User Manual - Clients

Event planning software



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Wise Technologies Ltd.



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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 <u>Venue Booking</u>. 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 <u>Register for Event</u>, is for new Participants. The link opens sign in form shown on figure 3.





Figure 1: Login screen

V	966666 Can't read the image' Click on image to get a new
Client User Registration	Form
Security code *	96666
Contact Person *	Rob Destines
Company *	RDM
Telephone	+123 45 678 910
Mobile No *	+123 45 678 911
Fax	+123 45 678 912
e-mail *	rob@rdm.xyz
Address and P.O. Box *	Park <u>Axenue</u> , 123, New York
Country *	Unated States
Client category	Business Partners
Client category	Values la tres
Username *	rob@rdm.xyz
Password *	
Repeat password *	
Register	Cancel

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

	53180 Can't read the Image's Cilck on Image to get an
ser Registration Form	
Security code *	53180
First name * Last name *	Andrea Vittalli Female
Gender *	•
Company * Profession *	Medilab Doctor
Years of Experience	5-10 years
e-mail *	andrea.vittalli@medilab.xyz
Mobile No *	+123 45 678 910
Office Contact No	+123 45 678 911
Address and P.O. Box *	Via Vittoria ∃2, Napoli, Italy
Nationality *	Italian
Username *	andrea.vittalli@medilab.xyz
Password *	
Repeat password *	
Register	Can

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.

	App	lication Action Logs								
		Date 🗘	Description \$	User that made change ≎	User Type	Role	Event Status	Participant status	Event Name 🗢	Serial No 🗘
	0	09.07.2016 16:03.34	Insert Payment Category	admin	DHCC staff	Admin				
	0	09.07.2016 16:03.55	Insert Payment Category	admin	DHCC staff	Admin				
	0	09.07.2016 16:04.15	Insert Payment Category	admin	DHCC staff	Admin				
	0	09.07.2016 16:04.29	Insert Document	admin	DHCC staff	Admin	Confirmed		test	121281-12121-12
	0	09.07.2016 16:04.33	Change Document	admin	DHCC staff	Admin	Confirmed		test	121281-12121-12
) [i]	0	09.07.2016 16:05.00	Change Event	admin	DHCC staff	Admin	Confirmed		test	121281-12121-12
/ <u> </u>	ō	09.07.2016 16:05.00	Change Event	admin	DHCC staff	Admin	Confirmed		test	121281-12121-12
	0	09.07.2016 16:09.40	Insert User Data peter.smi							
Home	ō	09.07.2016 16:11.50	Insert Participant Registrat		Participant		Confirmed	Not Paid	test	121281-12121-12
	0	09.07.2016 16:15.09	Change Event	admin	DHCC staff	Admin	Confirmed		test	121281-12121-12
	ō	09.07.2016 16:15.09	Change Event	admin	DHCC staff	Admin	Confirmed		test	121281-12121-12
MBRU staff	0	09.07.2016 16:15.31	Insert Participant Registrat		Participant		Confirmed	Not Paid	test	121281-12121-12
	ō	09.07.2016 16:16.32	Insert Event	admin	DHCC staff	Admin	New	Not Fuld	test	1212011212112
Clients	ō	09.07.2016 16:16.32	Insert Document	admin	DHCC staff	Admin	New		test	
	0	09.07.2016 16:16.32	Insert Document	admin	DHCC staff	Admin	New		test	
Participants	0	09.07.2016 16:16.32	Insert Document	admin	DHCC staff	Admin	New		test	
	0	09.07.2016 16:16.32	Insert Document	admin	DHCC staff	Admin	New		test	
Venues	0	09.07.2016 16:16.32	Insert Document	admin	DHCC staff	Admin	New			
	0								test	
Documents	-	09.07.2016 16:16.32	Insert Document	admin	DHCC staff	Admin	New		test	
	0	09.07.2016 16:16.32	Insert Document	admin	DHCC staff	Admin	New		test	
Jser Category	0	09.07.2016 16:16.32	Change Event	admin	DHCC staff	Admin	New		test	
	0	09.07.2016 16:16.35	Insert Reservation	admin	DHCC staff	Admin	New		test	
User Groups	0	09.07.2016 16:16.35	Change Reservation	admin	DHCC staff	Admin	New		test	
	0	09.07.2016 16:16.35	Change Event	admin	DHCC staff	Admin	New		test	
istered Suppliers	0	09.07.2016 16:16.42	Change Event	admin	DHCC staff	Admin	Requested		test	
	0	09.07.2016 16:16.42	Change Event	admin	DHCC staff	Admin	Requested		test	
Nationality	0	09.07.2016 16:16.51	Change Event	admin	DHCC staff	Admin	Initialized		test	
	0	09.07.2016 16:16.51	Delete Document	admin	DHCC staff	Admin	Initialized		test	
Country	0	09.07.2016 16:16.51	Delete Document	admin	DHCC staff	Admin	Initialized		test	
	0	09.07.2016 16:16.51	Change Event	admin	DHCC staff	Admin	Initialized		test	
Profession				3.0	f 30 14 km 1 3	2 3 4 5 6 7 8	9 10 P> PI 30	D 🔻		
				50						
User Logs										
Event Logs										
Lvent Logs										
Configuration										
comgaration										
Logout										

