



Poly Speed Dating Administrator Manual

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For SF PSD's *DateWrangler* System

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Welcome to the wonderful world of Poly Speed Dating (PSD)! This document tells you how to set up and run a Poly Speed Dating event.

This manual is a rough draft. The system is continually evolving, and so sometimes there are new ways of doing things that are better or more effective than those listed in this document. You should always be ready to explore the system, and figure things out. It is unlikely that you can do something catastrophic. Although not impossible!

We hope to flesh out this document, and therefore any comments as to errors or omissions are very much appreciated.

Table of Contents

1	What You Need To Run PSD in Your Locale.....	4
1.1	Skills and Things You Need	8
1.2	Recruitment and Registration.....	8
1.3	The Computer Stuff.....	9
2	Cost and Location	11
2.1	Thoughts on Locations	11
2.2	Ticket Cost	11
3	Setting up your infrastructure	13
3.1	Acquire an email address for hosting.....	13
3.2	Have Luke set up your local registration site.....	13
3.3	Customize the Website templates	13
3.4	Create a website that will be your event’s home.....	14
3.5	Minimal website requirements	14
4	Using the PSD Administration System.....	16
4.1	Logging on to your local registration site	16
4.2	The two “sides” of the PSD administration system	16
4.3	Site Administration	16
4.4	Usability hints	17
4.5	Groups and Users	17
5	Creating an event	18
5.1	Create The Event.....	18
5.2	Note on Gender Balancing: the Single Straight Men checkbox	19
5.3	Customize your event using Match questions.....	20
5.4	Customizing Gender.....	20
6	The Manage Event Screen	23
6.1	The Manage Commands	23
6.2	Special Admin Functions	25
7	The Days Before the Event.....	26
7.1	What happens as people register	26
7.1.1	i) Emails.....	26
7.1.2	ii) System-generated records	27
7.2	Emailing the speed-daters before the event	27
7.3	When to check the four checkboxes on the Event screen	27

7.4	Managing registrations.....	28
7.4.1	Reg records.....	28
7.4.2	People and Person Records	31
8	Setting up the Event.....	33
8.1	The Physical Table List.....	33
8.2	The Recess Round List.....	33
9	The Hours Before the Event	35
10	At the event.....	36
10.1	Arrive early	36
10.2	Check people in.....	36
10.3	New Registrations	37
10.4	Some Tips and Advice	37
10.5	Do the date-match run.....	37
10.6	Print and distribute the date sheets.....	38
10.7	Tips on running the event.....	38
10.8	At the end, collect the date sheets	38
11	After the event.....	39
11.1	Enter the information from the date sheets	39
11.2	Emailing the speed-daters after the event	41
12	Appendix B: Using your own local server.....	43

1 What is Poly Speed Dating

A Poly Speed Dating event is a face-to-face speed dating event usually held in some sort of restaurant or meeting hall. There are several (usually 12 or 13) rounds of dating, and each round daters go to designated tables to meet other daters. Each dater¹ is given a “date sheet” at the beginning of the evening that gives the schedule of these dates, i.e. says what table to go to, and who will be there. Each date is a brief face-to-face meeting of two daters. At the end of the meeting, each dater secretly marks off on their dating sheet whether they like their date. If both people mark yes, the organizers exchange emails at the end of the evening.

A sample date sheet is below (it is normally a full 8.5 x 11 sheet of paper).

¹ Sometimes a “dater” is actually a couple or a triad who are looking to meet someone jointly. For clarity, we use the seemingly singular “dater” throughout this manual to avoid “dating entity” as a moniker.

§ PSD Dating Schedule for Ben (BEN071) §

REMEMBER:

It is inappropriate to ask for any contact information during your date, to ask what your date thinks of you, or to otherwise escalate the date.

(F) after a Date denotes a friendship date - neither of you should match the other one's dating preferences. Let us know if there's a mistake!

THE TABLE OF DATES

Rnd	Date	Table	YES I am interested	NO I am not interested	Comments to Organizers (mismatch, no-show, bad behavior, etc.)
1	JES1733(F)		___	___	
2					
3	WH159(F)		___	___	
4	RAN1712(F)		___	___	
5	TP630(F)		___	___	
6	TB486(F)		___	___	
7	KM741		___	___	
8	KJ752		___	___	
9	PAU1718(F)		___	___	
10	GD181(F)		___	___	
11					
12	MAT1717(F)		___	___	

Cruises: 1 _____ 2 _____ 3 _____

Instructions: After each date, please check off YES if you want your information given to your date(s) or NO if you do not. If both parties indicate interest by selecting YES, we will swap your email addresses for you. Comments are for if the match violated the parameters you had entered, your date did something inappropriate or didn't show, or if there is anything else we should know.

Please return this form to us at the end of the evening.

Sample Date Sheet for Ben

Ben's dates are listed on the left hand side. Blanks mean a break round. The "(F)" means a friendship date (to fill in some rounds if there are not enough actual matches possible).

In this case there are 12 rounds of dating.

The difference between this speed dating and "conventional" speed dating is dater preferences are taken into account when making these schedules. In particular, people can specify what genders they are looking for, so the system can accommodate gays, straights, bisexuals, and so forth.

This means that before this event, daters need to register their preferences so DateWrangler can generate date sheets full of dates that are actual potential matches. See below for a snapshot of part of the registration form. This is what daters would see when registering on-line before the event. (It is not practical to have many people registering at the event.)

My name (First, then Last):

My desired public name :

This is the name that will be on your name tags, e.g., "Linda."

My email:

Your email will not be shared for any reason.

The only emails you get will be for this event and, if you check the box below, notices of future events.

Yes, I want to hear about future Poly Speed Dating (or other related Poly Social) events thrown by you folks.

I am (check all that apply):

Not currently in a primary relationship, but potentially interested in one.

Kinky. ([About the kinkiness.](#))

My age is:

What I am open to:

Remember:

Be open minded! If you are only looking for a specific, narrow thing then you are unlikely to find it *and* you will be unlikely to find the type of situation you didn't even know you wanted.

Acceptable age range: From to

Acceptable Kinkiness:

Gender and Sex ([Help!](#))

Gender matching is complex. We have attempted to design a system that is celebratory of the full spectrum of what is possible. Read the [help section](#) for more.

For this event, I am looking for *any* of the following:
(check once for looking, twice for preference)

- trans women
- trans men
- women
- men
- genderqueer, genderfluid, or gender bending people
- people who prefer to not be categorized or

My dates must be looking for *all* of the following:

- trans women
- trans men
- women
- men
- genderqueer, genderfluid, or gender bending people
- people who prefer to not be categorized or cannot

Sample Online Registration Form

After the event, organizers collect all the date sheets and enter them into DateWrangler. This is actually not as bad as it sounds. DateWrangler then determines all matches and sends out all the emails necessary.

To summarize, then, the entire event is the following sequence of events:

1. Put up registration site and advertise event.
2. Daters register
3. At the night of the event:
 - a. People arrive and the staff checks off that they are there.
 - b. The organizers run the scheduler and **print out at the event** everyone's date sheets.
 - c. Daters go through the 12 (or whatever) rounds of dating.
 - d. Date sheets are collected and entered into the system.

e. Emails with all final matches are sent out.

2 What You Need To Run PSD in Your Locale

Running a Poly Speed Dating (PSD) event basically consists of three general tasks:

- recruitment and registration
- logistics and site planning
- the computer stuff

We provide tools for the first and last of these. The middle one is all about your locale and we leave that to you.

2.1 *Skills and Things You Need*

You need several skills to run this event. Often this is achieved by getting together several people! You need:

- Someone who can do event planning, i.e. find a venue, negotiate terms, obtain food (if you are including food), manage volunteers, etc.
- Someone who can advertise and market the event.
- Someone who can obtain some domain name and set up a simple website at that domain.
- Someone who can set up laptops, printer, etc at a restaurant in only a few short hours and reliably connect it all up to the internet.
- At least 60 people to register for the event.
- (Optional) Someone who can handle html fairly comfortably and has a decent amount of computer expertise.

Advanced Technical Note: The main thrust of this manual assumes that you will be using the PSD system that runs on our remote PSD server, by connecting to it over the internet through a web browser. This is called “cloud computing” and it works fine. Alternatively, you could run the server-side stuff locally on your own computer, to eliminate the need for an internet connection. If you want to try this you will need someone fairly skilled technically in the ways of internet software development, who can install and run programs such as Python, sqlite3, and Django (written in Python). This option is discussed in an Appendix.

2.2 *Recruitment and Registration*

We will happily set up our parts of the on-line registration system for you. You will need to set up a simple static website as the main point of entry for your users, with the event description, FAQ, and so forth. Then you connect this site to the parts of our PSD Server that we set up just for you. When all this is done it will basically look like the registration pages we have. A good example is polyspeeddatingmidatlantic.org.

The static site is up to you. You host and configure it. We are happy to give you the bundle of html constituting our site as a starting point with the understanding that you will modify it so it looks distinctly different (e.g., different graphics) so as to avoid confusion.

Again, for a good example compare polyspeeddatingmidatlantic.org with polyspeeddating.com.

Almost all digital interaction you do will be with the PSD Admin program. This is run on our remote PSD server. PSD Admin manages a database of all the people who register for your events, what events you have planned for the future or have done in the past, and so on. You connect to it with a normal web browser. Once we set up your local registration site you can make new events on-line that people can register for.

The easiest way to accept payments is to use a PayPal account for incoming payments. Yes, you can use some system other than PayPal but the PSD server software is already all set up to slot in to PayPal, so that's the easiest way to go. With the PayPal link in place, the users can pay when they register, and the PSD software will automatically mark their registration as paid. You can also accept payments through means other than PayPal, and manually check off that they've paid.

When all this is set up you have to recruit your speed-daters. Hopefully you have the ability to motivate at least 60 people (and somewhat more women than men) to attend your PSD event; for practical reasons that's roughly the minimum you need so everyone feels they got "enough" dates. If you want, we can email our lists of folks to spread the word, but our folks don't live where you live. Just sayin.

