UQ Engage Event Management
Quick Reference Guides
Phase 1 Release 2 QRG Guides

Innovation in customer engagement
Purpose Statement

Quick Reference Guide (QRG)

This Quick Reference Guide (QRG) booklet will provide you quick, accessible information to perform specific tasks or business processes within UQ Engage. Each guide will be a one- or two-page instruction sheet, identifying what is important for you to know to move forward with your job.

QRGs within this document are categorised by the objects you will find in the UQ Engage system.
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Creating an Event (In-person or Online)

**Purpose:** Follow these steps to learn how to create an in-person or online event in UQ Engage

1. Click on the App Launcher button
2. Select the Event Management app to open the dashboard
3. Click on the Events dropdown tab
4. Click the New button
5. Enter the event details and save

**Format** – Choose in-person only or online-only

**Event Code** – If you select Student Recruitment as the Event Purpose, you will see a field ‘Event Code’. This is also called a Fee Waiver Code. This is a code provided by the Future Students International Recruitment Team to the event organiser to waive the application fee of prospective students who attended the event.
Webinar/Meeting URL – this field is mandatory for an online event

Event Page URL – The URL will be automatically generated once the event is saved

UI Experience – Choose from Simple (supports registration for individuals not groups) and BYO-CSS (support registration for groups)

The event is completed successfully when you see a green banner ‘Event saved successfully’ at the top of the screen.

The event has been created but not yet published. It must be linked to at least one event item before it can be published.
Creating an Event Item

**Purpose:** Follow these steps to learn how to create an Event Item linked to an Event

1. In the Event Management app, open the Events tab
2. Open an Event by clicking on the Event Name
3. Click the New Event Item button. The new event will be the registration for the event created.
4. Enter the new Event Item details then click Save

**Public Item Name** – The name of the event item should always be the event’s name. It is displayed as the name of the event on the registration page.

**Standard Form Fields** – The event registration form is set up in the Event Item. Specify the
standard form fields you want to add to each event.

**Custom Form Fields** – If you are not using custom form fields, select ‘UTM Only Form’. This will ensure you apply the 5 UTM parameters to the form so UTM tracking is applied.

If you want to create specific questions for your registration form from the standard, you can build them using the Custom Form Fields.

The event item is completed successfully when you see a green banner ‘Event item was created’ at the top of the screen.

5. See the new Event item here

6. Preview your event here and complete the final checklist to ensure you have covered all steps. When you are happy with it follow the steps to Publish the Event.

### Final Checklist

#### Online Only Events

- The URL of the webinar/meeting URL is filled in under the Webinar/Meeting URL section of the event record
- One event item is set up
- The name of the event item is the name of the event
- A thankyou page URL or message is specified. The standard thankyou page is https://study.uq.edu.au/thank-you-event-registration

#### In-Person Only Events

- The address of the venue is filled in under the Venue section of the event record
- One event item is set up
- The name of the event item is the name of the event
- A thankyou page URL or message is specified. The standard thankyou page is https://study.uq.edu.au/thank-you-event-registration

If you have questions, contact:
E: UQEngageCRM@uq.edu.au
Creating a Custom Form for an Event

**Purpose:** Follow these steps to create a Custom Form to link to an Event

If you want to add a specific question to your registration form, you will need to create a Custom Form.

The only limitation is it is restricted to the fields available in the Attendee record. If you cannot find the field in the attendee record, then the data captured from the form will not be able to be stored properly.

Each custom form you make must have 5 UTM parameter fields.

**Handy Tip!** Save time recreating the fields by copying the field configurations already set up in the pre-existing ‘Student Registration Form’.

1. From the Events Management dashboard click the Forms tab and select New Form

2. Give the Form a name then select the Type

3. Click Save

The Form Elements page will open

If you have questions, contact:
E: UQEngageCRM@uq.edu.au
4. Fill in the fields then click Save. Maps to Object – this field must map to the fields you find on the Attendee’s record.

The form is created successfully when you see a green banner ‘Record Saved Successfully’ at the top of the screen.
Duplicating a Custom Form

**Purpose:** Follow these steps to copy the UTM field configurations from an already set up custom form

1. After you have created your form (steps 1-3 above), you will need to locate the form you wish to copy the UTM parameters. Remember, you must clone all 5 UTMs for every custom form. Open the Forms tab and change the list view to ‘All’.