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.



	+ 1 event has issue.							
	- Calendar							
	Venues		× = +	Facilities	Room Setup Options			
	Name	Size Sq. ft Max capacity	Rental Rates Discount Rates					
¢ i	01.08.2016 📄 WEE	EKLY		August 2016				
Administration	Sunday 31	Monday 01	Tuesday 02	Wednesday 03	Thursday 04 05	Friday	Saturday 6	
Venue Booking								
All events	07	08	09	10	11 12		3	
Open event								
Finance mode								
ici. committee mode	14	15	16	17	18 19	2	0	
		10				-	•	
Logout								
Admin Admin	21	22	23	24	25 26	2	7	
	21		07:00-15:00 Auditorium Moder 08:00-16:00 KHMSC OR Laser 1			2	, ,	
	28	29	30	31	01 02	0	2	
	09:00-17:00 Lecture Hall	4 Hel: 08:00-16:00 KHMSC Debriefing 09:00-17:00 Lecture Hall 4 Hel:	08:00-16:00 KHMSC Debriefing	08:00-16:00 KHMSC Debriefing	10:00-15:00 Majlis Machine Vis 10:0	0-15:00 Majlis Machine Vis 0	5 0:00-17:00 Rotunda Nutriti 0:00-15:00 Majlis Machine	ion Vis
	Sunday					A.		4
	Sunday 31.07.2016	Monday 01.08.2016	Tuesday 02.08.2016	Wednesday 03.08.2016	Thursday 04.08.2016	Friday 05.08.2016	Saturday 06.08.2016	

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.

- O Refresh the current screen (keyboard: F5)
- 1 Opens the User Manual document
- * Marks the required input fields of different forms
- 🕂 Adding new item to table
- X Deleting all items of the current table
- 🖍 Editing of the selected item in the table
- X Deleting the selected item in the table
- A Exports all the Data of the current table to Excel spreadsheet
- A 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
- Toisplays participants attending the event
- K and X 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.

Select venue for changing its facilit	ties, setup options	and image uplo	ad.				
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)	1 3
oyer						Yes (2)	1
ktrium						Yes (3)	1
tajlis						Yes (4)	1
leeting Room 1						Yes (5)	1:
leeting Room 2						Yes (6)	11
ideo Conference Room						Yes (7)	1:
ecture Hall 1		30	AED 10,000.00	AED 7,000.00	Theatre style	Yes (8)	1:
ecture Hall 2						Yes (9)	1:
ecture Hall 3						Yes (10)	1:
ecture Hall 4						Yes (11)	1:
ecture Hall 5						Yes (12)	1:
ase Method Hall						Yes (13)	1:
otunda						Yes (14)	1:
MML Meeting Room 1						Yes (15)	12
MML Meeting Room 2						Yes (16)	1:
HMSC Clinical Ward						Yes (17)	1:
HMSC ED						Yes (18)	1
HMSC OR						Yes (19)	1:
HMSC ICU						Yes (20)	1 3
HMSC Debriefing Room						Yes (21)	1:
HMSC Training Room						Yes (22)	1:
HMSC Dental Simulation Room						Yes (23)	1

Figure 6: Sample Data Table

First row of a Header contains the name of the Table and Table and 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 \times or \checkmark 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*).

