Below are questions and answers from our Smartrans Users Chat on Friday, October 9. If you have additional questions, please write to smartranshelp@mit.edu. In addition please make sure to view the enhancements list at the end of this document and visit our enhancements to date page. Thanks again for providing valuable feedback on SmarTrans.

1. (Q) So, what are you working on for SmarTrans since you launched the last set of enhancements?
   (A) We’ll be implementing the option to allow administrators to hide or show attendees’ names on the attendee list. We’re also investigating the possibility of allowing administrators the ability to modify registrant’s records.

2. (Q) I sometimes forget how to use a particular feature in SmarTrans, but it's a pain to search through the pdf manual. Is there any other way to get quick info?
   (A) There will be in the next couple of months. We are creating some screen casts, short videos, that will replace the online training, broken into smaller chunks, and we might even integrate them into SmarTrans so you don’t have to hunt for them. They will appear next to the relevant corresponding step.

3. (Q) I have a request about cut and paste flexibility in the event area. Presently it ignores all fonts, colors, spacing, etc. Can this be fixed?
   (A) Good idea. It'll be added to the list. As a workaround, you can use simple html code in the event description box to make it work the way you would like.

4. (Q) What is the best way to gather sensitive information, like Social Security numbers for events that require security clearances?
   (A) Regarding your question about sending sensitive information through SmarTrans...The best option would be to take this information via phone. We have coordinated events on campus at our nuclear facility which required social security numbers, etc., from registrants. We have asked them to submit this information via phone. It is the best workaround that we can suggest at this time.

5. (Q) Could SmarTrans take international currencies?
   (A) We are currently investigating this possibility and will know more in the next month or so.

6. (Q) Why was SmarTrans created?
   (A) SmarTrans was initially developed as a means for groups to take transactions from alumni (e.g., event registration) and the data associated with them to be captured in the alumni database for use by staff and alumni groups. It was not intended to be an event management or customer relationship management system, but as it has grown and needs have evolved, we have implemented some features that overlap with these other types of systems as best possible.
7. (Q) How are enhancements processed at the Association?

(A) Each enhancement may be traced back to an alum and/or staff request. The process is as follows: a.) Alums make requests & Nora tracks them on a spreadsheet  b.) IT reviews the requests with staff representatives from across the Association and based on their knowledge of the priorities of alumni, we prioritize what would be desired as enhancements. c.) The set of enhancements are divided into support (easier/quick) and projects (more complicated) - we try to schedule the easier/quick ones as support work so we can slip them in throughout the year. The larger ones go to the IT Project Team and are scheduled pending other projects going on around the Association. d.) Projects that are deemed feasible for the coming year are implemented. e.) We test & release the enhancements and share the info with users via email list and enhancements page.

8. (Q) What is "ASB"

(A) ASB stands for Alumni Site Builder which is an easy website builder tool used by the Alumni Association for clubs, classes and groups.

9. (Q) It would be helpful to streamline the process of creating an event. Currently one has to enter the event information in several locations. There is the front page and then a separate event page. It would be convenient to post the event description on the front page instead of doing it twice. Also it would be great if the club event got posted to a master alumni event calendar, currently this procedure is not clear.

(A) Your first question is an ASB question - we'll follow up with you offline. We're focusing on the SmarTrans questions today. For events set up in SmarTrans, they are all posted in the Association's master calendar.

10. (Q) What did you mean by that posting: modify registrant's records?

(A) I mean the option for the Admin/officers to edit the registrant's registration form.

11. (Q) What are the different number of categories of users?

(A) Departments at MIT & in the Alumni Association: 28; alumni clubs & affinity groups: 67; alumni classes: 24; enterprise forum chapters: 9; FSILG groups: 14

12. (Q) I am not familiar with HTML codes. Is there a list of codes that can be used that can be referenced easily in SmarTrans?

(A) On the event registration set up page, sample html code can be found under the event description box.

13. (Q) Will a complete copy of this script be made available to today's participants?

(A) Yes, next week a complete transcript of pre-submitted and live questions and answers will be added to the Web link that this chat is taking place.
14. (Q) Where do you stand on implementing a shopping cart facility so that alums can pay for multiple events and their dues in one transaction?

