User Manual – Scientific Committee

Event planning software



Version 1.05 Ljubljana, 04.08.2016

Wise Technologies Ltd.



Introduction – system overview 2
Logging into the system 2
Navigating through the application
General navigation 4
Legend 5
Tables
Types of Users
Staff
Administrator
Scientific Committee
Finance
Event Planners
Clients
Participants
Event Life cycle
Stage New (Code 0, Color:)
Stage Requested (Code 1 Color:)
Stage Initialized (Code 2, Color:) 14
Stage Documents Submitted (Code 3, Color:)
Stage Documents in Review (Code 4, Color:
Stage Accepted (Code 5, Color:)
Stage Accepted in review (Code 6, Color:)
Stage Confirmed (Code 7, Color:)
Stage Pending (Code 8, Color:)
Stage Rejected (Code 9, Color:
Stage Canceled (Code 10, Color:)
User Manual for Scientific Committee Users 18



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.



Username:	
admin	
Password:	
•••••	
Login	
Sign in:	
Venue Booking	
Register for Event	



Figure 1: Login screen

×	966666 Carl read the image? Click on image to	get a new one.
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>Avenue</u> , 123, New York	
Country *	Unated States	-
Client category	Business Partners	
y /		
Username *	rob@rdm.xyz	
Password *		
Repeat password *		
Register		Cancel

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

	53180 Cart read the image? Click on image to get a	ne
Jser Registration Form		
Security code *	53180	_
First name *	Andrea Vittalli	
Gender *	Female	
Company *	Medilab	' _
Profession *	Doctor	
Years of Experience	5-10 years	
e-mail *	andrea.vittalli@medilab.xvz	_
Mobile No *	+123 45 678 910	_
Office Contact No	+123 45 678 911	-
Address and P.O. Box *	Via Vittoria 32, <u>Napol</u> i, Italy	
Nationality *	Italian	-
Username *	andrea.vittalli@medilab.xyz	
Password *		_
Repeat password *		

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
/	0	09.07.2016 16:05.00	Change Event	admin	DHCC staff	Admin	Confirmed		test	121281-12121-12
	ō	09.07.2016 16:09.40	Insert User Data peter.smi							
Home	0	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
	o	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
Moreo stari	0	09.07.2016 16:16.32	Insert Event	admin	DHCC staff	Admin	New	Not Palu	test	121201-12121-12
Clients	0	09.07.2016 16:16.32	Insert Document	admin	DHCC staff	Admin	New			
cilcins	0	09.07.2016 16:16.32	Insert Document	admin	DHCC staff	Admin	New		test	
Participants									test	
	0	09.07.2016 16:16.32	Insert Document	admin	DHCC staff DHCC staff	Admin Admin	New		test	
Venues	0	09.07.2016 16:16.32	Insert Document	admin			New		test	
	0	09.07.2016 16:16.32	Insert Document	admin	DHCC staff	Admin	New		test	
Documents	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	
User 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 c4 1	2 3 4 5 6 7 8	3 9 10 P> P1 3	0 🔻		
User Logs										
Event Logs										
Configuration										
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									
	Ve	nues			× : +	Facilities		Room Setup Options			
		Name	Size Sq. ft Max capacity	Rental Rates	Discount Rates						
• •											
() i	01.	08.2016 📋 WEEKLY	Y			August 2016					
	~	Sunday 31	Monday 01	02	Fuesday	Wednesday 03	04	Thursday 05	Friday	Saturday 16	>>
Administration		51	01	02		03	04	03	· · · · ·	10	
Venue Booking											
All events			->				A.,		<u> </u>		
Open event		07	08	09		10	11	12		3	
Finance mode											
Sci. committee mode			A								
Sen committee mode		14	15	16		17	18	19	2	10	
Logout											
Admin Admin											
		21	22 07:00-15:00 Auditorium M	23 oder 07:00-15:00	Auditorium Moder	24 07:00-15:00 Auditorium Mod 09:00-17:00 Lecture Hall 1 Ar	25 09:00-17:0	26 D0 Lecture Hall 1 Arti	2	7	
			08.00-16.00 KHMSC OK La	ser 08.00-10.00	CREASE OR Laser	09.00-17.00 Lecture Hall T Ar	u				
				4			4	4			
		28 09:00-17:00 Lecture Hall 4 H	29 Hel: 08:00-16:00 KHMSC Debrie 09:00-17:00 Lecture Hall 4	30 efing 08:00-16:00	KHMSC Debriefing	31 08:00-16:00 KHMSC Debriefin	01 ig 10:00-15:0	02 D0 Majlis Machine Vis 10:00-	15:00 Majlis Machine Vis	9:00-17:00 Rotunda Nutrition	
			09:00-17:00 Lecture Hall 4	nei					-	0:00-15:00 Majiis Machine Vis	
			4	4	4		4	4	4		4
	<	Sunday 31.07.2016	Monday 01.08.2016		Fuesday 2.08.2016	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.

	ies, setup options						
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:
oyer						Yes (2)	1
trium						Yes (3)	1:
Tajlis						Yes (4)	1
leeting Room 1						Yes (5)	1:
feeting Room 2						Yes (6)	1
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)	
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)	1
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
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



	Venues							
	Select venue for changing its facilit		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
	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
() i	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
	KHMSC Dental Simulation Room						Yes (23)	1
User Category				1 of 1 🖂 🤜	4 1 30 34	30 🔻		
User Groups	Room Setup Options				Facilities			
Registered Suppliers	\$				\$			
Nationality								
Nationality	+ Choose venue image for uploa	d						
Country								

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.

