration Builder” from the list of options.

**OPWD Example Conference** (Active)  
14 Jan 2022 - 16 Jan 2022

**Settings** [Edit](#)

**Applicability:** Public

**Program Office:** Office of Professional and Workforce Development

**Costing Unit:** PWD-Conferences

**Client:**

8. Click the green “Configure General Settings” button.

**OPWD Example Conference** (Active)  
14 Jan 2022 - 16 Jan 2022

To get started, click **Configure General Settings**

9. Enter the following required information:
- Staff Registration Dates:** Defines when staff users can register participants through the Staff View.
  - Public Registration Dates:** Defines when participants can register through the Registration Site
  - Disallow Registration Site branding:** The number of days prior to the public registration start date that you would like Destiny One to disable the registration site customization URL.
  - Allow Public Cancellation Requests:** When enabled through the Conference Cancellation Requests configuration points under the configuration editor, conference participants have the ability to request a cancellation of their conference enrollment through the student portal. Cancellation requests can be set to number of days before conference start date, number of days after conference start date, number of days after conference enrollment date, or within a specified range of dates.

**Registration Dates & Times**

Specify your global and public registration dates (these can be overwritten at the package level) :

**Staff Registration Dates:** \* [ ] to [ ]

**Public Registration Dates:** \* [ ] to [ ]

**Disallow Registration Site branding:** \* 7 days before Conference Public Registration Start Date

**Allow Public Cancellation Requests:**

☒ 7 days before start date

☐ 7 days after start date

☐ 7 days after enrollment

☐ [ ] to [ ]

☐ Prevent requests by international students

☐ Early Bird Registration

☐ Late Registration

- e. **Academic Unites (AUs):** If you are not awarding AUs for the conference, click “None”. If you wish to award AUs for the conference, click “Package”. Additional fields will appear. In the Conference AU Range fields, define the range of AUs that can be awarded for the different packages of the conference. You will define the exact number of AUs that will be awarded for each package on the Package page.
- f. **CEUs:** If you are not awarding CEUs for the conference, click “None”. If you wish to award CEUs for the conference, click “Package”. Additional fields will appear. In the Conference CEU Range fields, define the range of CEUs that can be awarded for the different packages of the conference. You will define the exact number of CEUs that will be awarded for each package on the Package page. **Note:** If you are going to create sessions for your conference and you wish to award CEUs for sessions instead of packages select “Session” instead of “Package”. In the Conference CEU Range fields, define the range of CEUs that can be awarded for the different sessions of the conference. A conference cannot award CEUs at both the package level and the session level.

Operations and Display

Transcript: ☐ Show conference on transcript

Student View: ☒ Show conference on Student View

Attendance: ☐ Track attendance

Academic Units (AUs) : \* ☐ Package  
☐ None

CEUs: \* ☐ Package  
☐ Session  
☐ None

Grading: ☐ Grading enabled

Badge: This badge can be awarded to students on the participant list.

- g. **Registration Site Credit Cards:** Defines which credit card types will be accepted on at the event’s physical location.

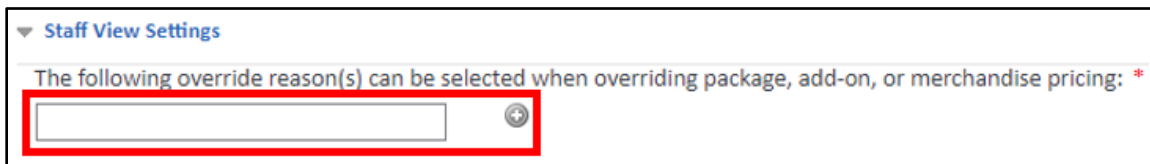
Payment Settings

Registration Site Credit Card: \* ☐ American Express  
☐ Diners Club  
☐ Discover  
☐ MasterCard  
☐ Visa

Registration Site Other Payment Methods: This will cause the participant's registration request to be forwarded to a staff member for processing.  
☐ Cash (in person only)  
☐ Check  
☐ Bank Wire (additional fees may apply)  
☐ Credit Card Deposit  
☐ Agent Invoice  
☐ School Group

Override Invoice Due Date:  days before start date ▼

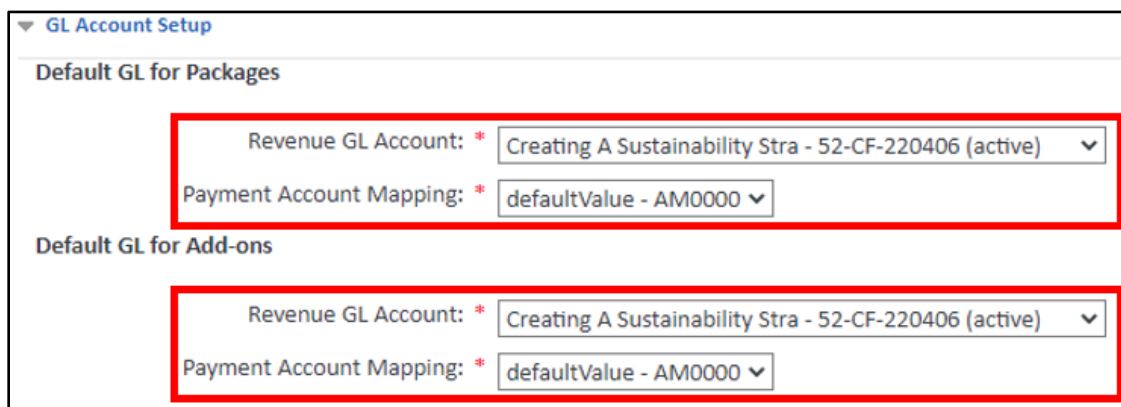
- h. Override Reason(s): During conference registration in the Staff View you may want to allow staff users to override fee amounts. Define the acceptable override reasons here.



▼ Staff View Settings

The following override reason(s) can be selected when overriding package, add-on, or merchandise pricing: \*

- i. Revenue GL Account: The default active account that the revenue from registrations (and purchases in the case of add-ons) will be credited to.
- j. Payment Account Mapping: The default account that the payments received will be debited from.



▼ GL Account Setup

Default GL for Packages

Revenue GL Account: \* Creating A Sustainability Stra - 52-CF-220406 (active) ▼

Payment Account Mapping: \* defaultValue - AM0000 ▼

Default GL for Add-ons

Revenue GL Account: \* Creating A Sustainability Stra - 52-CF-220406 (active) ▼

Payment Account Mapping: \* defaultValue - AM0000 ▼

- k. Group Registration Option: Allows or prevents group registration on the Conference Registration Site.
- l. Creating group members: If you would like the primary registrant using the Conference Registration Site to be able to create new profiles for the participants that is being registered, select "Allow registrant to create participants". If you want to limit group registration to people who are already members of the group, select "Prevent registrant from creating participants".
- m. Creating new participant accounts: Use the options to indicate if you want to use a full profile or a rapid profile to collect participant information on the Conference Registration Site. The rapid profile collects a handful of information on the login screen allowing participants to bypass the Student Profile. They can still choose to edit their profile later in the registration process and view the full profile. When full profile is selected, the login screen simply has a Register button that takes the participant directly to the full conference Student Profile for completion. Both the rapid and full profiles ask participants for their first and last name, email address, username and password. In addition, the full profile asks for date of birth, telephone number, address, preferred method of contact (marketing) and a security question and answer. In Public View, the security question and answer fields only appear if you have security questions defined in the Security Question preference table. The student Credentials subform is included in the full profile, but completion is not mandatory. **Note:** Regardless of the profile selected, when a registrant adds participants as part of a group registration, they only have to provide the first name, last name and email for each participant in the group.

▼ Login and Participant Profile Settings

The following options allow you to customize how new participants can be created on the registration site:

**Group Registration Option: \*** ☒ Display "I am registering one or more people" option on Registration Site  
☐ Hide "I am registering one or more people" option on Registration Site

**Creating group members: \*** ☒ Allow registrant to create participants  
☐ Prevent registrant from creating participants (registrant will be prompted to contact your organization to add list of potential participants)

**Creating new participant accounts: \*** ☐ Use full participant profile  
☒ Use rapid participant profile

	Display	Mandatory Fields
Preferred Pronouns	<input type="checkbox"/>	<input type="checkbox"/>
Gender	<input type="checkbox"/>	<input type="checkbox"/>
Date of Birth	<input type="checkbox"/>	<input type="checkbox"/>
Middle Name	<input type="checkbox"/>	<input type="checkbox"/>
SSN / SIN	<input type="checkbox"/>	<input type="checkbox"/>
Country of Birth	<input type="checkbox"/>	<input type="checkbox"/>
First Language	<input type="checkbox"/>	<input type="checkbox"/>
Credentials	<input type="checkbox"/>	<input type="checkbox"/>
Country of Citizenship	<input type="checkbox"/>	<input type="checkbox"/>
City of Birth	<input type="checkbox"/>	<input type="checkbox"/>

10. Enter the following optional features as needed:

- a. **Early Bird Registration:** Select the checkbox if the conference will offer different rates for early registration rate options. You define the specific details in a subsequent step. With the checkbox selected, use the calendar date selector to indicate what date early bird registration ends on.
- b. **Late Registration:** Select the checkbox if the conference will offer different rates for late registrants. You define the specific details in a subsequent step. With the checkbox selected, use the calendar date selector to indicate what date late registration starts on.
- c. **Transcript:** Allows the conference to appear on a student transcript.
- d. **Student View:** Allows the participants to be able to see the conference details when they log on to the Student View. Details include which sessions have been selected and the conference basket will be in the account history.
- e. **Attendance:** Enables attendance tracking for the conference. With this selected, you will be able to check-in students as they arrive at the conference.
- f. **Grading:** Allows grading of the conference participants. Use the resulting list to select the Grade Type. The available options are those defined on the Grade Types page under CM > Grading with an Availability of Transcript Grade Only or All. **Note:** Conference grading fields only appear if you have defined appropriate Grade Types.
- g. **Badging:** Badges are available only when the Credly Connector module is licensed by your school.
- h. **Registration Site Other Payment Methods:** Defines which additional payments types will be accepted on the Registration Site.
- i. **Override Invoice Due Date:** When left blank, applied invoice payments will default to the system-defined due date. Otherwise, enter an override invoice due date that will apply to this conference. This date will populate the invoice due date field but can still be modified by staff while processing a transaction or

while adjusting a transaction. If the start or end date is changed after invoices have been issued, you can manually adjust them if they were set to be due relative to the start or end date.

