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REGISTRATION AT EPAC 2006

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This report details the experience I had managing registration for EPAC 2006. It highlights the areas which worked well as well as those areas which did not work so well. It also attempts to mention all the different tasks that are necessary to do this job and gives some idea of the time and number of people involved.

1. MY INTRODUCTION TO SPMS

Conference registration is one of the key tasks which needs to be carried out by any institute who are organising any of the series of JACoW conferences which are held around the world each year. The task varies in scale from the smaller conferences which may only have a few hundred delegates to PAC which can have up to 1500 delegates. EPAC is one of the larger conferences and it typically has around 800 delegates attending. The task of organising the collection and storage of registration data and payments falls to the registration manager for the conference. The registration manager will also help to organise conference packs for the delegates, and staff a registration and general information desk at the conference.

The EPAC 2006 Local Organising Committee (LOC) did not decide who was going to manage registration until August 2005 so when I was given this job the first thing I had to do was attend a meeting about the SPMS (Scientific Program Management System). SPMS is a database which handles all the contributions to a conference from abstract submission through to publication. It has recently been modified so that it can also collect conference registration data. The registration module was first used at PAC'05 and the purpose of the August 2005 meeting was to review how well it had worked and to develop it further. It also served as an introduction on what it is used for to those present who had not used it before.

I came away from this meeting knowing that I had to work out what I wanted to ask and how I wanted to ask it before even contemplating using the registration module. A few drafts of the registration form were passed around a few key people on the LOC and Matt Arena, the author of SPMS, before the final set of questions (and where relevant, possible answers) were decided upon. All I had to do now is make the registration form in the SPMS registration module!

To a new user, the registration module can seem a little daunting. This is mainly because there are no instructions and working out how to use it can take a while. The issue of there being no instructions is being addressed and hopefully future users will not encounter this problem. However, even with no instructions you learn what is needed eventually and I did this with much guidance from Matt Arena.

Once the form had been set up it needed to be tested by as wide a range of people as possible. Make sure you ask people not only to try it with sensible answers, but with any answer that any user could possibly enter. This approach should ensure that any problems with the form are resolved before registration goes live. This testing was carried out and a few changes to the questions were made. No errors with the database were found but the wording of the questions and additional text was improved. Fake payment data was also entered so that payment processing could also be tested.

The form was now ready to go live. The trial data was deleted and I was ready to receive my first registration. We eventually went live in the first week of January 2006. This was about a week before the abstract submission deadline. It is worth having registration available by the abstract deadline since a few people do like to register at this stage. People did start to register almost immediately although at this stage it was only at the rate of about 2 or 3 people per day.

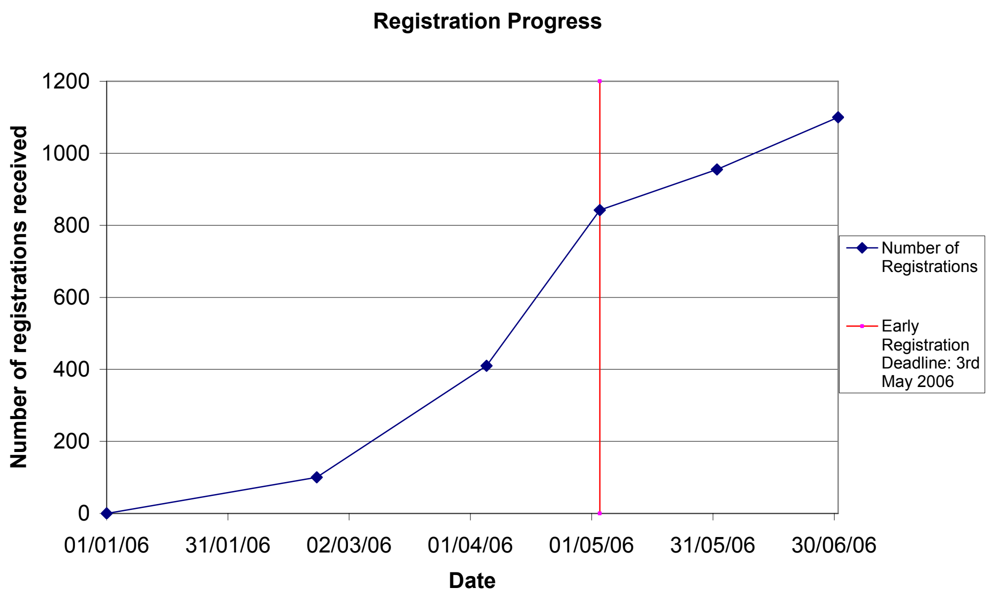
2. DEALING WITH REGISTRATIONS ONLINE

Most people manage to register without any problems and do not require any intervention from the registration manager. However, a few people do have problems and will contact the registration manager. A few requests were received to register in ways other then via the dedicated web page. All of these people were told that this was the only way to register and none of them failed to register as a result of being told this. There are usually a few other questions that come up which are usually just asking for clarification about how to register.

