University of Nottingham Students' Union

How to apply for an event or trip on the Member Dashboard

Introduction

The following guide will give you guidance on how to complete an event application in SUMs Member Dashboard: this will help you to understand the process that you will need to go through on the system to submit an application. What this guidance is not is thorough guidance on the events process, which is covered thoroughly in training elsewhere: all current rules on this process still apply.

What you'll see in the Member Dashboard is that, for the first time ever, this is an integrated process: a single form can be used to approve your event, sell products on the website, create multiple recurrences and get your external speaker approved at the same time. With so many purposes on one form, what you'll notice is that this is one of the longer processes on the Member Dashboard: this document will guide you through each page in turn, describing where specific data should be input, or specific documents uploaded. By following this process, an events form should be submitted for approval, and if approved any tickets should be automatically placed on the website.

Due to the complexity of this process, it is best approached on a desktop device. It is also worth noting that the system will not save drafts and that the form should be completed and submitted in one sitting: some amendments can be made after submission if necessary.

Please note that a large amount of additional guidance and policies are included within the resources section of the Member Dashboard: you can access this by scrolling down to **Resources** within the left hand navigation bar: here you will find all relevant policies, blank risk assessments and others.

An accompanying video to this form can be at the following link

How to get to your group's event dashboard

- On a desktop computer direct your internet browser to su.nottingham.ac.uk
- Click the button that says **log in** and you'll be directed to the login portal: log in using your normal student credentials
- After logging in, click the button that says **Member Dashboard** to be directed to the SUMS member dashboard.
- Within the member dashboard select the name of your group from the drop-down list, or click the button that says **manage** in your Memberships section. This will take you to your group's Dashboard.
- Within your group's dashboard there is a menu on the left hand side of the screen: scroll down to the menu item **Events and Trips**

Tabs within the events dashboard

- Within the Events Dashboard there are two tabs: **Applications** and **Upcoming Events and Trips**.
- The Events and Trips tab should summarise all events that are in your group's calendar, and will also summarise your ticket sales for the events.

- The Applications tab will summarise all previously submitted applications and their statuses (which will be explored in more depth later in this document).
- To create a new event or trip application press the **New Application** button in the top right hand corner of the screen.

How to complete the events application

Page 1: Introduction page

Within this screen, a series of slider buttons control the rest of the form and whether you have to complete certain elements: to turn on a slider simply click on it and it will go blue. If you feel that you have missed some information later on in the form then you can head backwards to turn a slider on before submission. The questions are as follows:

1) **Are you selling tickets?** This gives access to the part of the form where you can create tickets to the event.
2) **Do you have an external speaker?** This gives access to the part of the form where you can create an external speaker record
3) **Are you going off campus?** This makes the event a *trip* and means that you will have to supply certain other details and complete the Travel section
4) **Will you be catering food?** This gives access to the catering part of the form
5) **Will you be showing films?** This gives access to the film screening part of the form
6) **Will you be fundraising at the event?** This gives access to the fundraising part of the form
7) **Is this a recurring event?** This gives access to the recurrences part of the form, and also means that you can advertise an event and sell tickets without having to re-submit a form.
8) **Is this linked to a funding application?** At this point, this links to functionality that is not enabled within SUMS: you can, for the time being ignore this question.

After selecting the sliders that you wish, press **next** to move through the form.

Page 2: Basic Details

All events and trips will have to supply some details in this section of the form, although this form will look slightly different if you have set the 'Are you going off campus' to the Yes position. Most of this section is to be completed using text. You have to complete the following details:

1) **Event/Trip Name:** the name of your event, which will be listed on the website in the events list.
2) **Description:** use this section to summarise the aims and objectives of the event, who it is aimed at, what will be occurring and the capacity of the event. This section will be visible on the website on the event itself
3) **Start Date/End Date:** this will create the event in the events list, and should be listed as the start date/end date of the event itself. Dates for ticket sales, if tickets are being sold, will be input later, rather than here.
4) **Overall budget:** this is to be used to approve the event and needs to be input as a decimal figure: it may be that for more complex events, you may have to complete a more comprehensive budget assessment – if this occurs then you will be contacted by a member of staff. A blank budget form can be found within the resources section.
5) **Venue:** If you are putting on an event ON CAMPUS then you will be asked to complete some details here: if you select an SU Room then you will be able to select a room from a drop-down, if you select a university room then you should be able to enter details by open text. Please remember that this will not book you a room, and you will need to book a room separately via the normal process.

