User Manual

Event planning software



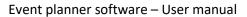
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Wise Technologies Ltd.



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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.



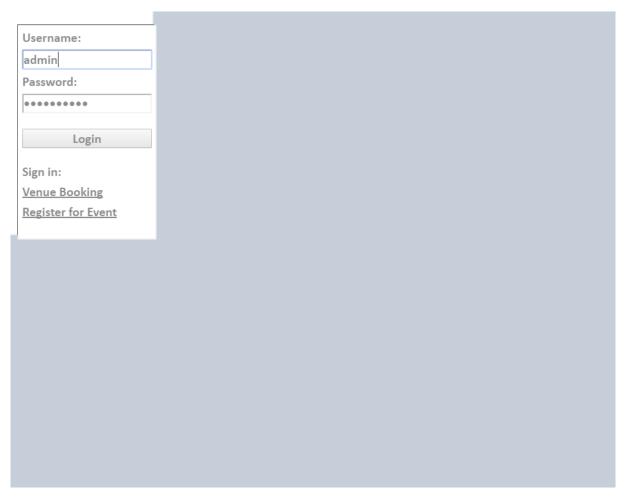


Figure 1: Login screen

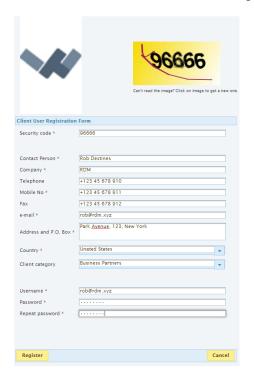


Figure 2: Sign in form for Client (Event organizer)



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.

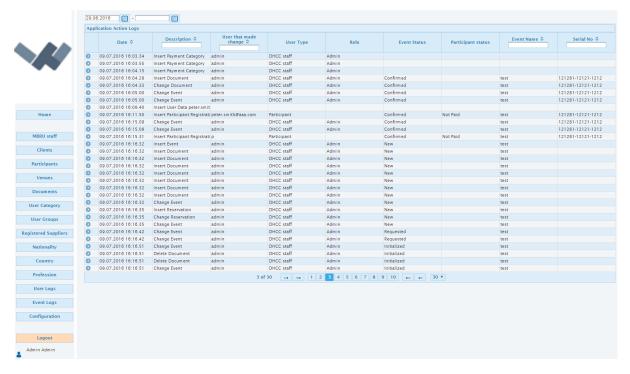


Figure 4: Menu

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.



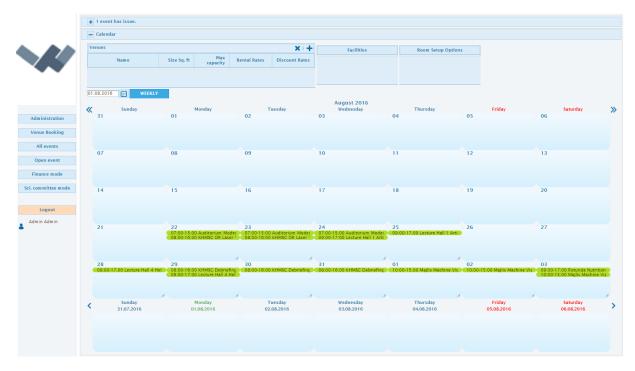


Figure 5: Panels

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)
- 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
- 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.



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 \times or \sim 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*).



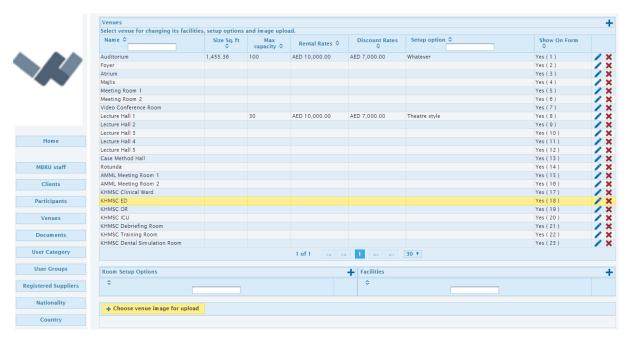


Figure 7: Selected row

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.

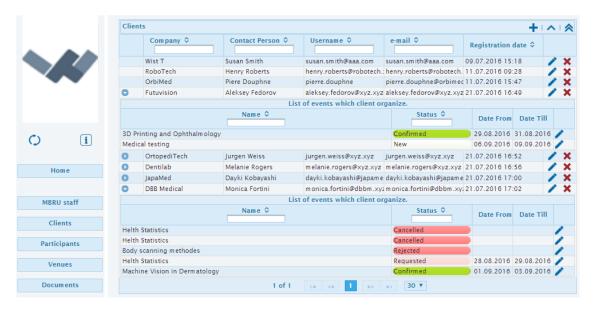


Figure 8: Clients table: two rows extended



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

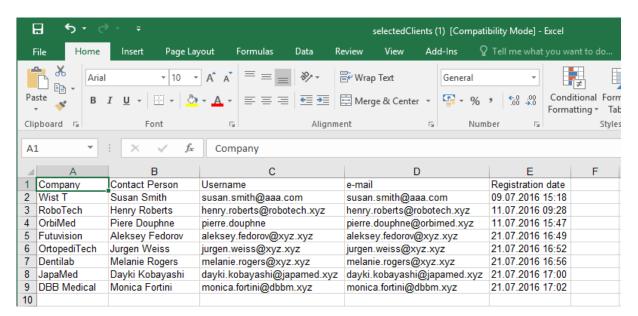


Figure 10: Exported Excel document

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

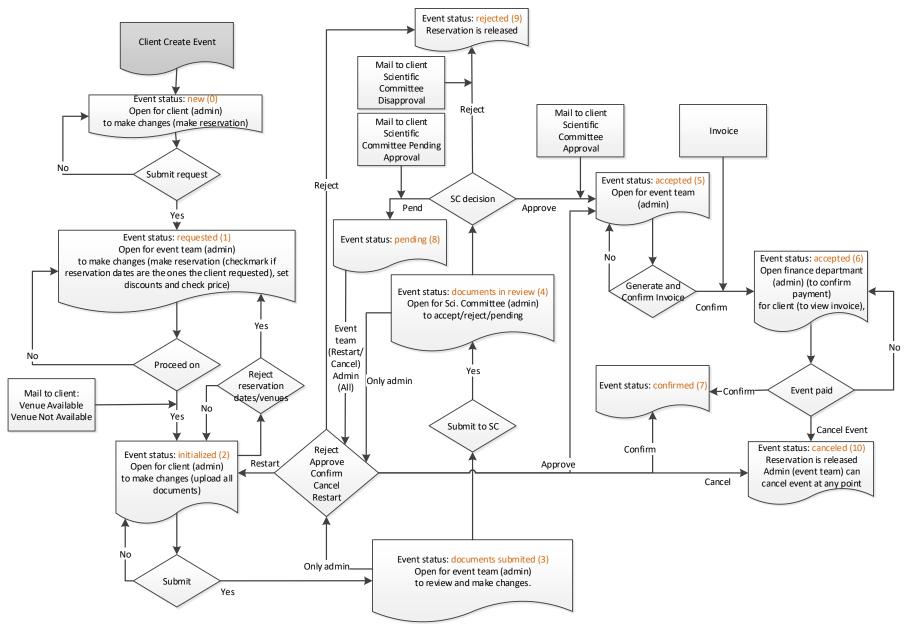
Each Event created in the system has its own life cycle. From creation of Event to the final approval or cancelation, there are certain stages that every Event must pass. We will divide this cycle into 10 different stages:

	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.