Event planner software – User manual



	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)	1
	Foyer						Yes (2)	1
	Atrium						Yes (3)	1
	Majlis						Yes (4)	1
	Meeting Room 1						Yes (5)	1
	Meeting Room 2						Yes (6)	1
	Video Conference Room						Yes (7)	1
Ć) []	Lecture Hall 1		30	AED 10,000.00	AED 7,000.00	Theatre style	Yes (8)	1
•	Lecture Hall 2						Yes (9)	1
	Lecture Hall 3						Yes (10)	1
Home	Lecture Hall 4						Yes (11)	1
	Lecture Hall 5						Yes (12)	1
	Case Method Hall						Yes (13)	1
MBRU staff	Rotunda						Yes (14)	1
	AMML Meeting Room 1						Yes (15)	1
Clients	AMML Meeting Room 2						Yes (16)	1
	KHMSC Clinical Ward						Yes (17)	1
Participants	KHMSC ED						Yes (18)	1
	KHMSC OR						Yes (19)	1
Venues	KHMSC ICU						Yes (20)	1
	KHMSC Debriefing Room						Yes (21)	1
Documents	KHMSC Training Room						Yes (22)	1
bottamento	KHMSC Dental Simulation Room						Yes (23)	1
User Category				1 of 1 🛛 🤜	4 1 12 14	30 ▼		
User Groups	Room Setup Options				Facilities			
Registered Suppliers	\$				\$			
Nationality	 Choose venue image for uploar 	4						

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.

	Clien	ts					+ :	~ .
		Company ≎	Contact Person ≎	Username 🗘	e-mail 🗘	Registration o	late 🗘	
		Wist T	Susan Smith	susan.smith@aaa.com	susan.smith@aaa.com	09.07.2016 15:	18	/ X
		RoboTech	Henry Roberts	henry.roberts@robotech.:	henry.roberts@robotech.	11.07.2016 09:	28	/ X
		OrbiMed	Piere Douphne	pierre.douphne	pierre.douphne@orbimec	11.07.2016 15:	47	/ X
•••	0	Futuvision	Aleksey Fedorov	aleksey.fedorov@xyz.xyz	aleksey.fedorov@xyz.xyz	21.07.2016 16:	49	🖊 🗙
			List	of events which client or	janize.			
			Name ≎		Status ≎	Date From	Date Till	
Ċ) II	3D Pr	inting and Ophthalmology			Confirmed	29.08.2016	31.08.201	5 🦯
\bigcirc \square	Medio	cal testing			New	06.09.2016	09.09.201	5 🦯
	0	OrtopediTech	Jurgen Weiss	jurgen.weiss@xyz.xyz	jurgen.weiss@xyz.xyz	21.07.2016 16:	52	/ X
Home	0	Dentilab	Melanie Rogers	melanie.rogers@xyz.xyz	m elanie.rogers@xyz.xyz	21.07.2016 16:	56	🖊 🗙
	0	JapaMed	Dayki Kobayashi	dayki.kobayashi@japame	dayki.kobayashi@japam e	21.07.2016 17:	00	🖊 🗙
	0	DBB Medical	Monica Fortini	m onica.fortini@dbbm.xyz	m onica.fortini@dbbm .xy;	21.07.2016 17:	02	🖊 🗙
MBRU staff			List	of events which client or	janize.			
Clients			Name 🗘		Status 🗘	Date From	Date Till	
citerits	Helth	Statistics			Cancelled			1
Participants	Helth	Statistics			Cancelled			1
T at the parts	Body	scanning methodes			Rejected			1
Venues	Helth	Statistics			Requested	28.08.2016	29.08.201	5 🧪
	Mach	ine Vision in Dermatology			Confirmed	01.09.2016	03.09.201	5 🦯
Documents			1 of 1	14 <4 1 >>	⊳i 30 ¥			

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.

		Clien	ts					+(~	*
			Company 🗘	Contact Person \$	Username ≎	e-mail ≎	Registration o	late ≎		
			Wist T	Susan Smith	susan.smith@aaa.com	susan.smith@aaa.com	09.07.2016 15:	18	1	×
			RoboTech	Henry Roberts	henry.roberts@robotech.:	henry.roberts@robotech.	11.07.2016 09:	28	1	×
	7		OrbiMed	Piere Douphne	pierre.douphne	pierre.douphne@orbimec	11.07.2016 15:	47	1	×
	·	0	Futuvision	Aleksey Fedorov	aleksey.fedorov@xyz.xyz	aleksey.fedorov@xyz.xyz	21.07.2016 16:	49	1	×
				List	of events which client or	ganize.				
				Name ≎		Status 🗘	Date From	Date Til	I.	
~	•	3D Pr	inting and Ophthalmology			Confirmed	29.08.2016	31.08.201	6 🖌	٩
Q	i	Medio	al testing			New	06.09.2016	09.09.201	6 🖌	٩
		0	OrtopediTech	Jurgen Weiss	jurgen.weiss@xyz.xyz	jurgen.weiss@xyz.xyz	21.07.2016 16:	52	1	×
Home		0	Dentilab	Melanie Rogers	melanie.rogers@xyz.xyz	melanie.rogers@xyz.xyz	21.07.2016 16:	56	1	×
Tiome		0	JapaMed	Dayki Kobayashi	dayki.kobayashi@japame	dayki.kobayashi@japame	21.07.2016 17:	00	1	×