- j. **Additional fields:** Select both the Display and Mandatory Fields checkboxes to make the field visible and mandatory. Leave both checkboxes blank to hide the field in the Conference Registration Site. Check off “Display” for all informational items you wish to collect. Check off “Mandatory Fields” for all information items you wish to require. **Note:** The Preferred Pronouns field will appear on the profile form only when the Use full participant profile option is selected.
- k. **Confirmation of Completion Report:** Define the text and background image for the Confirmation of Completion Report: Conferences report under Conference Reports Settings. The text will appear on three lines above and below the participant name and conference attendance dates.
- l. **Name Tag Report Logo:** Define the text and background image for the Confirmation of Completion Report: Conferences report under Conference Reports Settings. The text will appear on three lines above and below the participant name and conference attendance dates.
- m. **Resources Available:** An online resource is an external site that a conference participant can access for a specific period of time. When a participant is logged in to their page in the Public View, they will see the link to the online resource.

11. Once the required information is entered, click the navy “Save” button at the bottom of the page. If there is an error, it will be displayed at the top of the screen. Your progress will not be saved until all errors are corrected.

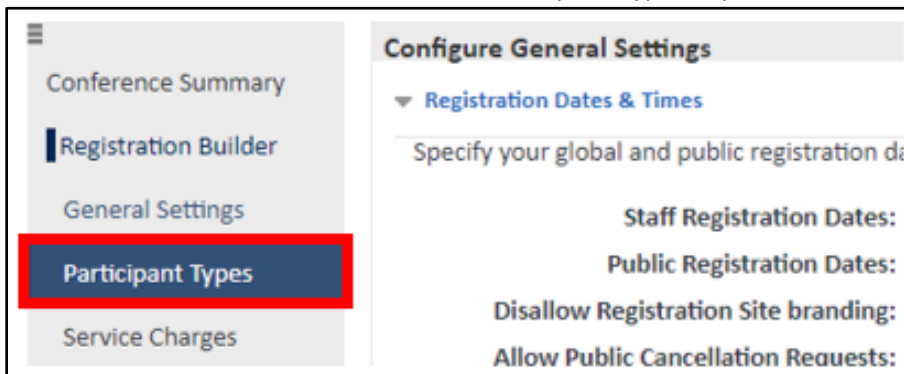


▼ Conference Online Resource

Resource: ☐ Resource Available

Save Cancel

12. On the left side of the screen, click the “Participant Types” option.



Configure General Settings

▼ Registration Dates & Times

Specify your global and public registration dates:

Staff Registration Dates:

Public Registration Dates:

Disallow Registration Site branding:

Allow Public Cancellation Requests:

Conference Summary

Registration Builder

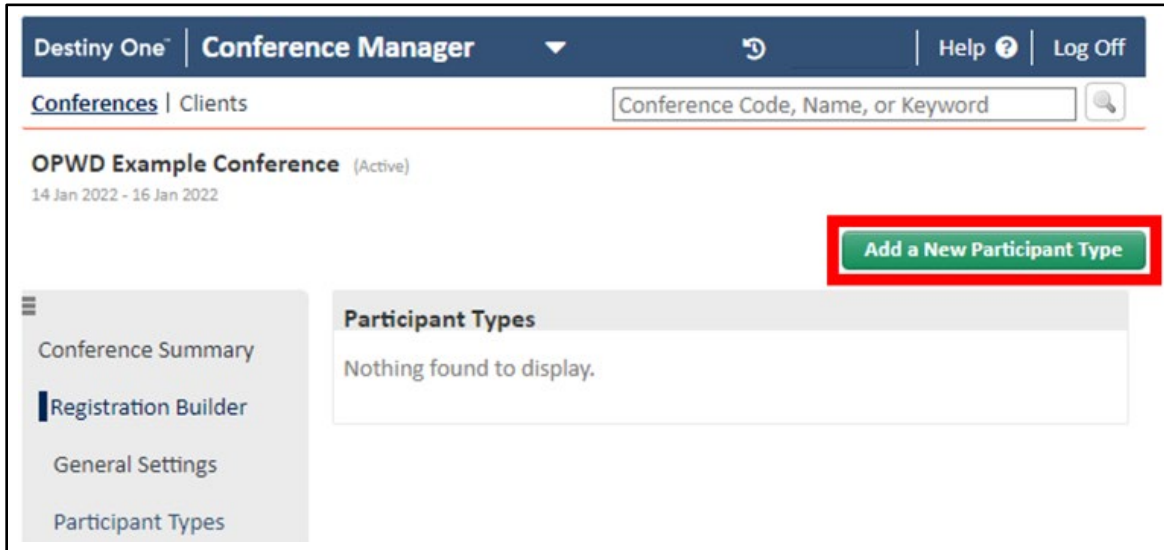
General Settings

Participant Types

Service Charges



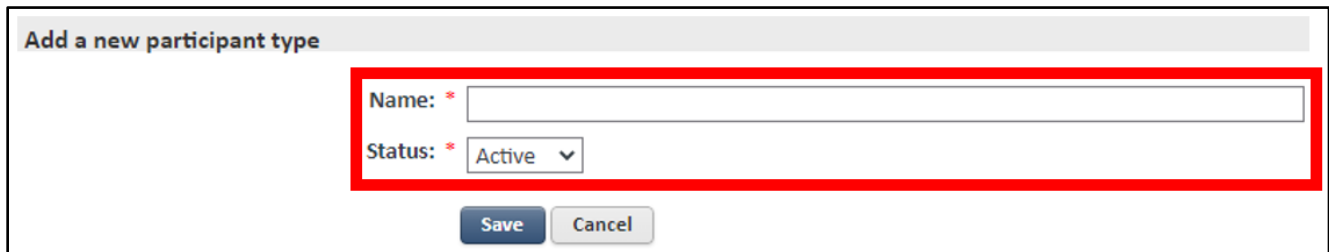
13. Click the green “Add a New Participant Type” button.



The screenshot shows the 'Destiny One | Conference Manager' interface. The top navigation bar includes 'Destiny One | Conference Manager', a search bar, and links for 'Help' and 'Log Off'. The main content area displays 'OPWD Example Conference (Active)' with dates '14 Jan 2022 - 16 Jan 2022'. A sidebar on the left lists 'Conference Summary', 'Registration Builder', 'General Settings', and 'Participant Types'. The 'Participant Types' section is active, showing 'Nothing found to display.' A green button labeled 'Add a New Participant Type' is highlighted with a red box.

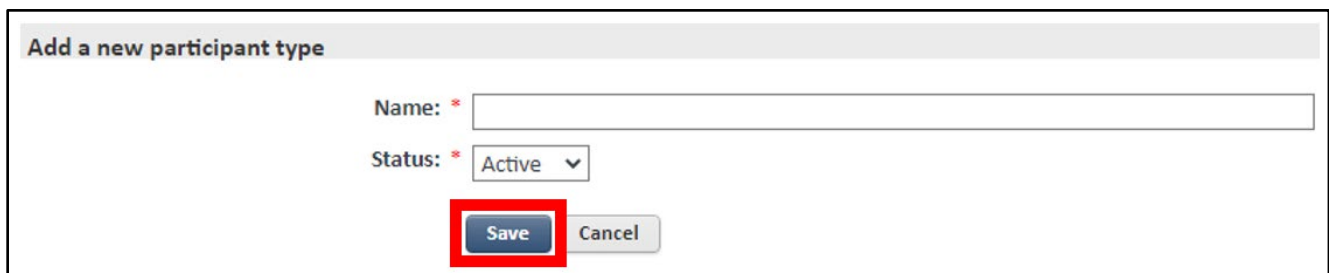
14. Enter the following information:

- Name: Type of Registration Category Name. Maximum of 40 characters.
- Status: Active or inactive status. A participant type must be active for a person to register as that registration type.



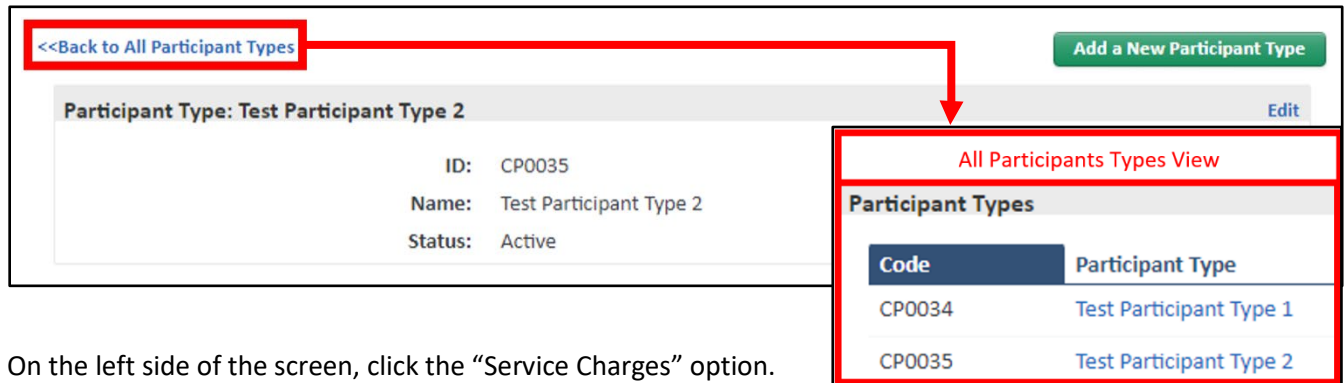
The screenshot shows the 'Add a new participant type' form. It has two input fields: 'Name: \*' and 'Status: \*'. The 'Status' field is a dropdown menu with 'Active' selected. Both fields are highlighted with a red box. Below the fields are 'Save' and 'Cancel' buttons.