2. Select the *Student Recruitment Registration Form* by clicking on its Form Name.

3. View All of the Form Elements
4. Here you can see all the UTM form elements. Open each one by clicking on the Form Element Name hyperlink.

5. Click Clone to clone the UTM field. The New Form Element entry box will open.

6. Select your newly created Form

7. Click Save

The cloned form element will be added to your form. Complete this process for the remaining 4 UTM form elements attaching them to the required form.
Creating a Hybrid Event

Purpose: Follow these steps to learn how to create a hybrid event (both in-person and online) in UQ Engage

1. Click on the App Launcher button
2. Select the Event Management app to open the dashboard
3. Click on the Events dropdown tab
4. Click the New button
5. Enter the event details then click Save

Format – Choose in-person and online

Event Code – If you select Student Recruitment as the Event Purpose, you will see a field ‘Event Code’. This is also called a Fee Waiver Code. This is a code provided by the Future Students International Recruitment Team to the event organiser to waive the application fee of prospective students who attended the event.

If you have questions, contact:
E: UQEngageCRM@uq.edu.au
Webinar/Meeting URL – For hybrid events, leave this blank and add the URL to the online session

Event Page URL – The URL will automatically generate once the event is saved

Post Registration – You can either redirect people back to the UQ website or show a Success Message relating to the Registration Success Message field below

UI Experience – Choose BYO-CSS for a hybrid event

Total Capacity – This field is automatically populated from the Event Item – Quantity Available

The event is completed successfully when you see a green banner ‘Event was created’ at the top of the screen.

The event has been created but not yet published. It must be linked to at least one Event Item before it can be published and have two or more Sessions attached to it.

If you have questions, contact:
E: UQEngageCRM@uq.edu.au
Creating a Session for a Hybrid Event and link to an Event Item

Purpose: Follow these steps to learn how to create a session for a hybrid event and link to an event item

1. From the Events dashboard select the event you would like to create a session for by clicking on the Event Name

2. Click the New button for a new session

3. Complete the New Session form then click Save

   **Session Name** – Indicate if the session is an online or in-person session. For example, “Session Psych(online)”

   **Webinar/Meeting URL** – This field is mandatory for online sessions of hybrid events

If you have questions, contact:
E: UQEngageCRM@uq.edu.au
Follow the same process to set up the sessions you need for your event

4. Your sessions will display in the Session section of the event. Once your sessions are created, you will need to link these to the Event Item you have already created. Click on the Event Item Name link to open the Event Item.

5. In the Event Item Sessions click New
6. Locate your sessions then click Save

Once your sessions are linked, complete the final checklist to ensure you have covered all the steps. When you are happy with it, follow the steps to Publish the Event.

**Final Checklist**

### In-Person and Online Events

- The address of the venue is filled in under the Venue section of the event record
- The URL of the webinar/meeting URL is empty under the Webinar/Meeting URL section of the event record
- The URL of the webinar/meeting URL is filled under the Webinar/Meeting URL section of the online session record
- One event item is set up
- The name of the event item is the name of the event
- Two sessions are set up
- Both sessions have the correct start and end dates
- Both sessions have an ‘Event Item Session’ which is linked to the ‘Event Item’ set up
- A thankyou page URL or message is specified
Publishing an Event

**Purpose:** Once you have created an event and its event item and sessions (if a hybrid event), you need to publish it. Follow these steps to publish an event.

1. From the Events dashboard, open the event you would like to publish.

2. Click Preview to preview your event details. Once you are happy, click Publish then Publish again.

The event is published successfully when you see a green banner ‘Event has been published’ at the top of the screen.

**Handy Tip!** If you created your event using the BYO-CSS layout, once published, you will need to copy the link in the second step to place on your marketing sites to allow the external users to land on the registration form directly.

To do this, open the Event Page section of the event. Click on the Event Page URL and select Register. Copy the register link here.

If you have questions, contact:
E: UQEngageCRM@uq.edu.au
View an Event Attendees Report

**Purpose:** Follow these steps to learn how to pull an Attendees report

1. From the Events dashboard select the event you want to report on

2. Click on Attendees Report

3. Apply the filters to refine your results. This will provide you with a more precise view of your data.

If you have questions, contact:
E: UQEngageCRM@uq.edu.au
UQ Engage

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