User Manual - Clients

Event planning software

Introduction – system overview

Event planning software system was made in order to make the whole Event planning process easier for all the involved users: Event hosts, organizers and participants. Application is available through the web server, allowing users to login remotely, yet – all the data is secured and system components available only for the authorized personnel.

The whole process is streamlined and customized according to Event host decision flow, providing clear information on Event lists, statuses and Client/Participant involvement.

The system consists of three main parts:

- Event host administration and approval system
- Client (event organizer) user interface
- Participant's user interface

All the components are interconnected through the common database, which provides accurate status of all the current Events and archived history of previous events.

Logging into the system

The system is accessed through the Event host web pages as single web link, providing login screen (figure 1) common for all system users – having a unique login name and password.

For new users there are two possibilities to sign in. First is dedicated for new Event organizers and is in form of a link **Venue Booking**. The link opens a new screen containing a sign in form shown on figure 2, where new users can enter their data. Organizer of the Event will be referenced as the Client throughout this document. Second link **Register for Event**, is for new Participants. The link opens sign in form shown on figure 3.

Figure 1: Login screen

Figure 2: Sign in form for Client (Event organizer)

Figure 3: Sign in form for Participants

Navigating through the application

After logging into the system, user is prompted to the main screen. Main screens vary, depending on which type of user is logged in and what role it has. This chapter will cover basic navigation, that is common to all users. For detailed navigation instructions please refer to user specific manuals.

General navigation

On all screens menu is located on the left side. On top of the menu is organizations logo with the link to organizations website. Located on the bottom part of the menu is info about user currently logged in. Top button is Home on all screens, except on the Home screen itself, and it will always bring the Home screen of the current user. Below Home button there are different menu buttons, depending on the type of user. Last button is always Logout button, which logs out the current user and bring out the login screen.

Figure 4: Menu

Located on the right part (the bigger part) of the screen are panels, containing the relevant data for different types of users and different menu options. The panels contain + or – marks for maximization or minimization. They allow user to customize their screen, by shrinking or expanding different panels.   They are located at the upper left corner of the panel as shown in figure 5.

Figure 5: Panels

Legend

There are different types of navigation options used in different segments of the application. Her we will list them and explain the actions they perform.

- ⟳ Refresh the current screen (keyboard: F5)
- ⓘ Opens the User Manual document
- * Marks the required input fields of different forms
- ➕ Adding new item to table
- ✖ Deleting all items of the current table
- ✏ Editing of the selected item in the table
- ✖ Deleting the selected item in the table
- ⟰ Exports all the Data of the current table to Excel spreadsheet
- ⌃ Exports the displayed Data of the current table to Excel spreadsheet (after filtering)
- 💾 Saves data from form to database
- ➖ Minimizes the expanded panel
- ➕ Expands the panel
- ▶ Shows additional information on the row
- 👤 Displays participants attending the event
- ⟪ and ⟫ Change month on a calendar view (keyboard: LEFT and RIGHT)
- ‹ and › Change week on a calendar view (keyboard: UP and DOWN)

Tables

For displaying and editing data from systems database, data Tables (Figure 6) are used. Generally, they consist of Header, Displayed Data Field in the middle and a Footer.