Over the course of registration, you can use PSD Admin to track your registrants, edit their profiles, and do all the other administrative actions you'll need. If you set up the PayPal link, PSD Admin will automatically mark registrants as paid when they pay through PayPal.

You can email your registrants form letters with PSD Admin. You'll want to do this before the event as a reminder, and after the event to tell them who their successful date-matches were.

2.3 The Computer Stuff

There are three main areas of Computer Stuff, all of which is done through the registration system.

Area 1: Registration

The first main area is the pre-event work.

- people register online
- you babysit their registrations to make sure they paid, didn't mess up their info, etc.
- when the time is right, check the box to stop accepting unpartnered males looking only for females (see below for more on this)
- just before the event, print nametags for everyone who has registered. Hand them out as people register. The left over ones (the no-shows) are simply discarded. It makes it easy for people to know if they have checked in or not.

Area 2: Scheduling and generating date sheets

The second main area is what you need to do at the event. This is done in PSD Admin remotely using our server. Make sure your internet connection is working :)

Steps are:

- configure the list of physical tables. How many tables are there in the room? Which are suitable for groups dating groups (i.e., bigger tables)? Which tables are designated for people with mobility issues? You only need to do this once.
- Configure any “break rounds” you might want so people have breaks in their schedule.
- check people in as they arrive
- use PSD Admin to generate speed-dating sheets based on who actually showed up. Don’t do this in advance, otherwise you’d be scheduling dates with no-show people.
- print and then hand out printed speed-dating sheets

Area 3: Entering in completed date sheets

The third main area can be done at the event after all the dates are complete, but it is much less hectic to do these the day after the event. It is easier to take the marked-up speed-dating sheets home, input them there, and email the results to the users. But if you’re okay with the added stress, you can also do this at the event itself, and hand them out while people are still in the room.

The steps are:

- input the marked-up speed-dating sheets
- calculate the results (who matched who)
- email the results to the users

Calculating results goes like this. PSD Admin has a data entry interface. One sheet at a time, you select the PSD ID for the sheet to load in, then for that sheet you check off who that person said Yes to. Then go on to the next sheet. It’s a bit tedious but that’s data entry for you.

You then tell the server to send out emails to each person saying who successfully matched them. Like the pre-event email, this post-event email can be customized.

3 Cost and Location

3.1 *Thoughts on Locations*

The main things to worry about are amount of space, how loud it is going to get when everyone is talking, and lighting. Lighting is less important, but fluorescent lights really do make the event seem less like a date. OTOH being thrown into a dozen dates in the course of the event can be challenging, and something like lighting that makes it seem less date-like can make it all feel less threatening and scary.

You basically want one table for every two “dating units” you have at the event. (A dating unit is an individual, or a group dating as a unit.) So if you are shooting for 100 people, ideally you want a space that has 50 different tables, some of which can seat four people for the group dates, but most which only need to seat two people. We have been known to put two dating locations at a single long table, one at each end, but this isn’t optimal.

There are three types of venues that we tend to use.

Conference halls: These have a lot of space, so people can move around easily. Sometimes the sound quality is better. But the chairs are sometimes problematic, the tables are generally too big or too long for optimal PSD use, and they generally don’t have food or drink so you’ll need to bring in your own (pizzas or something). Or if they do have food (a hotel or something), it’s their own in-house catering, which can get pricey.

Clubs: These usually have bad sound quality, and generally you have to rent chairs, but they do have lots of space. They also more easily allow for alcohol, something that is hard to do in a conference hall. Clubs usually want rent up front plus a bar minimum. This makes things slightly more expensive, and you usually have to bring food in from outside.

Restaurants: We like these best, especially those with a large private back room. Restaurants have tables, comfortable chairs, better lighting, and of course food, so you don’t have to manage your own food, which can get tedious. Under-21 people are usually not an issue. And they can allow for alcohol. The problem with restaurants is that a PSD event can sometimes have well over a hundred people and it is sometimes difficult to find a restaurant that will seat that many.

When negotiating with the restaurants, we have often done things like buy some fixed amount of food in exchange for the space to avoid paying for the rent, or allowing for a minimum bar so we get cheap rent. Generally restaurants will go for an exchange of purchasing food for access to the space, especially if you pick a restaurant that is good but not too popular so they really want more business.

3.2 *Ticket Cost*

Historically, if we are providing the food, for example pizza, we have charged \$12 per person in advance. This means groups of two cost \$24. These are the preregistration prices. We like to have food. It is much more fun to hold the event at a restaurant if you can, and have them cater some actual food other than pizza (read: pizza and looking sexy does not mix under most circumstances).

We have also run events where the venue was much more expensive, the food was superior, and the drinks were top-notch. For that event, we charge \$25 in advance.

Another option is to find a buffet restaurant (usually inexpensive to start), then negotiate a discount per-person price for your event. They will negotiate if you can promise them a large group of customers. It's up to you whether you build the restaurant cost into your PSD fee (and then you pay the restaurant), or have the each user pay the restaurant (buffet) as they arrive. Users like "free food", but there are always some people who won't want to eat there and might appreciate having the option to not pay for what they aren't eating. But either way, if you use something like a buffet restaurant, they handle the headache of food so you don't have to. And this way you can charge a lower PSD fee.

But you don't want the fee too low. You want it high enough so people feel obligated to show up. If the fee is too low a surprising number of people will find they have something else they need to do that night. A few will tell you, but most of these just won't show up.

For registration at the door, we tend to charge about twice the advance price. We do this to strongly encourage people to register early.

We generally tend to be very willing to reimburse if people cancel before one day prior to the event. Our official policy is that you can have the full amount towards the next event, or half the amount as cash. If you do not show your entire amount is forfeit.

4 Setting up your infrastructure

This section describes how to set up your registration site. Once you have your registration site up, you are good to set up an event, which will allow people to register. Generally speaking, section 4 is a one-time-only thing. You shouldn't need to do these activities when actually running your event, or if you decide to host the second event on the same site.

4.1 *Acquire an email address for hosting*

For us to send email as from you, we unfortunately need a password for an email account. We recommend setting up a new gmail account with an appropriate name and then sending me that email and password to protect yourself. We will then set up the admin site to send mail from that address.

Note that you need to log in to gmail and use the account a few times before we use it, otherwise Google freaks out and thinks we are spammers.

4.2 *Have DateWrangler set up your local registration site*

Luke will set you up a local registration site hosted on the PSD server at polyspeeddating.com. You and your daters will interact with it via web browsers.

Once Luke has set up everything, he will send you:

- four files that you customize to get your own look and feel on the registration forms
 - base.html
 - baseregform.html
 - registerGroup.html
 - registerIndiv.html
- an admin username and password for your local registration site.
- a customized URL to use for PayPal's Instant Payment Notification (IPN) processing (see PayPal).

4.3 *Customize the Website templates*

Recall that Luke sent you four files that you customize to get your own look and feel on the registration forms:

```
base.html
baseregform.html
registerGroup.html
registerIndiv.html
```

You can play with the HTML and the text somewhat. Don't mess with the curly-bracket tags. When you look at these files it will be obvious what you should and shouldn't mess with.

One way we customized these files was to have the big graphic at the top fetched from our own website. That way we could do a better job of giving these files the same look & feel

as the pages on our website, where we used the same graphic. This graphic is defined at the top of baseregform.html

When you are done customizing these four files, send them back to Luke. He will put them in place in your local registration site and give you the three important links so you can use them from your own website.

4.4 Update the “Organization” object

Log in to the Admin interface and click on the “Organizations” link and then the organization object there. Change the email addresses, etc., to what you want so when users are given pages with email links, the links render appropriately.

4.5 Create a website that will be your event’s home

As you customize the website templates (these will be used for your locale on polyspeeddating.com) you will also want to set up your own stand-alone website. Do these at the same time so the look and feel of your website and the template files match.

Minimal website requirements

- Your PSD event announcement (on its homepage)
- your FAQ page
- your how-to-register info page

Look at polyspeeddatingmidatlantic.org for one way to do this. We stole a lot of our text from polyspeeddating.com, then modified it to suit.



The screenshot shows the homepage of Poly Speed Dating MidAtlantic. At the top left is a logo featuring a red heart with a white speed-dating symbol (two curved lines) passing through it. To the right of the logo is a yellow box with the text "Poly Speed Dating MidAtlantic" in a blue, stylized font. Below this is a navigation bar with links: Home | FAQ | Register | Contact | Join BmorePoly. The main heading is "The World Needs Poly Speed Dating!". Below this is a paragraph of text: "BmorePoly is hosting Poly Speed Dating in the DC/MD/VA area! At 6 we'll have dinner together, and you need to be checked-in by 6:30 at the latest. Then at 7 we'll begin the Poly Speed Dating. Wacky fun! It should go till 9-9:30. This is the original Poly Speed Dating as invented by Pepper Mint and Luke Miratrix in San Francisco. (Accept no substitutes!) There is no reason that the complexities of non-monogamy should prevent us from engaging in the celebrated act of SPEED DATING. Our system takes into account gender preferences, age ranges, and the details of couples and trios dating together. All sexualities, genders and hair colors are welcome. Come and join us!" Below this is another heading: "The next MidAtlantic Poly Speed Dating event happens on November 13 2011. Here's how to register." followed by a paragraph: "Here's how to sign up for this fabulous event. First, RSVP to the BmorePoly Poly Speed Dating event so we know you want to join us. All the details on the event are there. BmorePoly is our local list and we use it to keep track of who is coming. If you're not already a member you can join, it's free and we don't do anything weird with your email. Tons of other events are listed in addition to this one, too. Next, register for the Poly Speed Dating event with all the details of who you're looking for, so we know what kind of people you want to date. There are links on BmorePoly to register, or you can come back here and do it. Either way works. The registration screen will ask you for your BmorePoly handle (username) so we'll be able to connect everything together." Below this is a heading: "Already registered?" followed by a paragraph: "If you want to check your registration or change any details, log in to your account here" with a link. At the bottom is a heading: "More Information" followed by a paragraph: "To learn more about Poly Speed Dating click here" with a link.