Event planner software - User manual





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 than 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.

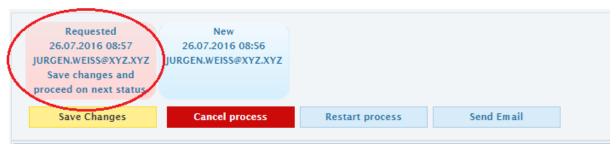


Figure 11: Stage Requested

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.

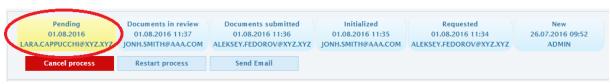


Figure 18: Stage Pending



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 Administrator Users

Administrator Users are the ones with most authority. Here we will explain only those Administrative tasks unique to this group of users. To avoid redundancy, tasks that cover the field of other user groups will be covered in the following chapters, dedicated to specific user group.

After logging in as Administrator, system links you to Administrator home page (Figure 21). On the left side of the page is the Administrator menu.

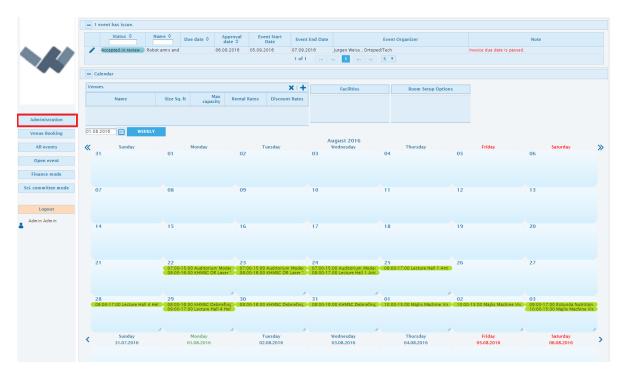


Figure 21: Administrator home page

As shown on the image above there are six menu options and a Logout button. In this chapter we will focus only on tasks under the first option: Administration. As we mentioned earlier, we will explain five following options further down this document. Option Venue Booking is covering the tasks, that are in the field of Client Users, so we will explain that in the next chapter (User Manual for Client Users). The next two options: All events and Open events are in the field of Event Planning team, so they will be described in User Manual for Event Planner Users. Options Finance mode and Sci. committee mode will be also described in their dedicated chapters.

After clicking on the first option in the menu, Administration, the following menu will appear on your screen (Figure 22).



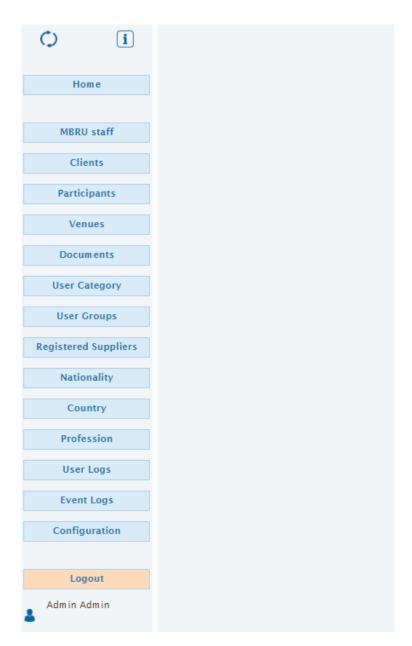


Figure 22: Administration menu

Staff

One of Administrators tasks is maintenance of application users by creating their accounts, updating data and giving them appropriate authorities in the system. This button opens screen shown on Figure 23. On the upper right side of the screen is mark +. By clicking on it new Form will appear (Figure 24), where we can add personal data of Stuff members (users). users are listed below, with each row dedicated to one user. To the right of each row we can find \times and \wedge marks. By clicking on them we can edit or delete each user.





Figure 23: Stuff page

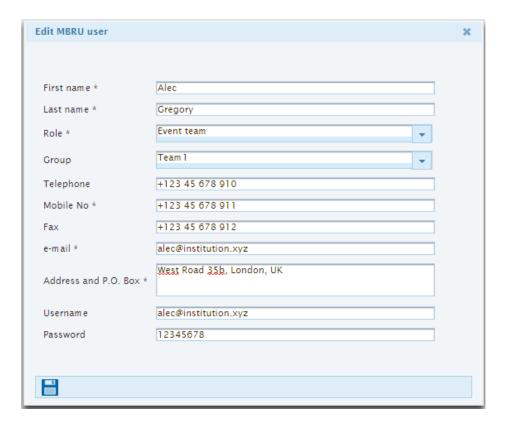


Figure 24: New User Form

The Role input field is mandatory. Administrator can choose from a drop down list (Figure 25), which is predefined offering the following options:

- Admin
- Event Planner
- Finance
- Scientific committee



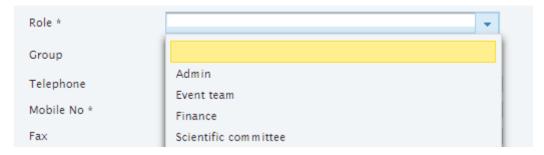


Figure 25: Role drop down list

User group field, also offers choices from a drop down list (Figure 26). The list is maintained in dedicated code list explained further down the document.

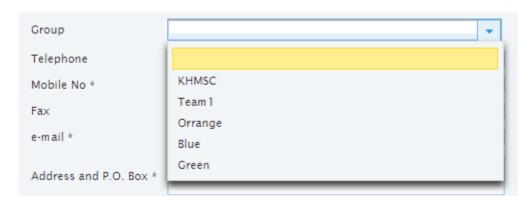


Figure 26: Group drop down list

Clients

This menu option allows Administrator to add, delete or edit Clients accounts. Clients can create their own accounts through the venue booking link on log in page. This menu options gives Administrators authority to change Clients accounts if needed. Adding, deleting and editing are done in the same way as for the Stuff users. For details please refer to previous sub chapter. Figure 27 shows an example Clients screen. Deleting Client is not possible, if the Client is in the process of organizing an Event.

The icon expands selected row showing all events organized by client.

Again by clicking on a mark, we can add new Client. The form is shown in figure 28. Client category code list is also defined by Administrator and will be explained further down the document. The options from this list are offered through a drop down list. Based on this category, Events will be complimentary or with discount and Deposit will be required or not. Also, a list of documents is set based on a category.