Figure 9: Clients table: two export icons

E	. 5 - (¢~ ∓					:	selectedClie	ents (1) [Compa	tibility N	/lode] -	Excel		
F	ile Home	Insert	Page Lay	/out	Formulas	Data	Review	View	Add	-Ins 🤇	2 Tell n	ne what	t you wa	nt to do.	
ľ	Aria	al	• 10 •	A A	= =	87 -	🖶 Wrap	p Text		General		Ŧ		≠	
Pa	ste 💉 B	ΙŪ·	🗄 📲 💆	- <u>A</u> -	===	€ →	🖽 Mero	ge & Center	*	₽ • %	9 •	0 .00 00 → .0		tional Fo tting *	orm Tab
Clip	board 🕞	F	ont	Es.		Aligni	nent		- Gi	Nur	nber	Es.		St	yles
A 1	L *	: ×	$\sqrt{-f_x}$	Com	ipany										
	А		в		С			D)			Е		F	
1	Company	Contact F	Person	Usernar	ne		e-mail				Regi	stration	i date		
2	Wist T	Susan Si	mith	susan.s	mith@aaa.c	:om	susan	.smith@aa	a.cor	n	09.07	7.2016	15:18		
3	RoboTech	Henry Ro	berts	henry.ro	berts@robo	tech.xyz	henry.	roberts@ro	obote	ch.xyz	11.07	7.2016	09:28		
4	OrbiMed	Piere Do	uphne	pierre.d			pierre.	douphne@	orbim)	ned.xyz	11.07	7.2016	15:47		
5	Futuvision	Aleksey	Fedorov	aleksey	.fedorov@xy	Z.XVZ	alekse	ey.fedorov@	Dxyz.	xyz	21.07	7.2016	16:49		
6	OrtopediTech	Jurgen W	/eiss	-	veiss@xyz.>			.weiss@xy			21.07	7.2016	16:52		
	Dentilab	Melanie F			.rogers@xyz			ie.rogers@			21.0	7.2016	16:56		\neg
8	JapaMed	Dayki Ko			obayashi@ja			kobayashi			21.07	7.2016	17:00		-
	DBB Medical	Monica F			fortini@dbbr			a.fortini@d		-		7.2016	17:02		-
10					0						_				

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)
٠	1	Requested	WISET Review	Event Planner
•	2	Initialized	For Response	Client (check venues and
	dates,	make changes, upload all require	ed documents)	
٠	3	Documents submitted	WISET Review	Event Planner
•	4	Documents in review	WISET Review	Scientific committee
•	5	Accepted	WISET Review	Finance department
٠	6	Accepted in review	WISET Review	Finance department
٠	7	Confirmed	Confirmed	Final status
٠	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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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.





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.





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.

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Documents submitted 26.07.2016 09:13 ADMIN Save changes and proceed on next status	Initialized 26.07.2016 09:08 ADMIN	Requested 26.07.2016 08:57 JURGEN.WEISS®XYZ.XYZ	New 26.07.2016 08:56 JURGEN.WEISS@XYZ.XYZ				
Save Changes	Approve by Sci.C.	Reject by Sci.C.	Pend by Sci.C.	Final Confirm	Cancel process	Restart process	Send Emai

Figure 13: Stage Documents submitted



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.



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.