The homepage is fairly self-evident. Announce your next event and have a link to your how-to-register info page, plus whatever other links and stuff you need for your own situation. The FAQ page is fairly self-evident too. Feel free to steal ours.

The how-to-register info page has a bit more to it, though not much really. This page describes your registration process. It has three important links. The first two important links are:

- How to register as an INDIVIDUAL
- How to register as an GROUP

These each connect to the pages registerIndiv.html and registerGroup.html that you got from Luke and customized specifically for your local registration site (see below). These are hosted on the PSD server at polyspeeddating.com. Get the URLs from Luke.

The third important link on this page lets already-registered users re-login and change things on their existing registration (what kind of people they are interested in dating, perhaps). This re-login page is also hosted on the PSD server at polyspeeddating.com. Get this URL from Luke too.

5 Using the PSD Administration System

5.1 Logging on to your local registration site

Log on to

<http://www.polyspeeddating.com/psd/XXX/reg/admin/>

where XXX is the code assigned by Luke for your local registration site.

You are now in the PSD administration system for your local registration site. Change the password to something good for you.

5.2 The two “sides” of the PSD administration system

There are two “sides” to the PSD administration system: the Admin side and the Manage side. When you first log on you are on the Admin side. We will look at the Admin side first, and the Manage side later.

Generally the Admin side is for making new events and examining individual registration forms and so forth. The Manage side is for managing a specific event, and has all the commands to schedule dates and so forth. It also has tools to see total number of people registered.

It is easy to move among the Admin functions, and it is easy to move among the Manage functions, but it is not so easy to go back and forth between Admin and Manage. But sometimes you need to. So when the time comes that you want to work on the Manage side you will find it helpful to keep the Manage page open in one tab and an Admin page open in another tab. Generally when you are starting to set up an event you only need the Admin functions so we will look there first.

5.3 Site Administration

You should see:

The screenshot displays the PSD administration system interface. At the top, there is a blue header with the text "PSD administration" and a tagline "...because we need to make the world a better place." Below the header, the main content area is titled "Site administration" and is divided into two columns. The left column lists various administrative functions, each with an "Add" button (green plus icon) and a "Change" button (orange pencil icon). The functions are grouped into sections: "Auth" (Groups, Users), "Register" (Break records, Cruise records, Date records, Events, Link records, Match choices, Match questions, Match records, Persons, Reg records, Table records), and "Sites" (Sites). The right column is titled "Recent Actions" and contains a list of actions performed, including "My Actions" (Location, Match question), "midat02 on 2011-11-13" (Event), "midat01 on 2011-09-18" (Event), and "RR(81) midat01-CB181G-Carrier-Brian" (Reg record).

Clicking on each of these takes you to a screen that controls that function.

5.4 Usability hints

To the right of the table on the Site administration screen is a Recent Actions box. You can click on the links there, they take you directly to that screen.

In each of the function management screens are multi-column tables. Most of these tables can be sorted by clicking on the labels at the top of each column header. Click a label once to sort the table ascending by that column, click again to sort descending. This will sort the entire table by that column.

Some of these screens also have Filters on the right side. These let you look at a selected subset of the data. This can be handy.

5.5 Groups and Users

In the Site administration screen's AUTH section is Groups and Users. You will rarely need to do anything here. I haven't needed to use either one. I don't even know what Groups does.

Users is an administrative list of all users who have access to the system, and the permissions assigned to each. When someone registers, they get a User account. This is how django allows for logging in and out and all that jazz. A user account is for a specific email address. It is given a PSD ID for the username. If someone changes their email, then it should be changed here.

Each user has an entry in this section. Administrative users (like you) will have the superuser box checked so they (you) can do anything you need to. Regular users (speed-daters) won't have this box checked.

The REGISTER section is where things happen. These lines on the Site administration screen are in alphabetical order (Break, Cruise, Date, Events, Link...) but when you set up and then administer an event the order you use them in is not alphabetical order. Oh well.

6 Creating an event

6.1 Create The Event

To create an event, either click Add on the Events line, or click Events and then on the screen that follows click the Add Event button. Either way, this takes you to the Add Event screen. After you fill in the fields don't forget to save the event using the Save buttons at the bottom.

Here are the fields on the Add Event screen and what you do with them.

Event: should be a short string with no spaces and punctuation. For example, "revival1" is good. This name will be part of the URLs for registration and management.

Longname: a longer and more descriptive human-comprehensible name. Though not too long.

Location: name of the hall or restaurant where the event will be held.

Address: address of the hall or restaurant where the event will be held, including city/state/zip

LocationURL: does the location have a website? Most restaurants or halls do. Put it here.

Accessdetails: how you get to the site of the event, where in the building you go when you arrive, etc. This shows up on the registration confirmation email. Include any details you want to be sure they have.

Cost per person: this is the advance-registration price.

Cost per person at door: this is the price if you accept on-site registrations.

(Note: I couldn't figure out how to prevent them from using the advance-registration price even on the day of the event, so 24 hours in advance I simply set the Cost per person up as high as the door price.)

Email for paypal account: PayPal isn't an absolute requirement to use the PSD software, but it makes things much easier, because the PSD software is set up to integrate nicely with PayPal. So if you haven't got one already, set up a PayPal account so you can get paid through an email address. Then enter that email address here. Set up Instant Payment Notification (IPN) for your PayPal account too, using the IPN link provided by Luke. See Setting up PayPal, below.

Email for asking registration questions: there are various email meta-links in the screens that are displayed to your users, these will be set to this address so people can click on them to email you.

Link to the mailing list for this event: a list where the speed-daters can sign up to be on your email list. It can be a Mailman list, a Yahoo group, a Meetup group, or whatever else you care to set this to.

Childcare Provided: This is a checkbox on whether to solicit information from daters about their childcare needs. Uncheck if no childcare.

Then four checkboxes that are used as you get closer to the date of your event:

Registration is closed: nobody else is allowed to register, check this if you have accepted all the speed-daters that you intend to have.

Registration is frozen: existing registrants can't change their reg details

Single straight men will be asked to bring a gender-balance companion: important box, see below

Do not email update emails or admin log emails: This is for when the PSD server doing the processing was on-site but there was no internet connection. In the current system you must have internet service on-site to communicate with the remote PSD server (which is not on-site) so this is a non-issue.

Date: the date of the event, format YYYY-MM-DD, ex. 2011-09-18

Starttime: starting time of the event in 24-hour format, ex. 19:00:00

Deadlinetime: the time all speed-daters have to be on-site by, ex. 18:30:00

Stoptime: the time the event is expected to end, ex. 21:00:00

And that's it.

Note: At the top of this screen are three buttons. The History button shows the change history of this event, however be aware it isn't always accurate. Registration Check-In is used when people arrive at the event, and the Manage button goes to the Manage screen (described below) with different commands to manage this event.

6.2 Note on Gender Balancing: the Single Straight Men checkbox

Okay, as for that checkbox labeled Single straight men will be asked to bring a gender-balance companion: as with any sexually charged event in this (or really, any) community, if you don't have a way to limit single straight men they will swamp your event and nobody will have a good time, including all those single straight men who will then spend the evening wandering around dateless and grumbling.

To avoid this, when the right moment comes, check this box to put a notification on the individual-registration screen (ie, not the registering-as-a-group screen) saying if you are a solo male looking only for females please first find a female gender balance, have her register, and then you can register (citing her as your gender balance).

The way you use this is, as people register you monitor the gender balance in the period leading up to your event. Then, check it when needed.

So, when is it needed? What is the right gender balance in your community? Your first thought might be 50/50, but that might not be the right answer. In most sex positive communities there are far more bi women than bi men. To accommodate the women who want to date each other, the PSD software has an alternating-rounds matcher. One round it optimizes for same-gender matches, the next round it doesn't. If your gender balance is 50/50, men who only want to date women may find themselves sitting out as often as every other round. To avoid this (if you so choose) it might be prudent to recruit somewhat more women daters than men. I know, not so easy. But there you go.

Save your event and go back to the Site administration screen.

6.3 **Customize your event using Match questions**

Now that you have created your event you need to customize it. You do this in the Match questions section of the Site administration screen. Click on Match questions to enter this screen.

Here you can customize three items that are part of the event: kinkinesses, gender, and location. Having said that, **don't customize kinkiness and be careful with gender**. Not only because it's opening up a can of worms but because the existing definitions (3 kinkinesses, some genders) are woven deeply into the rest of the system and changing these will break stuff. Don't do that.

Also **DON'T CHANGE ANY OF THE VARIOUS CHECKBOXES**

Location: But the third item, Location, does need to be customized. These are the geographic areas in your region that people might be from. Cities, counties, neighborhood names, etc. It looks like you can add any number of them, but as a practical matter try to limit yourself to a dozen or less or you'll make your users crazy. One of your locations should be something like Somewhere Else as a catchall. They each get a two letter unique code as well.

Need to delete a location? Check the Delete box to the right of the location you want to delete, then click one of the Save buttons at the bottom.

When you're done, Save your location updates and go back to the Site administration screen. Your event is now set up and ready to go. Are the URLs for registerIndiv.html and registerGroup linked to your website's how-to-register page? Test them. Don't forget to test that the PayPal part is working and putting money in your account. Then tell everyone about your website and let them register for the event.

You can also add extra questions. See below.

6.3.1 **Customizing Gender**

You can customize gender, but you **MUST** keep "M" and "W" as codes for men and women. If you have "trans men" and "trans women" you must keep the codes as "TM" and "TW."

6.3.2 **Adding new Match Questions**

You can also add new questions altogether. **We highly recommend talking to the staff** if you want to do this.