15. Click the Navy “Save” button. Repeat Steps 13-15 for each registration category type.



The screenshot shows the 'Add a new participant type' form. It has two input fields: 'Name: \*' and 'Status: \*'. The 'Status' field is a dropdown menu with 'Active' selected. Below the fields are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted with a red box.

16. To view all Participant Types, select the “Back to All Participant Types” hyperlink.

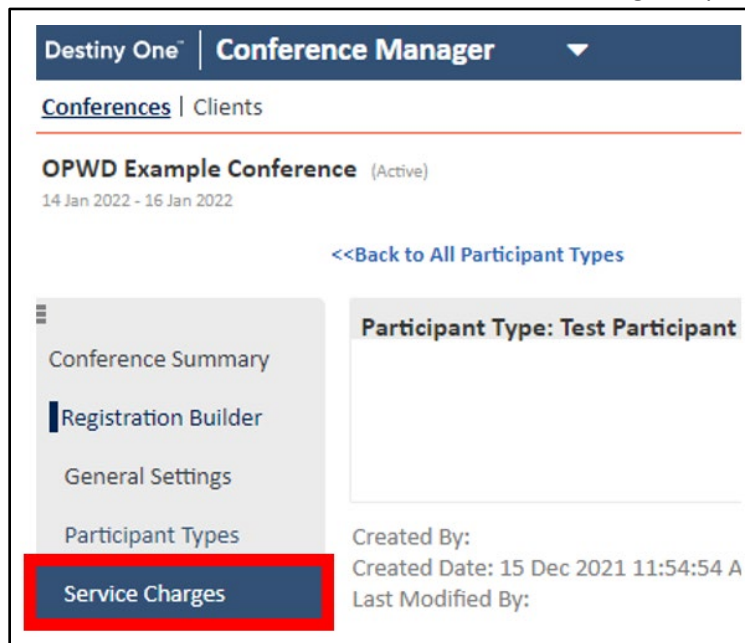


The screenshot shows the detail page for a Participant Type. At the top, there is a green button labeled "Add a New Participant Type". Below it, the title is "Participant Type: Test Participant Type 2" with an "Edit" link. The details listed are: ID: CP0035, Name: Test Participant Type 2, and Status: Active. A red box highlights the "<<Back to All Participant Types" link. A red arrow points from this link to a separate window titled "All Participants Types View".

**All Participants Types View**

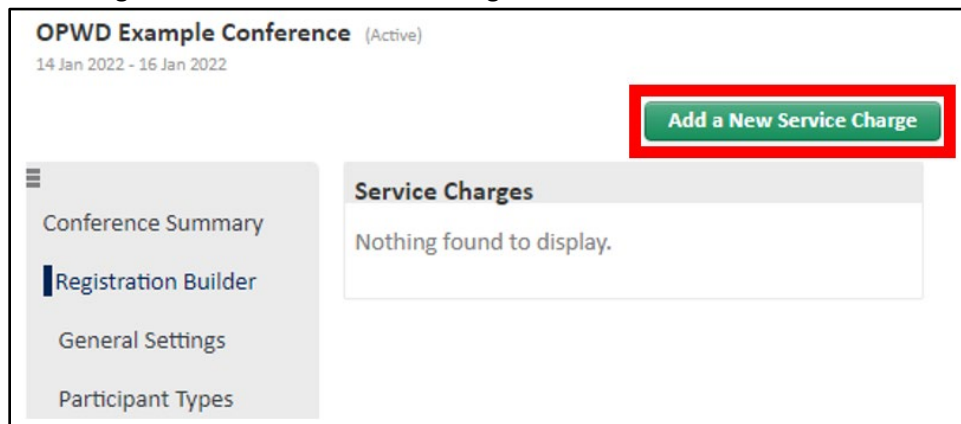
Code	Participant Type
CP0034	Test Participant Type 1
CP0035	Test Participant Type 2

17. On the left side of the screen, click the “Service Charges” option.



The screenshot shows the "Destiny One | Conference Manager" interface. The left sidebar has a red box around the "Service Charges" option. The main content area shows details for "OPWD Example Conference (Active)" with dates "14 Jan 2022 - 16 Jan 2022". Below this, there is a link "<<Back to All Participant Types". The "Participant Type: Test Participant" section is also visible. The "Service Charges" option in the sidebar is highlighted with a red box.

18. Click the green “Add a New Service Charge” button.



The screenshot shows the "Service Charges" page. The left sidebar has a red box around the "Service Charges" option. The main content area shows the title "Service Charges" and the message "Nothing found to display." A green button labeled "Add a New Service Charge" is highlighted with a red box.

19. Enter the following required information:

- a. Description: Description of the charge. Example: Cancellation Fee.
- b. Status: Only Active service charges can be applied during the dropping of a conference or add-on.

General

Description: \*

Status: \* Active

Fee Category:

- c. Define the qualifiers for the service charge and select the "Add Qualifier" button:
  - i. Name: Enter a name for the qualifier. If you are using more than one qualifier the name should contain enough information to suggest when it applies.
  - ii. Conditions: Fields that allow you to define when Destiny One should display the service charge as an option for the staff user to select during the cancellation of a conference registration. Qualifiers can reference the Conference Start Date or the Conference Registration Date.
  - iii. Participant Type: Optionally use the drop-down list to indicate which participant type the cancellation fee applies to.
  - iv. Fees: Indicate whether a service charge is a flat fee or a percentage.

Define when to apply this service charge: \*

Add / Edit Qualifier

Name:

Conditions: \*

>/< #
>/< #
Time Units:
Bef./Aft.:
Date / Manual: \*

Between:
and:

Participant Type

Fees: \*

☐ Flat Amount: \$
☐ Registration Fee: %

Not to exceed: \$

Selection Notes:

Add Qualifier

### Examples of Qualifier Conditions:

To display the cancellation fee if a participant cancels more than 7 days prior to the conference start date, enter:

> / <	#	> / <	#	Time Units.*	Bef./Aft.:*	Date / Manual:*
Between:	>	7	and:			
	Days	Before				Conference Start Date

To display the cancellation fee if a participant cancels less than 30 days prior to the conference start date, but more than 7 days prior to the conference start date, enter:

> / <	#	> / <	#	Time Units.*	Bef./Aft.:*	Date / Manual:*
Between:	<	30	and:	>	7	
	Days	Before				Conference Start Date

To display the cancellation fee if a participant cancels less than or equal to 2 days after registering for the conference, enter:

> / <	#	> / <	#	Time Units.*	Bef./Aft.:*	Date / Manual:*
Between:	<=	2	and:			
	Days	After				Conference Registration Da

To always display the cancellation fee no matter when a participant cancels, enter:

> / <	#	> / <	#	Time Units.*	Bef./Aft.:*	Date / Manual:*
Between:			and:			
						Manual

- d. Revenue GL Account: The default active account that the revenue from registrations (and purchases in the case of add-ons) will be credited to.
- e. Payment Account Mapping: The default account that the payments received will be debited from.

GL Account Setup

Revenue GL Account: \*

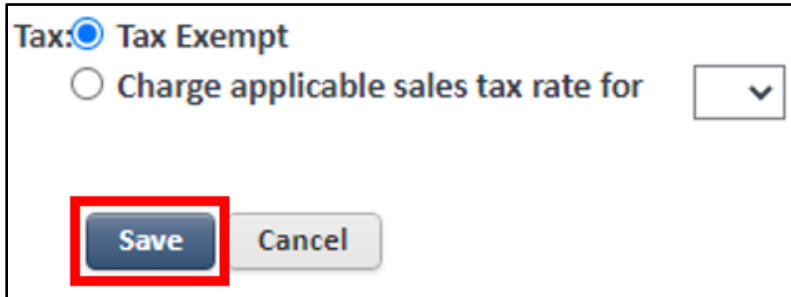
☒ Creating A Sustainability Stra - 52-CF-220406 (active)
 ☐ Associated Package or Add-On GL Account
 ☐ Allocate rounding to this fee component

Payment Account Mapping: \*

defaultValue - AM0000

- f. Tax Applicability: This section displays the applicable tax options defined on the System Administration>Accounting>Taxes page. The section is hidden if there are no taxes defined for your school. Select the Charge applicable sales tax rate for option and then select the location of the tax to be charged as well as the tax type.

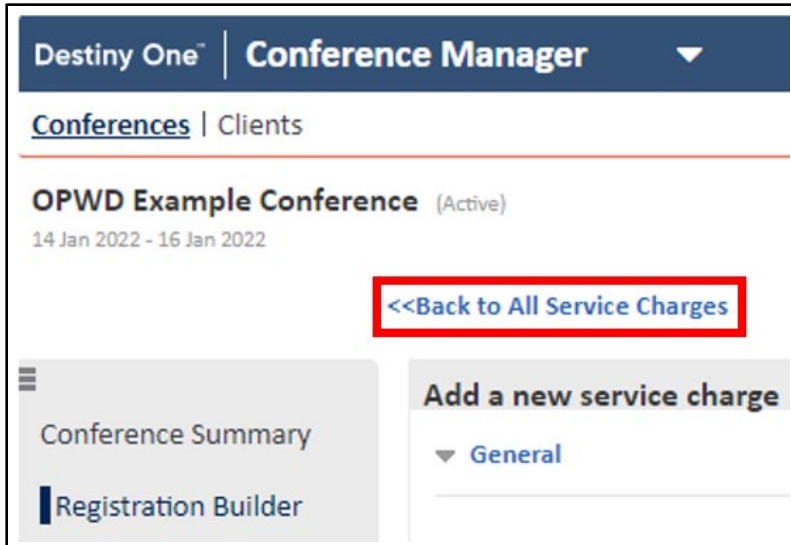
20. Click the Navy “Save” button. Repeat Steps 18-20 for each Service Charge.