(A) Current workaround would be to include membership dues and event fee at membership price in one ticket type for a single event where you want to package the two together. This does mean you would have to pull apart the data from the report on your end and send us the list of new members for coding which we are happy to do.

15. (Q) On our dues form, alums specify their preference for print vs. email communications. When will this info be used to automatically populate the Advance database instead of requiring manual entry by AA staff?

(A) I will need to check with Alumni Records on this question and will be back in touch off line.

16. (Q) If I don't have a laptop available, can I, as a club officer, collect cc information at an event and send it to MIT for processing?

(A) No, PCI compliance standards do not allow collection of credit card numbers in any form; you must use the secure interfaces when processing a credit card gift. (By the way, for your protection, you should never give your credit card information to anyone who is not inputting directly into a secure interface. The largest number of credit card breaches results from information taken from stolen laptops.)

17. (Q) Currently, SmarTrans requires the contact person's name, phone number, address, etc. Whenever we haven't wanted to put a home address on the internet, we've just filled the spot with dashes. Will this information still be required to create an event in the future?

(A) This is an ASB question - we'll add it to the list. On the SmarTrans event set up page, the contact person's home address is not needed, phone number is optional and only email is required.

18. (Q) We still want the ability to process refunds back to a credit card.

(A) If you mean for club officers to do this, currently MIT does not allow non staff access to the cyber source interface. That is only allowed to certain staff around Institute. We do not see MIT opening this up, but will definitely mention it to the group running the system. If you mean for staff to do this for all user groups of SmarTrans, this would imply quite a bit of staff time. We imagine you would prefer us spending time working on enhancements to SmarTrans rather than processing refunds. Please note there are 142 groups currently using SmarTrans.

19. (Q) The system can send a reminder email. Sometimes we need to send additional emails to attendees. Allow us to email all attendees at any time with text of our choosing.

(A) You can easily use the addresses in the registrant summary report list of email addresses to send an email to all registrants at any time. This allows for the greatest flexibility on your end.

20. (Q) It would also be convenient to 'event plan' - create an event, visible to the local/relevant Club but not yet posted for subscription. This would allow coordination and development and
communication in a common arena that is smoother than the current club coordination. Would this be a feasible implementation?

(A) There is a work around for what you suggest. You could post the event, and hide the ticket type then unhide it when you want to open up the event to the larger audience.

21. (Q) Is it possible to please include the class year of alum on the “Club of New York Dues Payment Receipt” email notice?

(A) Not a problem, we’ll add it to the list and perhaps can get it done as part of a support request.

22. (Q) Re HTML codes... it would be much nicer to use a commercial off-the-shelf component to allow people to edit the event description (and other) fields using a What-you-see-is-what-you-get editor, such as is available in free Content Management Systems>

(A) Great idea. This is definitely on the list for any major enhancements to SmarTrans in the future.

23. (Q) When will you Include middle initials/names in all reports [help.mit.edu #687486]? Some people in our area, and even in our Club, have the same first and last names.

(A) This was on the list of enhancements we sent around prior to the chat so it is on the list of things to address.

24. (Q) We would like the ability for Club officers to enter registrations for alums who do not have/supply an email address. Why does ST require an email address?

(A) The purpose of getting an email address from the registrant is that SmarTrans will send them a registration confirmation as well as the reminder before the event. Workaround is as follows: The event contact person can use their own email address to register the attendee. Note that when the event registration has expired, the email address not required.

25. (Q) Will there be a published list of submitted requests so we might "lobby" for our favorites?

(A) The list of proposed enhancements that was sent out prior to the chat and the new ones from today’s chat will be posted at http://alum.mit.edu/help/ReleaseNotes/

26. (Q) Regarding enhancement processing prioritization, I think we would all be better off if your users had more of say. Have you considered some sort of a user committee that would participate in the final prioritization?

(A) The creation of forums like this chat are intended to help the Alumni Association better gauge users needs and also help the staff when working with the Alumni Association Board on prioritizing resources. At this time there is no plan for a “formal committee”, but please know we are very open to hearing from all of our users and attempt to meet their needs as best as possible.

