

**Northwestern University  
Event Registration Online**

# Northwestern



**Program Information and Application  
As of February 16, 2015**

*Please note that any references to the Depository Services in this document  
have been replaced with e-Commerce Operations.*

## OVERVIEW

Northwestern University departments host hundreds of events every year. For larger events that would like to feature online registration and accept online credit card payments, Northwestern has established a relationship with Certain Software, a SaaS (Software as a Service) provider, and developers of Certain Meetings. The relationship allows the University to provide departments with greatly discounted access to the Certain Meetings online registration software application, reduced merchant account setup costs, and minimized PCI Compliance requirements including participating in a credit card security awareness training annually upon the request of Treasury Operations and per the most current PCIDSS requirements.

### Who can participate?

Any Northwestern department that will be hosting an event requiring online registration and online credit card payment capabilities can participate in the program.

### Benefits

Certain Meetings is a comprehensive online event registration service which allows event organizers great flexibility in every step of the event registration process. Certain Meetings can be used to manage any size event. Simple events can get up and running relatively quickly while larger more involved events require more time – but can create robust one stop registration sites using advanced features such as housing, travel, and program management.

#### **Features:**

- Attendee badge creation
  - Dynamic attendee email lists
  - Flexible reporting
  - Program management, including session attendance limits, wait lists, and session pricing
  - Tiered pricing, early bird, standard, and late registration
- And much more!

A more complete listing of all Certain Meetings features is available at Certain's website:

<https://www.certain.com/products/online-event-registration/>

### Department Responsibilities

Departments are responsible for:

1. Setting up events
2. Building and maintaining event sites and event registration forms
3. Ensuring that all components of an event are functioning properly prior to requesting to go live
4. Maintaining registrations (cancellations, refunds, adjustments, etc.)

Please see the section below on Event Site Setup, Development and Go-Live.

As a member of the Northwestern University Event Registration Online program, departments do not need to retain customer credit card information. **Potential event attendees are able to pay online directly at the event's registration page.** Any manual registrations (registrations paid via credit card, but received via phone/fax/mail) that are processed through the NU/Certain registration system must be entered through a **PCI compliant workstation or stand-alone credit card terminal (SEE DETAILED REQUIREMENTS NEXT PAGE)**. Any credit card information received through the mail or other method must be processed at once, and then destroyed via cross-cut shredder IMMEDIATELY AFTER BANK AUTHORIZATION IS RECEIVED. Refunds can be processed on the Certain Registration system without access to full credit card numbers.

**Please note that University Relations reserves the right to review the content of all NU web and registration pages at any time.**

## Payment Card Industry Data Security Standards

Certain Meetings is a PCI DSS compliant application provided by a PCI compliant vendor. Departments do not need to take any additional steps to maintain compliance as long as the department does not process any manual transactions via phone, fax, mail, or onsite over the Internet. **However, any staff involved with the use of Certain Meetings must participate in a credit card security awareness training annually or upon request by Treasury Operations per the PCIDSS requirements.**

**Online credit card entry through a workstation is *strongly discouraged*.** E-Commerce Operations can provide credit card swipe terminals for rent in conjunction with your event if you must accept card payments during the event itself. These terminals allow manual entry without the substantial configuration changes required for workstation entry.

**If a department believes that transactions must be processed online manually through any resource connected to NU's networks, the department MUST work with their internal IT team, NU IT Security and Compliance, and e-Commerce Operations to secure and then subsequently certify any workstation and associated network environments used for CHD (Cardholder Data) entry; this is at the DEPARTMENT'S EXPENSE both in the initial securing and certification and ongoing maintenance. These steps can add a great deal of additional time and cost to an event so must be considered carefully.**

***Samples of some workstation certification requirements are listed (but not limited to):***

- Firewall with network address translation (NAT)
- Intrusion detection/prevention system installed and monitored
- Audit logs turned on and monitored
- Unnecessary services disabled
- Anti-Virus software installed
- Individual user login
- Monthly vulnerability scans

**A COMPLETE SUMMARY OF ALL PCI DSS REQUIREMENTS FOR IT & NETWORK SECURITY IS AVAILABLE IN THE FULL PCI DSS STANDARD, LINKED FROM OUR WEB, BOTTOM OF PAGE IN THE PCI DSS ADDITIONAL RESOURCES SECTION:**

<http://www.northwestern.edu/controller/treasury-operations/e-commerce-operations/credit-card-security-pci-dss.html>

## Certain Events Costs

Setup Fee *	\$200.00	per event
Transaction Fee **	\$3.00 + 2.40%	per registration

### *Optional Costs:*

Event building ***	Varies depending on scope	
Swipe terminal rental	\$55.00	per month (1 month minimum)
On-Demand Webinars/Training ****	Free	

\* Setup fee includes Payment Card Industry Data Security Standard (PCI DSS) audit and compliance fees, PayPal Payflow account fees and Certain Software application fees.