**Tax:** ☒ **Tax Exempt**  
☐ Charge applicable sales tax rate for ▼

**Save** **Cancel**

21. To view all Service Charges, select the “Back to All Service Charges” hyperlink.



**Destiny One | Conference Manager** ▼

Conferences | Clients

**OPWD Example Conference** (Active)  
14 Jan 2022 - 16 Jan 2022

[<<Back to All Service Charges](#)

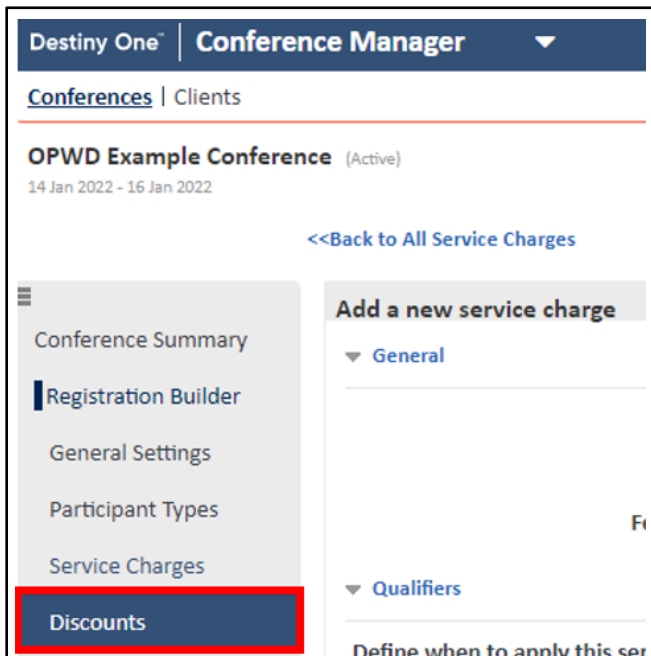
**Add a new service charge**

▼ General

Conference Summary

Registration Builder

22. On the left side of the screen, click the “Discounts” option.



**Destiny One | Conference Manager** ▼

Conferences | Clients

**OPWD Example Conference** (Active)  
14 Jan 2022 - 16 Jan 2022

[<<Back to All Service Charges](#)

**Add a new service charge**

▼ General

▼ Qualifiers

Define when to apply this ser

Conference Summary

Registration Builder

General Settings

Participant Types

Service Charges

**Discounts**

23. Click the green “Add a New Discount” button.

24. Enter the following required information:

- Description:** Enter a name for the discount.
- Published Code:** Enter the code to appear as the item label during the Staff View and Conference Registration Site checkout processes, and on the receipt.
- Applicability:** Select the Applicability. Options are Public or Internal. Internal discounts can only be applied in the Staff View. Public discounts can be applied from both the Registration Site and the Staff View.
- Details:** Enter details of the discount. The details are for internal use only.

- e. Effective Dates: The Effective Date can either be a specific date or a certain number of days before the conference start date.
- f. Expiry: Expiry can be a specific date, a certain number of days before **conference** start date or never expires.

▼ Effective Dates

Effective Date: \*

☐ Dec/20/2021
 ☐ days before conference start date

Expiry: \*

☐ Dec/20/2021
 ☐ days before conference start date
 ☐ Never expires

- g. GL Account: This is the account that the negative revenue from the discount will be credited to. The Revenue GL Account that you defined on the General Settings page appears automatically in the drop-down field.

▼ GL Account Setup

GL Account: \*

☐ Creating A Sustainability Stra - 52-CF-220406 (active)
 ☐ Associated Package or Add-On GL Account

- h. Discount: Select whether the discount is a \$ or a % per registration package and/or add-on, then enter a value in the applicable field.  
For example, the following details define a 25% discount:

Discount: \*

☐ \$ per registration package and/or add-on

☒ 25.0 % per registration package and/or add-on

- i. **Discount Type:** Group discounts are volume discounts which Destiny One automatically applies during checkout. After selecting the Group radio button, you must define the minimum number of registrations necessary in a single transaction to qualify for the volume discount. For example, the following details define a volume discount which will apply if 5 or more participants are registered in a single transaction:

**Discount Type:** \* ☐ Standard

☒ Group -  or more registrations

▼ Discount

**Discount:** \* ☐  \$ per registration package and/or add-on


☐  % per registration package and/or add-on

**Rounding:** ☐ Round % discount to the nearest \$

**Discount Type:** \* ☐ Standard

☐ Group -  or more registrations


25. Enter the following optional features as needed:

- a. **Rounding:** If you are using a % discount and you want Destiny One to round the discount to the nearest dollar, select the Round % discount to the nearest \$ checkbox.
- b. **Define a coupon code:** Enter a coupon code. Each code must be unique within the conference. A coupon code can be alphanumeric. You may want to use a word and number combination related to a marketing campaign (Ex: Alumni\_2013), or a random string combination (Ex: Ck6723b2), as relevant for your purposes. **Note:** A coupon code must be defined when the Discount Type is set as Standard.
- c. **Coupon Code Applicability:** Select the checkbox for Coupon can only be used once to limit the coupon code to one use per participant. **Note:** A participant can only register in one package for a given conference, but a person registering a group of people could register multiple groups. With this checkbox selected the discount can only be used for one transaction.
- d. **Limit code usage to marketing communications:** Use to limit the use of the coupon code to those individuals who received the code through a marketing communication, use the drop-down list to select the marketing communication and then click the add icon . The communication appears in a table of Associated communications. You can add multiple marketing communications. Marketing communications are defined on the Marketing Profile page.

▼ Coupon Code

**Define a coupon code to obtain the discount:**

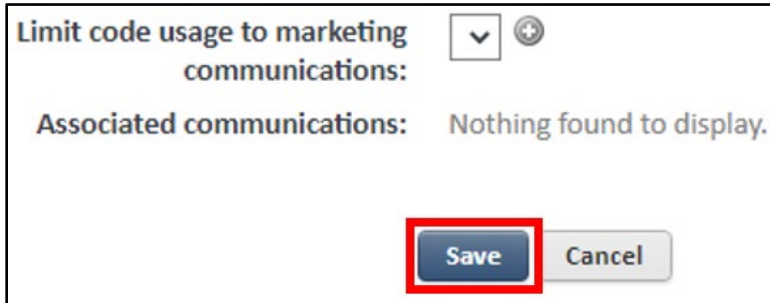
**Coupon Code Applicability:** ☐ Coupon can only be used once

**Limit code usage to marketing communications:** ▼ 

**Associated communications:** Nothing found to display.



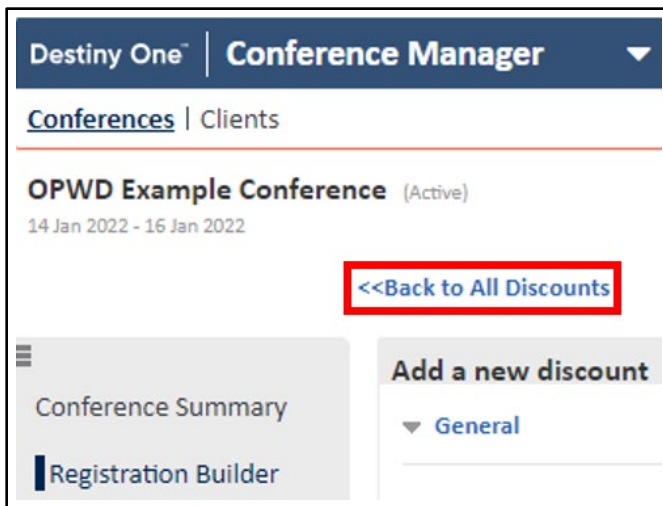
26. Click the Navy “Save” button. Repeat Steps 23-26 for each Discount.



Limit code usage to marketing communications:

Associated communications: Nothing found to display.

27. To view all Discounts, select the “Back to All Discounts” hyperlink.



Destiny One | Conference Manager

Conferences | Clients

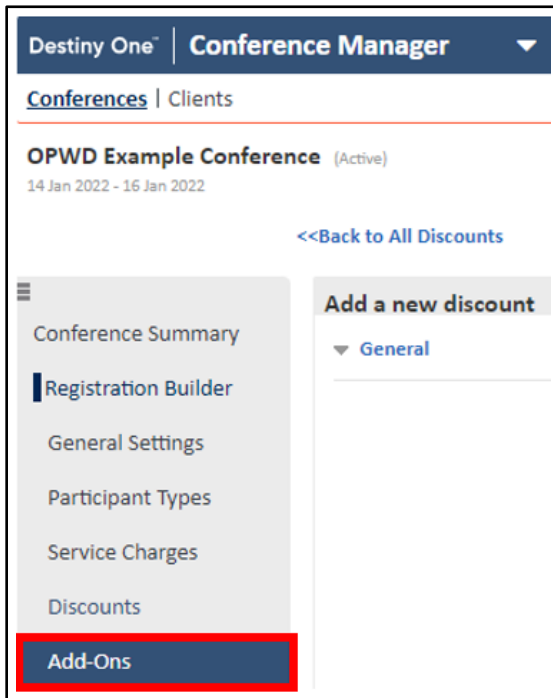
**OPWD Example Conference** (Active)  
14 Jan 2022 - 16 Jan 2022

[<<Back to All Discounts](#)

Conference Summary  
Registration Builder

Add a new discount  
General

28. On the left side of the screen, click the “Add-Ons” option.



Destiny One | Conference Manager

Conferences | Clients

**OPWD Example Conference** (Active)  
14 Jan 2022 - 16 Jan 2022

[<<Back to All Discounts](#)

Conference Summary  
Registration Builder  
General Settings  
Participant Types  
Service Charges  
Discounts  
**Add-Ons**

Add a new discount  
General

29. Click the green “Add a New Add-Ons” button.

30. Enter the following required information:

- Name:** Enter the name of the add-on.
- Status:** Select a Status. Options are Active or Inactive. Only Active add-ons can be purchased.
- Applicability:** Select the Applicability. Options are Public or Internal. Internal add-ons can only be purchased from the Staff View by an internal user. Public add-ons can be purchased from both the Registration Site and the Staff View.