Figure 27: Clients page

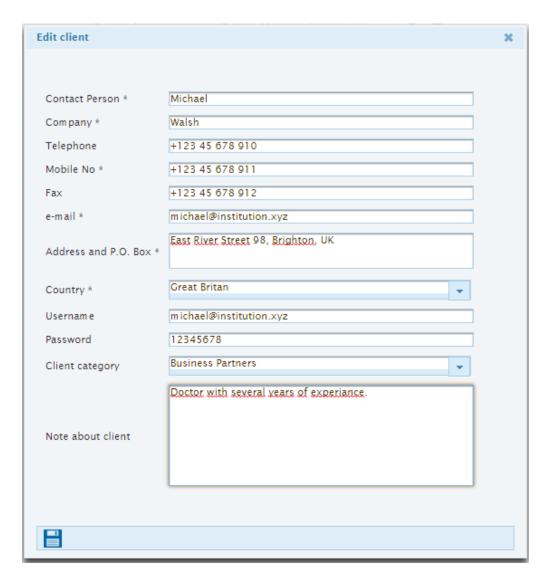


Figure 28: New Client form with Client category list



Username input field is set automatically based on e-mail input, and can be changed if needed.

Participants

Similar to previous two menu options, this one is also dedicated for adding, changing or deleting new users. This time for the user group Participants. Figure 29 shows example Participants screen. Deleting Participant is not possible, if the Participant is attending, or will attend an Event.

The icon expands selected row showing all events attended by Participant.



Figure 29: Participants page

A new Participant form is accessed by clicking on mark (Figure 30). The form offers selections from four drop down lists. Gender and Years of Experience are predefined. Profession and Nationality code lists are defined by Administrator and will be covered in the following chapters.

Username input field is set automatically based on e-mail input, and can be changed if needed.



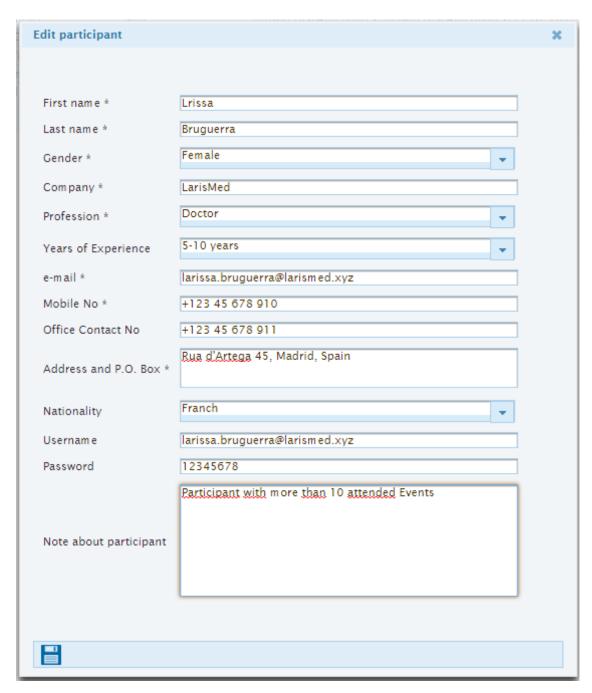


Figure 30: New Participant form

Venues

Venues menu option allows Administrator to add new or change data about existing venues.





Figure 31: Venues menu option screen

Similar to previous options we can find mark for adding new venue (Hall, Room...). By clicking on it new venue form will pop up (Figure 32). We can edit or delete each existing venue represented by a row in this table, by clicking on appropriate mark at the end of each line.

Edit venue		×
Order on form	6	
Show On Form	Yes	
Name *	Carnegie Hall	
Rental Rates *	8.200,00	
Discount Rates *	10%	
Size Sq. ft	1200	
Max capacity	35	
Setup option *	Classroom	
Address	Kensington Garden 126, London, UK	
	Large classroom	
Note about venue		

Figure 32: New Venue form



First field in form is Order. If it is set to 0, venue will not be shown to Client (venue cannot be booked). Otherwise the number is used for determining order of displaying venues. Setup option of a venue explains the possible arrangement of a room to suite certain needs (classroom, theatre, etc.). For Event pricing, Rental and Discount rates options are used, for the venue, depending on Client category, or tariff type assigned to event by Event Planner. Prices are for the venue for the whole Day.

When we click on a venue, additional options are displayed below (Figure 33). First, Room Setup Options, was mentioned before. Here Administrator can add or edit or delete this options through setup options form (Figure 34).

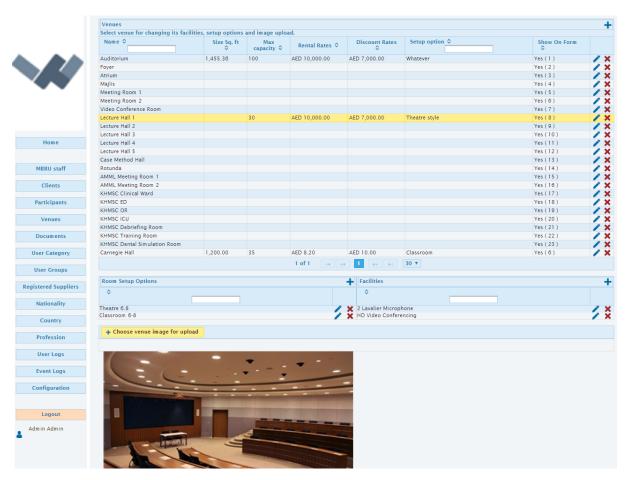


Figure 33: Additional Venue options



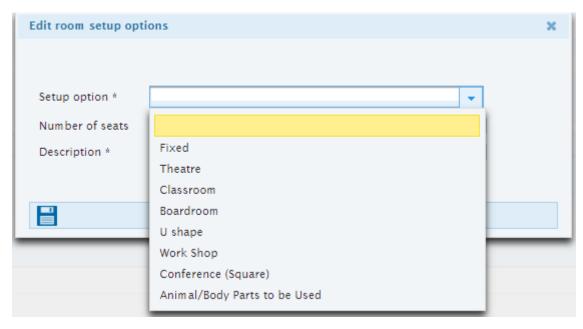


Figure 34: Setup options form

The Setup options form offers a predefined setups list, which is accessed through a drop down list, as shown in the image above.

Facilities are another option which can be defined by Administrator through Facilities form (Figure 35). It offers a predefined Facility list, which is accessed through a drop down list.

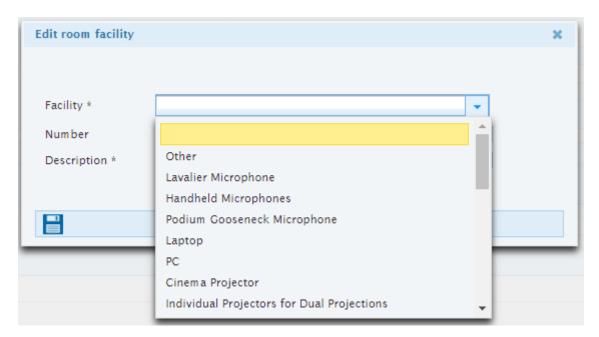


Figure 35: Facility options form

Administrator can also add picture of a venue by clicking on a yellow button on the bottom of the page (Figure 33) and selecting the file from a local machine to be uploaded.



