



ACEDS
ASSOCIATION OF CERTIFIED
E-DISCOVERY SPECIALISTS

CHAPTER BOARD RESOURCES GUIDE

ASSOCIATION OF CERTIFIED E-DISCOVERY SPECIALISTS

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Your Chapter Dashboard

Each chapter has a unique dashboard within www.aceds.org that is only accessible to that specific chapter's current board members. Upon each login, you should automatically be redirected to your chapter dashboard. On this page, you can view your chapter finances, view/export your member list, and retrieve your chapter account credentials.



CERTIFICATION ▾ TRAINING ▾ COMMUNITY ▾ PARTNERS ▾ BLOG ABOUT ▾

Chapter Board Resources

Member List



Documentation



Eventbrite Events

Your chapter has its own Eventbrite account to create and manage your events. The main advantages of the provided account are:

- A template event is already provided, and
- All your published events will automatically post to both your chapter website and the ACEDS national event calendar.

Before Creating an Event

Prior to creating an event, be sure to have most of the event details available including:

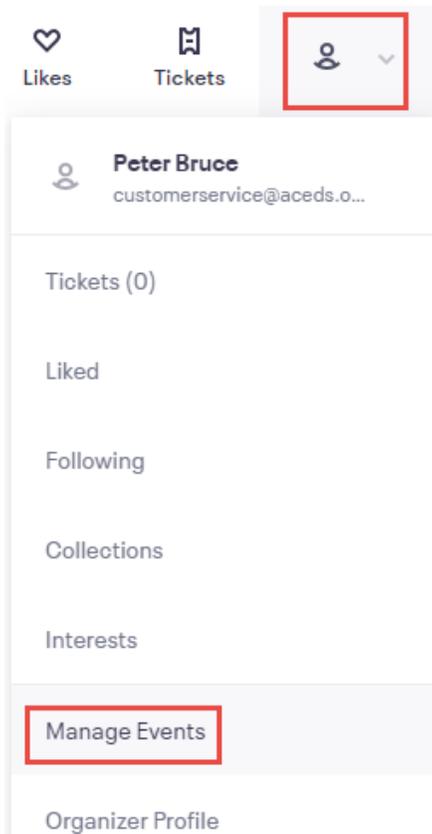
- Speaker(s) bios and headshots
- Title (no more than 70 characters; for Google searches keep to 60 characters)
- Description
- Online event URL (if applicable)
- Sponsors

Important note: If you need to use ACEDS National's Zoom or ON24 platform, please reach out to chapters@aceds.org to ensure the date and time of your event is available prior to creating and publishing your event in Eventbrite.

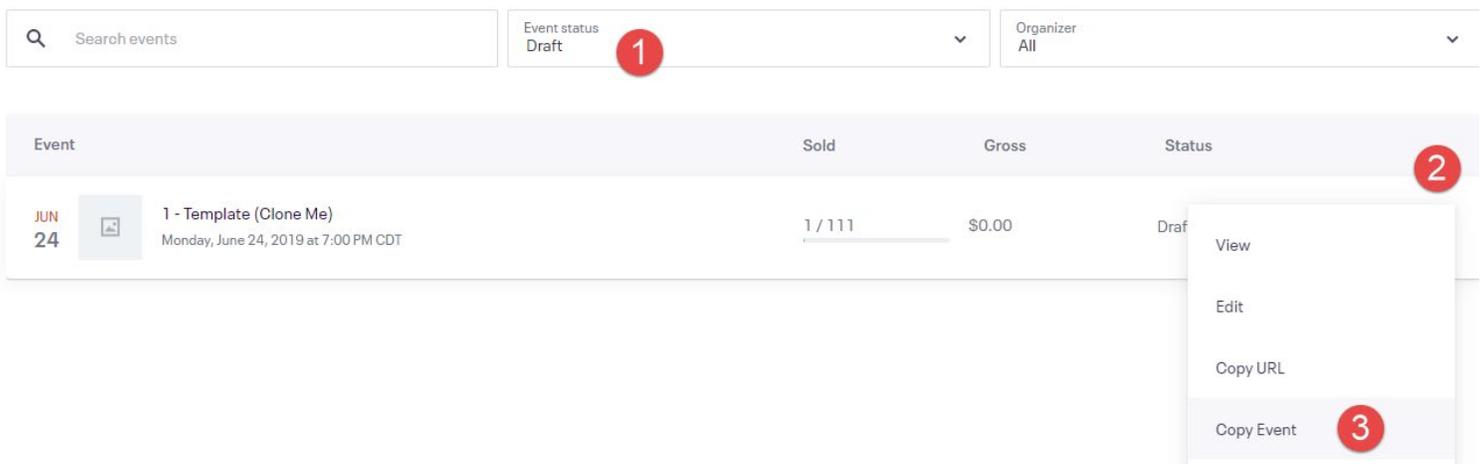
Creating an Event

Copy from Template

- 1) Log in to Eventbrite using the credentials above
- 2) Select “Manage Events” from the top right corner menu:



- 3) Select “Draft” status to view the template event to clone. Click on the ellipses to the right of the template and select “Copy Event”



- 4) Set the title, summary, and date/time for the event and click “copy event” to finalize the copy. (time zone is CT by default – customizable in step 5)

Configuration

Now you will configure some additional settings. The instructions below go from top to bottom down the left-hand menu.