- d. Staff Registration Dates & Public Registration Dates: The Staff and Public Registration Dates you defined on the General Settings page appear by default. Use the calendar date selectors to change the dates if required. **Note**: The public date range must fall within the staff date range.

▼ Registration Dates

Staff Registration Dates: \* Dec/15/2021 11:39 AM to Jan/10/2022 12:00 AM

Public Registration Dates: \* Dec/15/2021 11:39 AM to Jan/10/2022 12:00 AM

- e. Total Quantity & Quantity Purchasable per Participant: If the quantity of the add-on is limited, select the "Specify the total number available" checkbox and then enter the maximum number of the add-on that can be sold. If you want to limit each participant to a certain number of the add-on, use the drop-down list to enter the maximum Quantity Purchasable Per Participant. **Note**: If the add-on requires session selection, the Quantity Purchasable Per Participant is set to 1 and cannot be amended.

▼ Quantity

Total Quantity: ☐ Specify the total number available  
Leave unchecked if the quantity is unlimited.

Quantity Purchasable Per Participant: \* 1 ▼  
When session selection is enabled, only 1 Add-On could be purchased per transaction

- f. Revenue GL Account: This is the active account that the revenue from the add-on will be credited to. The Revenue GL Account that you defined on the General Settings page is selected by default.
- g. Payment Account Mapping: This is the account that the add-on payments will be debited from. The Payment Account Mapping that you defined on the General Settings page is selected by default.

▼ GL Account Setup

Revenue GL Account: \* Creating A Sustainability Stra - 52-CF-220406 (active) ▼

Payment Account Mapping: \* defaultValue - AM0000 ▼

Record unclaimed revenue separately: ☐

- h. Pricing Per Participant Type: The table contains all participant types for the conference. Use the checkboxes under the Eligible header to select which participant types are eligible to purchase the add-on. You must then define the price of the add-on for each selected participant type. There are three possible prices to define for each participant type:
- Early: This column appears if you indicated on the General Settings page that the conference allowed early bird registration. Enter the price each participant type must pay to buy the add-on before the early bird deadline.
  - Standard: This column is always present. Enter the standard price each participant type must pay to buy the add-on.

- iii. Late: This column appears if you indicated on the General Settings page that the conference allowed late registration. Enter the price each participant type must pay to buy the add-on after the late registration deadline.

▼ Pricing

Select the participant types eligible for this add-on and specify their pricing: \*

Eligible	Participant Type	Early On or before 23 Dec 2021	Standard *	Late On or after 23 Dec 2021
<input type="checkbox"/>	Test Participant Type 1	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<input type="checkbox"/>	Test Participant Type 2	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>

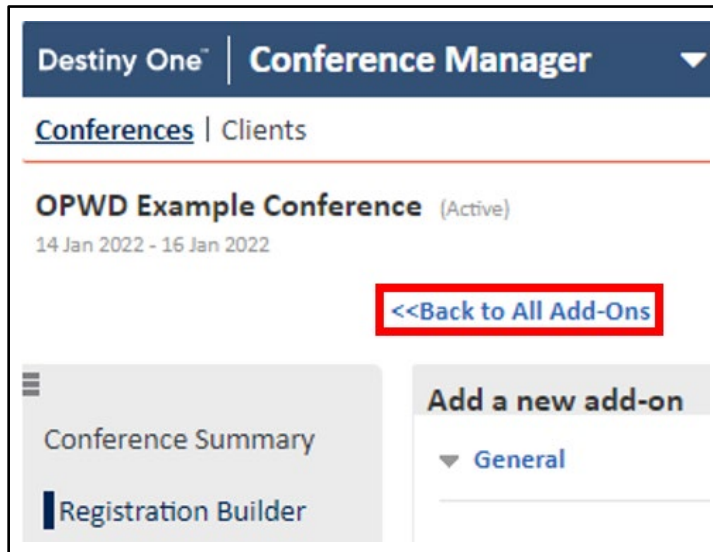
31. Enter the following optional features as needed:

- Description: Enter a description of the add-on. This description will appear on the Registration Site and during checkout in the Staff View.
- Session Selection: Select the “Add-On requires session selection” checkbox if the add-on will be tied to session selection. You select this option if you would like to charge a fee for a participant to select a session.
- Enable Wait List: If a Quantity of Add-Ons is specified, you can also set up a wait list to help control registrations.
- Taxes: This section displays the applicable tax options defined on the System Administration>Accounting>Taxes page. The section is hidden if there are no taxes defined for your school. Select the Charge applicable sales tax rate for option and then select the location of the tax to be charged as well as the tax type.

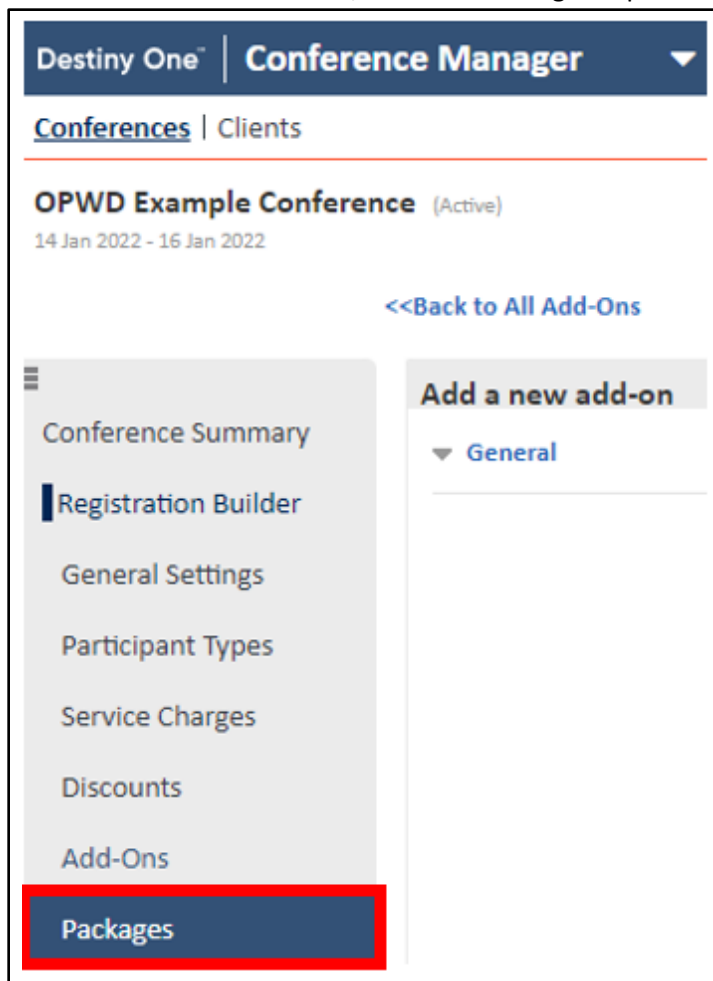
32. Click the Navy “Save” button. Repeat Steps 29-32 for each Add-On.

Eligible	Participant Type	Early On or before 23 Dec 2021
<input type="checkbox"/>	Test Participant Type 1	\$ <input type="text"/>
<input type="checkbox"/>	Test Participant Type 2	\$ <input type="text"/>

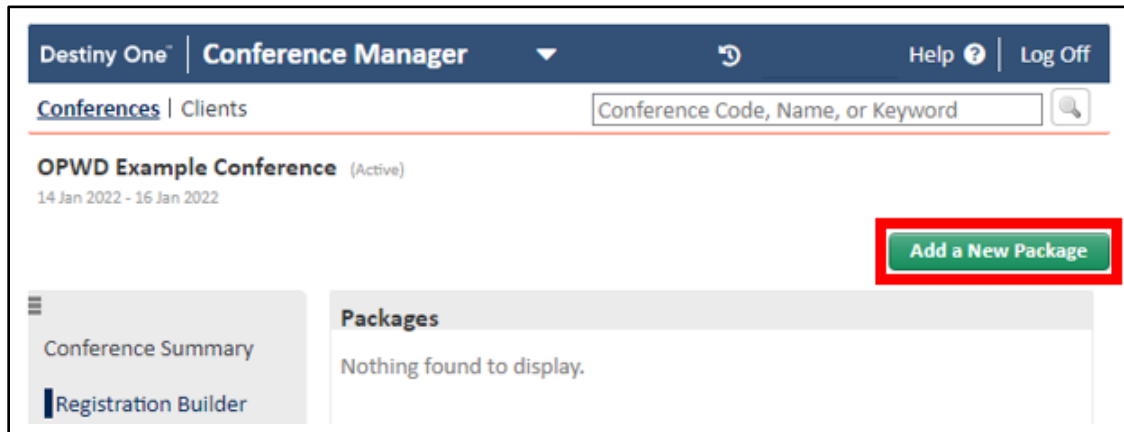
33. To view all Add-Ons, select the “Back to All Add-Ons” hyperlink.