	Documents in review 01.08.2016 11:11 JONH.SMITH@AAA.COM	Documents submitted 01.08.2016 11:08 MONICA.FORTINI@DBBM.XYZ	Initialized 01.08.2016 11:06 JOHN	Requested 24.07.2016 22:31 MONICA.FORTINI@DBBM.XYZ	New 24.07.2016 22:30 MONICA.FORTINI@DBBM.XY
١	Cancel process	Send Email			
)	Accepted 01.08.2016 11:23 ADMIN Final Confirm	01.08.2016 11:23 01.08.2016 11:11 ADMIN JONH.SMITH@AAA.COM	01.08.2016 11:23 01.08.2016 11:11 01.08.2016 11:08 ADMIN JONH.SMITH@AAA.COM MONICA.FORTINI@DBBM.XYZ	01.08.2016 11:23 01.08.2016 11:11 01.08.2016 11:08 01.08.2016 11:06 ADMIN JONH.SMITH@AAA.COM MONICA.FORTINI@DBBM.XYZ JOHN	01.08.2016 11:23 01.08.2016 11:11 01.08.2016 11:08 01.08.2016 11:06 24.07.2016 22:31 ADMIN JONH.SMITH@AAA.COM MONICA.FORTINI@DBBM.XYZ JOHN MONICA.FORTINI@DBBM.XYZ
epted in review 01.08.2016 O.GOMEZ@XYZ.XYZ		01.08.2016 11:11 JONH.SMITH@AAA.COM	01.08.2016 11:11 01.08.2016 11:08 JONH.SMITH@AAA.COM MONICA.FORTINI@DBBM.XYZ	01.08.2016 11:11 01.08.2016 11:08 01.08.2016 11:06 JONH.SMITH@AAA.COM MONICA.FORTINI@DBBM.XYZ JOHN	01.08.2016 11:11 01.08.2016 11:08 01.08.2016 11:06 24.07.2016 22:31 JONH.SMITH@AAA.COM MONICA.FORTINI@DBBM.XYZ JOHN MONICA.FORTINI@DBBM.XYZ

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



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





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.

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 ark, 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.



Event Information Name of the Event * Computer simmulation of Virus behaveour Description of the Event * Computer simmulation of Virus behaveour, with Examples from DB8 studies. Description of the Event * Computer simmulation of Virus behaveour, with Examples from DB8 studies. Description of the Event * Computer simmulation of Virus behaveour, with Examples from DB8 studies. Description of the Event * Computer simmulation of Virus behaveour, with Examples from DB8 studies. Description of the Event * Computer simmulation of Virus behaveour, with Examples from DB8 studies. Description of the Event * Computer simmulation of Virus behaveour, with Examples from DB8 studies. Description of the Event * Computer simmulation of Virus behaveour, with Examples from DB8 studies. Description of the Event * Computer simmulation of Virus behaveour, with Examples from DB8 studies. Description of the Event * Description of the Even	
Computer sim mulation of Virus behaveour, with Examples from DB8 studies. Description of the Event * Covernment Institutions Covernment Institutions	
Description of the Event * Client category * Covernment Institutions Covernment Institutions	
Client category * Covernment institutions	
Client category * Covernment institutions	
Home Contact Person * Monica Fortini	
Telephone Number +123 45 678 910 Email Address * monica.fortini@dbbm.xyz	
Logout Expected no. of Attendees * 20	
Date(s) of the Event *	
Amolice Fortni (DSB From * 27.09.2016 💼 Till * 28.09.2016 💼	
Start Time + 09:00 End Time + 16:00	
Make Reservation	
Purpose of Event *	
✓ Scientific Program	
Examination	
Healthcare Professionals Meeting	
Other	
Venue Set Up Requirements for Dental Simulation Room	
Theatre High Speed Hand pieces	
Work Shop Low speed Hand pieces	
Classroom Interoscope	
Conference (Square) 📃 X Ray Unit	
Animal/Body Parts to be Used	
Collaterals Required - Note Fads/Pencils Note software to be supplied by the organizer	
Collaterals Required - Flip Charts CME Application	
Av Required No -	
Teleconferencing CLME Approved No -	
Voting CPQ	
Power Point Presentation DHA	
✓ Internet connection HAAD	

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).

From *					Ti	*		
Start Time *	0	Jul		▼ 2	016	¥	0	
Males Deserv	Su	Мо	Ти	We	Th	Fr	Sa	
Make Reserv						1	2	
	3	4	5	6	7	8	9	
Purpose of E	10	11	12	13	14	15	16	
Scientific	17	18	19	20	21	22	23	
	24	25	26	27	28	29	30	
Exam ina	31							
📃 Healthca	7.1							
Other	Toda	iγ	-	-	-		Done	1

Figure 23: Date input selector

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From *			Till *	
Start Time *	08:00		End Time *	
Make Reserv	-	Choose Ti	me	1
Make Reserv	Time	08:00		
Purpose of	Hour			
	Minute			
Scientifi	(ogram	_	_	·

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.