Documents

This menu option allows Administrator to change existing list of documentation needed by Stuff members in order to perform their tasks in the Event life cycle stages. We have a mark in the upper right corner of the Table, for adding new document to the list. We can delete existing document simply by clicking on the mark at the end of each row.

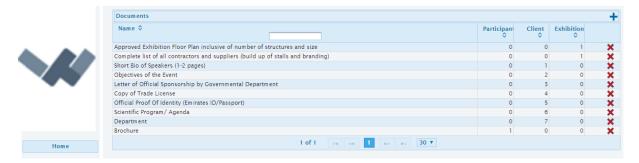


Figure 36: Documents list screen

A new Document form is shown in Figure 37. Participant input field is used for arranging order of a documents to be displayed to Participants, based on the number entered in this field. If 0 is entered document is not listed to Participants. The next two fields operate in similar way. They arrange order for required documents for exhibitions and Clients.

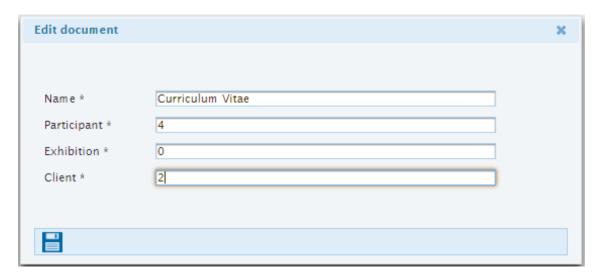


Figure 37: Documents form



User Category

Users are categorized (Clients or Participants) in six different categories. Each of a category has a different Tariff type, different period required prior to booking and additional option based on if Deposit is required or not. Administrator can change parameters by clinking on edit mark at the end of each line.

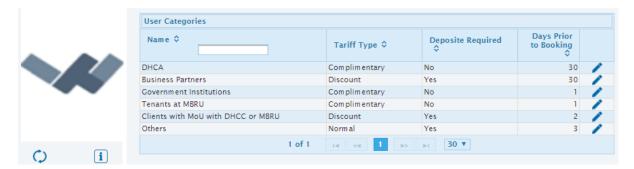


Figure 38: User Category

User Groups

User Groups menu option enables Administrator to add new or delete existing groups. These groups are used for the Event Planner users whom we assign to appropriate group. Each group of users has assigned set of venues, that they have a jurisdiction on. Figure 39 shows us an example of user Groups screen with marks for adding and deleting items.

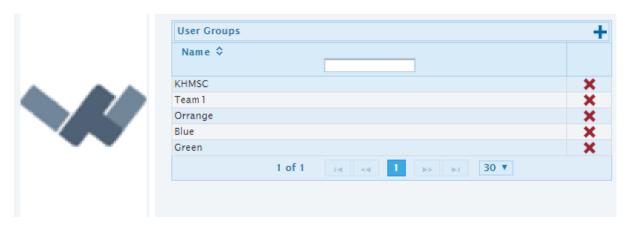


Figure 39: User Groups

Registered Suppliers

Each Event has an option for selecting catering provider for that Event. It can be a simple coffee break, or a full meal. In this menu option Administrator can add, change or delete our supplier



options. Additionally, we can export our list to Excel spreadsheet: full list of records or list of only those records displayed after filtering (Figure 40).

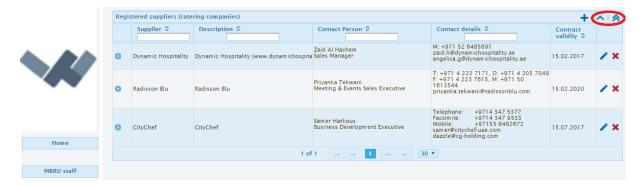


Figure 40: Registered suppliers

Nationality, Country and Profession

This three options will be covered together. This options allows us to add new Nationality, Country or Profession to our existing lists. We can excess this lists from drop down's in user's forms. As usually we can also edit or delete items.



Figure 41: Nationality

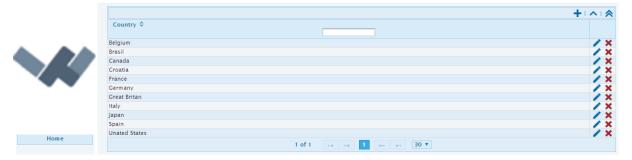


Figure 42: Country





Figure 43: Professions

User Logs

This menu option allows Administrator to monitor user's activity in the system. Administrator can display data for a certain period by setting the two date fields on the top of the Table. Administrator can also filter or arrange data by different values in the Table Header (Figure 44).

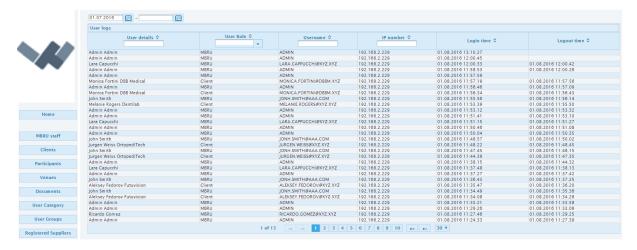


Figure 44: Example Users Log

Event Logs

The difference from previous option is that Administrator can monitor certain activities in the system (Figure 46). Here Administrator can extend each row to get more information. Administrator can use 'id' to browse database for more details about changes that are made (Figure 45).

0	22.07.2016 13:19.14	Delete Event	admin	DHCC staff	Admin
Datab ID	ase table Epl	ete Event Event 1FD6E5-E6A1-4637-9162-8B min, Admin	0CC413187E		
0	22.07.2016 13:19.14	Delete Reservation	admin	DHCC staff	Admin
0	22.07.2016 13:19.14	Delete Document	admin	DHCC staff	Admin

Figure 45: Event Logs - details



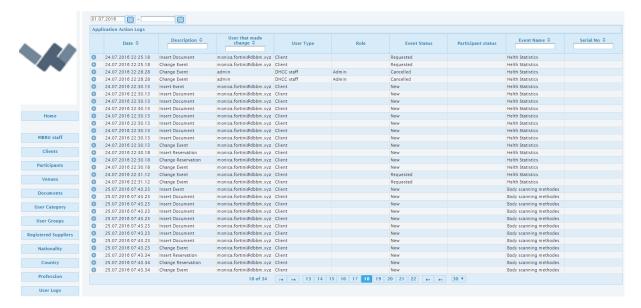


Figure 46: Event Logs

Configuration

This menu option is dedicated for setting certain Application Parameters. For instance, Administrator can set default Invoice Data, mail for correspondence, some default settings for Events and some other parameters as shown in Figure 47. Administrator can confirm changes by clicking on the Save Changes button.

Default cost settings can be set here. These are than taken in consideration when calculating final price for Clients.