Until about 1 month before the early registration deadline the rate at which people registered was sufficiently slow that keeping up with them all was not problematic. Payments were being received all along. The RAL cash office did not always manage to keep up with recording the bank transfers and processing the credit cards as well as would have been liked so questions were asked by delegates about whether their payment had been received and all I could do was apologise for the delay. I understand an automated system like PayPal will be used for future conferences. This is strongly recommended by me because of the trouble not having it caused me. By using PayPal, delegates will know instantly that their payment has been received if they have paid by credit card or bank transfer. Reminder e-mails are sent to delegates automatically in the first instance if they have not paid. However, subsequent reminders have to be sent manually. In the early days the number of excuses received for not paying was large. Although most of them were acceptable you do have to continue to remind people until they pay.

By 1 month before the early registration deadline we had received just over 400 registrations. Registration then continued at a rate of about 100 per week up to the deadline. About 100 registrations were received on deadline day. At this point we had about 900 delegates. This was already over the number we had assumed. There were a lot of registrations received with outstanding payments on deadline day (which was 3rd May 2006). A grace period of 1 week was allowed for people who had registered by the deadline to pay. In practice, this was not sufficient because of our delays in processing, but if PayPal is used for all payment types this will be more than adequate.

Registrations continued at a steady rate after the early deadline and over 1100 people had registered for the conference by the time it started. There were some additional registrations at the conference. However, the exact numbers of these is difficult to judge since I suspect that some people never filled in the online registration form.



3. OTHER PRE CONFERENCE PREPARATIONS

By the time of the early registration deadline attention needs to be turned to ensuring all the things which the delegate will receive are in hand or will be in enough time to finish preparations before the conference.

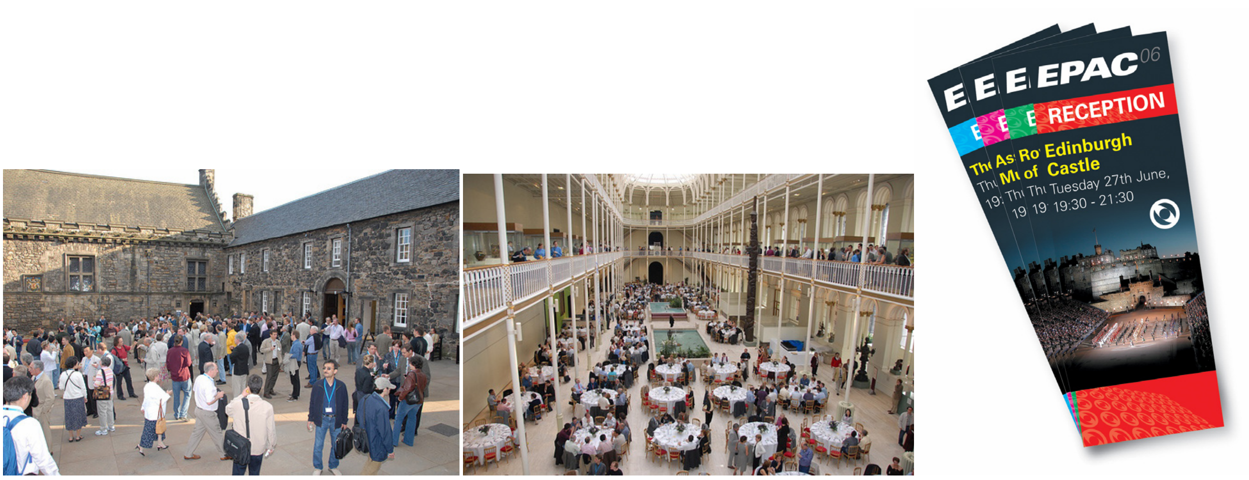
One of the most time consuming items are the delegate bags. These will typically contain all the fliers which the industrial exhibitors want to give to the delegates along with a pen and paper (usually sponsored) and a conference program. There may be any other items which you wish to give to your delegates (for example, we provided everyone with an umbrella). Firstly, ensuring all items are received in time can be problematic. We had given our industrial exhibitors a deadline of 3 weeks before the conference to send their fliers to us. Most of the industrial exhibitors failed to do this and a lot of chasing up was needed to get everything. The bag packing itself took a team of us about three days to do. There were 1200 bags to pack and an average of about 4 people doing the job at any one time.

The delegates will also need a pack which contains the paperwork relating to their attendance at the conference. We provided each delegate with an envelope which contained their receipt, credit card receipt (if applicable), badge and tickets to conference reception and banquet. These envelopes took a similar amount of time and effort to pack to as the bags. They had fewer things in them but they were person specific so you had to think much harder about what you were putting in them. Each of the items took a significant amount of time to prepare.

- The receipts took over two hours to print from SPMS. In the current version of SPMS you can only print all the receipts together – you cannot select a specific person's receipt to print.
- The badges were printed by our reprographic department. We colour coded our badges according to type of person: delegate, LOC, OC, staff, accompanying person, industrial exhibitor.
- Printing and allocating tickets is relatively easy so long as you are only dealing with one venue. We had three for our banquet! I recommend only printing the number of tickets which can actually be issued. That way, counting how many have been issued is easy (don't forget to include all the extra tickets people have purchased).

