Sphere User Guide

Getting Started with Sphere

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Contents

Introduction to Sphere 3

Logging in to Sphere 3

Managing Contacts 4

Creating new Contact 4

Event Registration Pages 5

Creating an Event Registration Page 6

Form Layout 6

Event Information 6

Registration Form Options 7

Form Customization 7

Events Requiring Payment 7

Adding Discounts to Check-Out 7

Adding Custom Fields in a Registration Page 8

Changing the Appearance of a Registration Page 9

Color Changes 9

Uploading Banner Image 9

Communicating with Contacts 10

Creating an Email Campaign 10

Running Reports 11

Additional Help 13

Appendix 14

Importing Contacts from an Outside Source 14

Adding eNewsletter Subscriber Option to Event Registration Pages 15

Creating an eNewsletter Campaign 15

Report Type Summaries 17

Introduction to Sphere

Sphere is an online event management system which allows users to create registration pages for events, collect registration fees online, host an event page, manage contacts and communicate to contacts via email. It is a hosted, web-based application, which means that no servers or components of the application are installed on any servers or desktop computers at USD. This gives users complete freedom in event organization, allowing users to edit accounts from any location. There are hundreds of not-for-profits using Sphere and consequently, there is virtually no downtime associated with upgrades or maintenance.

Each department user is associated with their own “Virtual Account.” A Virtual Account is created for each USD department using Sphere. All events and contacts for each department are stored in their respective Virtual Account. Users of Virtual Accounts may be assigned varying authority, from being able to handle, manage and edit all information, to only being able to open and read information with no editing permissions. This allows multiple users to work within a Virtual Account with varying access permissions, creating both management and clerical positions. Also, all contact and event data is accessible to all users within that virtual account with proper authority, allowing freedom and ease of information access.

Image 1: Sphere Homepage

Logging in to Sphere

In order to get started with Sphere, users first need to be registered by the Information Technology Services department on campus. Users may request an account from the ITS Help Desk which may be contacted by calling (619)260-7900 or emailing help@sandiego.edu. After being confirmed and registered, follow the steps to log in to Sphere.

1) Go to" http://www.Sphere.com/Sphere_Sphere/login/asp/Login.aspx" or "http://www.Sphere.com."
2) Enter in full, assigned email address.
3) Enter password.
4) Client should remain blank. Select "Login."

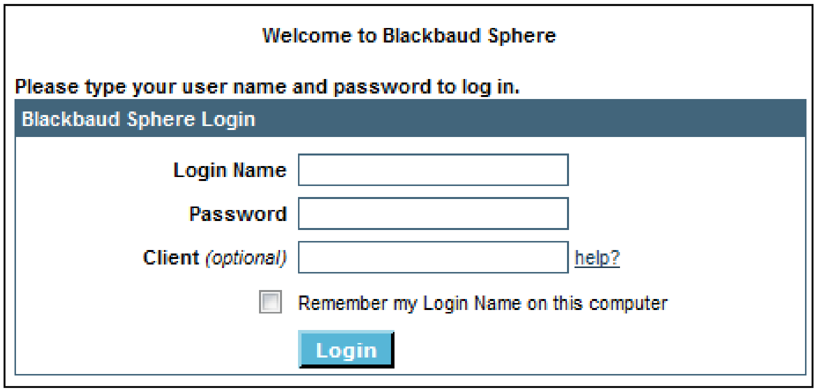

Image 2: Sphere Log-In

Managing Contacts

Contacts may be added or imported to Sphere either through outside sources (ex: Microsoft Outlook's Address Book) or created in Sphere. See the Appendix for additional information on importing contacts. Contacts are also created whenever someone registers for an events, or fills out a contact form. Contacts are managed by Sphere and are useful for managing guests to events, sending out mass emails and newsletters. Sphere saves information on individual contacts including name, address, phone number, email, school, major, et cetera. Custom fields for contacts are also available in case there is a piece of information about a contact the user wishes to include which is not already listed.

Creating new Contact

To manually create new contacts in Sphere, follow the steps below. This is useful when current contact information is not centrally located and there are small numbers of contacts to create.

1) Rollover **Contacts>Individuals** and click.
2) Select "New."
3) Fill out all necessary Profile information in the next page.
4) Click "Save and Finish, Save and New or Save and Next." Select the last option if users want to continue to manually enter in new contacts.

Image 3: Creating a New Contact

Event Registration Pages

The main purpose of Sphere is event management. Users can create online registration forms for events for their department. Registration pages can be completely customized including color choices, image uploads, field customization and website name. Clients can go to the registration page and register and pay for an event. Sphere users can also create free events, in which registrants would only enter in their contact information.