Last three parameters are important for systems Event displaying settings. First parameter determines for how many days previous to current day the Events should be displayed. Second determines how many days prior to provisional Event start, the Event should be confirmed.



	Application Parameters		
	Data for invoice		
	Company *	Wise Technologies	
\	Address and P.O. Box *	Cesta 24. junija 23, 1231 Ljubljana	
4	Telephone *	(01) 541 41 30	
	Fax *	(01) 541 41 30	
	E-mail for correspondence		
	Event Management Team Contact *	Ivona Maric	
	Event Management Team Email *	ivona.maric@wise-t.com	
Home	Default settings for event		
Home	Additional costs *	100.00	
	Discount percentage *	10	
MBRU staff	Discount amount *	100.00	
Clients	Deposite Fee *	5,000.00	
	Other parameters		
Participants	Default event organizer *	Wist T (Susan Smith) 🖶	
Venues	Other parameters		
venues	How many days back to show events? *	11	
Documents	Days before event start, not confirmed *	11	
Hana Catanana	Days to approval *	11	
User Category Save Changes			
User Groups			
Registered Suppliers	Log deletion		
Nationality	Delete logs older than	Delete	
Country			

Figure 47: Application parameters



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 48). 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 (these 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 48: 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 49.



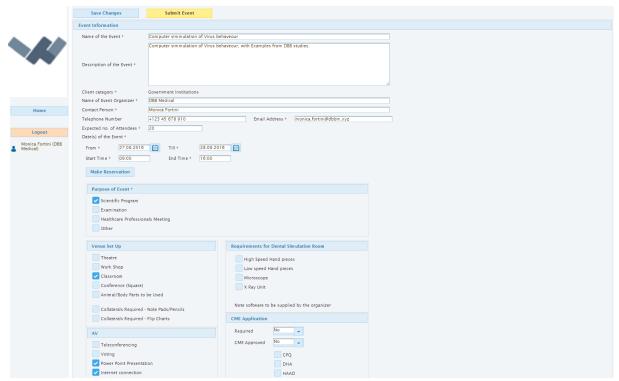


Figure 49: Venue booking screen

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 50 and 51).

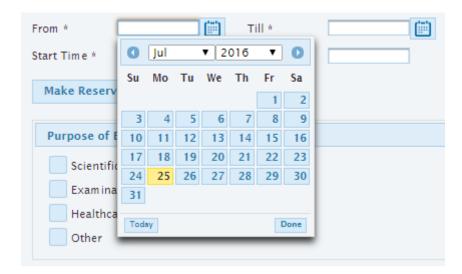


Figure 50: Date input selector





Figure 51: 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 52).

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 52: 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 53).

	lected in table below for download/	upload.		
Approved Exhibition Flo Complete list of all con	Name oor Plan inclusive of number of structu tractors and suppliers (build up of sta	ires and size Ils and branding	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				
	pany: Dynamic Hospitality (www.dy		Document	
Copy of Trade License	orship by Governmental Department / (Emirates ID/Passport) nda			

Figure 53: 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 54). Than Client can select appropriate document from a local machine in the pop up window.

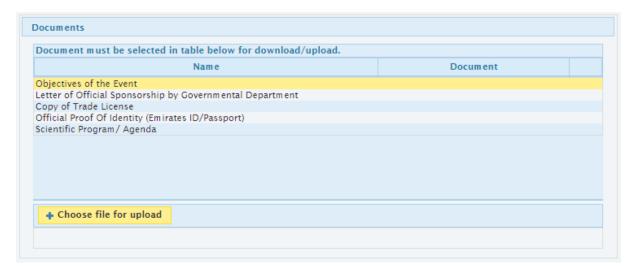


Figure 54: Document upload

My Events

The My events menu option opens the following screen (Figure 55).

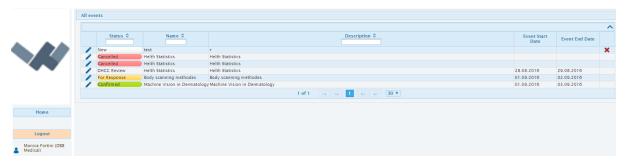


Figure 55: All events

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 56). 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.

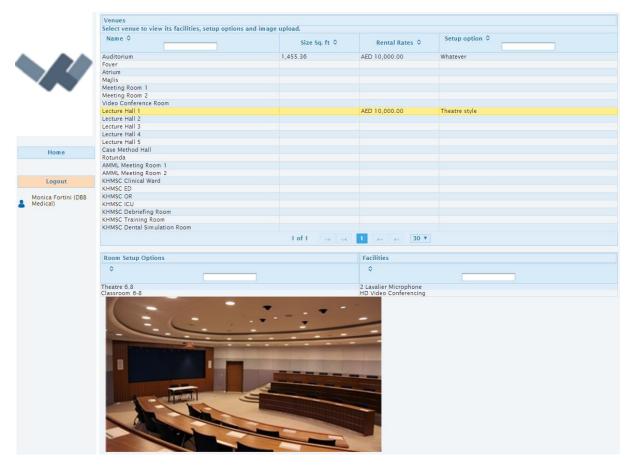


Figure 56: Browse Venues

My account

In this menu option Client can change their account settings, as shown in figure 57. 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.



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

Figure 57: My account



User Manual for Event Planner Users

After logging into the system as Event Planner user, the following screen appears (Figure 58). There are four additional menu options, besides the usual. These are:

Administration (option for Event Planner administrative tasks)

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

All events (option lists all Events)

Open events (lists only Events that are open to Participants)



Figure 58: Event Planner screen

On the right side of the screen, there is Event calendar view. Current month is displayed and a current week bellow that, with Events colored according to their status. Display can be changed to show only weekly calendar, by clicking on WEEKLY button. Navigation through calendar is possible in two ways. The <- left and -> right keys can be used for weekly navigation, and up and down for monthly. Additional , , and marks can be used. Above calendar, Event Planner has option to select certain venue (mark +), in which case only Events in selected venue are displayed on calendar. On top there are four buttons, of which, the first one (Calendar View) brings out the screen that is currently explained. Other three display the lists of Events (Figure 59) based on their status: New Requests, Events for Respond and Events with Issues.





Figure 59: New requests list

By clicking on a mark, the Event editing screen opens as shown in figure 60.

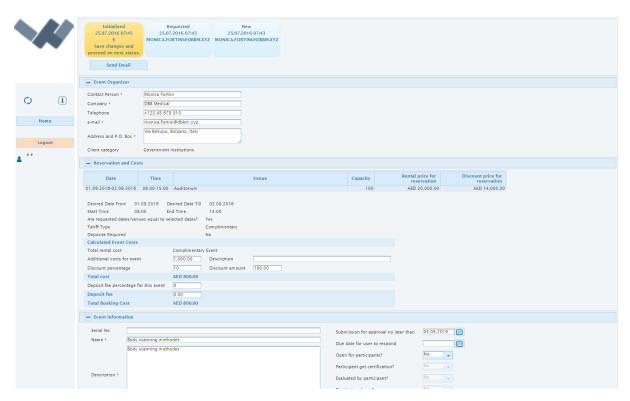


Figure 60: Event editing screen

Here Event Planner can access and change data about Events. Only certain data can be changed in certain stages. The stages of Event are displayed at the top of the screen. The current stage is left most, and is colored appropriately and clickable. By clicking on it, Event Planner saves data and proceeds to the next stage. Below stages, there is a button Send Email, to sand mails to Clients. The form pops up, as in figure 61. Besides mentioned button, also buttons Cancel process and Save Changes can be visible depending on the stage of Event.



