How to create an Activity

GUIDELINES ON HOW TO CREATE AN ACTIVITY AND ACTIVITY PAGES

11TH APRIL 2015

Content

Checklist

- o I just need a forum topic for my activity; I don't need to continue reading this manual
- o I want an activity page for my activity so I need to read this manual
- o I submitted a new activity and got a message that it was approved by the Web Admins
- o I can enter the activity administration area via different ways
- o I enter the general activity information (title, when, where, category...)
- o To personalise my activity, I had a look at chapter 5
- o If my activity is not an exchange, I set the "Bookings" for the registration period
- o For registrations, I checked the "Activity Registration Manual"
- o I published my activity so it is visible for everyone
- o I added subpages if needed (i.e. Lectures, Accommodation ...)

1. Starting an activity

Users who want to organise a certain activity have **2 options** for it at the website:

1.1. Open a forum topic

Open only a forum topic for the activity (and not an activity page) e.g. in case of e-lectures or activities without physical location. In this case go to **Forum → General → Activities** and there choose a category for your activity (see picture below):
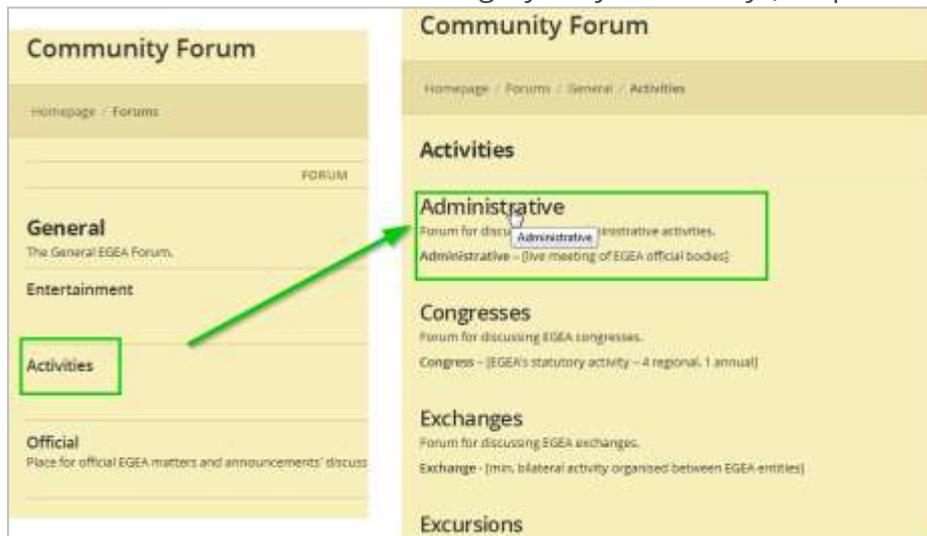
After selecting a category, you **open a new topic there**:
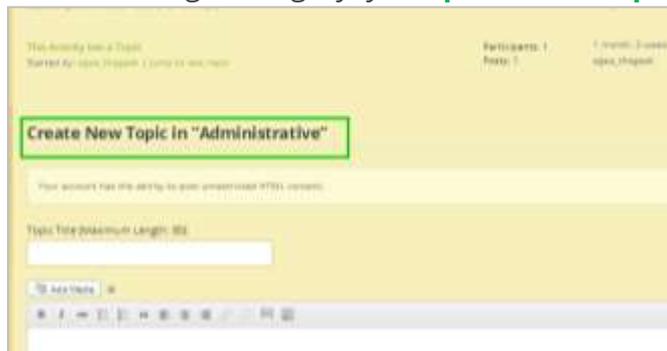
To make your forum topic more visible, you can also **create an announcement** (see the *announcements manual*) and connect it to this forum topic.

1.2.   Create a general activity page

If you want to have an activity page for your activity, go to the **Activity section** and click on Add new activity like shown on the picture below:

Fill in the form (especially the mandatory fields), select the category of the activity and submit the form:

After the form is submitted, an organiser gets a *notice at the website* and also an *e-mail* notifying him/her that the form was successfully submitted and is reviewed by the admin staff:

> Hi,
>
> Thank you for submitting your activity titled **Testing activity again :)**!
>
> Our team is going to review it and grant you access to the activity administration area as soon as possible.
>
> Sincerely,
> The WebAdmin team

After administrators **approve the activity**, the organiser gets another e-mail with the link which leads him/her to the activity administration area for the first time:

> Hi,
>
> Your EGEA Activity **Testing activity again :)** has been approved and now it is waiting for you to edit it!
>
> You got this e-mail notification because you submitted yourself as an activity organizer/creator.
>
> You also been promoted to activity organizer and from now on you can reach your activity administration area via this link.
>
> Sincerely,
> The WebAdmin team

If administrators **reject the activity**, an organiser gets an e-mail notification about the rejection:

> Hi,
>
> We are sorry to inform you that your EGEA Activity **Testing activity again and again :)))** has been rejected
>
> You got this e-mail notification because you submitted yourself as an activity organizer/creator.
>
> Sincerely,
> The WebAdmin team

2. Activity organiser rank

After the activity is approved by administrators, organisers also get a **new status (rank), called "Activity organiser"** which enables them to edit activities they are organising. Also, if organisers add some other users as co-organisers, these people get this new status (and the belonging rights) as well.

This status does not depend on some higher rank e.g. CP which means, **every user gets it** after his/her activity is approved for the first time. Once a person gets the Activity organiser status he/she keeps it forever. This enables members to reach and edit also their past activities. Because of this status (and connection to the system), all activity organisers have their activities automatically listed at their profiles, under **EGEA Career**.