Image 4: Sample Registration Page

Creating an Event Registration Page

To create a basic registration page, follow the steps below. For additional help on creating more complex registration pages or for definitions of certain fields, please refer to Sphere's online "Help" located at the top right corner of the main screen.

1) Rollover **Communities>Forms>Registration** and click.
2) Select "New."
3) Enter the event name, description of the event, and choose which fund any donations or fees will pay into. Click "Submit." Confirm information and click "Finish."
4) Click on the event from the **Forms>Registration** page. This page is called the "Event Website Creation Checklist." Use the "Form Layout," "Event Information," "Registration Form Options" and "Form Customization" pages to customize the Event Registration Page.
5) Users will be required to enter a fund number in the initial step of creating the registration page.
    a. If event is free, specify the select the fund name that corresponds to the user's Virtual Account.
    b. If fund requires a fee, continue to the instructions below.

Image 5: Event Website Creation Checklist

Form Layout

Users can choose between creating a single-page website with custom title and event description, or multi-page layout using a pre-defined website template layout.

Event Information

Users can edit basic event information including date, location and time. Also users can add an activity schedule to their event if applicable to their event.

Registration Form Options

Users can establish registration types and fees to be collected from registrants. If event is free, users must put a zero dollar amount under "Step 1: Add Registration Type>Payment Information." Users can also set up late fees, discounts and maximum event capacities. Programs can be created, if applicable, in Step 2. Registrants may be given the option to register additional attendees in Step 3. Payment information may be modified in Step 4. If registrants are given the option to pay by cash or check, ensure to include the mailing address for all off-line payments and check "Add Off-line Payment Option." A confirmation message may be customized in Step 5.

Form Customization

Users can modify forms and what information is to be collected on the registration pages. Users can set-up an enewsletter subscription option and add segmentation in "Add-Ons." The colors and layout of the registration page can also be customized.

Events Requiring Payment

Some events require attendees to pay a registration or attendance fee. These fees may be charged online using VISA, MasterCard, American Express and Discover on Sphere's registration page. While creating a new registration event, the option for applying a fund account becomes available. In order to get a fund account, users must contact Erin Brown. ITS will enter this fun number into Sphere and associate it with users registration forms. After the fund account has been created, it may be added to an event. It is important to remember that a **free** event does not require a fund account. For these events, users should use a fund that has the same name as their Virtual Account. For any event which requires a fee, a fund account is necessary before the event registration page can go live.

Users can create multiple registration types with varying fees. For example, a student may register as a "Student" and pay a lesser amount than a faculty or alumni who would register as "General Admission." Event managers need to plan ways to ensure that registrants are paying the proper amount depending on their registration status. One way to ensure this would be to require that all students show their student ID at check-in at the event and to make note that student IDs will be required and checked at the door in the event description. This will deter people who are not students from registering as a student due to its lesser price.

Adding Discounts to Check-Out

Some events may allow certain attendees to pay a reduced price for a ticket. Sphere users can create a discount code, and when registrants goes to check-out on their registration form, if they have that discount code, they can enter it in order to receive a reduced ticket cost, either by a dollar amount or a percentage. Event managers must plan how they are going to distribute the discount code and who is eligible.

1) Rollover **Control>Code Library>Discount Codes** and click.
2) Click "New."
3) Name: Enter in the Name of Discount Code, usually related to the name of associated event

4) Code: Enter in the code registrants will type in order to receive the discount. Ensure it is not something extremely straightforward, for example, “DISCOUNT.” Instead, choose codes which are more abstract, for example, “THBX15.”
5) Description: Enter in what the discount is intended to do, for example, “Discount cost 15% for [event].”
6) Click “Save.”

It is important to remember that all discount codes are shared by all Virtual Accounts. In order to keep specific Virtual Account’s discount codes unique, title, describe and create discount codes which apply to a specific event.

7) Rollover **Communities>Forms>Registration** and click.
8) Click on the event (if it is already created) to add discount code to.
9) Click on “Manage Website Info.”
10) Click on “Registration Form Options.”
11) Scroll down and click on “Add Discount Method.” The following window will appear:

Image 6: Discount Codes

12) Enter in a Name and Description (optional) of the discount to be applied.
13) From the “Discount Code” pull down menu, select the discount code previously created.
14) Select a “Discount Amount,” either a dollar amount or a percentage to be subtracted from the total check-out price.
15) Click “Add.”
16) The discount code will now be activated and a text box will be visible to registrants on the registration page where they can enter in the discount code.

