

FuquaConnect Event Guide

So, you want to host an 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.

Table of Contents

- Table of Contents.....1**
- About this Guide.....2**
- Creating a New Event.....2**
 - Navigating to your organization’s Action Center..... 2
 - Basic Event Details..... 2
 - RSVP Settings..... 4
 - Event Rating..... 5
 - Event Photo 5
 - Event Additional Information Form..... 6
 - Submitting your Event 6
- Editing or Canceling an Existing Event.....6**
 - Option 1: From the individual event 6
 - Option 2: From your organization’s Action Center..... 6
- Sharing your Event.....6**
 - Sharing a URL for your event 7
 - Sending event invitations in FuquaConnect 7
- Event RSVPs, Attendance & Ratings.....7**
 - Downloading RSVPs..... 7
 - Tracking Attendance..... 7
 - Event Ratings 8

About this Guide

This Event Guide was created using the NEW FuquaConnect navigation.

Using the features included in this guide will vary based on the navigation you are using. We recommend switching to the new navigation as this will become the standard view.

Switch to the NEW navigation by clicking “Try It Now” on the top of the FuquaConnect homepage after logging in. Alternatively, you can switch to the new navigation by clicking your profile circle in the top right of the screen, expanding the menu, and sliding the button to turn on new navigation at the bottom of the menu.

Want to leave feedback? While browsing and using the new navigation, feel free to share your feedback by clicking the **Involvement Icon** on the top right of your page and proceeding to select **LEAVE FEEDBACK**.

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 **Sidebar Icon** next to the FuquaConnect logo on the top left of your home page. Scroll and locate the **My Organizations** section and click the **Branch Icon** next to the organization you are creating an event for – Click **Events**.
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 see a list 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. **Time and Place:** You can set up your event to span multiple days, along with the option to add another date. 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.
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. You can also provide online location details.
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 be able to see this event <i>Note: public users aren’t able to RSVP to any events in FuquaConnect</i>
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, we recommend selecting 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. *Note: we do not recommend this tool for recording attendance.*
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.**

EVENT CATEGORIES:
*OPEN TO: DAYTIME

EVENT CATEGORIES:
*OPEN TO: EMBA
*OPEN TO: FACULTY/STAFF
*OPEN TO: MMS/MQM/MSQM
*OPEN TO: PARTNERS
ACADEMIC CALENDAR
ARTS, ENTERTAINMENT & SPORTS
CAREER PREP
COMMUNITY SERVICE
CONFERENCE OR SYMPOSIUM
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	<ul style="list-style-type: none"> 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. <i>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.</i>

RSVP SETTING: WHAT IT MEANS:	
ONLY INVITEES	<ul style="list-style-type: none"> Only users who you invite to your event will be able to RSVP (regardless of visibility settings).
NO ONE	<ul style="list-style-type: none"> 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.

- a. **Invite all members of this organization and all co-hosts after event approval:** This is a **NEW** feature that will automatically invite all members of the organization, along with any co-hosts noted. *Note: This is only an option when you create a NEW event, you cannot retroactively go back after event creation and run this function.*
 - b. **Waitlist:** This is a **NEW** feature that gives you the ability to maximize attendance. This feature limits the number of RSVP spots and will automatically allow participants to join the waitlist if the Event becomes full. They will be promoted from the waitlist if spots become available.
 - c. **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 feature 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, liability waiver/form, 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

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.

If you’ve created custom **collect custom Post Event Feedback 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 allow them to answer any post event evaluation questions. Responses will be anonymous and the link will expire 72 hours after it is sent.

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.

- Guidelines for image files
 - Dimensions: Image should be 1300px by 780px or larger and horizontal in orientation

- File Type: JPG, JPEG, GIF, PNG and PDF
- File Size: Use a photo that's no larger than 10MB
- General: Avoid images that have texts or logos. PDF will not have a preview and cannot be cropped.

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. 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**. 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.

Option 2: From your organization's Action Center

1. Navigate to your organization's **Action Center**. Follow the instructions in the Create a New Event section of this document.
2. Click on the **Sidebar Icon** next to the FuquaConnect logo on the top left of your home page. Scroll and locate the **My Organizations** section and click the **Branch Icon** next to the organization you are creating an event for – Click **Events**.
3. You'll be directed to a list of all your organization's current events. Click the **View More Details Icon** beside 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! You can alter the date or time of your event in FuquaConnect without losing all of your existing RSVPs. RSVPs will be notified automatically if the date/time are updated.

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 **View the More Details Icon** 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 go.fuqua.duke.edu/qrcode/.

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. Option 1: Click **Invitations & RSVPs** under Event Attendance.
3. Option 2: Click the **View More Details Icon** beside the event you want to access and click **View Invitations and RSVPs**
4. Your event's RSVP and invitation details are listed here. Click **Manage Participants** and then **Invite People** from the drop-down menu.
5. 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**.
6. 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.
7. 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

There are a few options to track attendance. To record attendance, navigate to your **Event Dashboard**. Under **Event Attendance**, click **Track Attendance**, **Attendance URL**, or **View QR Code**.

1. **Tracking Attendance by Invitations:** From the Track Attendance page, click **+ Add Attendance**. A list of all RSVPs for your event will appear. Click **Attended** to mark that user as having attended your event.

2. **Tracking Attendance by Text Entry or File Upload:** These options are in the same location as where you can track attendance by Invitation after you click **+Add Attendance**. Each option is on its own tab. If you have the email addresses of your event attendees handy somewhere else, you can use these two options to automatically check these individuals in. In text entry, you would copy & paste the emails of all attendees – up to 500 – and the system will automatically mark them as attended. If you have a file that contains emails, you can also upload that data file using this tab to mark them as attended.
3. **Tracking Attendance via URL:** Share the **Attendance URL** and any user who visits the URL within 72 hours after the event ends will be marked as "Attended" for this event.
4. **Tracking Attendance using FuquaConnect generated QR Code:** The **QR Code** provides a FuquaConnect generated QR Code to the attendance URL and can be added to presentations and other media during event.

If you are tracking attendance via URL or QR Code, invitees will not be able to RSVP using these methods until the event starts (i.e., if the event starts at 11:00am, these links/code will only become valid at 11:00am). You can use these methods during the event to engage with participants.

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.

If you **selected to collect post event feedback**, when you created the event. The data can be accessed by clicking "export feedback".

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.