FuquaConnect Event Guide

So, you want to host and event and share it with the Fuqua community on FuquaConnect. We've got you covered! This guide will walk you through each step of the process for creating a new event in your organization. We'll also share tips for promoting your event, suggest options for tracking attendance, and introduce you to the event ratings feature in FuquaConnect.

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Creating a New Event

All extra-curricular events (club, student leadership, non-academic, non-career, etc.) should be created in FuquaConnect to allow for greater visibility into all events happening across our community – a huge WIN for event planners trying to plan and de-conflict their upcoming events! Follow the steps below to create your event in FuquaConnect.

Navigating to your organization's Action Center

1. Search for your organization in the search bar or select it from your list of memberships on the FuquaConnect home page.
2. Click **Manage Organization*** in the top right of your organization's page. A new window will open to your **Action Center.** *If you don't see the manage organization button, check that you have permissions to create events for your organization.*
3. Alternatively, you can also navigate to your organization's **Action Center** by clicking the **Switchboard Icon** to the left of your profile icon in the top right menu of any page of FuquaConnect. Click **Manage** from the drop down menu and click the name of your organization under **My Memberships**.
4. Click the menu button next to the name of your organization (immediately under the FuquaConnect logo on the top left of the page) to expand all of your organization's tools. Click **Events**.
5. Here, you'll find a list of all current events in your organization. Click **Create Event** in the top right to open up the Event Form.

Basic Event Details

The first page of the Event Form allows you to set the basic details for your event – title, description, location, etc. Below we break down each field of this form and some recommendations for you to consider as you create your event in FuquaConnect.

1. **Event Title:** This is the name or title of your event – pretty self-explanatory! ☺

2. **Theme:** Themes are a hardcoded feature of FuquaConnect and are consistent across all other campuses using this platform. Fuqua doesn't plan to use this feature for reporting, but the system will still require that you select a theme in order to save your event. Just select the theme that makes the most sense for your event.

3. **Description:** Here you can share details about what your attendees can expect at your event (e.g. the content covered, the purpose of the event, speaker or panelist info, etc.). You are *not* able to insert images into the event description, but you can hyperlink to other web pages and/or documents in your FuquaConnect page. You can post an event flyer or other promotional image as the **Event Photo** (more on this later).

4. **Co-Hosts:** If you have other organizations or clubs sponsoring your event, you can type in the name of those organizations in the co-hosting box to select them. If you select a co-hosting organization, **this event will also show in their feed of events on their organization's home page.** *However, only the organization that created the event will be able to edit event details moving forward.*

5. **Start and End Dates / Times**: You can set up your event to span multiple days, but unlike OrgSync, you aren't able to set up "All Day Events" so you will need to select a specified start and end time for event.

6. **Location:** FuquaConnect has the option to share a map of your event's location. If your event is happening in a room at Fuqua, you should select **No** to sharing a map and simply enter the name of the room. However, if your event is happening off-campus (or somewhere else on Duke's campus), you may find it helpful to include a map for your attendees. **Have recurring or repeating events during the year?** Click **ADD ANOTHER DATE** under Location and enter the dates and times for all the instances of your event. Once you complete and submit the event form, each instance of the event will be created as **a separate event**. This means you'll be able to edit the location, timing, description, etc. of each instance of your event without affecting the others.

7. **Show To**: These visibility settings allow you to control who is able to see your event details in the main FuquaConnect event feed. This is different from who is actually able to RSVP to attend your event, which can be managed in **RSVP Settings** (more below). For example, you can make your event visible to the public, but only allow your organization members or specific users you invite to RSVP. The table below explains the visibility settings available on FuquaConnect.

VISIBILITY SETTING:	WHAT IT MEANS:
PUBLIC	Anyone in the world will able to see this event *Note: public users aren't able to RSVP to any events in FuquaConnect*
STUDENTS & STAFF AT FUQUACONNECT	Anyone in the Fuqua community will be able to see this event when logged in to FuquaConnect
ORGANIZATION MEMBERS	Only members of your organization (or any co-hosting organizations) will be able to see this event
INVITED USERS ONLY	Only the members of your organization that you invite will be able to see this event

**In almost all cases, you should select PUBLIC or STUDENTS & STAFF AT FUQUACONNECT so that your event will show on the main FuquaConnect event feed. This allows for greater visibility into all events across our community and assists event planners with de-conflicting their events. You can set appropriate categories and restrict RSVP settings to limit who is able to register for the event.