Venues							
Select venue for changing its facilities, setup options and image upload.							
Name ⇕	Size Sq. ft ⇕	Max capacity ⇕	Rental Rates ⇕	Discount Rates ⇕	Setup option ⇕	Show On Form ⇕	
Auditorium	1,455.36	100	AED 10,000.00	AED 7,000.00	Whatever	Yes (1)	✎ ✖
Foyer						Yes (2)	✎ ✖
Atrium						Yes (3)	✎ ✖
Majlis						Yes (4)	✎ ✖
Meeting Room 1						Yes (5)	✎ ✖
Meeting Room 2						Yes (6)	✎ ✖
Video Conference Room						Yes (7)	✎ ✖
Lecture Hall 1		30	AED 10,000.00	AED 7,000.00	Theatre style	Yes (8)	✎ ✖
Lecture Hall 2						Yes (9)	✎ ✖
Lecture Hall 3						Yes (10)	✎ ✖
Lecture Hall 4						Yes (11)	✎ ✖
Lecture Hall 5						Yes (12)	✎ ✖
Case Method Hall						Yes (13)	✎ ✖
Rotunda						Yes (14)	✎ ✖
AMML Meeting Room 1						Yes (15)	✎ ✖
AMML Meeting Room 2						Yes (16)	✎ ✖
KHMSC Clinical Ward						Yes (17)	✎ ✖
KHMSC ED						Yes (18)	✎ ✖
KHMSC OR						Yes (19)	✎ ✖
KHMSC ICU						Yes (20)	✎ ✖
KHMSC Debriefing Room						Yes (21)	✎ ✖
KHMSC Training Room						Yes (22)	✎ ✖
KHMSC Dental Simulation Room						Yes (23)	✎ ✖
			1 of 1 ⏮ ◀ **1** ▶ ⏭ 30 ▼				

Figure 6: Sample Data Table

First row of a Header contains the name of the Table and ➕ mark for adding new item to the Table. If needed, second row contains information about usage of a Table. Third row of a Header corresponds to the dataset displayed, and allows users filtering and sorting options on different Columns of the Table.

The main, middle, part of a Table, contains the displayed data. Data items are represented in rows. Each row can contain ✖ or ✎ button at the end or in the beginning, for deleting or editing row.

For selecting row user have to click on the row. Selected row is highlighted and additional information are shown *(Figure 7).*

Figure 7: Selected row

The footer of the Table contains some navigation and display options. It also shows the current position in the dataset. The number of items per page is predefined to 30 and is also adjustable from the Tables Footer.

Some Tables have option to expand row. For example: Client Table (Figure 8) has options to review all Clients' events by expanding row.

Figure 8: Clients table: two rows extended

Some Tables have export to excel option. As figures 9 and 10 shows, by clicking on marked icon, the Excel document (.xls) is created and downloaded to local hard drive. The document can be further edited by user on a local machine.

Figure 9: Clients table: two export icons

Figure 10: Exported Excel document

Types of Users

The application is designed to be used by different types of users. Each of these types have different roles and authorities in the system. This chapter will explain each of those user types in detail.

There are three main user types:

Staff (users employed by the organization, we will further divide this group, based on the user's role)
- **Clients** (users that are organizing the events)
- **Participants** (users who are attending events)

Staff

As mentioned, first group of users are those employed by the organization. Based on their roles and authorities we will further divide this group into four subgroups. These are: Administrator, Scientific Committee, Finance and Event Planers.

Administrator

Administrator role group has all the privileges in the system. They also have the authorities as any of the other group, so they can take same actions as Scientific Committee or Finance or any other user group for that matter. Additionally, they are responsible for the administration registers and code lists. We will cover this more in detail in the Administrator User Manual chapter.

Scientific Committee

The role of the scientific committee is to decide if the Event is scientifically relevant to the institutions context. They make their decision based on the documentation supplied by the Clients (organizers of the Event). Their decision can go three ways: Approved, Disapproved or Pending. Scientific committee has possibility to send mail with automatically attached documents supplied by the Client.

Finance

The role of this group is to create invoice for Event and to confirm Event once it is paid by the Client. During process of invoice creation, they should add invoice number and validate pricing and discounts as well as additional costs. After receiving payment from the Client they have to confirm the Event. Finance role allows user to reject Event if they found out that payment is not completed.

Event Planners

Users from this group have a role to communicate with Clients and Participants, and supply relevant information to others decision makers i.e. Scientific committee and Finance. Their role consists of various actions:
- reviewing the documentation provided by Clients
- making reservations for venues based on Clients wishes or confirm reservations made by Clients
- setting the discount amount or confirm those set by the system, based on the type of Client (Business Partner, Government etc.)
- confirm certain stages of Event

- …

They are further divided in groups by Administrator, giving them jurisdiction on group specific set of venues. Every Event Planner assigned to group can book only venues of that group.