\*\* Transaction fees are passed through from Certain Meetings and First Data Merchant Services.

\*\*\* Certain Meetings provides consulting services for custom event building, website development, and event project management. Costs vary depending on the requirements. For more information, please send an email to [EventReg@northwestern.edu](mailto:EventReg@northwestern.edu) with the subject line: *Custom Event Building*.

\*\*\*\* On-Demand Training sessions (WebEx online webinars) are offered by Certain Meetings. Departments and webmasters may attend as many of these online training sessions as they like for free, although Certain also offers custom training sessions on-site or online, but fees would apply/vary depending on the training. For more information, please send an email to [EventReg@northwestern.edu](mailto:EventReg@northwestern.edu) with the subject line: *Training*.

**Note:** Departments may host "free" events using this service or accept payment by cash or check; however, setup fee and \$3 per registration fee will still be charged to the department.

## Customer Notification

Since the Northwestern University online event registration site is hosted by an external (3<sup>rd</sup> party) vendor, the customer must be notified that they will leave Northwestern hosted web pages when they enter the registration system. All credit card charges for this service will appear as “**NU Event Registration**” on customer statements.

## Balancing and Reconciliation Procedures

Each day the department receives one or more successful registration transaction(s), Depository Services will make a deposit totaling the full amount received for all transactions completed for the department on the previous day via a CRT to the chart string that was used when the event was setup.

Departments will be notified of chargebacks and rejected transactions that occur after successful registration transactions. In the event of charge disputes, it is the responsibility of the department's event owners to obtain any substantiating documentation from cardholders in order to resolve disputes and prevent chargebacks. Depository Services will fax and/or email dispute and chargeback notifications to the department's event owners when received. If a dispute is not resolved and a chargeback is substantiated, the chargeback will be deducted from the department's account when received.

On a monthly basis, transaction fees totaling 2.4% of the total monthly revenue and \$3 per transaction registration fee will be deducted from the specified departmental account. The setup fee will be deducted during the first month of operation (the month that the event goes live).

Each department will be able to retrieve transaction reports via their event site's account. The department will verify that the total of all deposits and deductions to their account for the month compiled and reported by Depository Services match the expected deposits and deductions based on Certain Meeting's reports. If there is a discrepancy, the department will notify Depository Services immediately.

Cash and check payments (if accepted by the event) will need to be deposited at Depository Services and a CRT would need to be processed by the department. Although transactions that are paid by cash or check will not incur the 2.4% transaction charge, the \$3 per registration fee will apply.

## Online Event Site Application Process

Collection of funds through any channel, including the Northwestern Event Registration system, requires approval from the dean/director of budget and finance for the school to which the collecting department belongs.

To participate, simply fill out one of the applications that follow below, have the dean/director of finance for your school or department approve your request and return the original signed form to NU e-Commerce Operations, 619 Clark St, Evanston 60208, MC 1130. You can also fax the completed application form to (847) 491-4988 or email a copy of to [EventReg@northwestern.edu](mailto:EventReg@northwestern.edu) with the subject line *New Event Application*.

## User Setup and Configuration

If your department has not used the system before, Treasury Operations will create a new department on Certain Meetings when your application has been received and approved. By default, the technical and business contacts listed on the request form will be established as the department's primary users on the system, although an unlimited number of additional users may be added to each department's account. To request for additional users, the business contact should send the full names and email addresses of the new users and desired system roles for each user to [EventReg@northwestern.edu](mailto:EventReg@northwestern.edu) with the subject line *New User Request*.

The roles that are available are:

**Event Builder** – User has full access to system. User can create and modify all aspects of events, reports, and registrations. Users can add fees or process refunds for registrants.

**Registration Support** – User can process registrations, add fees or apply refunds to registrations. Users can run reports created by Event Builders. Users *cannot* modify any element (pricing, dates, layout, reports, etc) of the event.

**Reports Only** – Users can only run reports created by Event Builders. Users cannot modify reports, registrations, or any element of the event.

## **Event Site Setup, Development and Go-Live**

Setting up an event and creating an event site requires some knowledge of content management systems. More advanced event sites can be enhanced further with some basic HTML knowledge. A number of departments have collaborated with their IT staff or web communications/marketing teams in order to build robust event sites that require more advanced website building skills.