6) **Travel:** If you are putting on an event OFF CAMPUS then you will be asked to complete some details here: you will need to supply a destination, address, group leader and contact details. If you are travelling internationally then you should select the slider button and you will be asked to complete the international section of the form.
7) **Publish on the website:** this will place the event on your group's web page and within the organisation event listing.
8) **Do you require a float:** this will allow you to input an amount for a group's float, so that the finance office can prepare an amount for you.

Input the data that you need to, and then press **next** to continue through the form.

Page 3: Products

In this section you will be able create tickets (products) for your event: after approval of the event these tickets will be sold automatically through the website on the date that you enter. Please remember that if you wish multiple ticket types (e.g. for members and non-members, or for early bird rates) then you should create multiple ticket types.

To create a product, firstly click the **create** button in the top right hand corner. You will need to enter the following details:

1) **Product Name**
2) **Product Price**
3) **Start selling/stop selling:** this is the dates that the tickets will automatically be sold on the website. You can scroll through the available options (press the month button at the top to change the month and the year to change the year). Tickets will not be available until the start selling point passes, and once the system passes the STOP selling point, then the tickets will come off sale.
4) **Inventory:** this is how many tickets you have to sell, and will normally be the capacity of the event itself.
    a. If you are selling multiple tickets, then don't forget to divide your capacity by the amount of ticket types that you have.
    b. If you have unlimited tickets then enter the figure -1.
    c. Once you have sold your inventory the event will sell out.
5) **Max per transaction:** this is how many tickets an individual can buy in a single transaction NOT how many an individual can buy overall. If you wish to limit the amount an individual can buy then you should let a member of support staff know, and they can enable this feature.
6) **Do you want to sell online?** This slider will mean that the ticket is sold on the website
7) **Do you want to sell offline?** This slider will mean that the product is available on the reception till, when it becomes available.
8) **Do you want to sell to students?** This will allow only logged in students to buy a ticket
9) **Do you want to sell to the public?** This will allow any individual to buy a ticket
10) **Do you want to sell to group members?** This will allow only members of your group to buy a ticket.
11) **Department:** This will define which accounts the ticket sales are credited to – for the most part this will be pre-populated, unless your group has multiple accounts
12) **Nominal:** This will define where the ticket sales are credited to in your accounts. You should be aware of which nominal code to use, but for most student groups it will be one of the accounts beginning with 7, and for some SRS groups it may begin with 5.
13) **VAT:** This will define how much VAT is charged on a ticket. For most groups you should list under SGS, although the codes SRS and NTE are also available.

Before pressing submit please remember that if you want to sell different ticket types to non-members, students and members of the public then you should create multiple ticket types and only select ONE slider from numbers 8-10. After entering your details press **submit.**

It might be that you have additional requirements for details that you wish to collect for your product (e.g. access requirements, emergency contact details): if you do, then please get in touch with a member of your support staff after you have submitted.

If you need additional ticket types, press **create** again. If you have created all of your products then please press **next.**

Page 4: External Speakers

In this section you should define your external speaker(s). You should create a record for each of your external speakers.

As a first step, you should download and read the external speaker policy of the SU/University, and then signify that this has been done by clicking on the slider.

To create an external speaker, press the **create** button and then enter the following details:

1) Speaker Name
2) Organisation
3) Phone number of the organisation/speaker
4) Email address for the speaker: a copy of the External Speaker should be emailed to them.
5) Website of the speaker
6) Affiliations of the speaker
7) Information about the speaker
8) Media Interest: If you believe that the speaker may be controversial or will create any media interest then please turn on the slider and then input relevant details in the box below.

Press submit and then press create if you have other speakers. Once you have created all your speakers then press **next.**

Page 5: Catering

If you are having catering for your event, then please complete this section. The following details will need to be completed:

1) **Are you self-catering?** Use the slider to select that you are self-catering; following this, please download the food disclaimer policy and then signal acceptance of this policy
2) **Do you want to order food from the Students' Union?** If you wish for food to be ordered, please input an email address and a member of staff should contact you.
3) **If neither 1 nor 2 apply then please enter requisite details in the open text box below, summarising your approach to catering for the event.**

Press **next** to proceed

Page 6: Travel

In this section, travel details for your event will be input, including any driver details or alternative travel options.

If you or a member of your group are driving to the event: press the slider and then enter the student number details of your driver (if you have multiple drivers then please separate their details using a comma) and the amount of driving that will occur.