6.4 **Setting up Paypal**

PSD has everything in place to automatically accept payments through PayPal. Users can pay for their speed-date when they register, using their own PayPal account or with a credit card, which PayPal then processes. You will want to set up so when the user pays through PayPal, that PayPal notifies PSD that the payment was completed successfully. (Note, it's fine if they want to pay in a different way than through PayPal. The PSD system can allow this too, it's just not an automated process. See Before the event, below.)

Here is how to set up automatic payment processing through PayPal.

The PayPal feature you want to set up is called Instant Payment Notification (IPN). In step 5 of the PayPal setup it asks for the URL to which you would like to receive HTML posts. Luke will give you the URL to use here. It will be something like...

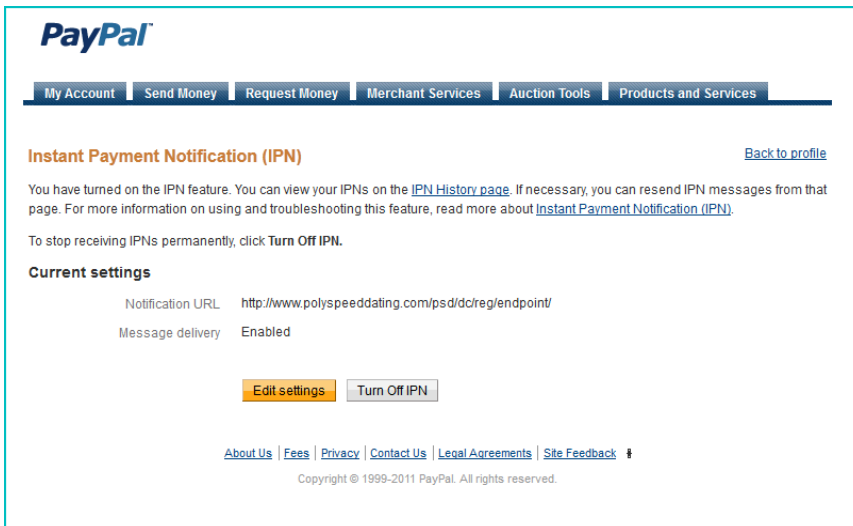
<http://www.polyspeeddating.com/psd/XXX/reg/endpoint/>

...where XXX is the code assigned by Luke for your local registration site.

Below is how to set this up (from <https://www.paypal-community.com/t5/Adding-and-updating-account-info/Instant-Payment-Notification-Preferences/m-127300/highlight/true?profile.language=en-gb#M133>):

You can review and update your instant payment notification preferences on your *PayPal* account by following the steps below:

1. Log in to your *PayPal* account.
2. Click 'Profile' at the top of the page.
3. Click the 'Instant Payment Notification Preferences' link in the Selling Preferences column.
4. Click 'Edit Settings'.
5. Check the checkbox and enter the URL to which you would like to receive HTML posts.
6. Click 'Save'.



PayPal

[My Account](#) | [Send Money](#) | [Request Money](#) | [Merchant Services](#) | [Auction Tools](#) | [Products and Services](#)

Instant Payment Notification (IPN) [Back to profile](#)

You have turned on the IPN feature. You can view your IPNs on the [IPN History page](#). If necessary, you can resend IPN messages from that page. For more information on using and troubleshooting this feature, read more about [Instant Payment Notification \(IPN\)](#).

To stop receiving IPNs permanently, click **Turn Off IPN**.

Current settings

Notification URL	http://www.polyspeeddating.com/psd/dcreg/endpoint/
Message delivery	Enabled

[Edit settings](#) [Turn Off IPN](#)

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When the notification is activated, PayPal sends payment notification posts with encrypted code to this URL for each payment you receive. When a customer makes a payment to you, PayPal posts a notification to your server at a URL you specify.

Perhaps you use PayPal for other purposes (say, your business). After your PSD event is over and before you launch your next one, you may not want to get all those IPN notifications. It's easy to set that up, use the PayPal button in this screen to Turn Off IPN. PayPal will send a message with a dire warning about how this will break IPN and your account, but I checked with PayPal and they say you can ignore this. Nothing will break and everything will be fine. You can turn IPN back on whenever you are ready to start taking registrations for your next PSD event.

7 The “Manage Event” Interface

Recall that there is an Admin side to the PSD system, and a Manage side. When you first log on you are in the Admin side. To get to the Manage side, which has different commands, open your Event and click the Manage button at the top. This takes you to the main Manage screen. You can also go to the url of the following format:

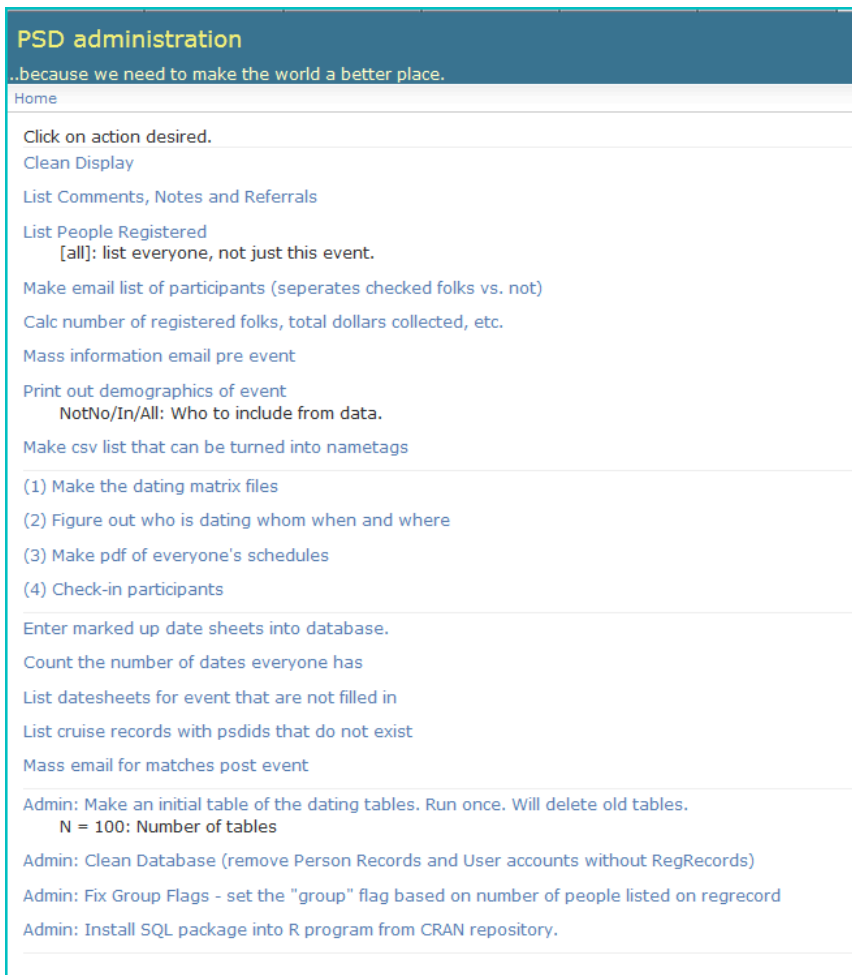
`http://polyspeeddating.com/psd/seattle/reg/manage/anthony1`

The manage screen consists of a list of commands that help you manage and run an event both before, during and after. These commands mostly take you to a subscreen that performs a specific function or print out some information. On most of those subscreens, these same Manage commands are listed at the bottom. So this same discussion applies to those command links as well.

At the top is a link labeled Home. This takes you to the Admin side.

7.1 The Manage Commands

The Manage screen is shown below. This same list of commands is found at the bottom of many of the Manage sub-screens, they can be used from there as well as here.



The screenshot shows a web interface titled "PSD administration" with a dark blue header. Below the header is a navigation bar with a "Home" link. The main content area contains a list of management commands, each with a brief description. The commands are:

- Click on action desired.
- Clean Display
- List Comments, Notes and Referrals
- List People Registered
 - [all]: list everyone, not just this event.
- Make email list of participants (seperates checked folks vs. not)
- Calc number of registered folks, total dollars collected, etc.
- Mass information email pre event
- Print out demographics of event
 - NotNo/In/All: Who to include from data.
- Make csv list that can be turned into nametags
- (1) Make the dating matrix files
- (2) Figure out who is dating whom when and where
- (3) Make pdf of everyone's schedules
- (4) Check-in participants
- Enter marked up date sheets into database.
- Count the number of dates everyone has
- List datesheets for event that are not filled in
- List cruise records with psdids that do not exist
- Mass email for matches post event
- Admin: Make an initial table of the dating tables. Run once. Will delete old tables.
 - N = 100: Number of tables
- Admin: Clean Database (remove Person Records and User accounts without RegRecords)
- Admin: Fix Group Flags - set the "group" flag based on number of people listed on regrecord
- Admin: Install SQL package into R program from CRAN repository.

The Home command at the top of the screen goes to the main Admin page. “Edit” allows you to edit the Event in the Admin side of the interface.

The following briefly describe the commands, but the important ones are described in more detail when discussing how to run an event.

Overview of Manage Commands

Clean display:

clear the screen by going back to this screen.

List Comments, Notes and Referrals:

display everybody’s free-text fields on one page.

List People Registered:

a way of listing everybody registered for this event. The note underneath ([all]: list everyone, not just this event) doesn’t seem to do anything.

Make email list of participants (separates checked folks vs. not):

do you need a list of everybody’s email address? Here is how to get it.

Calc number of registered folks, total dollars collected, etc:

some perhaps useful statistics

Mass information email pre event:

this is quite useful. See Emailing the speed-daters before the event.

Print out demographics of event:

some perhaps useful statistics.

If you want to look at only a subset of your daters, add “NotNo,” “In,” or “All” to the end of the resulting URL when you click on this link.

Break possibility of a match between multiple pairs of PSD IDs.

if you know you have people who should not date, look up their PSD IDs and then click on this link. Enter in the ids. Now these people will never be matched.