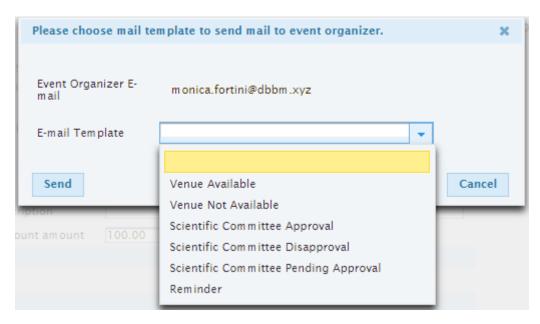


Figure 61: Sand Mail pop up

Six different templates are available from a drop down list E-mail Template. The Event Planner can confirm and sand e-mail by clicking on a button Sand.

The table below is divided in six collapsible sub tables. In first Event Planner can find information about Event Organizer (Client). The second is dedicated to Reservations and costs. Reservation for the certain venue can be made here or changed by Event Planner. Also Event costs can be set here and calculated. The third sub-table is Event Information. Here Event Planner can set Serial number of Event, dates for approval and due dates for Client respond. Event can also be set to open, but that will actually make effect only after the Event is finally approved.

In Documents sub-section documents can be uploaded by clicking on a listed document, the yellow button, choose file for upload, will appear (Figure 62). Than Client can select appropriate document from a local machine in the pop up window.

Document must be selected in table below for download/upload.		
Name	Document	
bjectives of the Event		
etter of Official Sponsorship by Governmental Department		
Copy of Trade License		
Official Proof Of Identity (Emirates ID/Passport)		
cientific Program / Agenda		
+ Choose file for upload		

Figure 62: Document upload



In the initial stage of Event the list of required documents can be modified by clicking or mark (Figure 63 and 64). By clicking on + mark the selection options pops up. The Event Planner can select document by double clicking on it.

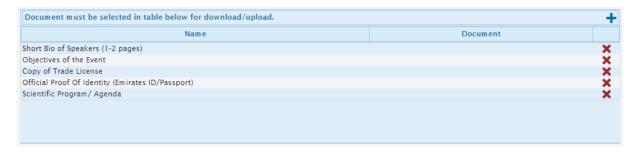


Figure 63: Document list modification

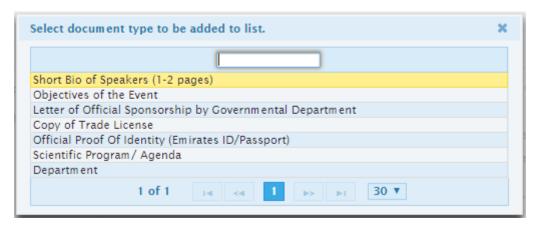


Figure 64: Document selection pop up

Further down the screen (Figure 65) similar can be done with Exhibition setup documents and documents for Participants.

At the bottom of the screen the stages of Event are displayed again. With the current state being left most, colored accordingly to state and clickable (save and proceed).



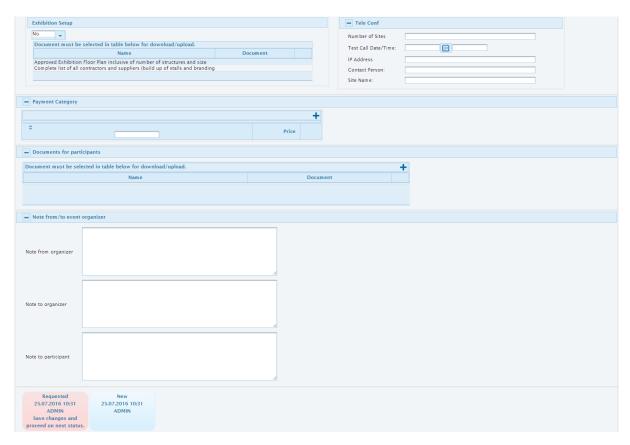


Figure 65: Event Planner screen – lower part

Administration

Administration options for Event Planner consists of Clients and Participants accounts administration. Accounts can be deleted or modified, by clicking on \times or \wedge mark, as shown in figure 66.

Clients and Participants user accounts cannot be deleted if those users are associated with past or upcoming Events, eider as organizers or attendants.

Clients

Clients administration screen offers additional details about Clients, accessed by clicking on a mark. The additional information is expanded from line. It shows all Client's Events and their status.



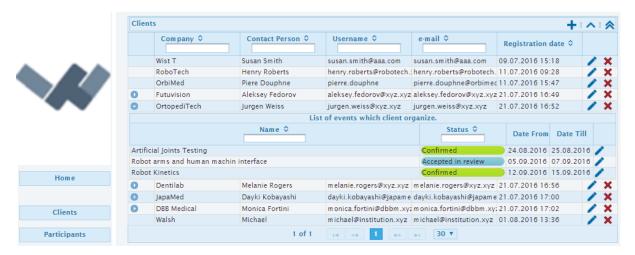


Figure 66: Event Planner administration – Clients

Participants

Participants administration screen offers additional details about Participants, accessed by clicking on a mark. The additional information is expanded from line. It shows all Events, that Participant has attended and their status (Figure 67).



Figure 67: Event Planner administration – Participants

Venue Booking

The venue booking and editing screen is the main screen for Event Planner, to manage their Clients Events. An example is shown in figure 68.



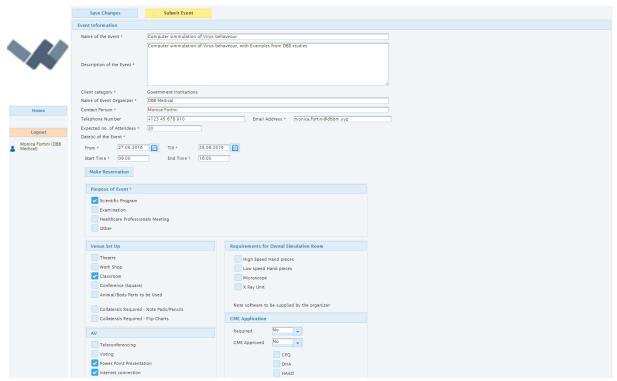


Figure 68: Venue booking screen

There are two buttons on top of the screen, Save Changes and Submit Event. The first one enables Event Planner 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 Event Planner to make reservation for desired venue. Date and Time input fields are equipped with appropriate input selectors (Figure 69 and 70).