34. On the left side of the screen, click the “Packages” option.



35. Click the green “Add a New Packages” button.



36. Enter the following required information:

- Name:** Enter the name of the package<sup>4</sup>.
- Status:** Select the conference Status. Options are Active or Inactive. People can only register in active packages.
- Applicability:** Select an Applicability. Options are Public or Internal. Internal packages can only be purchased from the Staff View by an internal user. Public packages can be purchased from both the Registration Site and the Staff View.

<sup>4</sup> Package: The purchasable components of a conference. The most common packages divide the conference into sections based on the amount of time the participant will be attending, such as a full-conference package or a single-day package.

- d. **Staff Registration Dates & Public Registration Dates:** The Staff and Public Registration dates that you defined on the General Settings page appear automatically in these fields. If you want to apply different registration dates for the package, use the calendar date selectors to change the dates and/or times.

▼ Registration Dates

Staff Registration Dates: \* Dec/15/2021 11:39 AM to Jan/10/2022 12:00 AM

Public Registration Dates: \* Dec/15/2021 11:39 AM to Jan/10/2022 12:00 AM

- e. **Revenue GL Account:** This is the active account that the revenue from the package will be credited to. The Revenue GL Account that you defined on the General Settings page is selected by default.
- f. **Payment Account Mapping:** This is the account that the package payments will be debited from. The Payment Account Mapping that you defined on the General Settings page is selected by default.

▼ GL Account Setup

Revenue GL Account: \* Creating A Sustainability Stra - 52-CF-220406 (active) ▼

Payment Account Mapping: \* defaultValue - AM0000 ▼

Record unclaimed revenue separately: ☐

- g. **Pricing Per Participant Type:** The table contains all participant types. Use the checkboxes under the Eligible header to select which participant types can purchase the package. You must then define the price of the package for each selected participant type. There are three possible prices to define for each participant type:
- Early:** This column appears if you indicated on the General Settings page that the conference allowed early bird registration. Enter the price each participant type must pay to register for the conference before the early bird deadline.
  - Standard:** This column is always present. Enter the standard price each participant type must pay to register in the conference.
  - Late:** This column appears if you indicated on the General Settings page that the conference allowed late registration. Enter the price each participant type must pay to register for the conference after the late registration deadline.

▼ Pricing

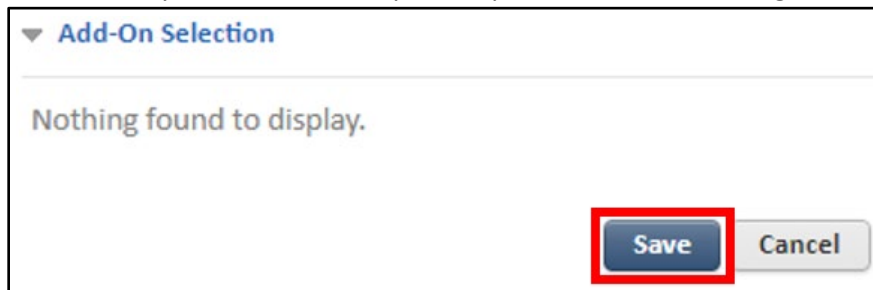
Select the participant types eligible for this package and specify their pricing: \*

Eligible	Participant Type	Early On or before 23 Dec 2021	Standard *	Late On or after 23 Dec 2021
<input type="checkbox"/>	Test Participant Type 1	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<input type="checkbox"/>	Test Participant Type 2	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>

37. Enter the following optional features as needed:

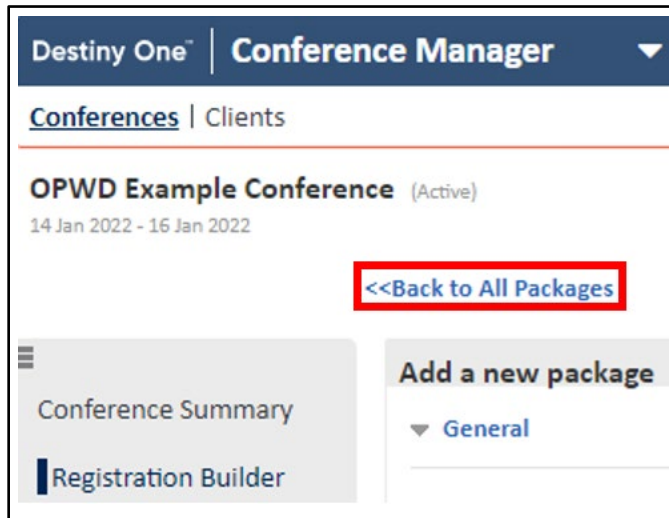
- a. Allow seat reservation: Select to allow for reserved seats. Only visible when the “Seat Reservations: Enable feature” is enabled. To set this option to true by default when a package is created or copied, enable the Seat Reservations: Default value for conference package seat reservation attribute configuration point (key: customize\_feature.seat.reservations.conference.defaultSelected).
- b. Description: Enter a description of the package. The description will appear in both the Staff View and the Conference Registration Site.
- c. Session Selection: Select the “Package requires session selection” checkbox if the package will be tied to sessions.
- d. CEUs: The CEU section is displayed if it is first configured on the General Settings page that the conference will award CEUs at the package level. Select the Package awards CEUs checkbox if you want participants who purchase this package to receive CEUs. A new field appears. In the field, enter the number of CEUs the participant will be awarded for this package. **Note:** The value you enter must fall within the CEU range you defined on the General Settings page.
- e. Association / Professional Credits: The AU section is displayed if it is first configured on the General Settings page that the conference will award AUs at the package level. Select the Package awards AUs checkbox if you want participants who purchase this package to receive AUs. A new field appears. In the field, enter the number of AUs the participant will be awarded for this package. **Note:** The value you enter must fall within the AU range you defined on the General Settings page.
- f. Quantity: To limit the number of registrants within the package, select the “Specify the total number available” checkbox. A Quantity Limit text box appears. Enter the maximum number of registrants allowed for the package. If your package can have an unlimited number of registrants, skip this section.
- g. Enable Wait List: If a Quantity of packages is specified, you can also set up a wait list to help control registrations.
- h. Taxes: This section displays the applicable tax options defined on the System Administration>Accounting>Taxes page. The section is hidden if there are no taxes defined for your school. Select the Charge applicable sales tax rate for option and then select the location of the tax to be charged as well as the tax type.

38. Click the Navy “Save” button. Repeat Steps 34-38 for each Package.

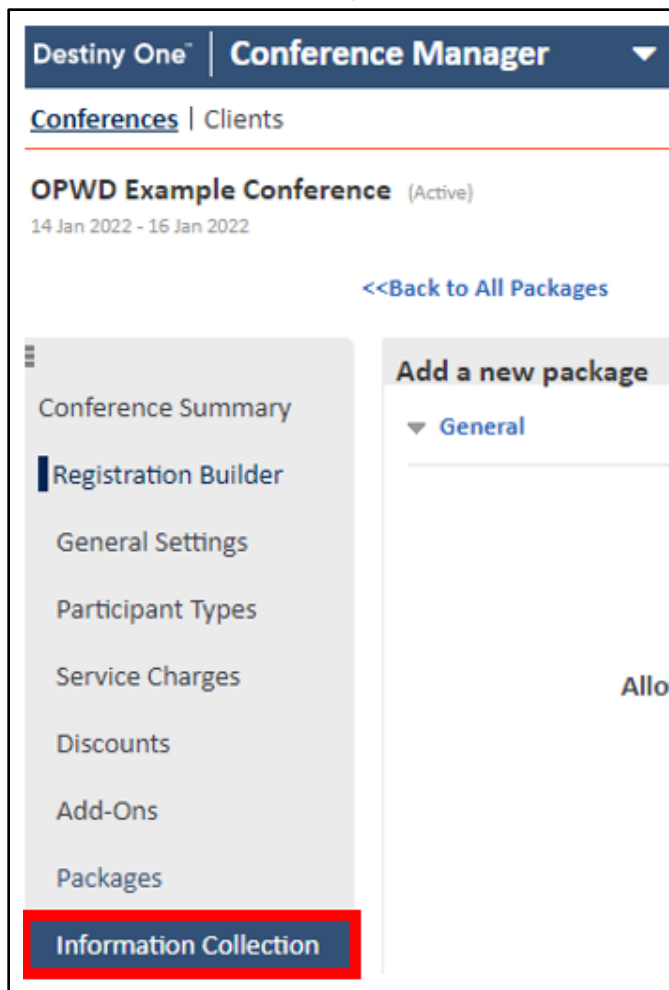




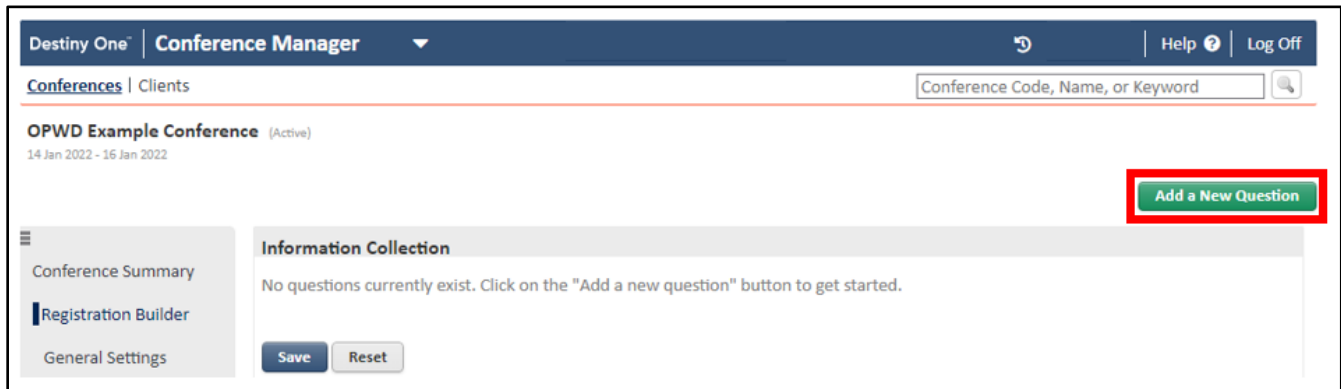
39. To view all Packages, select the “Back to All Packages” hyperlink.