Clients

Clients are group of users who organize different Events. They are responsible for the initiation of each Event. They suggest new Event to Event Planners, providing name and short description of the Event. As well as the contact person and company details. They can make reservation for the desired venues on desired dates, if those are still available. They are also obliged to provide documentation, depending on their category, about Event, for Scientific Committee to review. They provide some specific details, like information about purpose of Event, estimated number of participants, desired venue set up, requirements for dental simulation room, AV, CME application, Tele Conf and catering wishes. If Event is exhibition they have to upload exhibition floor plan and list of contractors and suppliers. Last, but not lest they are responsible for covering all the costs prior to Event dates.

Participants

Participants are the attendants of the Events. Not all Events are opened for participants, moreover by default, the Event is not opened for Participants, and Event Planner has to open it. They provide the basic user information. They choose which Events to attend and they are obliged to make the payment prior to Event, if Event is payable.

Event Life cycle

Each Event created in the system has its own life cycle. From creation of Event to the final approval or cancelation, there are certain stages that every Event must pass. We will divide this cycle into 10 different stages:

	Code	Name	Name for Client	Designated to
•	0	New	New	Client (create Event)
•	1	Requested	WISET Review	Event Planner
•	2	Initialized	For Response	Client (check venues and dates, make changes, upload all required documents)
•	3	Documents submitted	WISET Review	Event Planner
•	4	Documents in review	WISET Review	Scientific committee
•	5	Accepted	WISET Review	Finance department
•	6	Accepted in review	WISET Review	Finance department
•	7	Confirmed	Confirmed	Final status
•	8	Pending	WISET Review	Event Planner
•	9	Rejected	Rejected	Final status
•	10	Cancelled	Canceled	Final status

Each stage requires some action of specific user in order to move to the next stage, until the final stage is reached.

It is good to note at this point that Administrator users have excess to Event at any stage and have the authority to make any possible changes at any time.

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Client Create Event

Event status: new (0)
Open for client (admin)
to make changes (make reservation)

Submit request — No

Yes

Event status: requested (1)
Open for event team (admin)
to make changes (make reservation (checkmark if
reservation dates are the ones the client requested), set
discounts and check price)

Proceed on — No

Yes

Mail to client:
Venue Available
Venue Not Available

Reject
reservation
dates/venues

Yes — No

Event status: initialized (2)
Open for client (admin)
to make changes (upload all
documents)

Restart

Submit — No

Yes

Event status: documents submited (3)
Open for event team (admin)
to review and make changes.

Only admin

Event status: rejected (9)
Reservation is released

Mail to client
Scientific
Committee
Disapproval

Mail to client
Scientific
Committee Pending
Approval

Reject

SC decision

Pend

Approve

Event status: pending (8)

Event status: documents in review (4)
Open for Sci. Committee (admin)
to accept/reject/pending

Event
team
(Restart/
Cancel)
Admin
(All)

Only admin

Reject
Approve
Confirm
Cancel
Restart

Submit to SC

Yes

Mail to client
Scientific
Committee
Approval

Invoice

Event status: accepted (5)
Open for event team
(admin)

No

Generate and
Confirm Invoice

Confirm

Event status: accepted (6)
Open finance departmant
(admin) (to confirm
payment)
for client (to view invoice),

No

Event status: confirmed (7) — Confirm — Event paid

Confirm

Approve

Cancel

Cancel Event

Event status: canceled (10)
Reservation is released
Admin (event team) can
cancel event at any point

Stage New (Code 0, Color:)

Stage New is the first stage in the Events life cycle. It is designated to Client users who want to organize new Event. Client has to provide: name of the Event, description, dates of the Event i.e. start date and time and end date and time, expected number of attendees as well as purpose of Event. Information about organizer i.e. name of Event organizer, contact person, telephone number, email address, are automatically prefilled with data from Client account. Client has possibility to change them. Client also has possibility to make reservation for desired venue or multiple venues on desired date or dates. If venue is not available on the selected date, reservation cannot be made.

Once Event is submitted it goes to next stage, in status requested. Client can only review event in that status and cannot make any changes.