Adding Custom Fields in a Registration Page

If users want to ask a question that is specific to their event, or if they want to gather information which will help them analyze demographics or other attributes to their event attendees, users can create custom fields on their registration page. For additional help on creating custom fields, please refer to Sphere’s online “Help” located at the top right corner of the main screen.

1) Rollover **Communities>Forms>Registration** and click.
2) Click on the event to edit.
3) Click “Manage Website Info.”
4) Click “Form Customization.”
5) Select “Field Selection” along the top of the web browser.
6) Select either “Custom Profile Fields” or “Custom Event Fields” depending on user needs. Select “Add a Field” and enter in the information for the custom fields needed.

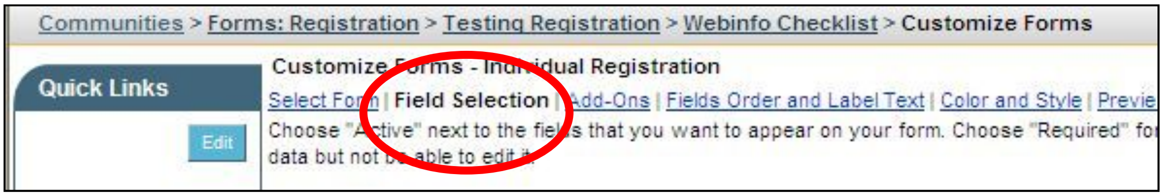

Image 7: Customizing Forms

Changing the Appearance of a Registration Page

Sphere automatically assigned a basic color pallet to newly created events. In order to change the color scheme and upload banner photos unique to user events, follow the steps below.

Color Changes

1) Rollover **Communities>Forms>Registration** and click.
2) Click on the event to edit.
3) Click “Manage Website Info.”
4) Click “Form Customization.”
5) Select “Color and Style” along the top of the web browser. Users can change the way their event site looks to viewers.

University of San Diego’s color pallet:

Founders Blue: #002469
Immaculata Blue: #1A75CF
Torero Blue: #78B3E0
Alcala White: #FFFFFF

Users may use Hex/HTML color codes in the color selection window. For a list of color codes, visit http://www.webmonkey.com/reference/Color_Charts

Uploading Banner Image

1) Rollover **Communities>Forms>Registration** and click.
2) Click on the event to edit.
3) Click “Manage Website Info.”
4) Click “Form Layout.”
5) Select “Import Logo.” Recommended picture size is 20KB or less. Basic “USD” banners may be used from USD’s website.
6) This is also an option when originally creating an Event Page.

Communicating with Contacts

Communicating with event registrants is an important aspect of most events. Users can use Sphere to communicate to contacts in order to remind them that they have registered for an event, send out payment notifications, recruit for future events, et cetera. E-mail lists are typically built using contacts within Sphere that have been created as a result of the person registering. As noted above, users can also import contacts and build e-mail lists from their imported contacts.

Creating an Email Campaign

"Email Campaigns" are a higher level email organizational unit. They are normally associated with an event. Within Email Campaigns, multiple emails can be created to send out to contacts. This allows an easy way to organize emails, especially when a department has multiple events to manage.

1) Rollover **Communications>eMail** and click.
2) Select "New."
3) A window will appear in which users will define the new eMail group created. Fill out the fields as appropriate.
4) Select "Save" and the email will appear in the Email Campaign list.
5) Select the appropriate Email Campaign. From the new page that loads, select "New" to create a new email in this campaign.
6) After a new email has been created, it can be edited by selecting "Content."


New Delete Duplicate

	Mailing Name ▲	Mailing Type	Date Modified	Campaign Name	Owner/Collaborator	Receivers	Content	Schedule	Status
☐	Another Reminder	Single Mailing	10/21/2009	Dog Show Attendees	Alisa Sieber	Receiver	Content	-	Open

Image 8: Email Management

7) An email editor will appear. Emails can either be made in this window, or an existing template can be used. Text emails can be imported using the "*.txt" extension. HTML emails can be imported as well. (For example, creating emails in Microsoft FrontPage)

Image 9: Email Editor

8) After creating the email, select "Save/Finish."
9) Next, select "Receiver" from the Mailing list. This is where users will choose their recipients. Users can choose contacts that have been previously created or imported, choose individuals based on segments, registrants to specific events or other available items. To choose registrants for an existing event, select **Communities>Forms>Registration** and select the event in which users will send an email to. Select "Add" for each criterion.