Make csv list that can be turned into nametags:

At the event you will want to give everyone a nametag. Click this to make a CSV-formatted list that you can cut-and-paste from the screen into something like MS Word, then use that program’s nametag template. All you need on the nametag are pubname and personID, you can ignore the rest of the fields in the CSV list. Since you only print these two items, you don’t need full nametag-sized labels. I found that 30-up Avery 5160 label sheets work fine, and since these have 30 on a sheet instead of 10-up like nametag sheets do, it’s a better value.

Make an initial table of the dating tables. Run once. Will delete old tables:

This makes the list of the physical tables in the room you'll be using for the event. You run this once when you set up the physical configuration of a new room you'll be using for your event. See below.

- (1) *Check-in participants*
- (2) *Make the dating matrix files*
- (3) *Figure out who is dating whom when and where*
- (4) *Make pdf of everyone's schedules*

These are the commands you will use at the PSD event. These are covered elsewhere (see *At the Event*).

Enter marked up date sheets into database:

This is covered elsewhere (see *After the event*).

Count the number of dates everyone has:

this creates a CSV file and downloads it to your computer, containing the same information that can also be displayed by other functions on-screen.

List datesheets for event that are not filled in

Once you have entered marked update sheets, this checks to see if you have missed any or lost any.

List cruise records with psdids that do not exist

This checks to see if any cruise records are for people that don't exist. It indicates that most likely somebody made a mistake when entering data after the event.

Mass email for matches post event

This allows for sending out e-mails to everybody saying what their matches are. See *After the event*.

7.2 Special Admin Functions

You generally should not need to use any of these functions.

Admin: Clean Database (remove Person Records and User accounts without RegRecords)

If you need to delete a person or group, first go to the Reg record screen and delete their record there. Then use this cleanup function to have the PSD software find and delete all the related records for that person or group.

Admin: Fix Group Flags - set the "group" flag based on number of people listed on regrecord

If the group vs individual flags get out of sync this is a way to fix them. Rarely needed.

Admin: Install SQL package into R program from CRAN repository.

It's unlikely you will ever need this.

8 The Days Before the Event

Okay, all your infrastructure is in place. You have announced your event and told people to go to your website to register. They are going to the website, navigating to your registration page, and clicking to register either as an individual or as a group. You're on your way to a great event.

But between now and the time your event starts what should you pay attention to? Here is what to do.

8.1 ***Watch your demographic breakdown***

Monitor the balance of women to men. If you end up with too many men, you should check the "SSM" box in the Event admin page. This will warn SSM that they need a companion to balance them out.

Generally about a 3:2 woman-man ratio is best due to the high prevalence of bisexual women and low prevalence of bi and gay men (but this depends on region, of course).

8.2 ***Watch registrants' special notes and comments***

People sometimes put questions in their comments field. Read them and handle them as needed.

8.3 ***Assemble volunteer team***

Make sure you have folks to handle on-site registration, etc., for the day of the event.

8.4 ***Check for confused registrants***

Sometimes it is clear a group is registering, but as an individual, or something like that. Email these people and ask their intentions and repair registration as needed.

8.5 ***Check for stranded daters***

You can run matching and generate schedules before the event, to see who is not going to have dates in all likelihood. Email these people. See below for more.

8.6 ***What happens as people register***

8.6.1 ***i) Emails***

When people register you will get some emails coming in to your account.

The first email you will receive has the Subject line of "Registration for LLNNN" where LLNNN is the PSDID alphanumeric code for this registrant. This email comes from the PSD server. This email notes that the registrant's payment flag is False.

Then if they pay for the event when they register (and you have set up Instant Payment Notification in PayPal) you'll see a second email with the Subject line of "PayPal Payment for LLNNN" with the same PSDID alphanumeric code for this registrant. This email also comes from the PSD server, when PayPal sends the server confirmation of payment. Note, this email does not say how much was paid. It only says that PayPal told PSD that a

payment was made. This email notes that the registrant's payment flag was changed to True.

If a payment was made, you will get a third email, this one from PayPal, noting that "you received a payment of \$<amount> USD from <name>". This email will also have the LLNNN code (the PSDID) which the PSD system assigned to this registrant. So you should have no trouble matching everything up.

8.6.2 ii) System-generated records

When they register the PSD system will also create some records in its system. The PSD system will create one Reg record for each registrant, that is, if the registrant is a group it will create one Reg record for the group and if it's an individual it will create one Reg record for each person. And the PSD system will create one Persons record for each person, whether that person is in a group or an individual.

To access these, from the Site administration screen click on Reg record or Persons. You can single-click or double-click. In the screen that follows, click on the record of interest. Here is what is in each of these records, and what you can do with them.

8.7 Do a Dry-Run

Pretend it is the day-off by walking through the "Setting up the Event" and "Hours before the event" and "At the Event" steps below. Make sure you can generate pdf schedules and make sure those tables have Table numbers on them.

8.8 Email the speed-daters before the event

You will want to email all the speed-daters a few days before the event to tell them a few things. The PSD system has an automated way to do this. It is on the Manage side of the system. To get to this, go to your Event and on the top of the Change event screen you will see three buttons: Manage, Registration Check-In, and History.

Click the Manage button to go to the main Manage screen. This screen contains a list of command links that are described elsewhere (see The Manage screen).

8.9 Check the four checkboxes on the Event screen

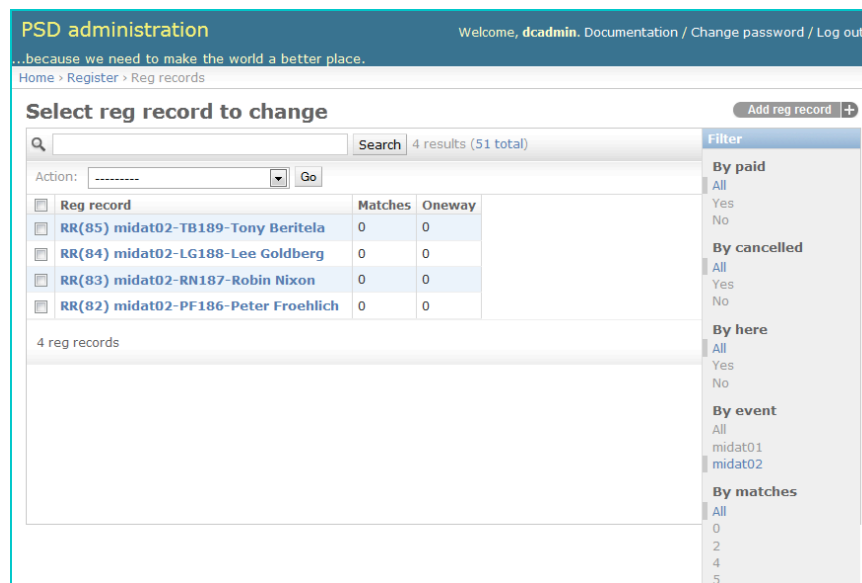
To be filled in later.

9 Managing registrations

Each registrant registers via the group or individual registration form. The system then makes a registration record object, one person object for each individual, and the user object so they can login and check their registration. If this is a re-registration than the system will reuse the user object and the person objects, but will still make a new registration object. The main object of interest is the registration object, called a RegRecord.

9.1 Reg records

These are the registration records, one per registrant (individual or group).



There are filters at the right side so you can look at only certain records. These can be very handy, for example to find people who haven't paid yet. There is also a button to hand-add a reg record that you should never use. Instead, add people through the "Manage Screen" via the "Walk-in Registration" option.

In the table on the Reg records screen these look like: RR(nn) eventname-LLNNN-registrantname.

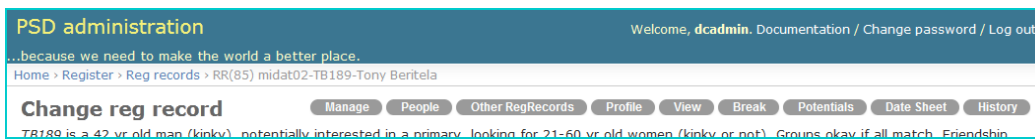
RR(nn): is the internal record number, you can ignore this

eventname: the short Event name you gave on the Add Event screen

LLNNN: the PSDID alphanumeric code for this individual or group. Groups end with G (LLNNNG).

registrantname: The real name (or, for groups, names) of the registrant

When you open one of these records, there are a number of buttons at the top.



Manage: takes you to the main Manage screen (see Manage screen, below.)

People: lists the person (or people if it's a group) linked to this reg record.

Other RegRecords: This lists all RegRecords associated with this particular PSD ID (i.e., records of past events).

Profile: goes to a page that shows what this user sees when they log in.

View: a summary screen for this user.

Break: break records for this user, ie, who this person should not be set up to date. You can quickly break a number of potential matches by checking off the boxes and then hitting "save."

Potentials: a list of who this person might match (once all matches have been computed in the Manage section). It shows mutual matches, and both types of "one-way" matches. Useful for seeing how many dates a person might have.

Date Sheet: the same information that is on their date sheet, and editable yes/no and cruise fields. (once all matches have been computed and a dates scheduled in the Manage section)

Update: If you need to change a registration's matching data (i.e., how they registered) **use this button**. It will show you a registration form with the info, and you can change it as needed and then hit save.

History: if this record was ever edited, its change history, however it isn't always accurate.

Below that is a summary of who this registrant (individual or group) is, and what they are looking for.

Below that are many fields. Event name, Psdid, and Email are obvious. Nickname is the "public" name that the registrant wants to be known by. This is the name that will be printed on their nametag and shown in other "public" places.

PSD administration Welcome, dadmin. Documentation / Change password / Log out

...because we need to make the world a better place.

Home » Register » Reg records » RR(85) midat02-TB189-Tony B

Change reg record

TB189 is a 42 yr old man (kinky), potentially interested in a primary, looking for 21-60 yr old women (kinky or not). Groups okay if all match. Friendship dates okay. From Greater Baltimore.