3. Activity administration

3.1.   Reaching the Activity administration area

The first time users get the right to access the activity administration (backend) area is when they get a **confirmation e-mail** (informing them their activity has been approved) with the link to this area.

Once being logged in at the website, organisers can access activity administration area (while the activity is still a *draft*, so not published yet) via **My EGEA area** (Profile page), by clicking on Activities and then Activities I'm organising, like shown on the picture below.

There he/she needs to click on the "edit" button.

An activity is only visible to other users, AFTER it has been published (administrators don't publish activities, just approve them – YOU have to publish

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them). To publish your activity, click on "publish" in the box on the right (possible only after it has been approved by administrators):
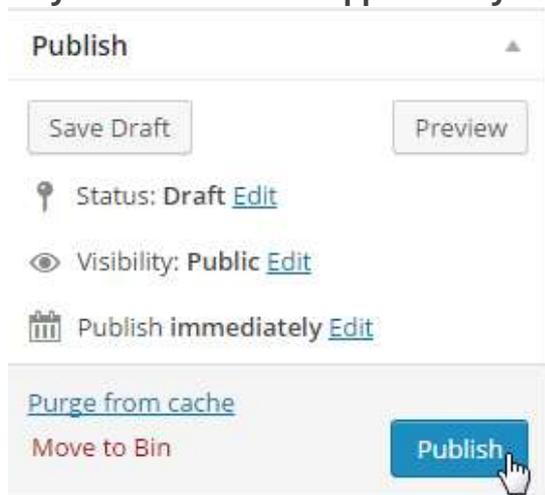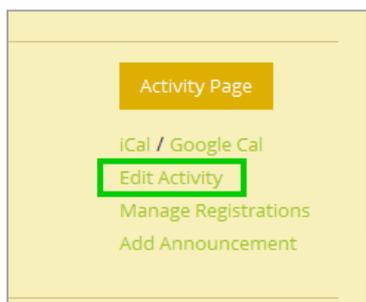

After the activity is **published** (so it's no longer a draft), an organiser can reach the activity administration area via 3 more channels:

- In **My EGEA area** under Activities – by clicking on this category, an overview of **all activities organised** by this user is shown:


- At the **Activity page** itself, by clicking on "Edit activity" like shown in the picture below:

- At the **Activities overview page** (Activities section) by clicking on "Edit activity" like shown in the picture below:

- Activities organised by one user can also be reached via the website's backend (once a user is "back there") at "**Activities**", but there users can see **ALL activities created at the EGEA website:**
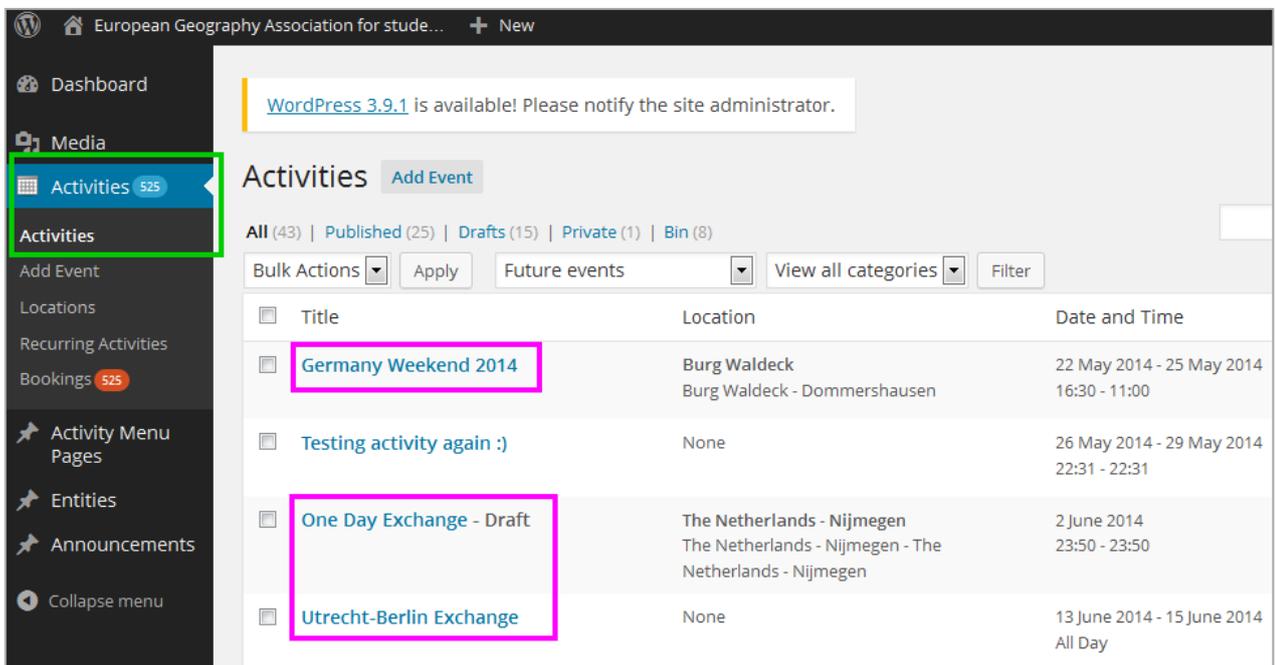
o Non-organisers however **cannot edit them** (will get an error notice if they click on the titles), so they cannot harm someone else's activity. Use the search tool for finding your activity, because the system shows you all existing activities.