8. **Self-Reported Attendance**: If you want to allow anyone to mark themselves as having "Attended" your event, you should check the box next to **allow anyone to self-report attendance** (under the drop down for Show To). More information on this tool is in the Event RSVPs, Attendance & Ratings section of this document.

9. **Event Categories:** You should ALWAYS select at least one category (or several categories) for each of your organization's events. **Assigning categories to your events allows users to filter events on the main FuquaConnect feed, helping members of the Fuqua community find events appropriate for them.**

There are categories for describing the intended audience of the event and categories for describing the nature of the event. We've listed all category options below. You can assign as many categories to your event as you'd like, **but at a minimum, you should always indicate who the event is open to in your category selection.**

CATEGORIES:
*OPEN TO: DAYTIME
*OPEN TO: EMBA
*OPEN TO: FACULTY/STAFF
*OPEN TO: MMS/MQM
*OPEN TO: PARTNERS
ACADEMIC CALENDAR
ARTS, ENTERTAINMENT & SPORTS
CAREER PREP
COMMUNITY SERVICE
CONFERENCE OR SYMPOSIUM

CATEGORIES:
HEALTH & WELLNESS
INFO SESSION
LECTURE, SEMINAR OR WORKSHOP
SOCIAL

10. **Perks:** This is another hardcoded feature of FuquaConnect. You don't need to select any Perks to submit your event, but you may opt to select **Free Food** or **Free Stuff** if you think that may motivate attendance at your event.

11. **Additional Information:** These questions are used primarily for internal reporting on FuquaConnect and to help connect event planners to resources based on the answers to these questions.

    Wait – why does the Additional Information section ask who can attend my event? Didn't I already indicate that by selecting event categories? Yes, technically. However, answering the "Who can attend this event?" question as part of the Additional Information allows for greater specificity in your answer (e.g. more options) and more robust internal reporting in FuquaConnect.

RSVP Settings

On the next page of the Event Form, you can set your event's RSVP Settings and request information from your event attendees. As a reminder, your RSVP Settings are separate from the visibility of your event – meaning you can make your event visible to a larger audience than who is actually able to register to attend.

1. **Who can RSVP:** The table below outlines what each RSVP setting in FuquaConnect means.

RSVP SETTING:	WHAT IT MEANS:
ANYONE	Anyone that is able to see your event can RSVP. As an example, if your event is set to be visible to "Students & Staff at FuquaConnect", anyone within the Fuqua community would be able to RSVP. If your event is set to be visible to "Organization members", anyone who is a member of your organization would be able to RSVP. *As a reminder, public users are NOT able to RSVP to events on FuquaConnect, so even if your event is set to be visible to "Public", only logged in users would be able to RSVP.*
ONLY INVITEES	Only users who you invite to your event will be able to RSVP (regardless of visibility settings).
NO ONE	RSVP is not required or not necessary. This is the recommended option for events you create in FuquaConnect as an "FYI" and you are not actively tracking participation or attendance.

You can also set a limit on the number of RSVP spots available or allow users who RSVP to bring guests. If you select **Allow Guests** you can set a limit on the number of guests each attendee can bring. *Note: this option will NOT ask for the name(s) of the guest, but it may still be useful for getting a total headcount for catering or other supplies.*

2. **Organization Representation:** This option allows attendees of your event to select an organization in FuquaConnect to represent at the event. In most cases, we do **NOT** recommend that you enable this option. However, if you were hosting an event where you wanted to have representation from a select number of clubs, you may want to use this feature.

3. **RSVP Questions**: This is a **NEW** feature that gives you the ability to ask additional questions as users RSVP to your event. This is a great option if you'd like to collect dietary restrictions or other information (section, t-shirt size, etc.) in advance of your event. When a user RSVPs for your event, they will be directed to answer these questions before their RSVP is recorded. You will be able to pull these responses when you export RSVP data (more information is in the Downloading RSVPs section of this document).