Event:

Psdid:

Nickname:

Email:

Admin

Join Our Mailing List (Y/N)

Here

Paid

Pending

Cancelled

Stationary

Dating

Friend Dates (Y/N)

All Group Members Must Match (Y/N)

Date Groups (Y/N)

Location: Annapolis Greater Baltimore Germantown/Rockville/Laurel Frederick/Hagerston Washington DC Northern Virginia Other Virginia Delaware Pennsylvania Somewhere Else

Children ([Show](#))

Comments:

Notes:

Real id in database: 85

[Delete](#) [Save and add another](#) [Save and continue editing](#) [Save](#)

Next are the Admin checkboxes. When they registered, did they say they wanted to join your mailing list? (Maybe they already did, through the Join link on your website or on the registration page.) Have they Paid? If they paid through PayPal, and you set up the IPN link, this will already be checked. Or if they pay differently, you can check it manually. You can check Pending as a reminder that they said they were going to pay (but haven't yet), or perhaps that they promised they would attend. Cancelled is if they registered but then said they weren't coming. Stationary is if they have mobility issues, the system will assign them to as few tables as possible, and those tables will be your designated Stationary tables, for mobility-impaired folks (see Tables).

Next are the Dating checkboxes. When they registered did they say they want Friend dates? These are people that don't match their dating criteria, to fill in their dance card. If they want to date a group, did they say that all group members must match their criteria? Are they willing to date groups?

The next bunch of boxes is for Location. These are the locations where this registrant lives or works. That is, the locations that are convenient for this registrant. Locations are matched only as a secondary consideration; nobody will lose dates if the location doesn't match. These come into play only if the registrant has more potential dates than dance-card

slots. If that's the case, Location matches get priority. (And yes, the slanted list is a bug. Maybe one day the developers will track it down, but in the meantime don't worry about it, it's just cosmetic.)

Childcare: The section for Children collects information for the organizers.

Finally, at the bottom are Comments and Notes fields.

Comments are the freeform text they entered when they registered, including (if they did what you asked) the name of their gender balance for single males when the unpartnered-male flag is set.

Notes are private notes to yourself, plus two system-generated flags if appropriate: the PayPal transaction ID (if they paid with PayPal) and the unpartnered-male flag if the single-male checkbox was checked when they registered and this person is a male individual (ie, not a member of a group) who said he is looking only for women (you can see his match criteria on his Persons record).

There is a PayPal transaction ID if they paid with PayPal and this was registered through IPN. The auto-generated link will *try* to take you to a place where you can refund their money if needed.

There is an unpartnered-male flag if the unpartnered-male box was checked for the event when this person registered as a man looking only for women.

If the unpartnered-male box was checked they'll see a notice when they register asking men looking only for women to first find a female gender balance and have her register, and only then should the male register and when he does he needs to cite his gender balance in the Comments field of his registration. A little complicated, sure, but this prevents your event from being swamped with single guys on the prowl. If they don't register the way they need to, you have every excuse to have a conversation with them, and if necessary tell them to either find a gender balance or sorry you can't attend. There is more on this under Note on Gender Balancing: the Single Straight Men checkbox.

If you put a note in with an exclamation point "!" they will be flagged as they check in and sent to an administrator to talk.

9.1.1 People and Person Records

You should not need to do anything with these records. See Appendix for some details on it.

10 Trouble-shooting Registrations

The RegRecord form is how to figure out why someone is not getting many dates. Carefully read how they are registered and see if something does not make sense.

For example, we will discuss two hypothetical daters who didn't get dates. This just illustrates some common problems.

NS117: For NS117, NS117 happens to require their dates to be open to *all* categories (i.e., be completely pan-sexual). This will severely limit dates.

How to tell: their description says "must be open to" and then a long list of stuff.

TA145G: For TA145G, because they are a group, and the second person needs women only and everyone must match. That is fine, but then these potential women needs to be bisexual since she would have to like all the options of both. Adding femme, butch, etc., into the second person could help.

How to tell: In the "Potential Match" printout there are a lot of one-sided matches, indicating lots of interest in folks who don't have interest back. Groups are often dinged by things like this.

DD444: She marked "not kinky" and "not kinky only" and gets few dates.

How to tell: experience, sadly. Some problems show up again and again.

These are the sorts of things to look out for. Identify folks with few dates and examine their profile via the Admin RegRecord interface. Look for narrow age ranges, kink-only, and so forth. When these people come in to register, talk with them and see if they really meant what they registered for. Be open to their wanting fewer, higher quality dates vs. more dates. More is not necessarily better.

11 Setting up the Event

You need to make your list of physical tables and also decide where you want your recess rounds to be (recess rounds are rounds where some daters do not get assigned dates so they can take a break).

11.1 The Physical Table List

Generate the original list with:

Admin: Make an initial table of the dating tables. Run once. Will delete old tables.

This is the list of the physical tables in the room you'll be using for the event. You run this once when you set up the physical configuration of a new room you'll be using for events. As long as you still use that room you never need to change this again.

How many tables are there in the room? Which are suitable for groups (i.e., bigger tables)? Which tables are designated for people with mobility issues (easier to get to, perhaps)?

A good rule of thumb is to have one group-capable table for each group at the event and one stationary table for each person with mobility issues.

It defaults to 100 tables. You probably don't have that many but turns out this doesn't matter. Sure, after you build the list you could delete the entries over the number of tables you actually have in the room, but it turns out that the PSD software doesn't use more tables than it has to.

When you run this function, be aware that it completely wipes out the old tables and whatever customizations you've already done to them.

Important: Make sure you have a group table for each group and a stationary table for each stationary person. Also make sure you have some group + stationary so if a group gets matched with a stationary person nothing bad happens.

Table Quality: Tables can be given quality numbers. High quality tables will be used first. Tweak quality with the Table List editor.

Generally put low quality tables between high quality ones to spread folks out. Put low quality tables near the social area so they are empty during break rounds.

11.2 The Recess Round List

The way you control what recesses might be assigned to people is by making RecessRecords that have the psdid 'template'. For each kind, as part of scheduling, people will be divided up evenly among the possibilities at random. Make Recess Records on the Manage side. You make a type of recess by making a few lines of rounds that all can be that type of recess. So for example if you made a 'short' with

4,5

5,6

6,7

it would put a third of your daters on break for rounds 4+5, a third for rounds 5+6, and a third for rounds 6+7.

Often we do something like this: Give everybody one round off early on (3, 4 or 5) and also two consecutive rounds off between 7 and 11 inclusive. (Yes, this meant half the people were on recess in rounds 8, 9 and 10, while only a quarter were on recess in 7 or 11.) Create all the recess templates before scheduling.

The rounds a RecessRecord covers are a comma-separated list.

Technical Info: If you edit these records with the Admin interface you will note the model also has a field 'volatile'—if you assign any recess by hand (for example, giving someone a long recess in rounds 1 and 2 because they said they'd be late), leave 'volatile' unset so that that hand-added recess will not be erased when the assigner tries to erase all recesses for the event and start over. (Templates also have to not be volatile.)

12 The Hours Before the Event

From the Event Manager, run step (2) Make the Date Matrix. This figures out who can date whom, and also Generally after you run step (2) you can sort the regrecords by matches in the Admin page for RegRecord.

Now, when folks come in who have few matches, you can talk to them and try and tweak their registration on the fly.

Try running “(3) Figure out who is dating whom and where.” Look for the printout at the end called “list of sad folks.” This gives a similar view to the above, listing those with few dates.

E.g.:

	personID	total	theo	score
3	AS120	3	3	0
8	CM144	2	2	0
9	CO119	4	4	0
12	DW140	2	2	0
22	NS117	1	1	0
24	PB121	3	4	25
28	RT138	3	3	0
32	TA145G	0	0	0

The total column tells you how many dates they have. The theo column tells you how many dates they *could* have---so NS117, for example, only has one possible match. TA145G has no one possible.

If you are clever enough to do this a few days before as a dry run, you can check these registrations and try and fix/change them so they get more dates.

13 At the event

Here is what to do at the actual event. Practice all these steps before the event starts (don't worry, you won't break anything) to make sure that it will all go smoothly at the event.

13.1 Arrive early

Allow plenty of time, especially if this is your first PSD. Everything takes longer than you'd like. What do you need to do in order to set up at the event?

You need to be ready for people to arrive well before your advertised start time. This means the computers are set up, the printer is ready, the internet connection is working, and the nametags (which you already printed) are available. Does anyone still owe you money? Be prepared to make change. Will you be letting people register at the door? Have another internet-enabled computer available so they can go to the website and fill in the registration form.

You will also need to rearrange and number the tables, set up food, and do other things to get the room ready.

13.2 Check people in

Set up your door-checking-in computer so as people arrive you can check them in. Train someone to do check-in. Only use people who have good attention to detail since if a mistake is made here, people can be dropped entirely from the event.

On any Manage screen, select (1) Check-in participants. This is the check-in screen

Hey there, PSD staff person. To check someone in:

- * Make sure they've paid, and if not, ask them to!
- * Click the button next to their name.

Flag Key:

- * LOW - not many potential matches. Have them see special agent.
- * DRINK - give them a free drink ticket
- * READ - something possibly important (with an !) is in the comments to right. Read it and check
- * SSM - they registered and we don't have a balance date for them. See agent.
- * CHECK - something is off. Have them see agent.