Stage Requested (Code 1 Color:)

This stage of Event is designated to the Event Planner to review Client's request. Before initializing reservation, it is required from user to check venues and dates, user category, tariff type, prices and discounts. If needed Event Planner can set additional costs and add new documents or delete existing. Event Planner can also assign serial number to event. Event Planner should review due dates for Client to respond as well as due date for Client to upload all documents. Events, when these dates are not met, will be displayed on list of Events with issue. Issue list contains Events that:

- Should be already confirmed. (Start date of event is less then X days (parameter is set by Administrator in configuration page) from current date.
- Date for submitting documents is passed. (Date is set on event)
- Due date for response is passed. (Date is set on event)
- Event has pending status.
- Invoice due date is passed. (Date is set on event when invoice is created)
- Client is not satisfied with booking. (Client rejects venue booking)

Event can be canceled at this stage if it does not meet Organization standards. Event can be canceled by Administrator at any stage. Event can be also restarted by Administrator.

After proceeding on next status the mail is automatically sent to the Client informing him about Event progress and venue availability. If Event Planner cannot confirm requests dates or venues they should state that on the form, by setting no next to the question 'Are requested dates/venues equal to selected dates' and mail about 'Venue not available' are automatically sent to the Client. Otherwise, mail 'Venue available' is send to the Client.

Event Planner has possibility, at any stage, to send mails to Client through application. Predefined templates for mails are:

- Venue Available
- Venue Not Available
- Scientific Committee Approval
- Scientific Committee Disapproval
- Scientific Committee Pending Approval
- Reminder

Figure 11 is showing example of status bar on form for editing Event for Event in Stage Requested.

Figure 11: Stage Requested

Stage Initialized (Code 2, Color: ☐)

This stage is opened again for the Clients to make changes if needed. But most of all it is required to upload all the documentation set by Event Planner in previous stage. If there were any changes made to reservation dates by Event Planer, they can be rejected at this point, returning the Event back to previous stage. After Client submits changes Event moves to next stage: documents submitted. If there are no required documents, Event stage for reviewing documents will be skipped and Event will automatically go to approved status.

Figure 12 is showing example of status bar on form for editing Event, for Event in Stage Initialized.

Figure 12: Stage Initialized

Stage Documents Submitted (Code 3, Color: ☐)

At this stage the Event Planners action is required again. At this stage Event Planner can review and change all Event data. Venue reservation and dates cannot be changed anymore. Submit will take Event to the next stage. At this point Administrator users have additional authorities. They can reject the Event. They can Approve the Event moving it to the stage 5 i.e. Event accepted and skipping the intermediate stages. They can also make the final confirmation at this point. They can also Reject the Event or send Event to Pending stage.

Figure 13 is showing example of status bar on form for editing Event for Event in Stage Documents Submitted.

Figure 13: Stage Documents submitted

Stage Documents in Review (Code 4, Color: ▇)

This stage is meant for user with Scientific Committee role. Since it is necessary for all members of Scientific Committee to review all the documents provided by the Client, user with Scientific Committee role has possibility to send mail with all Client documents attached. Decision can go three ways at this point. Event can be either Approved, or Rejected or Pended. In any case the mail is sent automatically to the Client with appropriate information. Administrator, at this point, has all the authorities as in the previous stage. When Event is rejected or pended it is required to specify reason.

Figure 14 is showing example of status bar on form for editing Event for Event in Stage Documents in Review.

Figure 14: Stage Documents in Review

Stage Accepted (Code 5, Color: ▢)

At this stage Event is open for the Finance department. Invoice should be generated and submitted at this stage. Finance department should provide invoice number and invoice due date. After confirmation Event moves to the next stage.

Figure 15 is showing example of status bar on form for editing Event for Event in Stage Accepted.

Figure 15: Stage Accepted

Stage Accepted in review (Code 6, Color: ▇)

This stage is also open for Finance Users. Payment confirmation is required in order for Event to progress to the next and final stage. On the contrary Event can also be Canceled at this point by Finance User. It is good to mention, that Cancelation can be made at any stage of the Event, by Administrator.

Figure 16 is showing example of status bar on form for editing Event for Event in Stage Accepted in review.