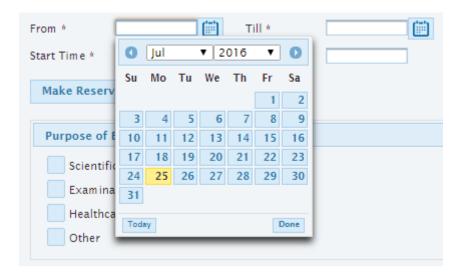


Figure 69: Date input selector





Figure 70: Time input selector

After filling required fields with Event information, Event Planner can make reservation, as mentioned above. After clicking reservation button, the following form pops up (Figure 71).

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.

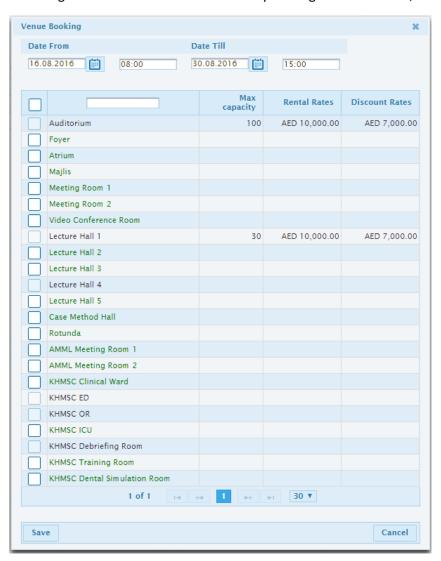


Figure 71: Reservation form



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 72).

Document must be se	lected in table below for download/uploa	nd.		
Ammunum d Euchibisiam El	Name oor Plan inclusive of number of structures a	ad size	Document	
	tractors and suppliers (build up of stalls an			
ele Conf				
Number of Sites	100			
Test Call Date/Time:	16.08.2016			
IP Address	123.456.789.101			
Contact Person:	Monica Fortini			
Site Name:	www.ddb.com			
atering				
	nany: Dynamic Hospitality (www.dynami	ich conitality ac)		
Name of Catering Com		chospitanty.ae)		
Num ber of PAX: Budget Per Person:	95			
Coffee Break 1	82			
Coffee Break 2				
Lunch				
Dinner				
Cocktail				
ocuments				
Document must be se	ected in table below for download/uploa	d.		
	Name		Document	
Objectives of the Event etter of Official Sponso	orship by Governmental Department			
Copy of Trade License	/ (Emirates ID/Passport)			
cientific Program/ Age				
MBRU Event Manager				

Figure 72: 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 73). Than Event Planner can select appropriate document from a local machine in the pop up window.

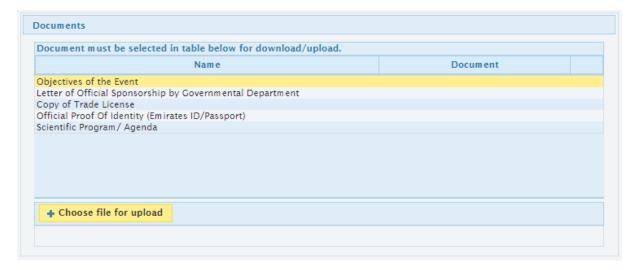


Figure 73: Document upload

All Events

This menu option displays all available Events and their statuses highlighted in colors as in figure 74. Besides familiar editing option the mark \dagger is introduced. By clicking on it Event Planner can access information about Participants that are attending certain Event.



Figure 74: All Events screen

Open events

This menu option is quite similar to previous one with the difference that only Events opened to Participants are displayed. Therefor also highlighted statuses are obsolete (Figure 75).



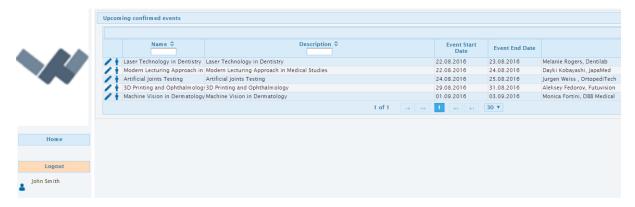


Figure 75: Open events screen



User Manual for Scientific Committee Users

After logging in as a Scientific Committee user the following screen appears (Figure 76). On the right side is a table with all Events that need Scientific Committee response.



Figure 76: Scientific Committee home screen

After clicking on Event, list of documents is opened. And action buttons appear above in the following order: Approve, Pend, Reject and Send Email. The documents for review can be downloaded by clicking on them (Figure 77). Actions are described in the chapter Event Lifecycle.

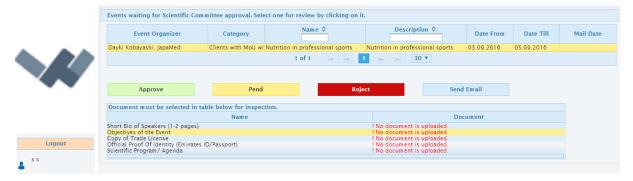


Figure 77: Scientific Committee extended screen

If the selected action is to approve Event by clicking Approve button, the following pop up appears (Figure 78). The user is asked to enter decision date.



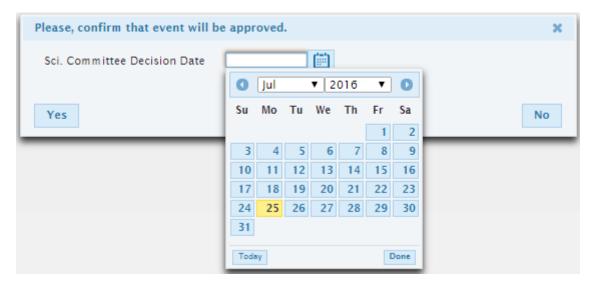


Figure 78: Approve pop up

If the selected action is to pend or reject Event by clicking appropriate button, the following pop up appears (Figure 79). The user is asked to enter decision date and to state reasons.

Please enter reaso	on for not approving this event and confirm pending status.	×
Sci. Committee Decision Date		
Reason for Pending Approval		
Yes		No

Figure 79: Pend pop up



User Manual for Finance Users

After logging in as a Finance user the following screen appears (Figure 80). On the right side there are two tables with all Events that need Finance response. First table lists Events that need invoice creation and the second one, Events that are waiting for confirmation.

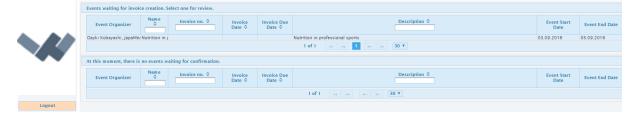


Figure 80: Finance home screen

After clicking on Event in the first table the screen is updated as follows (Figure 81):



Figure 81: Create Invoice

Here Finance user can create invoice by clicking on a Create Invoice button. Figure 82 shows the form that appears. Invoice number needs to be added. The rest of data can also be modified, except the Cost Details. After clicking Yes button invoice is created and new buttons appear on the screen, as shown in figure 83.