ID	Nickname	Name	CHECK IN	Flag	Notes
1	AC347	Andrew C	<input type="checkbox"/> PAID		
2	AJ603	amiee joy	<input checked="" type="checkbox"/> PAID	LOW	paypal transaction id: 3DU54081BG8727341
3	AJ645	Anthony P	<input checked="" type="checkbox"/> PAID	LOW	paypal transaction id: 70N95257F06308209
4	ALA366	Alan	<input checked="" type="checkbox"/> PAID	LOW	paypal transaction id: 9S462028N2497752J
5	ALC613	Alcor	<input checked="" type="checkbox"/> PAID		paypal transaction id: 01447758EP474044E
6	ALL636	Allie M	<input checked="" type="checkbox"/> PAID	LOW	paypal transaction id: 2AD24718SD4236839
7	ALL689	Allison T	<input checked="" type="checkbox"/> PAID	LOW	paypal transaction id: 66488935YK3602803
8	ALL690	Allie S	<input checked="" type="checkbox"/> PAID	LOW	paypal transaction id: 9GH30810AJ941391T
9	AMA650	Amanda L	<input checked="" type="checkbox"/> PAID		paypal transaction id: 94610592UB756461E
10	AMY333	Amy H	<input checked="" type="checkbox"/> PAID		paypal transaction id: 4K054114J14033747
11	AN634G	Anne and Neil	<input checked="" type="checkbox"/> PAID		paypal transaction id: 9R507101E2315520P
12	AND621	Andrew G	<input checked="" type="checkbox"/> PAID	LOW	paypal transaction id: 1CP07590596590523
13	AND666	Andrew M	<input checked="" type="checkbox"/> PAID	LOW	paypal transaction id: 0F521144ML670091V
14	ANG674	Angelica	<input checked="" type="checkbox"/> PAID		paypal transaction id: 53J86949K7958804R
15	ANI667	Anni	<input checked="" type="checkbox"/> PAID		paypal transaction id: 0281669347362314E

Follow these steps:

- 1) Locate person on list, determine and interpret any flags (see below)
- 2) Verify whether they have paid. If they are not yet paid, the PAID box will be unchecked. Take their money and check the box.
- 3) Click on the “Check in ID” button
- 4) **ONLY IF YOU SEE THE FOLLOWING:**

You have checked in [AAR428: Aaron \(Aaron S\)](#) UNDO AAR428

should you hand them a name tag.

GOLDEN RULE: If it doesn't say the above, don't give a nametag.

EVEN IF you send the person to talk to someone else, either check them in first (and give them nametag) or do not check them in (and keep nametag).

The Flags:

Drink: give them a free drink ticket

Read: read the notes and act accordingly

SSM: They need balance. Have them see organizer

CHECK, LOW: They need to talk to organizer

13.3 New Registrations

If people arrive who want to date who have not yet registered, you can register them. We recommend first doing the following:

Click “do not send email” on the Admin page for the Event. This will make it so when you add a registration it does not send email.

13.4 Flagged People: Some Tips and Advice

The main thing is watching for folks who have registered incorrectly or too restrictidly, somehow.

You can edit these people. Go to the regrecord, click on the Update, and talk through it. See above for “troubleshooting reg records.”

13.5 Do the date-match run

After everyone has arrived and checked in, finalize the data and set up the dating sheets. To do this, from the Manage screen select

- (1) Make the dating matrix files, and then
- (2) Figure out who is dating whom when and where

Step 1 is straightforward, click on it, let it run, and that's it. For Step 2, you need to make a few choices.

Home

Welcome, dca

Rounds: 12

Trials: 1

Include: Everyone that has not cancelled ▼

Start Scheduling

Rounds: the number of dating periods you'll be having. We like 14, and then we schedule 4 rounds of breaks.

Trials: how many iteration loops the software does while doing its calculations. Something like 10 or 15 gives fine results. The higher the number, the better the results. The only downside to a higher number is it takes longer, though a good solid number like 10 or 15 didn't seem to take much longer than the minimum of 1.

Include: which records to include in the calculation. Before the day of the event, while you are playing with this and doing practice runs to get a feel for the system, you can use any of the options. But when you do it for real at the event you have to select Folks checked off as here. This eliminates any no-shows from the dating lists.

13.6 ***Print and distribute the date sheets***

After you have completed the date-match run, on any Manage screen, select (3) Make pdf of everyone's schedules.

This will generate a large pdf file of all of the date sheets, one sheet per page, and offer it for download. Print this pdf on the printer that you brought to the event. Give these out.

Warning: Do not re-run the matching after you hand out printed out sheets. There will be no way to recover the old schedules!

13.7 ***Tips on running the event***

Remain calm.

Ring a bell or make an announcement every 6 minutes. Post signs listing the round number so people can get back on track if they get confused.

13.8 ***At the end, collect the date sheets***

You don't need to organize or order the sheets. The data entry system can take them in any order.

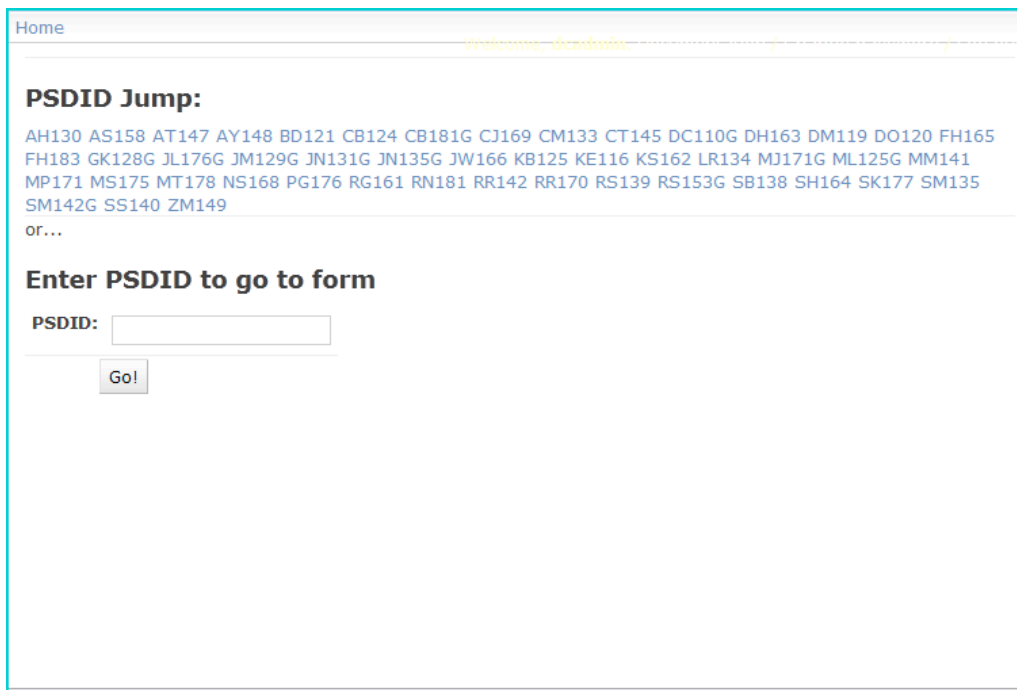
Take them home with you for data entry later. Or if you are feeling especially masochistic you can enter them at the event, and distribute the results then and there. But that's a lot of work and pressure, and not recommended.

14 After the event

The PSD event is over. Now it's time to put everyone's speed-dating choices into the system, generate everyone's mutual matches, and email the matches to the daters.

14.1 Enter the information from the date sheets

From the manage screen, select enter date sheets. You will see a form where you type in the poly speed dating ID.



The screenshot shows a web interface with a header bar containing "Home" on the left and "Welcome, dadmin" on the right. Below the header, there is a section titled "PSDID Jump:" followed by a list of alphanumeric IDs: AH130 AS158 AT147 AY148 BD121 CB124 CB181G CJ169 CM133 CT145 DC110G DH163 DM119 DO120 FH165 FH183 GK128G JL176G JM129G JN131G JN135G JW166 KB125 KE116 KS162 LR134 MJ171G ML125G MM141 MP171 MS175 MT178 NS168 PG176 RG161 RN181 RR142 RR170 RS139 RS153G SB138 SH164 SK177 SM135 SM142G SS140 ZM149. Below this list is the text "or...". Underneath, there is a section titled "Enter PSDID to go to form" which includes a label "PSDID:" followed by a text input field and a "Go!" button.

Hit enter, and you will get an electronic version of their date sheet.

Date Sheet for AY148 at midat01 on 2011-09-18

Comments: Adrienne
 Referral:
 Notes: paypal transaction id: 6CN4314222739583L
 AY148 is a 32 yr old woman (not kinky), potentially interested in a primary, looking for 25-55 yr old women (kinky or not). Individuals in groups okay. Friendship dates okay. From Annapolis, Greater Baltimore, Germantown/Rockville/Laurel, Frederick/Hagerstown.