As event sites are being developed, they remain in testing mode until they are switched live. Prior to going live, all events need to be reviewed by Treasury Operations staff in order to ensure that all the necessary event details are in place such as event code, payment methods, charts strings, and online payment security options, in order to accurately book revenues and expenses.

## **Support Options**

### **Event Registrations/Payments/Issuing Refunds**

Depository Services and e-Commerce Operations provide guidance on handling matters that impact the flow of money to and from Certain Meetings software. Typical issues revolve around recording non-credit card payments such as checks/cash, issuing refunds, adjusting charges, or how to apply cancellation fees.

### **Event Development and Maintenance**

Departments and schools are responsible for building and maintaining event sites. Depository Services and e-Commerce Operations do not support those activities due to resource constraints; however, because the university pays an annual support package to Certain Meetings, event builders are encouraged to contact Certain Support at (888) 237-8246 for responses to support questions of technical nature.

## **For More Information**

To schedule a demonstration, discuss program options or for any additional information, please contact **John Ferrer at 847-491-5344**, or send an email to [EventReg@northwestern.edu](mailto:EventReg@northwestern.edu) with the subject line *Certain Meetings Information Request* along with the information that you need or the questions that you would like answered.



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# Online Event Registration Site

## Single Event Request Form

Please complete the following to request an online event registration site:

Event Name:		Date of Application:	
Date registration Opens:	Date registration closes:	Dates of event (if different):	
Estimated Attendance		Estimated Revenue	
Dept. Name	Dept. Phone #	Dept. Fax #	
Dept. Building / Street	Dept. City, IL	ZIP Code	Mail Code
Business Contact	E-mail Address		
Technical Contact	E-mail Address		
Send statements to, if different than above:			
Billing Name:	Billing Phone #	Billing Fax #	
Billing Street	Billing City, IL	ZIP Code	Mail Code
Chart string to charge for setup and transaction fees: Fund – DeptID – Project – Activity – Account (Usually 78680)			
Chart string to credit for payments: Fund – DeptID – Project – Activity – Account			
Additional services requested: Event Building	Performed upon request by Certain or their affiliate and charged by the hour; Notify us of the need to receive a quote from Certain by placing an 'x' here:		
Individual Training	Onsite training offered by Certain charged by the hour plus any travel expenses or webinar based training charged based on number of participants; Notify us of the need to receive a quote from Certain by placing an 'x' here:		

The following are terms and conditions which must be agreed to in order to participate in the event registration online program:

Department agrees that it will not store any credit card numbers electronically. Department further agrees that if credit card numbers are received through any means, they must be securely stored until processed through a PCI DSS compliant workstation or through a standalone credit card terminal.

By signing this form you agree that you have read the NU Event Registration Online documentation and will abide by the requirements for participation in the program.

Requested by: Printed Name _____  Title _____  Signature _____  Date _____	Financial Director or Dean Approval: Printed Name _____  Title _____  Signature _____  Date _____
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# Online Event Registration Site

## Multiple Event Request Form

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Please complete the following to request an online event registration site:

Dept. Name:		Dept. Phone #:		Date of Application:	
Dept. Building / Street:		Dept. Fax #:			
Business Contact:		Dept. City:		, IL ZIP Code:	
Technical Contact:		E-mail Address:		Mail Code:	
		E-mail Address:			

Send statements to, if different than above:

Billing Name:		Billing Phone #:		Billing Fax #:	
Billing Street:		Billing City:		, IL ZIP Code: Mail Code:	

Additional services requested:

Event Building	Performed upon request by Certain or their affiliate and charged by the hour; Notify us of the need to receive a quote from Certain by placing an 'x' here:
Individual Training	Onsite training offered by Certain charged by the hour plus any travel expenses or webinar based training charged based on number of participants; Notify us of the need to receive a quote from Certain by placing an 'x' here:
Chart string to charge for additional services: Fund – DeptID –Project – Activity – Account (Usually 78680)	

List all events, attach additional pages as needed.

Event Name	Event Dates	Registration Start Date	Registration End Date	Estimated Attendance	Estimated Revenue	CUFS Account to Charge fund-area-org-object (usually 8680)	CUFS Account to Credit (fund-area-org-revenue)

The following are terms and conditions which must be agreed to in order to participate in the event registration online program:

Department agrees that it will not store any credit card numbers electronically. Department further agrees that if credit card numbers are received through any means, they must be securely stored until processed through a PCI DSS compliant workstation or through a standalone credit card terminal. By signing this form you agree that you have read the NU Event Registration Online documentation and will abide by the requirements for participation in the program.

Requested by: Printed Name _____  Title _____  Signature _____  Date _____	Financial Director or Dean Approval: Printed Name _____  Title _____  Signature _____  Date _____
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