o All those ways take an organiser to the **activity admin area**, but once being "back there" organiser also gets an access to some other areas in the website backend - some are allowed for them to use (e.g. activity menu pages, media and announcements), some not. But they are shown there because they cannot be completely removed/ hidden. It looks like shown in the picture below.
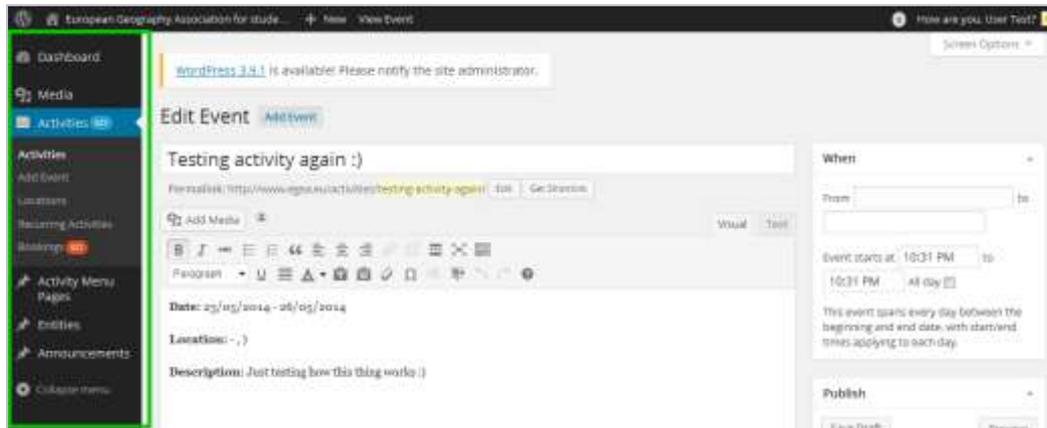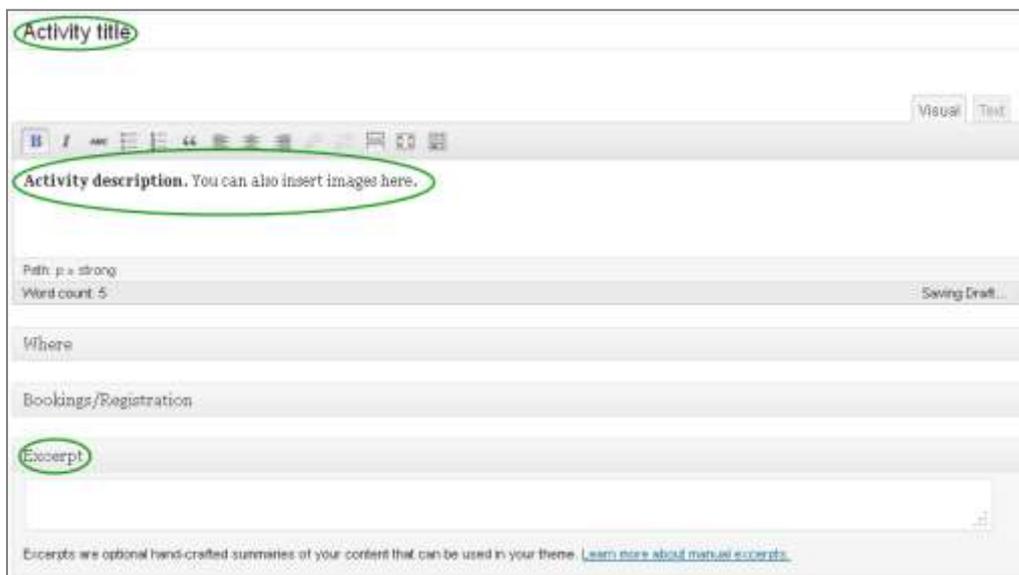
Please note: if there is a bug and you CAN actually do some actions there beside the allowed ones, please don't touch it and report it right away!

3.2.   Editing the general activity info

The main tools to build your activity administration area:

A. TITLE, EDITOR AND EXCERPT

The **title** of the activity will be displayed in the sidebar of the homepage and on the top of the activity page and subpages. Please enter the **description** (or welcome text) to the **editor** – that will be seen on the activity main page.

Activity organisers   can   also   insert   **media**   (pictures,   videos,   files)   to   the editor/description area.

Please note: In case you want to post a **video**, you need to **break the URL first**! You can do it either by **(1)** using the URL of the video, but removing the link from it when you paste it in the editor (broken chain in the menu bar) or **(2)** switching to HTML view and paste the embed code there. *To sum up: putting the embed code in the editor in visual mode or pasting the URL as a link will break it and your video will be shown.*

Excerpt is not used here, ***please ignore it.***

B. WHEN

Here organisers can specify the start and end date of the activity.

C. WHERE

Please put in the location of your activity here.