Round	PSDID	Friend?	Table	Marked Yes	Geek Code
1	JN135G		Table 2	<input checked="" type="checkbox"/>	a group of a 28 yr old woman (kinky) looking for 22-50 yr old women (kinky or not) and a 31 yr old man looking for 25-55 yr old men (kinky or not). Friendship dates okay. From Greater Baltimore.
2	SK177 (F)		Table 9	<input checked="" type="checkbox"/>	a 36 yr old woman (kinky) looking for 30-49 yr old men (kinky or not). Groups not okay. Friendship dates okay. From Annapolis, Greater Baltimore, Germantown/Rockville/Laurel, Frederick/Hagerstown.
3	MJ171G (F)		Table 5	<input type="checkbox"/>	a group of a 54 yr old woman (not kinky) looking for 35-55 yr old men/women (kinky or not) and a 57 yr old man looking for 25-55 yr old men (kinky or not). Individuals in groups okay. Friendship dates okay. From Annapolis, Greater Baltimore, Germantown/Rockville/Laurel, Frederick/Hagerstown.
4	ML125G		Table 14	<input checked="" type="checkbox"/>	a group of a 33 yr old woman (not kinky) looking for 24-40 yr old men/women (kinky or not) and a 31 yr old man looking for 25-55 yr old men (kinky or not). Friendship dates okay. From Annapolis.
5	CB124		Table 15	<input checked="" type="checkbox"/>	a 28 yr old woman (kinky) looking for 21-35 yr old men/women/gender-queers (kinky or not). Groups not okay. Friendship dates okay. From Annapolis, Greater Baltimore, Germantown/Rockville/Laurel, Frederick/Hagerstown.
6	CB181G		Table 2	<input type="checkbox"/>	a group of a 33 yr old woman (not kinky) looking for 27-99 yr old women (kinky or not) and a 33 yr old man looking for 25-55 yr old men (kinky or not). Friendship dates okay. From Annapolis, Greater Baltimore, Germantown/Rockville/Laurel, Frederick/Hagerstown.
7	RR170		Table 15	<input checked="" type="checkbox"/>	a 26 yr old woman (kinky) looking for 18-55 yr old men/trans men/women/trans women/gender-queers (kinky or not). Friendship dates okay. From Annapolis, Greater Baltimore, Germantown/Rockville/Laurel, Frederick/Hagerstown.
8	DH163		Table 15	<input type="checkbox"/>	a 28 yr old woman (kinky), potentially interested in a primary, looking for 25-40 yr old women/gender-queers (kinky or not). Friendship dates okay. From Annapolis, Greater Baltimore, Germantown/Rockville/Laurel, Frederick/Hagerstown.
9	GK128G		Table 14	<input type="checkbox"/>	a group of a 45 yr old woman (not kinky) looking for 21-60 yr old women (kinky or not) and a 45 yr old man looking for 25-55 yr old men (kinky or not). No friendship dates. From Annapolis, Greater Baltimore, Germantown/Rockville/Laurel, Frederick/Hagerstown.
10	JN131G		Table 1	<input checked="" type="checkbox"/>	a group of a 34 yr old woman (not kinky) looking for 25-39 yr old non-kinky men/trans men/women/trans women/gender-queers. Matching one member is fine. Individuals in groups okay. From Annapolis, Greater Baltimore, Germantown/Rockville/Laurel, Frederick/Hagerstown.
11	SH164		Table 4	<input checked="" type="checkbox"/>	a 35 yr old woman (kinky) looking for 25-42 yr old men/women (kinky or not). Individuals in groups okay. Friendship dates okay. From Annapolis, Greater Baltimore, Germantown/Rockville/Laurel, Frederick/Hagerstown.
12	DC110G		Table 2	<input type="checkbox"/>	a group of a 54 yr old man (kinky) looking for 25-60 yr old men/trans men/women/trans women/gender-queers (kinky or not). Matching one member is fine. Individuals in groups okay. Friendship dates okay. From Annapolis, Greater Baltimore, Germantown/Rockville/Laurel, Frederick/Hagerstown.

Cruises:
 #1 #2 #3

The PSDID codes at the top are links, one for each dater. Clicking the link takes you to that person's entry screen. Or you can enter the PSDID manually, but this is rarely necessary.

So, you've got a stack of marked-up dating sheets. You don't need to organize or order the sheets. The data entry system can take them in any order. For the sheet on the top of the pile, click on its PSDID. You'll see the entry form for that dater.

If this dater said Yes in a particular round, check the Yes box. Don't worry about the No boxes.

At the bottom are three boxes under Cruises. Maybe while chatting between rounds this dater met someone they'd like to connect with later, and hand-entered that person's PSDID on the dating sheet. Add it here.

When you've entered this sheet's data, click Submit at the bottom. You should get the screen where you enter the next PSDID. Repeat until you're done.

You can have multiple people entering on different computers at the same time.

When done you can check your work using the other options that check for missing sheets.

Tip: For cruises, you can have the "List People Registered" output in a separate window to search for names and whatnot if necessary.

Overview: Have a bunch of data entry monkeys do the following until done:

1. Grab a sheet
2. either click on a PSD ID or type in field
3. Check that the first date PSDID matches on the screen and the form (to ensure you aren't making a mistake).

4. check off yesses
5. Type in cruises

14.2 Looking for missing sheets

Go back to the manage page.

Click on “[List datesheets for event that are not filled in](#)”

This tells you if you missed any sheets. Figure out what to do with those missing sheets.

14.3 Looking for bad cruise IDs

Go back to the manage page.

Click on “[List cruise records with psdids that do not exist](#)”

You can go back and re-enter these if you like. You can search “List People Registered” output for likely candidates.

14.4 Emailing the speed-daters after the event

You have arrived at the last and final step of your Poly Speed Dating event. Well done! All the data is entered and you are ready to tell everyone who their matches are. Here is how to do this.

On any Manage screen, select Mass email for matches post event. The post-event email screen appears.

This is how you send matches to folks. You can edit a message, and then do a trial “send” by *not* having the box at bottom checked. This will print out all the emails to the screen so you can see if you like the formatting. When ready, hit the back button and then check off that box and then hit “send.”



The screenshot shows a web interface titled "PSD administration" with a blue header. Below the header is a navigation bar with a "Home" link. The main content area contains the following text and form elements:

- A message: "...because we need to make the world a better place."
- A "Home" link.
- A descriptive text: "This form is for emailing all attendees at a past PSD event. For instance, because they have matches!"
- An "Event code:" label followed by a text input field.
- A "Subject line for mass email:" label followed by a text input field.
- A "Mass email:" label followed by a large text area for composing the message.
- Two checkboxes at the bottom: "Send everyone their matches, too?" and "Really send the email or just do a test-render? (Check means really send.)".
- A "Send that email!" button.

Put in the Subject line for the email and the message you want to send. Check the box to Send everyone their matches, too (that's the point of this email after all!).

If you just want to see what the results look like, don't check the box marked Really send the email. With the box unchecked, it generates the emails and lets you look at them, but doesn't send them. That's how you can make sure it's coming out the way you want it.

Click the button marked Send That Email! Don't worry, if you haven't checked the box it won't really send the email.

Warning: Some email accounts will choke after sending a fixed number of emails and then you have to wait to send the rest. Scroll down and find the number where it failed to send. Later, restart at that number and it will start sending from that number on.

15 Frequently Asked Questions

15.1 *There are no tables on the final PDFs. What is going on?*

You need to make the “table of tables.” Select this option from the Event Manager, choose some number of tables to be group and stationary OK, and generate. This should fix the problem.

15.2 *It looks like no one is getting matches at all. What is going on?*

You need to explicitly tell DateWrangler to match people. Go to manage, and select the “make date matrix” option. Now it will calculate who likes whom.

15.3 *How do I break a potential date between two people?*

Two ways. First, use the “break dates” form in the Manage screen. Second, open RegRecord for one of the people and select “break” from the options at the top. Check off other person and hit submit.

16 Appendix A: Using your own local server

If you want to, you can get our bundled application and do everything on your own computer. There is a set-up check-list and it is not too bad. In brief: install Python, install Django, install R, edit a file holding all the site-specific variables (email, location of files, etc.), run a configuration script and then you are done! Once you get things running this way, you can more easily configure small things or write more code to do special things. We encourage you to try this!

For full control, you need to have a webserver that can run Django. Put all our stuff on that server.

This setup is also necessary if you don't have internet, or have unreliable internet, at your dating site. There is one caveat: you don't actually need a webserver. Django will provide a fake testing webserver that works well enough.

17 Appendix B: Some details on the inner workings of things

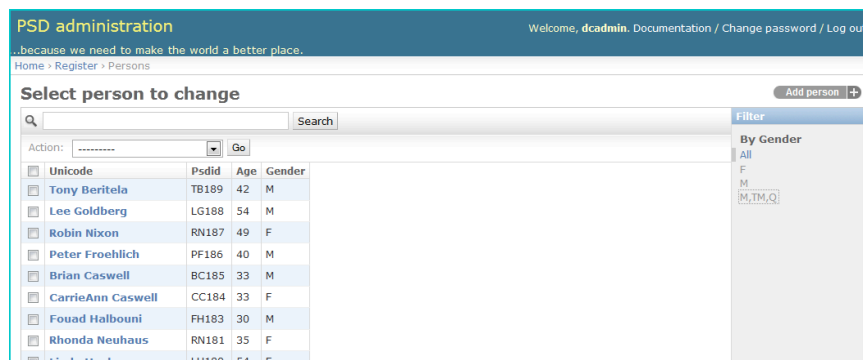
17.1 The Person Records

RegRecords have collections of associated Person Records associated with them to store individual preferences such as who or what someone wants to date.

Generally, these are easiest to change with the “update” button for a RegRecord.

On the Person screen there’s one record for each person, whether they registered as an individual or as a member of a group.

In the table on the Persons screen, these are simply the real name of each person, whether an individual or a member of a group.



Click on a name to view that record.

PSD administration Welcome, dadmin. Documentation / Change password / Log out

...because we need to make the world a better place.

Home > Register > Persons > Christine Jones

Change person All Registrations Registrations History

CJ169 is a 24 yr old woman (kinky) looking for 21-45 yr old men/trans men/women/trans women/gender-queers (kinky or not)

First Name:

Last Name:

Gender: male female trans male trans female genderqueer

Age:

Seeking Primary (Y/N)

Kinky (Y/N)

Gender Wanted: male female trans male trans female genderqueer

Seek age min:

Seek age max:

Seek kinkiness:

Psdid:

Real id in database: 69

[Delete](#) [Save and add another](#) [Save and continue editing](#) [Save](#)

At the top of each Persons record you will see a summary of who this person is and what they are looking for. Below that are many fields. First Name, Last Name, Gender (they can select from five possibilities), Age, Kinky (yes or no), are they seeking a primary partner (yes or no), what gender(s) are they willing to match with, what min/max age are they willing to match with, what kinkiness are they willing to match with. As before, the checkboxes are slanted, not under each other. Same cosmetic bug, ignore it.

There are three buttons in the top right corner: All Registrations, Registrations, and History.

PSD administration Welcome, dadmin. Documentation / Change password / Log out

...because we need to make the world a better place.

Home > Register > Persons > Denise Hansen

Change person All Registrations Registrations History

DH163 is a 28 yr old woman (kinky) potentially interested in a primary. Looking for 25-40 yr old women/gender-queers (kinky or not)

All Registrations goes to the Reg records screen. Registrations lists all the events this registrant has registered for. History shows the change history for this record, and who changed it, however be aware it isn't always accurate.