(Q) Will your completed chat room discussion list questions and answers in the order discussed today, or will the questions/answers be grouped according to topic?
(A) They will appear in the order submitted and we will also include release notes, FAQ's and other relevant links to SmarTrans.

27. (Q) Is there a location that we can view all attendees of all our events in one consolidated list or group setting (like a CRM tool)?

(A) SmarTrans was not developed to be a CRM. SmarTrans was initially developed as a means for groups to take transactions from alumni (e.g., event registration) and the data associated with them to be captured in the alumni database for use by staff and alumni groups. It was not intended to be an event management or customer relationship management system, but as it has grown and needs have evolved, we have implemented some features that overlap with these other types of systems as best possible.

28. (Q) I do not understand the continuing reluctance to a user group. Best practice for IT always includes user groups who are part of the prioritization process. Maybe Judy Cole has some thoughts about this.

(A) There is no reluctance to user input and every enhancement thus far has been directly tied to a user's request. We are very open to feedback and input and I would encourage users to talk to MITAA staff and board members with your concerns.

29. (Q) For alumni who log into the Infinite Connection to register for an event, can we display their club status (i.e. non-member) or membership type?

(A) Great idea - we will be looking at how to integrate more information about an alum into their profile and into other places across applications, and we will add this to the list.

30. (Q) I didn't think the comment on "streamline the process" had anything to do with ASB...

(A) According to an earlier comment: "There is the front page and then a separate event page. It would be convenient to post event description on the front page instead of doing it twice", this is an ASB question. When you create an event in ASB or add a SmarTrans event to your Event page, you need to create a short description in addition to a detailed description. The short description shows up on the Event page with the event name as a hyper link which takes you to the detailed page when clicking on it.

31. (Q) I would like to see membership take effect as soon as the registration/payment is done. Currently it is not in effect until the following day. This creates problems when we send out an event announcement that also asks alums to join our club and offers a discount to members. Currently they need to join the club, wait a day and then sign up for the event to get the member discount.

(A) Unfortunately SmarTrans is unable to do this at this time. The current work around is to include a member fee in the event price. Also it has been our experience (maybe not yours!) that people are very honest for the most part. By including the member fee in the price, you could collect dues at the same time. You would need to then send a list of people who paid their dues in this manner to the Alumni Association so that we can code them properly. Separate dues payments are automatically coded in our
database. Using the method above, the membership would have to be manually input by Alumni Association Staff.

32. (Q) It would be great to be able to download the registration receipt report by selecting a date range of registration. Is that in the works?

(A) That is a great suggestion and we will add it to the enhancements list!

33. (Q) Is there a way to set up SmarTrans events which repeat? For example, we have happy hours that take place the first Tuesday night of the month at a particular location. Rather than enter all the information each month, could we just enter it once and have it not expire?

(A): You can clone a previous event by using the "Clone" link and save it as a new one.

34. (Q): Are there any plans to repopulate the Publishing Information dates? I.e., default the Publish Start Date/Time with today’s date and time? And something similar with the Publish End Date/Time?

We’ve received more requests to get rid of the default in the Publish Start Date and Publish End Date fields than requests to keep the default so we removed them in the last SmarTrans release but we’re open to all suggestions and may change it if needed in the future.

35. (Q): Another question: What's the timeline for implementation of these new features?

(A) This question was answered earlier in the transcript.

36. (Q): Care to provide a template or listing of the simple HTML codes allowable re: "workaround" for pasting fonts

(A) The event description box only allows the following html code:

Bold: <b>text</b>
Italics: <i>text</i>
Line break: <br>
Hyperlink: <a href="your URL here"> link text</a>

Examples of acceptable links:

<a href="http://alum.mit.edu">The MIT Alumni Association</a>
<a href="mailto:jdoe@alum.mit.edu">email Jane Doe</a>

37. (Q): What linkage do you anticipate for dues? Our club charges different amounts for members/nonmembers. It would be good to allow people to pay for membership at the same time they sign up for an event, rather than having to go through 2 separate transactions.