40. On the left side of the screen, click the “Information Collection” option.




41. Click the green “Add a New Question” button.



The screenshot shows the 'Destiny One | Conference Manager' interface. At the top, there's a navigation bar with 'Destiny One | Conference Manager', a search bar, and 'Help' and 'Log Off' links. Below the navigation bar, there's a section for 'OPWD Example Conference (Active)' with dates '14 Jan 2022 - 16 Jan 2022'. On the right side, a green button labeled 'Add a New Question' is highlighted with a red box. On the left, there's a sidebar with 'Conference Summary', 'Registration Builder', and 'General Settings'. The main content area is titled 'Information Collection' and contains the text 'No questions currently exist. Click on the "Add a new question" button to get started.' and 'Save' and 'Reset' buttons.

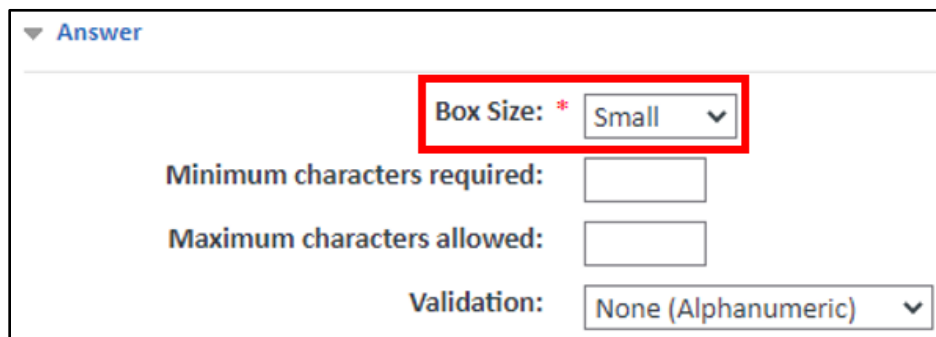
42. Enter the following required information:

- Question Type: Select what type of question you want to ask. The Question Type you select will change the Answer options and may even hide the Answer section. **Note**: The Question Type of File Upload cannot be associated to Sessions.
- Question: Enter the question in the text box provided.



The screenshot shows the 'Question' form. It has a 'Question Type' dropdown menu set to 'Text Box'. Below it is a large text box for the 'Question' which is highlighted with a red box. There is also a 'Required?' checkbox and a 'Question Description' text box.

- Box Size: The box height is constant allowing one line of text. Use the drop-down list to choose a small, medium, or large box size to set the length of the box. The sizes are configurable, but by default:
  - small = 30 characters
  - medium = 100 characters
  - large = 300 characters



The screenshot shows the 'Answer' form. It has a 'Box Size' dropdown menu set to 'Small', which is highlighted with a red box. Below it are fields for 'Minimum characters required:', 'Maximum characters allowed:', and a 'Validation' dropdown menu set to 'None (Alphanumeric)'.

- d. **Question appears:** Indicate if the question should be asked once per transaction or once per participant. If you select once per transaction the question appears during the checkout process. If you select once per participant, then:
  - i. In the Staff View (all transactions) or on the Registration Site (group transactions) the question is not asked during checkout. After registration each participant needs to log into the Participant Portal in order to answer the questions.
  - ii. On the Registration Site when a single participant is registering, the question is asked during checkout.
  - iii. **Note:** For Group conference registration, the required information collection question can be skipped if the registrant is not permitted to answer on behalf of the participants i.e., if a question is marked as Required? and Visibility is set as Once per participant and has the Allow group registrant to provide answers on behalf of participants unchecked. Participants registered as part of a group will receive an email to log in and answer the question, however they can skip answering the required question.
- e. **Status:** Options are Active or Inactive. Only active questions will be asked during registration.
- f. **Applicability:** Options are Public or Internal. Public questions will be asked on both the Registration Site and the Staff View, while Internal questions will only be asked on the Staff View.

▼ Visibility

Question appears: \* ☐ Once per transaction  
☐ Once per participant

Status: \*

Applicability: \*

- g. You must associate this question with a participant type, package, add-on or session: You can associate the question to one of the following:
  - i. Participant Types
  - ii. Packages
  - iii. Add-Ons
  - iv. Sessions

Once you select a radio button a table appears showing all of the available options for that association. Use the checkboxes under the Eligible heading to indicate which participant type, package or add-on the question applies to. Questions are associated to sessions on the Session Details page.

▼ Associations

You must associate this question with a participant type, package, add-on or session : \*

☐ Show when registering as one of the following participant types

☐ Show when registering into one of the following packages

☐ Show when registering in one of the following add-ons

☐ Show when registering in a session (Association of the information collection to the specific session is performed on the session profile)

43. Enter the following optional features as needed:

- a. Required?: Select the checkbox if answering the question is mandatory.
- b. Question Description: If the question requires instructional text or additional explanation, enter the information in this field and the details will appear below the answer area or answer options.
- c. Minimum characters required: Enter the minimum number of characters that the participant must enter in the answer.
- d. Maximum characters allowed: Enter the maximum number of characters that can be entered in the text field.
- e. Validation: Use the drop-down list to indicate if there should be validation of the answer. Options are None (Alphanumeric), Number only, Email format or Regular expression mask.
- f. Follow-up Questions: You can add follow-up questions to the main question in the Follow-up Question sub form on the Edit Question page. Follow-up questions can be set to appear based on an answer provided in the main question. **Note**: In order to add a conditional follow-up, you must first create and/or save the question with a supported question type.

44. Click the Navy “Save” button. Repeat Steps 41-44 for each Question.

Follow-up Question

In order to add a conditional follow-up, you must first create and/or save the question with a supported question type.

Save

Cancel

45. To view all Questions, select the “Back to All Questions” hyperlink.

Destiny One | Conference Manager

[Conferences](#) | [Clients](#)

**OPWD Example Conference** (Active)  
14 Jan 2022 - 16 Jan 2022

Conference Summary

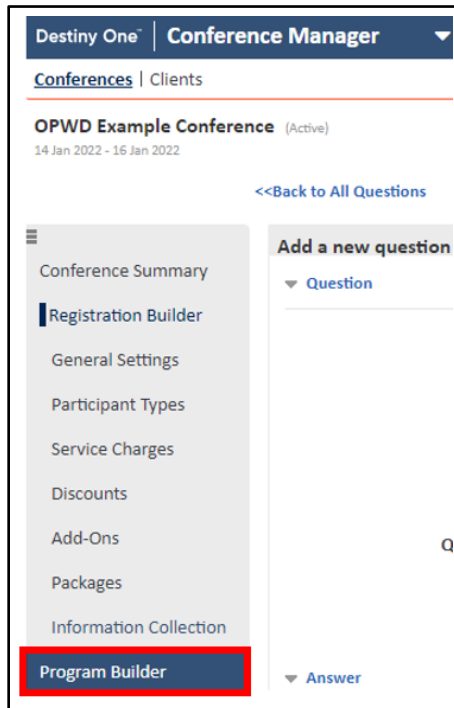
Registration Builder

Add a new question

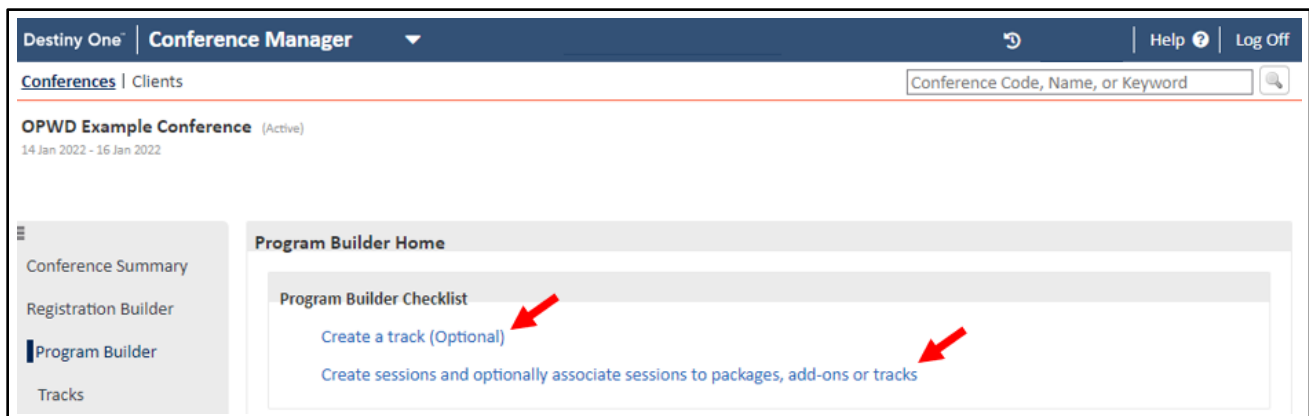
Question

[<<Back to All Questions](#)

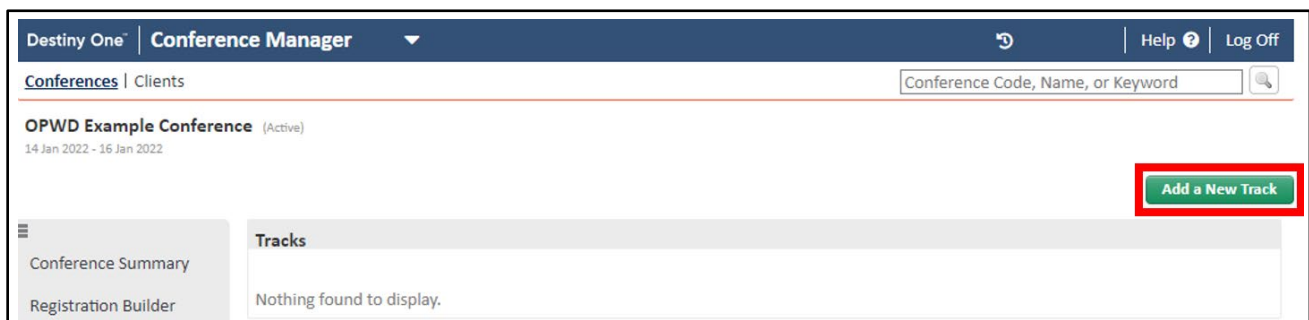
46. On the left side of the screen, click the “Program Builder” option.