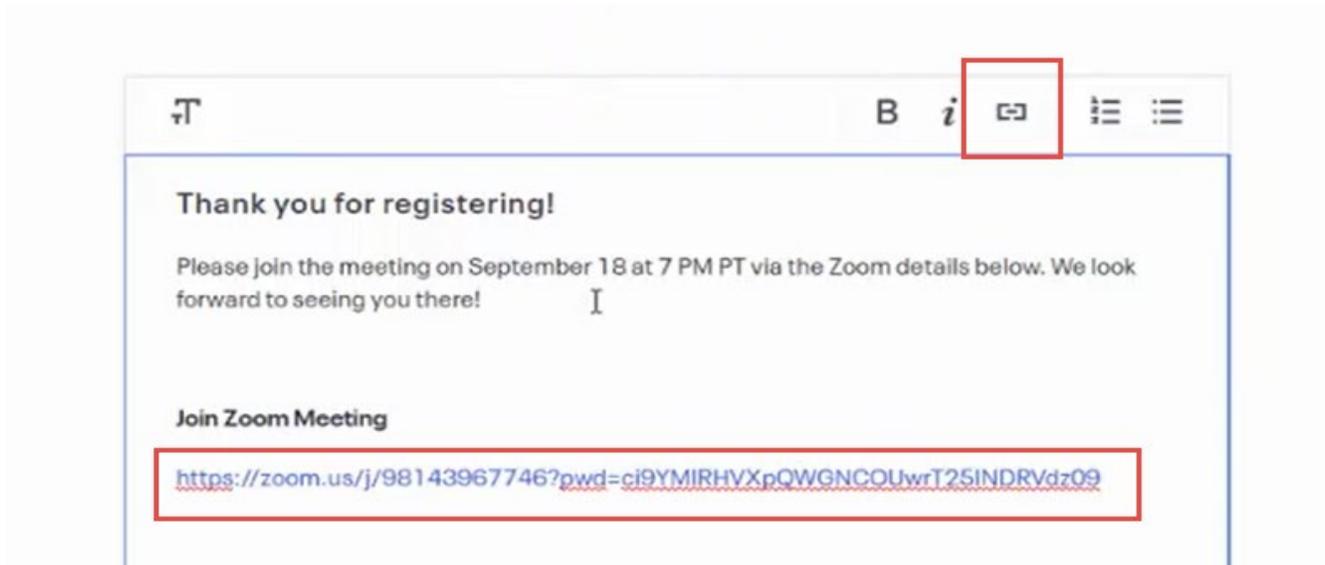
1) Basic Information

- a. Event Title
- b. Location – Venue, Online Event, or To be announced
 - i. Venue: You can search for and set the venue/address to display on the event
 - ii. Online Event: This will allow you to set up a special “online event page” if the webinar link is to be provided post-registration. If you have not already done so, contact chapters@aceds.org to schedule your meeting and ensure an ACEDS meeting resource (On24, Zoom) is available. To add your webinar information:

1. Click “Online Event Page” and then “Add Text”
2. Paste in the provided link and information. Be sure to hyperlink the event link so that registrants can click it. Add your event confirmation message above the text. More about online events:

https://www.eventbrite.com/support/articles/en_US/Multi_Group_How_To/how-to-set-up-an-online-only-event?lg=en_US

The screenshot displays the Eventbrite configuration interface. On the left, a vertical menu lists various settings: Basic Info, Details, Online Event Page (highlighted with a red box and a red circle containing the number 1), Tickets, Dashboard, Order Options, Invite & Promote, Analyze, and Manage Attendees. The main content area is divided into two sections. The first section, 'Live video content', includes a description and five options: Google Meet, Vimeo Live, YouTube Live, Webinar, and Livestream. The second section, 'Text, media & links', includes a description and four options: Add text (highlighted with a red box and a red circle containing the number 2), Add image, Add video, and Add link.



- iii. To be announced – you can add the venue information later
- c. Date/Time – Click advanced settings to change the time zone

2) Details

- a. Main Event Image – Add a logo/image for the event
- b. Summary - A short description of the event
- c. Description – A longer format description that can hold more details, images, etc.