Once the envelope had been filled it was marked according to whether payment had been received or not. This way, we knew immediately whether we had to ask the delegate for payment at the conference or not.

Of course, registrations were continuing to come in all the time for the conference so the number of envelopes and contents were continually increasing. You will have to keep making new ones right up until the last minute (and even at the conference).



The conference reception (left), banquet (centre) and the tickets for these events (right)

4. THE REGISTRATION DESK AT THE CONFERENCE

The beginning of the conference is the moment of truth when you discover what you have done right and what you have done wrong. I think we largely got it right but there are always little things you would change.

Conference registration was supposed to be open on the Sunday afternoon prior to the start of the conference for two hours. In practice, people turned up outside of these hours. We had as many bags as we could fit behind the desk, all of the envelopes and a couple of computers to help us out. There was a team of eight of us doing this job on this day and the next morning at the start of the conference. These people were mainly CCLRC staff but we also had a representative from both a past and future conference. Although the queues were never very long I think we could have used a few more people than we had behind the desk on those days. I would recommend that you have one person behind the desk for every one hundred delegates you are expecting. Most of these people only need to be able to ask someone's name and then find their envelope and give them a bag. The manager has to sort out the problems!

There were a significant number of people who arrived at the conference and had not pre-registered. These people were sent to the computer café and asked to fill in the registration form before returning to the desk. These people then had to have a badge made up for them and tickets to the reception and banquet issued at the desk by the person dealing with them. These people are the ones who caused the queues! It might be worth thinking about dealing with such people in a separate area so that the majority of people who have registered and just want to pick up their packs don't suffer.

I had two of my registration staff dedicated to taking payments during these registration sessions. These were mainly cash payments although a few credit card payments were also necessary in this way. Delegates were encouraged to enter their credit card details into SPMS wherever possible. The only problems with cash payments are the security of the money (we had a safe to store any significant quantities in) and the fact that someone has to go to the bank every day to pay the money in. There were quite a few people who were recorded as unpaid who said that they had paid when they arrived. These people were asked to provide us with proof of payment at a later time during the conference. No-one was denied entry due to lack of payment. The overriding principle at these conferences is not to turn anyone away.

The registration manager is the person who the registration staff turn to whenever they have a problem. Whatever you do, do not assign yourself a specific task – it will not get done! The problems mainly related to our information about a delegate not being consistent with what they thought they had given us. This mainly related to payment although numbers of tickets ordered were also an issue. All of these problems were resolved satisfactorily. In between times (these were short) I made sure that supplies of everything kept flowing. Overall these early registration sessions are incredibly busy. The ability to multitask (or at least think about several things at once) and to stay calm in a stressful situation is essential for the registration manager. Having one person doing this job so there is a single point of contact is advisable although it could possibly be done by more than one person so long as they both know what is going on at all times. Overall, I do not think more than one person is required in this role so long as there are adequate staff on the desk.

After lunch on the first day of the conference things become much quieter. By this time there were only four registration staff (including myself) and we were feeling a lot more relaxed. There are a few people who register after this time but not many. The registration desk becomes a general enquiry desk (so make sure you all know everything about the conference!) and the task of making sure everyone's registration really is complete begins.

Activity at the conference registration desk at the Sunday afternoon conference registration session

5. POST CONFERENCE WORK

There is a significant amount of work to be carried out after the conference. This involves dealing with people who did not turn up and people who still owe money.

Of the people who registered for EPAC a significant number did not attend the conference. About ten people informed me of this in advance of the conference. However, there were about 70 unclaimed envelopes at the conference as well. Some of these people had paid for the conference and others had not. Those who had paid were not entitled to a refund since they had not informed me in advance (none of these people actually asked for a refund). Those who hadn't paid were not chased for payment – they were just deleted from the list of delegates. The final number of delegates who we believe attended the conference was 1068.

About 50 people had some outstanding money at the end of the conference. Some of these were conference registration fees but quite a lot were payments for extra tickets which had never been received. Further reminder e-mails were sent for these people to pay. Some of these people's payments were found within large bank transfers which had not been identified before. Identifying bank transfers is one of the biggest problems with this payment type. Ensuring that everyone is recorded as having paid when a large transfer is made can be problematic, especially since the people concerned have not always registered! There are always a few transfers with no name on them which can be difficult to identify as well. Eventually all these people who owed money were invoiced by CCLRC for what they owed.

Refunds were made to the delegates who had informed me in advance that they would not be attending. These were processed as quickly as the delegate provided the information required to make the refund.

Post conference work continues for a few months after the conference although the amount of it diminishes with time. My experience is that over three months on from the conference I am still doing small amounts of work although there are not many more loose ends to tie up now!

6. STATISTICS

Total number of delegates who attended the conference – 1068
Total number of accompanying people – 183
Number of banquet tickets sold – 1250
Revenue paid by cash - ~ 2%
Revenue paid by bank transfer - ~ 49%
Revenue paid by credit card - ~ 49%