(A) For the time being the workaround listed earlier in the transcript is the only way of doing this. To implement this we would have to do a major revamp of SmarTrans.
38. (Q): As you know, we have multiple events open for registration at a time, and we would very much like the ability to have alums pay for all of them, and their dues, at the same time. Also, our volunteer treasurer is already working many hours, and your suggested workaround, as you noted, would require significant additional work on his part.

(A) Good idea, we will add this to the list. To implement this we would have to do a major revamp of SmarTrans.

39. (Q): We would like the ability to send ad hoc emails to all registrants

(A) We will add this to the list. We understand the challenges when it's a large group of attendees and the issues you could run into with ISP providers blacklisting you. Most events aren't this large and grabbing the list of email addresses from the downloadable report to populate an email is workable, but in the long run it would be a helpful functionality.

Thanks for your suggestion. Unfortunately, the last time I tried to do that, since we have so MANY registrants, my email address got blacklisted and I had to call my ISP to allow me to send ANY email ever again.

(A) For the time being the workaround listed earlier in the transcript is the only way of doing this. To implement this we would have to do a major revamp of SmarTrans.

40. (Q): Would modification include the ability to unregister somebody? Occasionally we reach an attendance limit and I am subsequently informed that somebody cannot attend, so I would like to make that place available to somebody on the waiting list. The only way I can do that currently is to increase the attendance limit, but that would still show the original person as being registered, which is wrong. I am not talking about offering refunds.

(A) We will add this to the list of what we mean by modifying a registration. Registration modification is a complex request and may not be feasible as SmarTrans is written today, but we will look into it.

41. (Q): On the "Events Attendee History" report, is there a way to add a field showing whether or not the attendee is a Club member? If so, perhaps the member # could be included for the purpose of linking tables.

(A) We will add this to the list. This is a support type of request that may fit in if we have a few hours of unforeseen time available.

42. (Q): I am very familiar with HTML, and I would like a specific list of which codes are accepted, not just a few examples. Right now it's trial and error. I try a valid HTML code and it may or may not work (Same thing applies to ASB)

(A) The event description box only allows the following html code:

**Bold:** `<b>text</b>`

*Italics:* `<i>text</i>`
43. (Q): We really need to be able to copy from WORD, which is what we do for our event flyers. I have no HTML expertise. The HTML suggestion was what I received several years ago.

(A): Unfortunately Microsoft Word content, when copied and pasted from the application, introduces quite a bit of odd and unworkable code into Web site text entry interfaces in general. This is not a challenge faced just by our site. You might end up spending more time trying to find and fix issues compared to pasting in the information as unformatted text. The problem code that MS Word introduces not only causes issues for you but also for users in terms of the resulting HTML text.

44. (Q): Can we create an event with no closing date to collect membership dues for our Enterprise Forum group?

(A): We will add this to our list. We would have to think about how this might impact dues renewal reminders, and terms for renewal if there is a no end date option.

45. (Q): Please have SmarTrans separate dues from donation from event. Now when one person pays dues and makes a donation it is on one line. Can that information be spread over two lines, one dealing with dues and the other with donation? It would be a great help.

(A): This is related to the request for membership & membership ticket types. It’s the combination of multiple types of transactions into one transaction that can be teased out in reporting and where money goes. You could add it to the transcript along with the package requests.

46. (Q): I think that the "Register" button in the SmarTrans Registration page can be made a bit more prominent, perhaps through a different color scheme. Other than that, I am quite happy with SmarTrans.

(A): Great - we'll talk with our designer to see if we can tweak it a bit - nice idea.

47. (Q): Auto-validation of membership type. Patrons often get discounted tickets, and regular (or non-members) often accidentally click on the wrong member type, which results in our following up with them.

(A): We agree this would be great, it's on the secondary list of enhancements at present because it doesn't affect as many groups as other enhancements.
48. (Q): Some way of preventing non-alums from registering for events on their own, as our events are intended for alums and their guests.

(A): We would have to remove the option to register w/o logging into the Infinite Connection. We removed it at one point and clubs and other groups immediately asked for it to be put back, which we did.

49. (Q): Automated reports to send out total rsvps on a daily basis, starting a certain number of days before the event date.