3) **Tickets** – You are allowed one type of ticket on our plan (free tickets). If we need to host an event with multiple ticket types or with paid tickets, please contact chapters@aceds.org. Ticket currency has to be set on an event by event basis, and instructions on how to change the currency can be [found here](#). Tickets must have a quantity, but you can set it as high as is needed (if hosting via ACEDS National Zoom account, webinars need to be capped at 500 and meetings need to be capped at 300). If there is limited capacity at the venue, be sure to set the quantity to that cap.

- a. Name: Name that will show on the event page (we use the name general admission)
- b. Quantity: Total tickets available
- c. Start Date: Date tickets are available to purchase
- d. Sales End: Defaults to the date/time of the event. For virtual events, we recommend extending this to when the event ends.
- e. Advanced Settings:
 - i. Description
 - ii. Visibility: must be visible for users to obtain the ticket on the event page
 - iii. Tickets per order: minimum and maximum quantity a user can reserve

iv. Sales channel: leave as everywhere

- 4) **Dashboard** – Gives you an overview of the event and where you can get the event URL if you are sharing it via other platforms.
- 5) **Order Options** – This is where you can customize the order experience
 - a. Order Form – **This is very important. Do not remove or modify the fields that are pre-selected.** If you need to add additional fields, that is ok to do.
 - b. Order confirmation – Customize the message attendees will receive after registering and the email confirmation they will receive. If you are hosting a virtual event, it is a good idea to post your event link within this message.
 - c. Event Type & Language – Leave as Registration/English unless the event will have physical tickets or be in another language
 - d. Waitlist Settings – If the event has a maximum capacity, you can use a waiting list to capture information from people who would like to attend.
 - e. Manage Waitlist – When you select a user and click “release tickets” it will register them for the event.
- 6) **Invite & Promote** – This is not a section that we will use widely, but you can create custom tracking links in this section. You can also create tracking links by taking your event link and appending ?aff= to the end with your tracking code after the equals sign eg) ?aff=affiliate1, ?aff=newsletter, etc.
- 7) **Manage Attendees** – Here you can view/export/manage registrants.
 - a. Orders – View all registration orders
 - b. Add attendees – Manually register someone for the event (we do not suggest doing this as registrants must acknowledge the privacy policy at the end of the registration form)
 - c. Emails to Attendees – Send an email to all registrants
 - d. Attendee List – Export the list of registrants (**Just a reminder that lists are for ACEDS business purposes only and should not be shared or used for personal or other business purposes. If you have questions, please contact chapters@aceds.org**)
 - e. Guest Lists – Add lists of attendees without impacting ticket quantities (speakers, etc.)
 - f. Name Badges – Creates printable name badges
(https://www.eventbrite.com/support/articles/en_US/How_To/how-to-print-attendee-name-badges?lg=en_US)

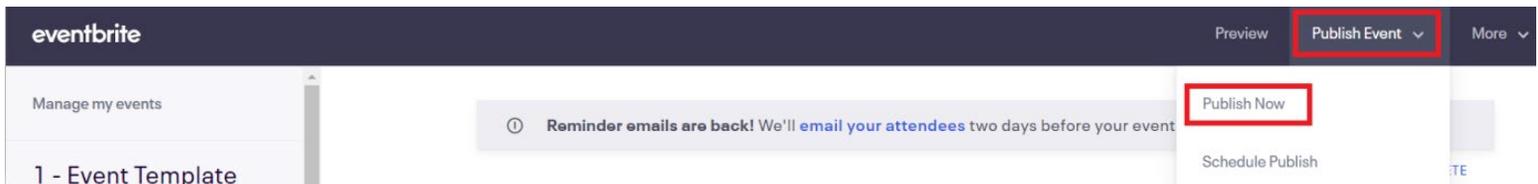
- g. Check-in – Can be used at an event to log who actually attended (we also check-in attendees during virtual events)

Desktop: https://www.eventbrite.com/support/articles/en_US/How_To/how-to-use-a-laptop-to-check-in-attendees-at-your-event?lg=en_US

iOS App: https://www.eventbrite.com/support/articles/en_US/How_To/how-to-check-in-attendees-at-the-event-with-eventbrite-organizer?lg=en_US

Publishing Your Event

- 1) Once you are ready to publish, click on “Publish Event” located at the top of the event page and click “Publish Now.” **Please note that when published, the event will automatically post to ACEDS.org and your chapter website. Do not publish the event until you are ready for it to appear for others to see it.**



- 2) The event is now live on Eventbrite. It will automatically post to ACEDS.org under “Live and Virtual Events” and your chapter website within one hour. If your event has not appeared within an hour or two, or if you don’t want it to appear on the website calendars, please contact chapters@aceds.org for assistance.