If the activity ***does NOT have a physical location*** (e.g. photo competitions), tick the "***This event does not have a physical location***" box, like shown below:


D. CATEGORY

It is automatically saved after choosing it in the basic form when submitting a new activity, but in case you change your mind, please tick a relevant activity category.
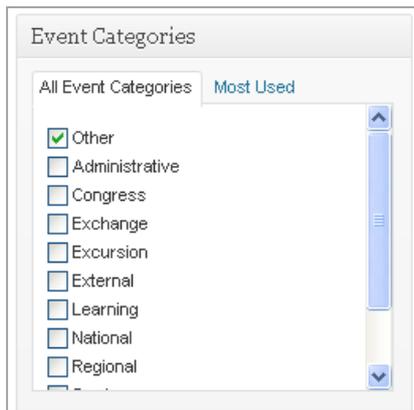
E. FEATURED IMAGE

The featured image will be the cover image of the activity on the top of the activity pages and subpages. You can set it by pressing "Set featured image":
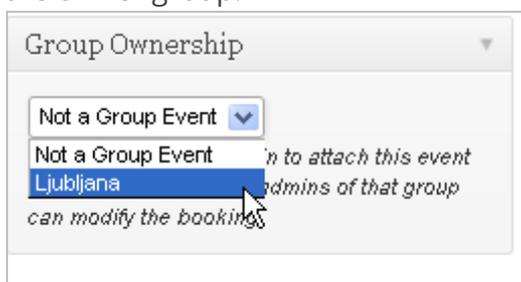
Upload an image to your **Media library** or select an already uploaded one from the library gallery; post it by pressing "Set featured image":
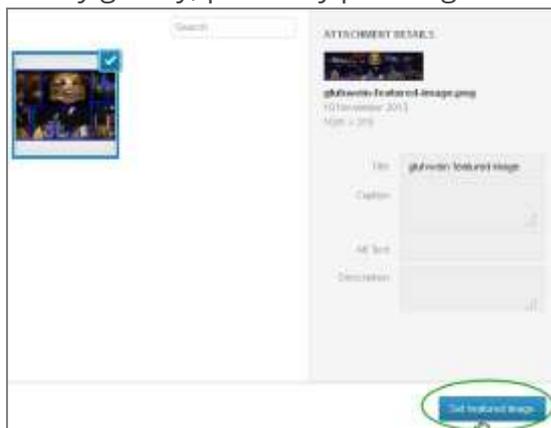
If the picture is not shown directly, refresh the page.

F. GROUP OWNERSHIP

If this is a **group event** (e.g. something organised *on behalf of an entity*), please choose the owner group.

NOTE: By doing this also your **group administrators** (entity CPs / committee representatives) are able to edit the activity as well.

Example: if an activity is organised and EGEA Ljubljana is set as an "owner group", then both CPs of this entity can edit the activity.

PLEASE NOTE: You might have problems if you choose a **group** event option (choose your entity) and make an event **private**:

If you choose this and save it, your activity page will be only seen to your entity members. But if you will try to change it later to public (visible to all EGEAns), you need to remove the group choice (put "no group event" again) first and save this setting. After that you can change privacy options as well. If you don't remove the group choice first, your activity will not be possible to be set to public, so please have this in mind!
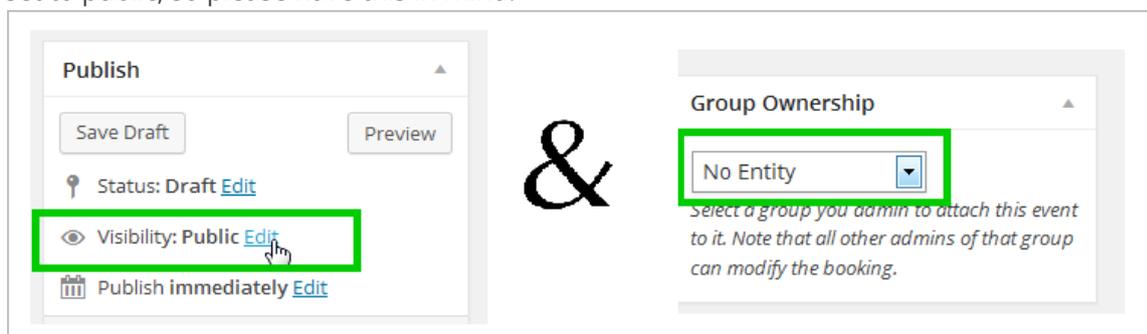
It is recommended to **leave the privacy settings as default** (**public**) to avoid problems and also to **not choose** the Group ownership option because you can anyway give rights to those you want in the "Organisers and Participating entities" field (see point 3.2.).

4. Bookings/Registration

4.1. Tickets

Tickets describe the places (or the type of places) that are available for registration for an activity. If you have just one price for the event, you use one ticket e.g. "Standard ticket" and "sell" it to all the people who will register. This means if a congress price is 100 EUR, all 80 places are charged with this ticket price.

For enabling registrations please tick the "***Enable registration for this event***" box, like shown in a picture below. Don't choose this option for exchanges!

After marking this field, an **advanced options area** opens where you can manage activity registration settings (or bookings like they are called here):

When you click on the "***Edit***" link under the ticket ("Standard ticket" as shown in the image above), a new area opens with more setting possibilities:

- o **Name**: Name of the ticket which will be displayed on the registration (booking) form. If there is only one price, name it "Standard ticket". If there is a certain type of participants who have a discount (e.g. trainers at congresses), a new ticket needs to be added to the standard one and named accordingly.

- o **Price**: Prices are in EUR.

- o **Spaces**: number of tickets available for one type of ticket (here: "Standard ticket"), there can be different types of tickets with different amounts.
  Please note: Setting a number of spaces limits the amount of possible registrations, e.g. if you set 50 spaces, the 51st person to register will not be able to do this anymore. To avoid this, set a higher number than spaces available, i.e. for congresses, where always more people sign up. For how to handle these cases, please check the **Activity Registration Manual**.

By clicking on "*Show Advanced Options*", extra fields are opened which need to be filled in:

- o *At least spaces per booking*: how many tickets one have to book – please put **1** here!!
- o *At most spaces per booking*: please put **1** here!!
- o *Available from and until*: dates when the registration period starts and closes (needs to be set for every ticket separately)
- o *Required*: we don't use this feature – *please ignore*
- o *Available for*: specify the user group this ticket can be booked by/registered.