Venue Booking			×
Date From D	ate Till		
16.08.2016 🗰 08:00 3	0.08.2016	15:00	
	Max capacity	Rental Rates	Discount Rates
Auditorium	100	AED 10,000.00	AED 7,000.00
Foyer			
Atrium			
Majlis			
Meeting Room 1			
Meeting Room 2			
Video Conference Room			
Lecture Hall 1	30	AED 10,000.00	AED 7,000.00
Lecture Hall 2			
Lecture Hall 3			
Lecture Hall 4			
Lecture Hall 5			
Case Method Hall			
Rotunda			
AMML Meeting Room 1			
AMML Meeting Room 2			
KHMSC Clinical Ward			
KHMSC ED			
KHMSC OR			
KHMSC ICU			
KHMSC Debriefing Room			
KHMSC Training Room			
KHMSC Dental Simulation Room			
1 of 1 🗔	<4 1 >>	⊫i 30 ▼	
Save			Cancel

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).

	elected in table below for download/upload.		
	oor Plan inclusive of number of structures and size tractors and suppliers (build up of stalls and brandii	Document	
ele Conf			
Number of Sites	100		
Test Call Date/Time:	16.08.2016 🛗 10:00		
IP Address	123.456.789.101		
Contact Person:	Monica Fortini		
Site Name:	www.ddb.com		
Catering			
Name of Catering Com	pany: Dynamic Hospitality (www.dynamichospita	lity.ae)	
Number of PAX:	22		
Budget Per Person:	95		
✓ Coffee Break 1			
Coffee Break 2			
🗸 Lunch			
Dinner			
Cocktail			
ocuments			
Document must be se	lected in table below for download/upload.		
	Name	Document	
Objectives of the Event Letter of Official Spons	orship by Governmental Department		
	y (Emirates ID/Passport)		
Scientific Program/ Age	enda		
) MBRU Event Manage	nent Team		

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.

	w for download/upload.		_
Name		Document	
bjectives of the Event			
etter of Official Sponsorship by Governme	ntal Department		
Copy of Trade License			
Official Proof Of Identity (Emirates ID/Passp	ort)		
icientific Program/ Agenda			
Choose file for upload			

Figure 27: Document upload

My Events

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

	All eve	ents					
							^
		Status 🗢	Name 🗘	Description 🗘	Event Start Date	Event End Date	
	1		test	r			×
	1			Helth Statistics			
	1			Helth Statistics			
	1			Helth Statistics		29.08.2016	
	1			Body scanning methodes		02.09.2016	
	1	Confirmed	Machine Vision in Dermatology	Machine Vision in Dermatology	01.09.2016	03.09.2016	
() i				1 of 1 14 <4 1 ⇒ ⊨1 30 ▼			
Home							
Logout							
Monica Fortini (DBB Medical)							

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.

	12			
	Venues			
	Select venue to view its facilities, setup options and	l image upload.		
	Name 🗘	Size Sq. ft ≎	Rental Rates 🗘	Setup option 🗘
	Auditorium	1,455.36	AED 10,000.00	Whatever
	Fover	1,455.50	AED 10,000.00	whatever
	Atrium			
• •	Majlis			
	Meeting Room 1			
	Meeting Room 2			
	Video Conference Room			
	Lecture Hall 1		AED 10,000.00	Theatre style
<i>c</i>	Lecture Hall 2			
() [i]	Lecture Hall 3			
	Lecture Hall 4			
	Lecture Hall 5			
11 mars	Case Method Hall			
Home	Rotunda			
	AMML Meeting Room 1			
	AMML Meeting Room 2			
1	KHMSC Clinical Ward			
Logout	KHMSC ED			
CONTRACTOR DE LA CONTRACTOR				
Monica Fortini (DBB	KHMSC OR			
Medical)	KHMSC ICU			
	KHMSC Debriefing Room			
	KHMSC Training Room			
	KHMSC Dental Simulation Room			
		1 of 1 🛛 🖂	1 >> >1 30 V	
	Room Setup Options		Facilities	
	\$		\$	
	×		× ·	
	Theatre 6.8		2 Lavalier Microphone	
	Classroom 6-8		2 Lavalier Microphone HD Video Conferencing	

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.

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	My Account		
	Contact Person *	Monica Fortini	
	Company *	DBB Medical	
· · ·	Telephone		
	Mobile No *	+123 45 678 910	
	Fax		
() i	e-mail *	monica.fortini@dbbm.xyz	
Home	Address and P.O. Box *	Via Belluno, Bolzano, Italy	
	Country *	Italy 🗸	
Logout	Client category	Governm ent Institutions	
Monica Fortini (DBB Medical)	Username *	monica.fortini@dbbm.xyz	
 Metrical) 	Password *	1	
	Save Changes		

Figure 30: My account