   Users can formulate sophisticated queries based on detailed information that has been collected as a part of the event. For example, if a registration form was made to collect meal preference from registrants, users could build a custom list that represents everyone who picked a particular meal choice in order to contact them.
10) After recipients have been selected, select "Schedule" to send the email.
11) It is a good idea to test the email first before sending it. After the email has been confirmed, check the approved boxes for HTML and Text, then select "Next."
12) Choose sending preferences, either "Send Now" or create a scheduled mailing.

Running Reports

Generating registration reports is an integral part of running an event. Reports provide useful information about contacts and registrants, such as: fees collected; information collected on registration forms; etc. Running reports can be a complex operation. For additional help on running reports please refer to Sphere's online "Help" located at the top right corner of the main screen. The following is a very basic method to help users get started running reports.

1) Rollover **Communities>Forms>Registration** and click.
2) Click on event in which a report will be ran on.
3) Click on "View Reports."
4) Select the desired type of report to run. For information on available reports, see

Appendix: *Report Type Summaries*, page 17.

5) Select “Run Report.”

6) Specify Date Range, if applicable. Otherwise, click “Next.”

7) Select all fields which should be shown in field.

8) (Optional) To run reports for Custom Fields, along top heading, click “Custom Fields.”

9) (Optional) Select custom fields to be included in report.

   Ex: [I would like to volunteer] and [I represent a Graduate Program and would like to reserve a table for the Grad Fair (conference registration required)]

10) Select desired sorting criteria and select “Finish.”

11) Select “No - Run the report immediately and wait for it to complete” and click “Run Report.”

12) Report will show all information which meets the selected criteria. Export to Excel in order to have more freedom with handling current report.

Additional Help

Sphere has an excellent source of online help and user tutorials available. It is recommended for users to go through a few of the basic tutorials before starting with Sphere in order to familiarize themselves better with the system beyond the scope of this help document. To access Sphere’s online help source, click on “Help” located in the top right corner of any Sphere screen.

To access Sphere’s online tutorials, click on “Training & Support.” A new window will pop up. Navigate through the “Self-Paced Courses” in order to find tutorials which cover the material needed.

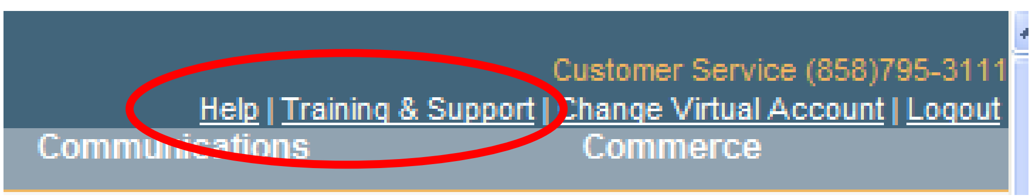

Image 10: Help Location

Appendix

Importing Contacts from an Outside Source

If contact information is stored in a centrally located electronic file and there are large numbers of contacts to add to Sphere, this is the preferred method of creating contacts. However, this method may be complex depending on what source contacts are imported from and depending on the amount of information already gathered on individual contacts. For additional help on importing contacts, please refer to Sphere's online "Help" located at the top right corner of the main screen.

1) Ensure all contacts have been saved in an outside source in the appropriate .CSV file (Goldmine, Palm Desktop, Microsoft Excel, Microsoft Access ,FileMaker, Yahoo, and Outlook).
2) Roll over **Contacts>Database Management>Manage Contact>Import Contacts** and click.
3) Select "New Import Batch" from the top icon.
4) "Step 1: Upload the file"
    - "Who is the data assigned to?" – A name from the pull down menu can be selected if the contacts can only be accessed by one person. Normally, leave the option "Everyone in organization" selected as default. This allows everyone in the organization to access the contacts.
    - Select either "Import Individual Contacts" or "Import Organizational Contacts" as desired.
    - Select duplication option as desired.

Image 11: Contact Navigation

5) “Step 2A: Set Default Values” is an optional step. Skip this and select “Next.”
6) “Step 2B: Select Segments and eNewsletters” is an optional step. If users have segments or eNewsletters they wish to associate with their contacts, select them. Otherwise, select “Next.”
7) “Step 3: Map the fields” is a crucial step. Users must make connections between Sphere’s default naming conventions and the naming conventions used in their .CSV file.