Name	Standard Ticket
Description	
Price	
Spaces	
At least	1 spaces per booking
At most	1 spaces per booking
Available from	12/04/2015 at 01:30 PM
Available until	12/04/2015 at 01:45 PM
Required?	☐
Available for	Everyone ▼

→ If organisers want to enable *all EGEAns* to register for a certain ticket, they should select "**Everyone**". This selection is **default for most of EGEA activities** and it is recommended for organizers to keep it.

*NOTE: the system is set to **only allow logged-in users to register**, so people have to first register to the EGEA website in order to register for an activity*

→ If a ticket is only for a **certain administrative group in EGEA** (e.g. Board and CPs), please select "**Logged-in users**" from the dropdown list and tick the Board of EGEA and Entity CP checkbox:

Spaces	10		Available for	Logged In Users ▼
At least		spaces per booking	Restrict to	☐ Administrator
At most		spaces per booking		☐ Editor
Available from		at		☐ Author
Available until		at		☐ Contributor
Required?	☐			☐ Subscriber
Available for	Everyone ▼			☐ Keymaster
	Everyone			☐ Moderator
Hide Advanced Optio	Logged In Users			☐ Participant
Close Ticket Editor	Guest Users			☐ Spectator
				☐ Blocked
				☐ Entity CP - Committee Representative
				☐ Regional CP - Regional Assistant
				☐ Board of EGEA
				☐ Activity Organizer
				☐ RA

NOTE: this list applies only to administrative ranks in EGEA who have certain rights within the website and NOT to e.g. organisers of a specific activity – here "Activity organiser" means all users who organised at least one activity in EGEA and got this website rank.

4.2.   Event Options

Event Options

Total Spaces [   ]
Individual tickets with remaining spaces will not be available if total booking spaces reach this

Maximum Spaces Per Booking [   ]
If set, the total number of spaces for a single booking to this event cannot exceed this amount.

Booking Cut-Off Date [25/11/2013] [12:00 AM]
*This is the definite date after which bookings will be closed for this event, regardless of individua
the event start date.*

Coupons

Coupons selected here will be applied to bookings made for this event.

No coupons created yet.

Booking Form

You can choose to use a custom booking form, or leave as is to use the default booking form.

Selected Booking Form : [[Default] ▼]

- o **Total spaces**: This means a maximum number of places for the activity.
  Please note: To avoid problems with limitations, it's best to **leave this field empty**. This enables everyone who wants to come to actually register for this activity.
- o **Maximum Spaces Per Booking**: Same issue as with "Total spaces", so leave this field empty as well.
- o **Booking Cut-Off Date**: This is the **definite date** after which registrations for the activity (bookings) will be closed, regardless of individual ticket settings (it is therefore recommended that all tickets have the same end date as the registrations for the activity itself).
- o **Coupons**: ignore
- o **Booking form**: There is the **Default** booking form (which users will see when registering for your activity) requiring VISA number, allergy/illness and whether the user is vegetarian.

5. Other settings

5.1.   Excerpts
LEAVE EMPTY

5.2.   Attributes
Additional information about displaying activities:
- o **Open for**: who this activity is open for (e.g. Everyone, EGEA Budapest members, etc.). It is just a **piece of information** (attribute) and it does not restrict anyone to register.
- o **Total Spaces:** Here organisers can enter a number of places of their activity - it's a **simple attribute** for the front end which will be shown on the activity page here, no restriction for registrations:

General Information

Price: €0.00
Number of spaces: 50
External website: Click here

Register for this Activity

- o **Website**: in case this activity has an **external** website, place the link here, starting with **http://**

o **Color HEX Code**: HEX (e.g. ffffff – ***without the #***) code of the main colour (header background, menu background). Customise your activity page; there are many websites, where you can find the HEX codes for colours, e.g.: http://www.color-hex.com/

o **Link Color HEX code**: HEX (e.g. ffffff – ***without the #***) code of the menu link colour.

5.3.   Organisers and Participating entities

o **Organisers**: Here the author can add other activity in order to be displayed at the activity page: Users are added by entering their **usernames**. All the people who are added here get the activity organiser rank and with this also the right to edit this activity.

PLEASE NOTE: only add those team members who are dealing directly with the activity page and registration management and know what to do in the admin are

o **Organising entities**: Here organisers can add their entity's name if they want it to be displayed at the activity page. In case more entities are organising an activity, they can put their names there as well. This is only an attribute field and it gives no special rights to entities entered here – they are only shown at the activity page.

o **Guest entities:** This field is used in a case of an **exchange**, where there is a host (organising) and a guest (visiting) entity. Again, names written here are only attributes - shown at the activity page and do not give any special rights to these groups.

Below is an example of how it looks like in the ***activity administration area***:

And how it looks like at the *activity page*:

5.4.   Activity Forum Topic

If you want to open a forum topic about your activity, you need to choose **ONLY ONE** of the offered options below according to the situation [**If you choose more options, the system will not work correctly!**]

- o **Create a new topic in...:** this feature can only be chosen if the **activity hasn't been published yet** (the "Publish" button has not been pressed)**!**
  You need to select a belonging subforum from the dropdown list (e.g. if publishing a NY party, select "Other") and then press "Publish". By doing that *a topic with the activity's title* is created in that subforum (= activity and forum are being connected):

And the topic can be found in the **Forum** section → General → Activities → Other

- o **Pick an existing topic:** this feature can be chosen if the **activity has already been published**. Create a forum topic in the according section (e.g. Exchanges, Other) and pick it from the drop down menu, The topic will be connected to the activity.