47. Click either “Create a track (optional)” or “Create sessions and optionally associate sessions to packages, add-ons or tracks”. Steps 48-52 cover Tracks. Steps 53-58 cover Sessions.



48. Select the green “Add a New Track” button.



49. Enter the following required information:

- Name: Enter the name of the Track.
- Status: Options are Active and Inactive. Only active tracks can be associated to sessions.
- Applicability: Options are Public or Internal. Only public tracks are listed in the Conference Registration Site and Participant Portal.

**Add a new track**

Name: \*

Status: \* Active ▾

Applicability: \* Public ▾

Description:

Paragraphs: 0, Words: 0, Characters (with HTML): 0

Save Cancel

50. Enter the following optional features as needed:

- Description: Enter the description of the track.

51. Click the Navy “Save” button. Repeat Steps 48-51 for each Track.

Paragraphs: 0, Words: 0, Characters (with HTML): 0

Save Cancel

52. To view all Tracks, select the “Back to All Tracks” hyperlink.

**Destiny One | Conference Manager**

[Conferences](#) | Clients

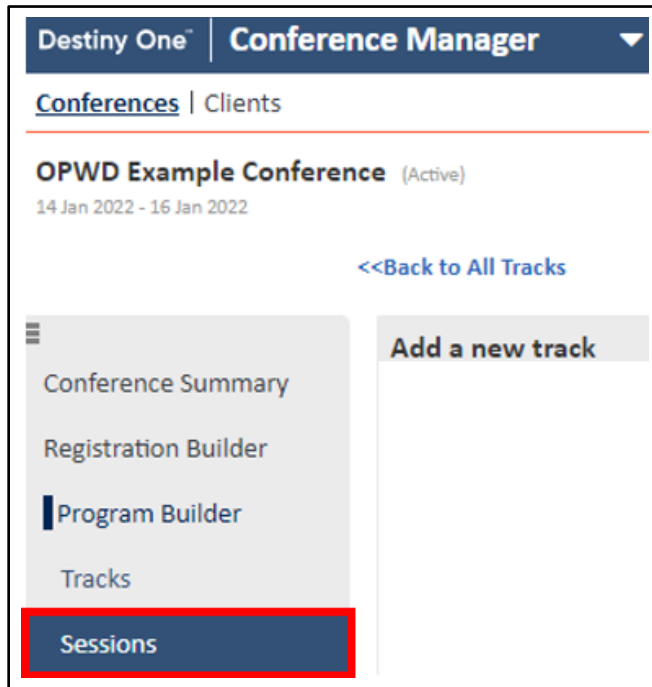
**OPWD Example Conference** (Active)

14 Jan 2022 - 16 Jan 2022

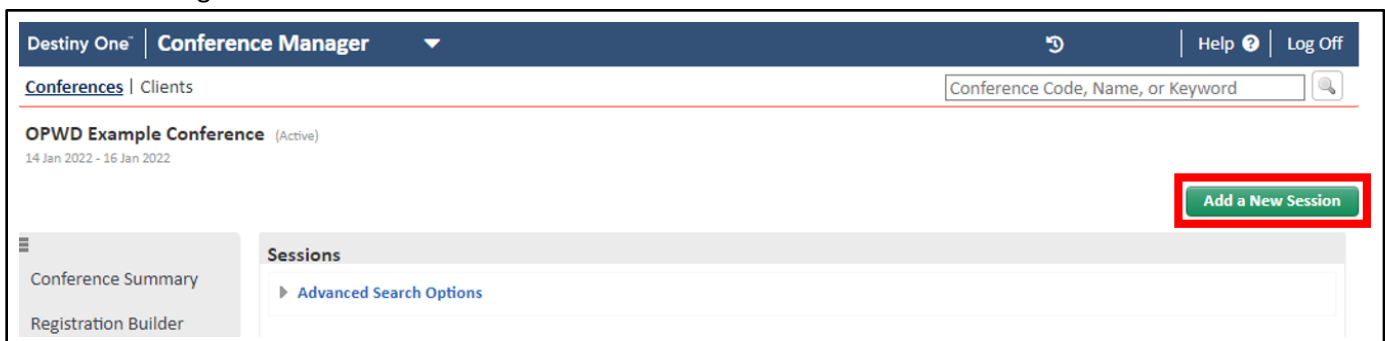
[<<Back to All Tracks](#)

Conference Summary Add a new track

53. On the left side of the screen as a subcategory under Program Builder, click the “Sessions” option.



54. Select the green “Add a New Session” button.



55. Enter the following required information:

- Name:** Enter the name of the session.
- Status:** Select a session status. Options are Active or Inactive. Only active sessions can be selected by participants.
- Applicability:** Select the session applicability. Options are Internal or Public. Internal sessions can only be selected from the Staff View by an internal user. Public packages can be selected from both the Participant Portal and the Staff View. **Note:** The details of internal sessions appear on the Conference Registration Site and the Participant portal, however the availability of the session is listed as "Restricted" on the Participant Portal and it cannot be selected.

**Name:** \*

**Status:** \* Active ▾

**Applicability:** \* Public ▾

**Description:**

Paragraphs: 0, Words: 0, Characters (with HTML): 0

**Speaker:**

**Session Date & Time:**

**Tracks:** ☐ Track One Example ☐ Track Two Example

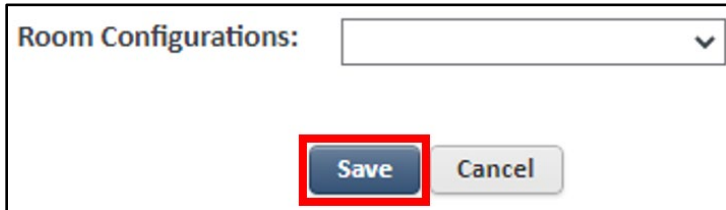
56. Enter the following optional features as needed:

- a. **Description:** Optionally enter a description of the session. The description will appear in both the Staff View and the Conference Registration Site.
- b. **Speaker:** Optionally enter the name of the speaker presenting during the session.
- c. **Session Date & Time:** Optionally define the date and time for a session by using the calendar date selectors to define both the start date and time and the end date and time. The start and end date must be on the same day. Reminder: A conference can have several overlapping sessions. A participant is not able to select overlapping sessions. In the table of available selections, if the session overlaps any part of an already selected session, the Add button is not available. In its place the note "Schedule Conflict" appears. You will need to remove the selected session that conflicts with the session the participant wants to add. The Add button will then re-appear beside the desired session in the available sessions table. Open sessions are not included in the schedule comparison.
- d. **Tracks:** If you have created tracks for the conference the name of each active track is listed with a checkbox beside it. Select the checkbox beside each track that the session is associated with.
- e. **Open Session:** If you would like the system to automatically select the session for every participant who purchases the package or add-on the session is associated with, select the Auto-selected on purchase checkbox.
- f. **Session capacity:** If the session has unlimited capacity, leave this section blank. If the session has limited capacity select the "Capacity is limited" checkbox. An additional field appears. Enter the maximum number of participants who can select this session in the Quantity Limit field.



- i. Wait List: Optional. Select to create a wait list for the session. Only available when the Session Capacity option is selected.
- g. Attendance: If you would like to track attendance for the session select the “Track attendance” checkbox.
- h. CEUs: The CEU section appears if on the General Settings page you indicated the conference would award CEUs at the session level. Select the Session awards CEUs checkbox if you want participants who select this session to receive CEUs. A new field appears. In the field, enter the number of CEUs the participant will be awarded for this session. Note: The value you enter must fall within the CEU range you defined on the General Settings page.
- i. Location: You can either type out the name of the location (free form) or you can use the drop-down lists to book a room. The available rooms are defined on the various CM > Locations pages. Warnings let you know if the room is too small to accommodate the session's maximum capacity or if another conference (or course section) has booked the room during the selected time slot.
  - i. Location: Type in the name of a location. This does not book a room.
  - ii. Campus: Use the drop-down list to select a campus.
  - iii. Building: Use the drop-down list to select a building. Options depend on the campus selected.
  - iv. Room: Use the drop-down list to select a room. Options depend on the building selected. The maximum capacity of the room is shown beside the room name.
  - v. Room Configuration: Use the drop-down list to select a room configuration. Options depend on the room selected.
- j. Packages: Define which Packages the session is associated to. All packages that require session selection appear in a table.
- k. Add-Ons: Define which Add-Ons the session is associated to. All add-ons that require session selection appear in a table.
- l. Questions: Define which Questions should be asked during selection of the session. All information collection questions that are tied to session selection appear in a table.

57. Click the Navy “Save” button. Repeat Steps 54-57 for each Session.



58. To view all Tracks, select the “Back to All Tracks” hyperlink.