If you are taking alternative transport and are looking at booking a supplier: select the transport type and then the details of any suppliers. Upload a quoted amount for your chosen transport using the **upload** button and then input the finance codes for your group's account. Please note that this does not override normal X365 procedures, and normal finance processing applies.

If you do not yet have any defined travel plans, then please summarise your proposed travel arrangements in the open-text box

Page 7: International

If you are travelling internationally, then you will need to complete the following sections of the form. As one of the more complex events, this will be a larger section to complete, and all information is mandatory in the form.

You will need to complete the following details:

1) Firstly download and read the policy, and then click the slider to state that you have read this policy.
2) Upload your booking reference and terms and conditions for any travel that has been booked.
3) Signify the ATOL protection button if it applies
4) Enter all details of your chosen Travel Provider
5) Upload the quotation for your travel, which should have been provided by the provider.
6) Enter all finance details for your group and the quotation.

Once you have submitted details, press the **next** button.

Page 8: Fundraising

If you are fundraising for another charity at the event, please enter the name, charity number and fundraising date for your event.

As SUMS is a shared system between several student unions, there are references to 'charity bucket' collections within this section which may not be relevant to your event: if you do not need to use charity buckets then please enter 0 and the date of your event in this section.

Once all details are collected within the form please press the **next** button.

Page 9: Recurrences

In this section you will be able to enter any recurrences for your event, and this will allow automated listing of both your recurring events and the tickets for those future events. Please note that any recurrences will have to be using similar details to those already approved (e.g. venues, external speakers).

To create a recurrence, you will firstly be asked to define the start and end date of the event, followed by a start date and end date of the ticket sales. Following entry of these details press **submit** to create the recurrence in your application.

If you wish to create any further recurrences press the **create** button in the top left right hand corner of the screen.

After creation of all of your recurrences press the **next** button.

Page 10: Film

If you are screening a film, then you should complete this section; due to licensing conditions a charge might be made for the film that you are going to show.

Firstly enter the name of the film that you wish to show in the open-text box. Use the slider box if you intend the screen to be shown outdoors.

Finally download the film screening policy and read it, signifying agreement with the policy by using the slider button.

Complete the page by pressing the **next** button.

Page 11: Additional Information

All completers of the form will now be sent to page 11 and may have to complete some additional details. To open up the text boxes for completion, set both sliders to the right hand side. In the additional information page please firstly complete the following:

1) Any information about collaborations (either internal or external) in your event.
2) Any equipment requests that you may need.

A member of staff may be in touch to assist with your equipment requests following submission of your form.

Page 12: Risk Assessment

All events will have to upload a risk assessment, and a blank risk assessment can be downloaded from the Resources section of the dashboard (to enter the Resources section without leaving the page, right click on the 'Resources' button in the bottom left hand corner of the navigation bar and say 'Open Link in New Tab).

It might be that the event is covered by your annual risk assessment that has already been approved: if this is the case please upload your completed annual risk assessment now.

To upload a file either drag and drop a file or press the upload bar. You will not be able to proceed until a file is uploaded. After upload press **next** to go to the submission form.

Page 13: Submission

Before submission, please check all pages to see if you have entered correct details: if you wish to amend any details of the form, please scroll back through and amend using the **previous** and **next** buttons. After you've checked press the **submit** button to complete the form.

<u>How to check the status of your event application</u>

When you submit an events application, a notification is sent to staff and they will read and approve the form. In the **Applications** section of the events dashboard, you should be able to see the details of the previous event applications that you've submitted.

Following approval, please note that activity is automated: all of your tickets will be sold at the time that you have set, and the event will also be visible in the events calendar on the dates that you have set. These processes will not be automated until the event is approved by a member of staff, and all current guidance on approval still applies.

To check the status of your application, the following statuses should be visible:

Approved: This means that your application has been approved and all tickets should be sold on the date set.

Pending: This means that either no member of staff has reviewed your application or that some comments have been left.

Declined: This means that your application has been declined. You should hear from a member of staff in this eventuality. You will be unable to amend a declined application and will have to submit a new application.

As part of the review process, a member of staff is able to give comments on your application: if some staff feedback has been left then you will see a **tick** in the **staff feedback** comment.

If feedback has been left but your status is left in a pending status you can see this feedback by pressing the **modify** button (it looks like a wrench/spanner). The feedback will be shown in the Form Feedback section. In this state you can modify and resubmit your form without having to start an application, simply go through the application as above and then press **submit** to do this.

To view any previously submitted events forms, you can click the **view** button.

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