- o **Connect an activity to the subforum:** This option can only be activated by the web staff. So in case you already have a *subforum created for you activity* (usually the case for congresses) and would like the activity to be connected to the entire subforum they need to contact the Web Admin team. **In this case they shouldn't choose any of the two options named above.**

5.5.   Activity announcement

This feature is not available in the activities administration area, but is a separate feature (see the Announcements manual!). Activity announcements can only be created **AFTER** an activity has been created!

After you create an announcement for a certain activity, it will appear as news at the activity page:

6. Activity registration management

6.1.   Publish Guests Lists

6.2.   Entity order

PLEASE NOTE: **We made a separate manual that deals with the activity registration management. Only touch these features after reading the other manuals!**

7. Publishing the activity

7.1. Finished?

When finished with editing the activity settings, organisers have to press "**Publish**" to publish the newly created activity (or "**Update**" in case the activity has already been published and you were only editing the remaining settings):
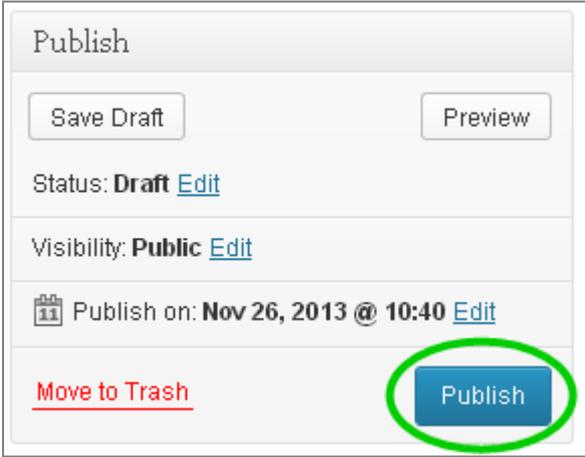
You can also press "*Preview Changes*" to check how changes look like in a separate window, so you don't to exit this editing area in case you would like to continue with editing.

7.2. Problems with editing

AUTO SAVE NOTICE

If while an organiser is editing the activity the website (or the computer) crashes or is not working well, an **auto save notice** might appear after the page reloads:

Please ignore this notice and proceed like nothing happened because this notice has no real function (=is a lie)

8. Setting different price groups

PLEASE NOTE: **This is only for activities that use different price categories like the Annual congress.**

The ticket setting area (*see chapter 4 for more info about tickets*) is also a place where we define the price for the Annual Congress where we have 4 price groups. Name your tickets „A ticket" „B ticket", „C ticket", „D ticket" and make people who register aware that they need to **choose a ticket according to their group.**

Ticket Name	Price	Min/Max	Start/End	Avail. Spaces	Booked Spaces
Group A Austria, Belgium, Denmark, Finland, France, Germany, Iceland, Ireland, Israel, Luxembourg, the Netherlands, Norway, Sweden, Switzerland, United Kingdom Edit | View Bookings	160.00	1 / 1	18/04/2014 12:00 AM 20/05/2014 11:59 PM	200/ 200	0
Group B Czech Republic, Italy, Malta, Slovakia, Slovenia, Spain Edit | View Bookings	128.00	1 / 1	18/04/2014 12:00 AM 20/05/2014 11:59 PM	200/ 200	0
Group C Belarus, Bulgaria, Croatia, Cyprus, Estonia, Greece, Hungary, Latvia, Lithuania, Poland, Portugal, Russian Federation, Slovakia, Turkey Edit | View Bookings	104.00	1 / 1	18/04/2014 12:00 AM 20/05/2014 11:59 PM	200/ 200	0
Group D Albania, Armenia, Azerbaijan, Bosnia and Herzegovina, Georgia, Macedonia, Moldova, Montenegro, Romania, Serbia, Ukraine Edit | View Bookings	80.00	1 / 1	18/04/2014 12:00 AM 20/05/2014 11:59 PM	199/ 200	1

In case members make a *mistake and choose a **wrong ticket*** (this needs to be checked manually after the registration period is closed), organisers can still modify registrations (also changing tickets) afterwards via the activity admin panel. → *the procedure is described in the Activity registrations management manual.*
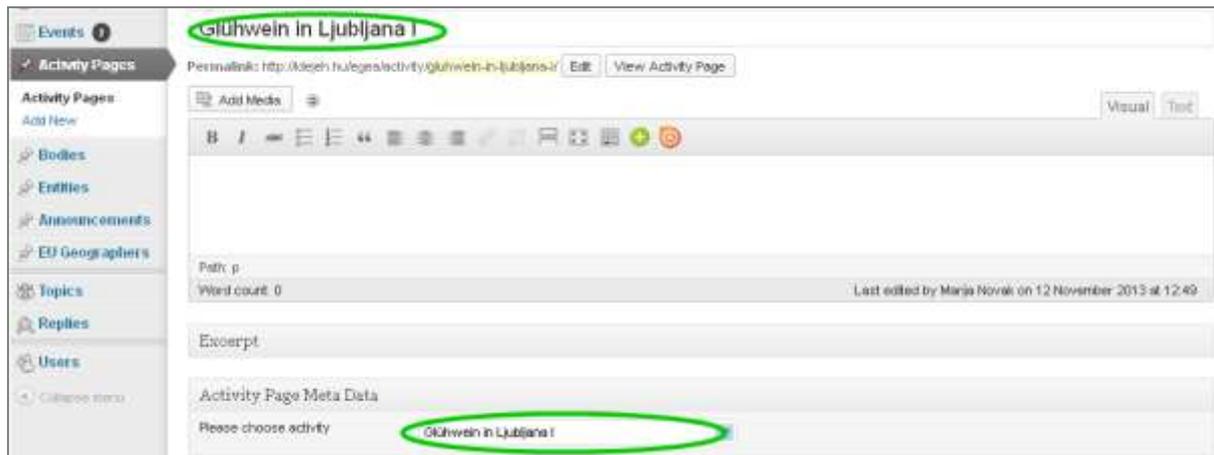
9. Activity subpages