Updating Events

You may update your event at any time by logging into your Eventbrite account, selecting “manage events,” and locating the event within the published events list. Any changes made to the event will update on ACEDS.org and your chapter website within one hour. If you delete your event, it will disappear from those sites within an hour.

Pulling Registrant & Attendee Reports

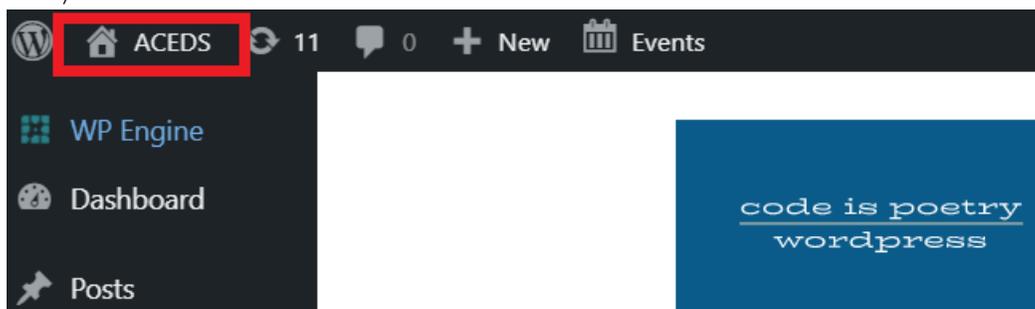
1. Log into Eventbrite and click on the event
2. To pull the report, click on “Attendee List” listed under “Manage Attendees” and then click on “Full Attendee Report”

3. This will take you to the Attendee Summary page where you will click on “Excel” to download the full report
4. In the spreadsheet, you will be able to determine who has registered (Attending) and who attended (Checked in). Live attendees will not populate unless manually checked-in as described in number 7 of the Configuration section above.
5. Please note that these lists are for ACEDS business purposes only and should not be shared or used for personal or other business purposes. If you have any questions, please contact chapters@aceds.org.

Chapter Website Administration

Your chapter website includes a board page that can be customized with each board members photo, bio, and contact information. This guide will show you how to update your board listings. If you would like updates made to any other page within your site, please contact chapters@aceds.org to coordinate those changes.

- 1) Log in to your website using this URL with your chapter’s name in place of CHAPTER:
<https://CHAPTER.aceds.org/wp-login.php>
- 2) Once you have logged into your chapter account, click on “ACEDS” located on the top left corner of the page – this will direct you to your chapter’s homepage where you will be able to edit your board of directors



- 3) Click on “Board” located at the top of your homepage

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[HOME](#) [MEMBERSHIP](#) [BOARD](#) [EVENTS](#) [CONTACT US](#)

- 4) Once you are on the Chapter Board page, click on “Beaver Builder” located at the top of the page

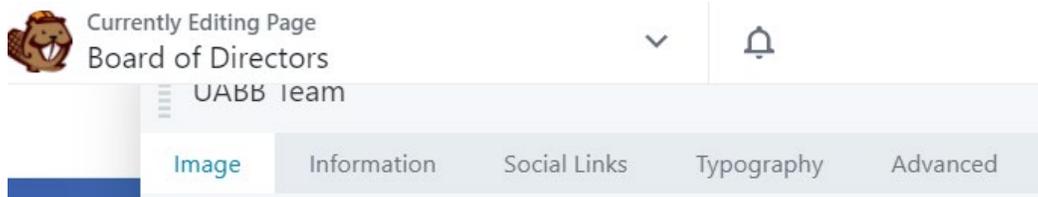
Visit [ACEDS.org](https://www.aceds.org)

5) Once the editor loads, hover over an item and you will be able to do the following



- Click and hold the four arrows to drag and drop the element within the page
- Click on the wrench to edit the item. (more information below)
- Click the two sheets to duplicate the item. You can duplicate individual items, or you can duplicate entire rows or sections.
- The two panels side by side are for editing columns. You should not need to use this option.
- Click the X button to delete the item. If you delete a row or container, it will delete all of the items within it as well.

6) Editing Items (Wrench Icon)



- Image: Change the image shown in the item by clicking edit or remove.
 - When you click edit, the site's media library will open. You can select an already uploaded image or upload one of your own.
 - Do not change the style or size settings
 - Information: Use the "Member Information" section to add the board member's name, title, and bio. Do not edit the other sections below.
 - Social Links: You can add links to email addressed, Twitter, LinkedIn, etc. here. When you edit an item, you can change the image and the link. Please note that for emails, the link should be mailto: followed by the email. Ex) mailto:chapters@aceds.org
 - Typography & Advanced: Do not modify these sections.
 - Click "save" to close the element and save your changes.
- 7) When you are finished editing, click on the blue "Done" button in the top right corner of the site. Subsequently, select "Publish" to make your changes live. Your work will not appear on the site until it is published.