   For example, in the .CSV file, users may have “Mobile Phone Number” as one of their headings. However, Sphere calls this “Cell Phone.” Users must select “Mobile Phone Number” from the drop down menu to associate this with “Cell Phone.”
8) Select “Import Now” when finished. The newly created imported batch will appear on the new screen. It may say “Waiting to be processed.” Give the program time to process the information before users can continue. When it is done processing, it will say “Complete.”
9) Navigate to **Contacts>Individuals**. Select “Show All.” Imported users should appear.

Adding eNewsletter Subscriber Option to Event Registration Pages

Allow registrants to events to be added to an eNewsletter campaign in order to receive event-related newsletters. An eNewsletter must already be created in order to use this option.

1) Navigate to the “Event Website Creation Checklist” under **Communities>Forms>Registration** and click on the desired event to edit.
2) Click on “Form Customization.”
3) Click on “Add-Ons.”
4) Scroll to the bottom of the page to “eNewsletter Sign-Up.” Select “Activate” for the eNewsletter registrants can sign up for.
5) Select “Save and Preview” in order to see the enewsletter option on the registration page.

Creating an eNewsletter Campaign

Sphere allows users to communicate with their registrants through two ways, emails and enewsletters. Emails provide users a way of notifying their contact of specific information, especially useful when needing to pass event-specific information. eNewsletters provide a different means of relaying information. They aim at giving a broad spectrum of department or event related information to contacts either on a monthly, weekly, or another scheduled basis. They provide contacts with updates to department events, news and upcoming activities. Using enewsletters in concurrence with emails allows users to effectively communicate with contacts.

1) Rollover **Communications>eNewsletter** and click.
2) Select “New.”
3) A window will appear in which users will define the new eNewsletter group they’ve created. Fill out the fields as appropriate.
4) Select “Save” and the email will appear in the eNewsletter Campaign list.
5) Select the appropriate eNewsletter Campaign. From the new page that loads, select “New” to create a new enewsletter in this campaign.

6) After a new enewsletter has been created, it can be edited by selecting “Content.”

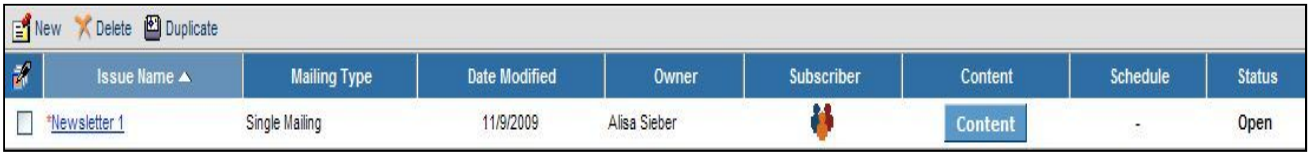

Image 12: eNewsletter Management

7) An enewsletter editor will appear. eNewsletters can either be made in this window, or an existing template can be used. Text newsletters can be imported using the “*.txt” extension. HTML enewsletters can be imported as well. (For example, creating enewsletters in Microsoft FrontPage)

Image 13: eNewsletter Editor

8) After creating the enewsletter, select “Save/Finish.”

9) Next, click the image under “Subscriber.” All subscribers will be listed. (Becoming a subscriber to an enewsletter is optional to the registrant. Subscribers will only be listed if they have opted to subscribe to an enewsletter. In order to allow registrants the option to subscribe, refer to Appendix: *Adding eNewsletter Subscriber Option to Event Registration Pages* page 15.)

10) After verifying subscribers, select “Schedule” to send the enewsletter.

11) It is a good idea to test the enewsletter first before sending it. After the enewsletter has been confirmed, check the approved boxes for HTML and Text, then select “Next.”

12) Choose sending preferences, either “Send Now” or create a scheduled mailing.

Report Type Summaries

There are many different types of customizable reports Sphere can create in order to help users effectively track, manage and evaluate the activities of their event website and registrants. Users can run real-time reports to collect information regarding registrants' information, payment information, registered guests, even table numbers for banquets. Below are is a summary table of the different types of reports users can run, and which selections will give that report. In order to run reports, users must navigate to their event, and click on "View Reports."