Event Rating
Another **NEW** feature! If the option to **automatically send Event Rating notification after event** is selected, FuquaConnect will automatically send a survey link to all attendees asking them to rate the event out of 5 stars and leave an optional comment. Responses will be anonymous and the link will expire 72 hours after it's sent.

The link will only be sent to users that are marked as having "Attended" the event. So, in order to take advantage of this feature, you will need to *record event attendance in FuquaConnect*. More on this tool can be found in the Event RSVPs, Attendance & Ratings section of this document.

Event Photo
Your Event Photo is what will display prominently on the main FuquaConnect event feed. We recommend uploading your event flyer or another high-quality image that will draw attention when users are scrolling through the feed. Be sure to pay attention to the image file guidelines – especially aspect ratio and size – when uploading your Event Photo.

Event Additional Information Form
Like the Additional Information collected as part of the basic event details, these questions are used primarily for internal reporting on FuquaConnect and to help connect event planners to resources based on the nature of their event (catering, alcohol, etc.).

Submitting your Event
The final page allows you to review each part of the Event Form and make any last minute edits to your event details. Click **Submit** at the bottom of the page when you are ready to publish your event. You can expect a brief delay (about 10 -15 minutes) before your event shows up on both your organization's page and the main FuquaConnect event feed.

Editing or Canceling an Existing Event
Once your event is created in FuquaConnect, you can go back at any point and update the details of the event – change the location, modify the categories, etc. You can also choose to cancel the event if your organization will no longer be hosting that event.

You have 2 options for accessing the **Event Dashboard**, where you can manage all aspects of your event – send invitations, review RSVPs, track attendance and change the details.

Option 1: From the individual event
1. Open the event you want to edit by searching for it in the FuquaConnect event feed or from your organization's home page.
2. Click **Manage Event** in the top right of the public view of your event.
3. This is your **Event Dashboard.** Click **Change Details** to update the event (at the top right of the dashboard). You will be guided through each page of the Event Form. Click **Resubmit** on the final page to confirm your updates. If you need to cancel the event, click **Cancel Event** (next to Change Details)**.** A pop up will appear allowing you to write a message that will go out to all RSVPs with your event cancellation. Again, you can expect a brief delay (about 10-15 minutes) before the changes you made are reflected in both your organization's event feed and the main FuquaConnect event feed.

1. Navigate to your organization's **Action Center.** Follow the instructions in the [Create a New Event section](#) of this document.
2. Click the menu button next to the name of your organization (immediately under the FuquaConnect logo in the top left) to expand all of your organization's tools. Click **Events**.
3. You'll be directed to a list of all your organization's current events (*you can click the drop down next to **Status** to filter to show past or canceled events.)*
4. Click the name of the event you want to access the **Event Dashboard**. From here, you can follow the same instructions as option 1.

If I change the date or time of my event, will all of my event's existing RSVPs be deleted? Nope! Unlike OrgSync, you can alter the date or time of your event in FuquaConnect without losing all of your existing RSVPs. However, it's still a good idea to send a message to your event attendees to alert them to the change.

Sharing your Event

Your event is created in FuquaConnect. Now it's time to start promoting the event to your members or the Fuqua community!

Sharing a URL for your event

To insert a URL to your event in a newsletter or email:

1. Open the event you want to share by searching for it in the FuquaConnect event feed or from your organization's event feed.
2. You can also open up your organization's **Action Center** and click **Events.** Click the **View in Explore** button under **Action** to open up the public view of your event.
3. Copy the URL from your web browser of the public view of your event. ***Be sure you are sharing the link for the public view of your event, not the link to the Event Dashboard.*** The URL should follow the convention fuquaconnect.duke.edu/event/######. If the words "action center" are in the URL, it's NOT the right link to share.
4. You can also use this URL to create a QR code to share on flyers. We recommend the QR code generator available here: https://www.qr-code-generator.com/.