To create **activity subpages** (or activity menu pages as they are called in the administration area) for your activity (e.g. Lectures, Accommodation etc. are subpages to a congress), please navigate to the **Activity Menu Pages** menu link and click **Add new Activity menu Page**:
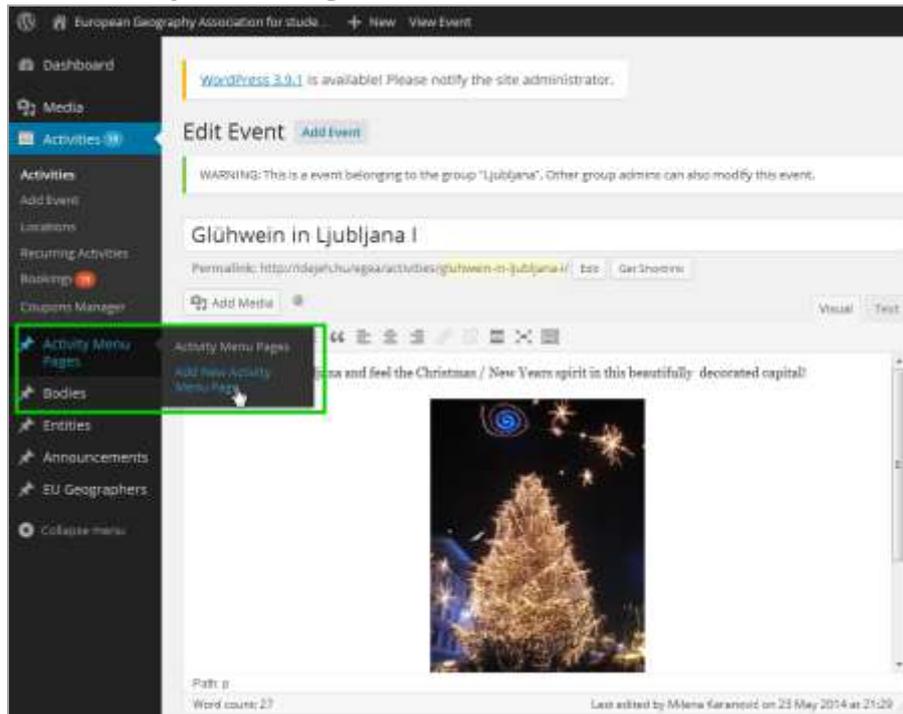

A. CREATING THE FIRST, BASIC PAGE FOR ADDING MENUS

First step: create a page that has the **same (IDENTICAL!!!) title** as the activity you need supages for (this is necessary for the system to work). Enter the title and scroll down and choose your activity from the drop down menu at "*Please choose activity*". **Publish** this page.
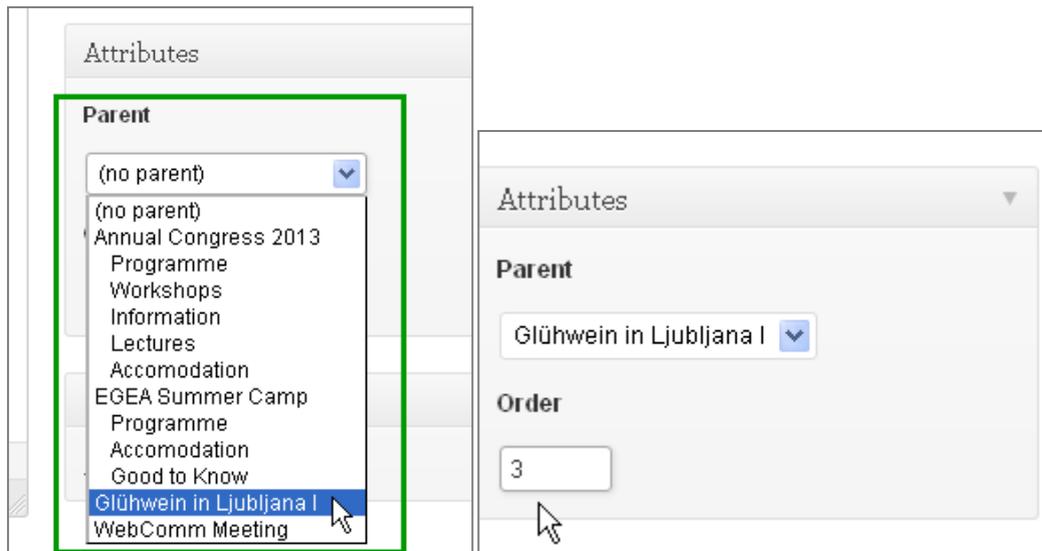
B. ADDING A MAIN MENU