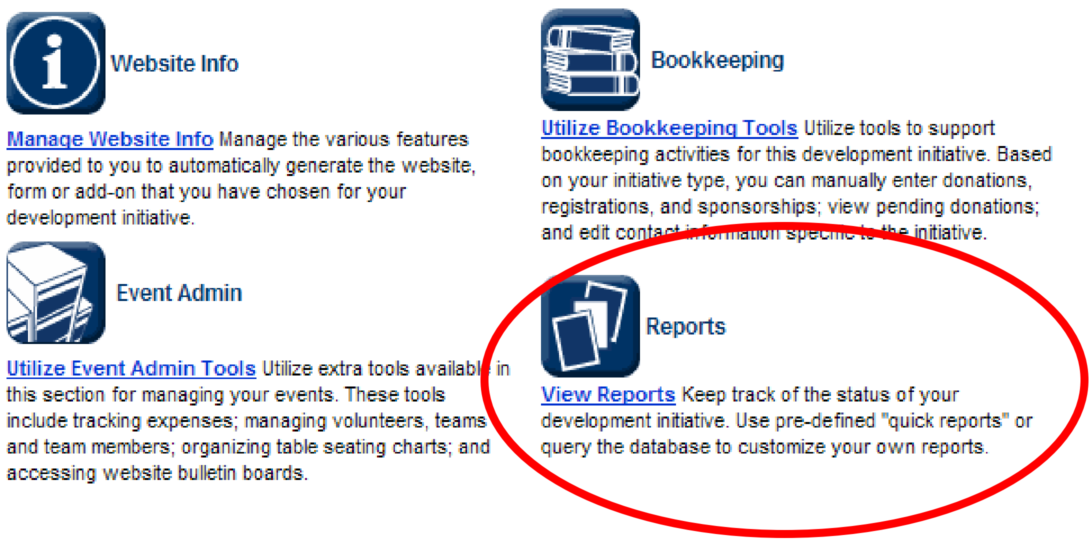

Image 14: View Reports Location

Table 1: Report Types

Report Type	Select Report	Definition
Money	Total Initiative Revenue	Displays total revenue gained from registrations including donations, sponsorship, and auction item and opportunity ticket total.
	Goal vs. Actual	Displays the initiative goal in comparison to the total amount collected to a specified time period.
	Online vs. Offline	Displays the total number of transactions made both online (card payments) and offline (cash or check payments) along with the respective amount collected from each source.
Marketing	Event Referrer (Donation)	Displays URL location from where registrant donors were referred to event site. (N/A for basic Sphere users)
	Source (Registration)	Displays percentage of registrant donors which were referred by different sources. (N/A for basic Sphere users)
All Initiative Contacts	All Initiative Contacts	Displays all contacts who registered for an event and when. These contacts may be saved to an email list.
Registrations	Registration Type Summary	Displays number of registrants which fall into defined registration types on the registration page. (For example, registrants may register for an event as either a student or an alumni.) Each category may be selected to display all registrants of that type. These contacts may be saved to an email list.
	All Registrant Purchases Summary	Displays each registrant's payment amount. Each registrant may be selected to display how that registrant paid (either online or offline). These contacts may be saved to an email list.
	Registration Purchases Detail	Displays the amount paid per individual registrant, registrant type (For example, student or alumni), and if registrant paid online or offline. These contacts may be saved to an email list.
	Order/Registration Attributes	Displays Order ID and Registration ID for individual registrations. These contacts may be saved to an email list.
Registrations with Attendees	All Attendees	Displays guests of registrants. If registrant did not register a guest, their name appears as their own guest. These contacts may be saved to an email list.
	Attendee Report per Registration Type	Displays guests of registrants and registrant type (For example, student or alumni). If registrant did not register a guest, their name appears as their own guest. These contacts may be saved to an email list.
Registration Groups	Registration Groups	Displays main purchaser for any group of registrants. For example, if registrants are allowed to pay for guests, the primary registrant will appear as the purchaser for both themselves and their guest. (N/A for basic Sphere users)
Donors	All Donors	Displays which registrants were donors and how much they donated. Displays guests of registrants. If registrant did not register a guest, their name appears as their own guest.

		These contacts may be saved to an email list.
Additional Contacts & Wait List	All Additional Contacts	Displays any additional contacts and their information which may not have appeared in other reports. (N/A for basic Sphere users)
	Wait List Report	Displays any people could not register for an event due to the event being at maximum capacity. They are put on a wait list. User can see their contact information, when they attempted to register, and which event they are on a wait list for. Displays guests of registrants. If registrant did not register a guest, their name appears as their own guest. These contacts may be saved to an email list.
Tables & Seating	Table Seating Summary	Displays all tables reserved for an event, how many seats are available, and the maximum capacity at each table.
	Table Seating Detail	Displays which table and seat guests have been assigned to. Also displays a party name if applicable. Displays guests of registrants. If registrant did not register a guest, their name appears as their own guest. These contacts may be saved to an email list.