Sending event invitations in FuquaConnect

1. Navigate to the **Event Dashboard.** Follow the steps in the [Edit or Cancel an Existing Event](#) section of this document.
2. Click **Invitations & RSVPs** under Event Attendance.
3. Your event's RSVP and invitation details are listed here. Click **Invite People** in the top right.
4. Unfortunately, you cannot easily select all members or specific groups of your members to invite them to your event. Instead of individually selecting each member of your organization, we recommend exporting a copy of your roster and copying the emails of the users you'd like to invite using the option to **Invite by Email.**
5. When you've copied all email addresses into the box, click **Add Email Addresses** immediately underneath**.** At the very bottom of the page, you will see a list of all email addresses you've entered. Click **Send Invitations** underneath that list.
6. The users you invited will receive an event invitation via FuquaConnect. Depending on each individual user's notification settings, they may also receive an email from FuquaConnect with a link to your event.

Event RSVPs, Attendance & Ratings

Your event is coming up soon! Learn how to download your RSVPs, track attendance, or solicit event feedback in FuquaConnect.

Downloading RSVPs

1. Navigate to the **Invitations & RSVPs** section of the **Event Dashboard**. Follow the instructions for Sending Event Invitations in FuquaConnect.
2. Click **Export** from the top right options.
3. This will trigger an Excel download. You'll receive an email when your file is ready with a link to download. Alternatively, you can click your user icon in the very top right of the page and click **Downloads** from the dropdown to see a list of all reports you've pulled in FuquaConnect. Your RSVP download will display as **EVENT NAME – Export – Event Invitation List** in this listing.

Tracking Attendance

At the moment, the only options available to track attendance in FuquaConnect are manual. To record attendance, navigate to your **Event Dashboard**. Under **Event Attendance**, click **Track Attendance.**

1. **Tracking Attendance by Invitations:** From the Track Attendance page, click **Add Attendance** in the rop right**.** This will open the Invitations page and a list of all users who have RSVPd for your event will appear in a table. Under Attendance, you will have the option to mark that user as Attended, Absent, Excused or NA. Click **Attended** to mark that user as having attended your event.
2. **Tracking Attendance by Text Entry:** On the Add Attendance page, click the next tab over from Invitations (**Text Entry**). You should copy and paste the email addresses of your event attendees in the box to mark multiple users as having attended your event. You should use the **firstname.lastname@duke.edu** email format for your users. Depending on the nature of your event, we recommend displaying a QR code or short URL to a form (built in FuquaConnect or with another tool) to collect email addresses of your attendees at the start of your event.
3. **Tracking Attendance by File Upload**: On the Add Attendance page, click the third tab (**File Upload**).You can upload a .csv or .txt file containing the email addresses of your attendees to mark them as attended in FuquaConnect. Each email address should be in its own row. You should use the **firstname.lastname@duke.edu** email format.
4. **Tracking Attendance by User Self-Report:** This attendance tracking method is only possible if you **selected the option to allow users to self-report attendance to your event** when submitting the Event Form. After your event is over, you should instruct your attendees to navigate to their **Event History** in FuquaConnect by clicking their user icon in the top right and selecting Event History from the drop down. Then, they should find the name of your event, and mark themselves as attended by clicking the **Attendance Status** button.***** The next time you view your event attendance, all users who have followed this process will show as attended your event.

**In order for this button to appear to your event attendees, they have to have RSVPd "Yes" in FuquaConnect PRIOR to the start of your event. A green alert will show at the top of the screen to indicate their attendance has been recorded after the click the Attendance Status button. When they refresh the page, their Attendance Status will say Attended.*

Event Ratings

If you **selected the option to automatically send the event rating notification** when you created the event, a link will be sent out to any users marked Attended after their attendance is recorded and the event is over.

You can also send the event rating form out to any attendees manually. Navigate to the **Event Dashboard**, scroll down to the **Event Ratings** section and click **Send Notifications.** Attendees will be sent an email with the option to give a rating up to 5 stars and leave an optional comment. All Event Ratings will be anonymous and the results will display here once attendees complete the form. You can click **Export Ratings** next to Send Notifications to download an Excel of these results.