Step two: repeat the procedure and name the new page accordingly (e.g. Lectures, Accommodation) – as shown in the picture.
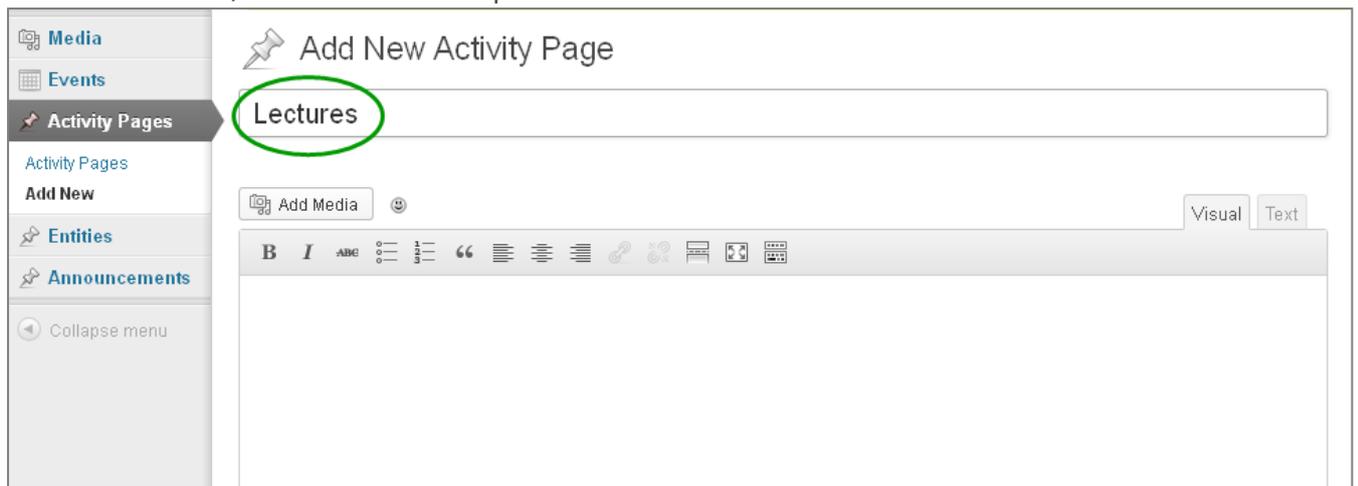
Select the previously created activity subpage as a **parent page** (Attributes box on the right side) and enter the **number for ordering** (from left to right) – for example, if this page is the last in your list with 3 menu links, enter 3.

IMPORTANT: Then scroll down and from the activity dropdown select the activity this subpage belongs to:

Step 3: After everything is set, **publish** this page as well, and then create the **remaining subpages** by repeating the procedure.

C. ADDING SUBPAGES TO AN EXISTING SUBPAGE

Example: You have created a subpage called "Excursions" and you want subpages to that with the different excursion destinations:

The procedure is the same as above and as a **parent** you just pick the subpage ("Excursion" in this example).
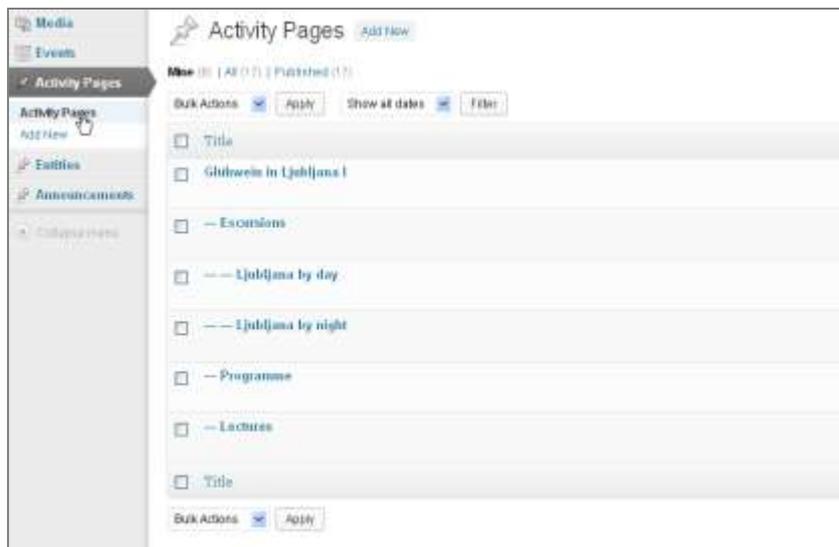
Be careful to always choose the right parent (see picture above) AND the right activity in the activity Meta data (see picture below):

D. CHECKING THE ORDER OF MENUS AND SUBMENUS IN THE BACKEND

You can check how the ordering looks like by clicking on "**Activity pages**" in the admin area.

E. FINAL RESULT (EXAMPLE)

In the front-end (= EGEA website) it looks like on the picture below:

10.   Activity evaluation form

All activity organisers need to provide EGEA with the basic information about the activity **by filling in the evaluation form**.

The process of filling in the form:
- **[only on the test website yet]5 days** after the activity has ended, all organisers get an e-mail notification for filling in the evaluation form with the link to the form. **[until this is installed on the live website, please get the form yourself (→ActCom!) and fill it in]**
- Organisers are expected to fill in the form in **7 days** after receiving an e-mail.
- If it's not submitted in this time range, an (unreported) activity will not be recorded in the database and the entity will not benefit from it (no points).

The form needs to be filled in only once! So in case there are more organisers, only one should fill it in. Communicate amongst yourself in cases like this to avoid the confusion.

11.   Support/Questions

If you, after reading this manual, still have **questions** you can always **contact us** at webcomm@egea.eu or use the contact form at the website.