Figure 16: Stage Accepted in review

Stage Confirmed (Code 7, Color: ▇)

This is one of the final stages in Events life cycle. Even, at this point Event can be opened for Participants.

Figure 17 is showing example of status bar on form for editing Event for Event in Stage Confirmed.

Figure 17: Stage Confirmed

Stage Pending (Code 8, Color: ▇)

This is optional stage for the Event Planner to Restart or Cancel the Event. If Event Planner restarts process, the Client gets a new chance to meet scientific requirements and thereby ensure that Event will be carried out.

Figure 18 is showing example of status bar on form for editing Event for Event in Stage Pending.

Figure 18: Stage Pending

Stage Rejected (Code 9, Color: ▮)

If it comes to this point all the reservations and resources made in previous steps are released. The Event is in the final stage. No more changes are allowed to this Event, except cancelation.

Figure 19 is showing example of status bar on form for editing Event for Event in Stage Rejected.

Figure 19: Stage Rejected

Stage Canceled (Code 10, Color: ▮)

Similar to previous stage, all the reservations and resources made in previous steps are released. The Event is in the final stage.

Figure 20 is showing example of status bar on form for editing Event for Event in Stage Canceled.

Figure 20: Stage Cancelled

User Manual for Client Users

Client users are users who organize events.

After logging into the system, as a Client, the Clients screen pops up in the browser (Figure 21). Besides familiar menu items, that were introduced earlier, there are four buttons in Client screen that will be explained in this chapter. The buttons are:

Venue Booking (this options opens a venue booking screen, where Clients can manage their bookings and Event organization)

My Events (opens all Events screen, where all Events organized by a Client are shown)

Browse Venues (this option lets Clients browse different venues that are available)

My account (opens Clients account settings)

Figure 21: Client screen

On the right side of the screen, there are tables showing different Client's Events with different status. If there are any Events listed in a status category, the appropriate table will be expanded, as for example, confirmed upcoming Events in above figure. The editing screen for listed Events can be accessed, by clicking on ✏ mark, on the left side of listed Event. This screen will be explained in the next chapter.

Venue Booking

The venue booking and editing screen is the main screen for Clients, to manage their Events. An example is shown in figure 22.

Figure 22: Venue booking screen

There are two buttons on top of the screen, Save Changes and Submit Event. The first one enables Client to save current Event settings for future editing. The second one submits the Event, moving it to the next stage. Below them there is an Event information input form with additional button, Make Reservation. The button enables Client to make reservation for desired venue. Date and Time input fields are equipped with appropriate input selectors (Figure 23 and 24).

Figure 23: Date input selector

Figure 24: Time input selector

After filling required fields with Event information, Client can make reservation, as mentioned above. After clicking reservation button, the following form pops up (Figure 25).

All possible venues are listed in the form. Based on the time and date inputs, the available ones are colored green and enabled for selection. By clicking on Save button, Client confirms their selection.

Figure 25: Reservation form

Below reservation buttons there are check boxes for selecting additional options for venue, required by Clients. If exhibition setup is required, the list of documents, that need to be provided by Client, is listed (Figure 26).

Figure 26: Event information – lower part

The required documents can be uploaded by clicking on a listed document, the yellow button, choose file for upload, will appear (Figure 27). Than Client can select appropriate document from a local machine in the pop up window.

Figure 27: Document upload

My Events

The My events menu option opens the following screen (Figure 28).

Figure 28: All events

Here all Client's Events are listed and available for editing. Events are highlighted in different colors, based on the status they are in. The Events that are not submitted yet, can be deleted here. As the test Event from the figure above, for example.

Browse Venues

This menu option opens the following screen (Figure 29). Here Clients can browse venues, check possible setup options and see available facilities for each venue. Venue image is displayed in the bottom, if provided.

Figure 29: Browse Venues

My account

In this menu option Client can change their account settings, as shown in figure 30. Fields Country and Client category are selectable through drop down list. List options are predefined by Administrator. The Client confirms settings by clicking on a Save Changes button.

Figure 30: My account