Invoice Details		
Invoice no.		
Invoice Date	25.07.2016	
Invoice Due Date	25.07.2016	
Bill To		
Company *	JapaMed	
Address and P.O. Box *	Inokashira Dori 1123, Tokio, Japan	
Telephone	+ 123 45 678 910	
Costs Details		
Total cost	800.00	
Deposit fee	5,000.00	
Invoice Total	5,800.00	

Figure 82: Invoice form

View invoice	Delete invoice
Invoice Details	
Invoice no.	25
Invoice Date	25.07.2016
Invoice Due Date	25.07.2016
Costs Details	
Total rental cost	AED 0.00
Additional costs for event	AED 1,000.00
Description of additional costs	
Total cost	AED 800.00
Deposit fee	AED 5,000.00
Total Booking Cost	AED 5,800.00

Figure 83: Invoice created

User has an option to view, delete or create new invoice. By clicking on green Submit Invoice button, invoice is submitted and the Event is removed from the first table. It is now listed in the second table, as Event that is waiting for confirmation (Figure 84).



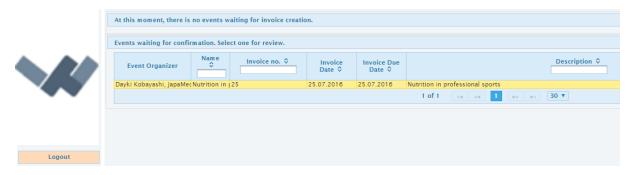


Figure 84: Event waiting for confirmation

At this point only Client's payment is separating Event from final confirmation (Figure 85).

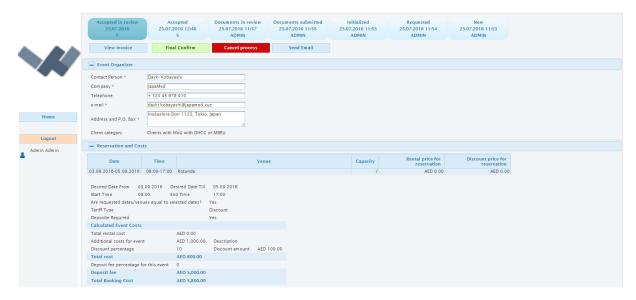


Figure 85: Event waiting for confirmation – Administrator screen



User Manual for Participant Users

After logging into the system as a Participant user, the Participants home screen appears (Figure 86).



Figure 86: Participant's home screen

There are three menu options besides the standard ones. These are:

Calendar View

My Events

My Account

On the right side Events are displayed. The ones, that logged in Participant is attending, are colored green, others are yellow. On top there are few display options. Left most is Show All Events and others display Events by months.

If green Event is clicked the screen shown in figure 87 appears. Participant has an option to Cancel Event by clicking appropriate button, and confirming that in the pop up dialog. Alternatively, Participant can download receipt by clicking Download receipt button. Participant is also provided with option to download Event's documents if provided. It is done by clicking on it.



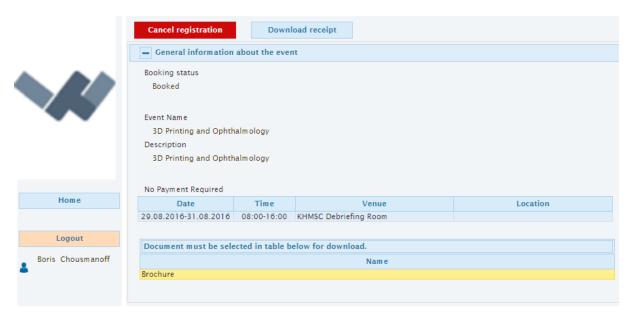


Figure 87: Registered event

If yellow Event is clicked the user is shown the screen as on figure 88. User can now register to that Event simply by clicking Continue registration, and confirming that in a pop up dialog.

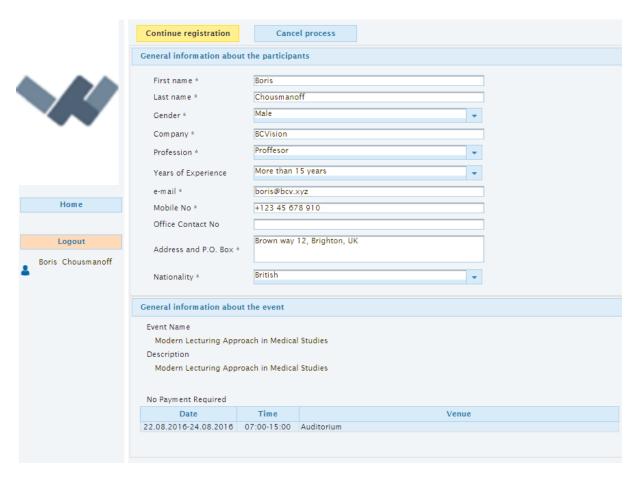


Figure 88: Unregistered event



Calendar View

By selecting this menu option, Events are listed in a calendar as figure 89 shows.



Figure 89: Calendar view

Current month is displayed and a current week bellow that, with Events colored green in month view. In week view Events are yellow by default and green is used for Events that participant is attending. Display can be changed to show only weekly calendar, by clicking on WEEKLY button. Navigation through calendar is possible in two ways. The <- left and -> right keys can be used for weekly navigation, and up and down for monthly. Additional , and marks can be used.

My Events

This menu option displays only those Events, that Participant is registered for, or has attended in the past. Example screen is shown in figure 90.

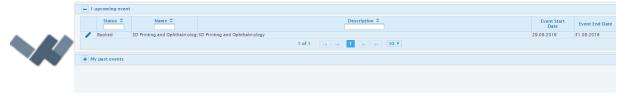


Figure 90: My Events



My Account

In this menu option Participant can change their account settings, as shown in figure 91. Fields Company, Years of Experience and Nationality are selectable through drop down list. List options are predefined by Administrator. The participant confirms settings by clicking on a Save Changes button.

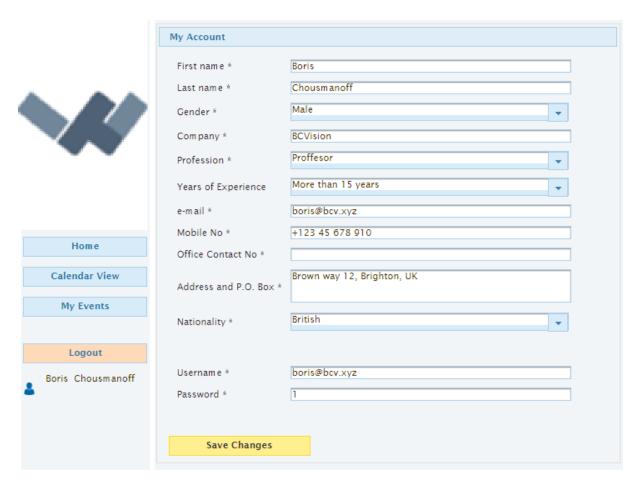


Figure 91: Participants account