(A): It currently sends out the report at 14 days, 5 days, 1 day and on the day of the event. There is concern that it would be overwhelming for the recipients, and one particular number of days would also not work for all groups. You may also always log in at anytime to download the report.

50. (Q): Overall transparency into upcoming enhancement changes and prioritization.

(A): See the release notes page at http://alum.mit.edu/help/ReleaseNotes/ and subscribe to the feed to keep up on not just SmarTrans updates but many online activity & service updates.

51. (Q): A way for people to check status, modify (add or remove guests), or cancel their registration for an event.

(A): It’ll be added to the enhancement consideration list. We’re currently investigating the possibility for Admin to modify the registrant record.

52. (Q): Please add more identifying info to the dues member lookup reports that appear, so we can distinguish between dual listings of the same name and class year--or better yet, clean up your db records so there aren't multiple records. (See Patricia Craig, SM '84.)

(A): As you can see, it is on the list of enhancements. It's not as easy as it seems from a backend perspective, but we are pushing to see if it might be integrated at a future date. We will check to see if perhaps, in the short term, we could add just a middle initial.
53. Q): Please allow use to set more than one "member only" ticketing option.

(A): Right now you could set up as many different member only ticket types as you would like. The particular type would not automatically appear based on your membership type - that would be similar to the request from NY.

54. (Q). Please give us the option of searching for events rather than only scrolling through a long list, or viewing events and their reports by event and publish dates in reverse order

(A): Great idea - staff would love it as well. Consider it added to the list for consideration. Staff would love this as well. SmarTrans has really become a victim of its own success - no one envisioned we'd have as many users and events and memberships in the system and it has grown to include an amount of data that is increasingly hard to parse.

55. (Q): For reunions (like my 20th for class of '89) registration, integrate dues payment history into Infinite Connection accounts so people can access this info. Reunion registration recorded dues payments outside of SmarTrans.

(A) This is the exact kind of thing I'm looking to include in alumni My Account pages, along with giving info, etc. when we work on revamping that in the coming year or so. Our applications should feed information across them more seamlessly.

56. (Q): . Enable administrators to process/enter membership dues payments received like we already do for much more expensive ticketing.

(A): We are investigating this because you may do this for events at present, but we agree that it would be good to have for membership as well. Katy from Colorado has also asked about this.

57. (Q): Adding more filters such as date range search, paged results and/or archiving old events on the event display page.

(A): We will add this to the search for events request - excellent idea. Glad you like the improvements we've made thus far.
59. (Q): If I could make one additional request, it would be for the SmarTrans Dues Report to include a field for the earliest payment date in the member's dues history -- I know this information is available through the "dues history" function for a particular member, but it would be helpful to have that earliest payment date for all members in one table.

(A): We'll add it to the list. Not sure if it is something everyone would be interested in, but we will investigate.

Below are the enhancements and the enhancements to come:

Submitted Enhancements

Add a checkbox on "Create an Event" page that prompts officer to indicate whether they want their event to show on the MITAA Event Calendar.

Auto-renewal for dues.

Include a field in which middle or maiden names may be entered/edited, and show the middle name or initial in ALL alum.mit.edu reports and data views.

Allow the hidden tickets to be hidden from the public but available for officer/admin to register people offline. (For some big events, some special free tickets are created for the internal registrations but it's frustrating that the officers have to hide them and turn them on to register, and then turn them off again.)

Make the Dues history report show the payment info made via both SmarTrans and offline registrations entered in Advance (paid by check). Currently it only displays the info for SmarTrans transactions.

The automatic "none of the above" option is confusing. For meal options, "none" should never be an option.

Pre-populate the affiliation and/or class year after clicking on a looked-up registrant. Provide the look-up option for officers when clicking on "add guest" button.
Streamline registration process to 2 pages or fewer. Press a button to register and then enter all the personal info and payment info on a single screen.

“Actual” attendance report (record No Shows and people who show up at the door)

Allow MITAA administrators to clone various items across groups.

Package dues and membership together as a purchase.

Allow the lapsed members email function to be defined in terms of the time frame of the lapse - range of number of years.

Enhancements to date