	Clier	nts					+ ⊧ ∧	N II
• •		Company 🗘	Contact Person 🗘	Username ≎	e-mail 🗘	Registration	date ≎	
		Wist T	Susan Smith	susan.smith@aaa.com	susan.smith@aaa.com	09.07.2016 15:	18	/
		RoboTech	Henry Roberts	henry.roberts@robotech.	henry.roberts@robotech.	11.07.2016 09:	28	1
		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
			Lis	t of events which client or	ganize.			
			Name ≎		Status 🗢	Date From	Date Till	
	3D P	rinting and Ophthalmolog	y		Confirmed	29.08.2016	31.08.2016	1
) <u>i</u>	Medi	ical testing			New	06.09.2016	09.09.2016	1
	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
	0	DBB Medical	Monica Fortini	m onica.fortini@dbbm.xyz	monica.fortini@dbbm.xy;	21.07.2016 17:	.02	r
MBRU staff			Lis	t of events which client or	ganize.			
			Name 🗘		Status \$	Date From	Date Till	
Clients	Halt	h Statistics			Cancelled			
		h Statistics			Cancelled			1
Participants		scanning methodes			Rejected			1
		h Statistics			Requested	28.08.2016	20.08.2016	1
Venues		nine Vision in Dermatology	/		Confirmed	01.09.2016		
		the theorem bernhatology			Comment	01.05.2010	00.00.2010	-

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.

	Clier	its					+(~	~
		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	×
		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		
^	3D P	rinting and Ophthalmology			Confirmed	29.08.2016	31.08.201	6 🖌	P
() <u>i</u>	Medi	cal testing			New	06.09.2016	09.09.201	6 🖌	P
	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	×
	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:

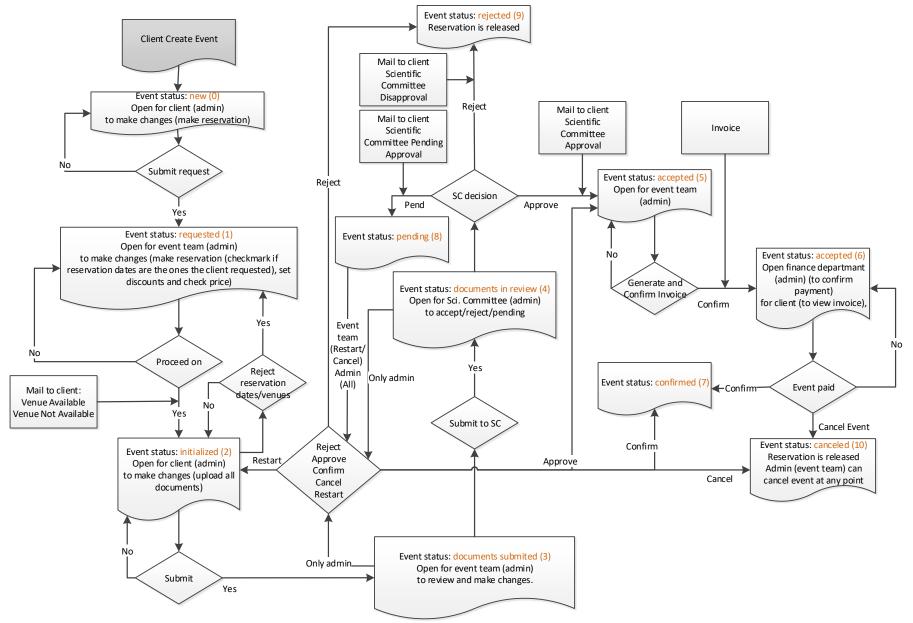
	Code	Name	Name for Client	Designated to
•	0	New	New	Client (create Event)
٠	1	Requested	WISET Review	Event Planner
•	2	Initialized	For Response	Client (check venues and
	dates,	make changes, upload all require	ed documents)	
٠	3	Documents submitted	WISET Review	Event Planner
•	4	Documents in review	WISET 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.



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 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.

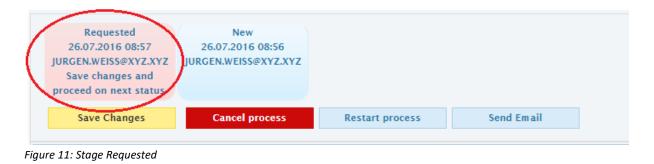
After proceeding on next status the mail is automatically sent to the Client informing him about Event progress and venue availability. If Event Planner cannot confirm requests dates or venues they should state that on the form, by setting no next to the question 'Are requested dates/venues equal to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

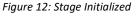




This stage is opened again for the Clients to make changes if needed. But most of all it is required to upload all the documentation set by Event Planner in previous stage. If there were any changes made to reservation dates by Event Planer, they can be rejected at this point, returning the Event back 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.

Event planner software – User manual



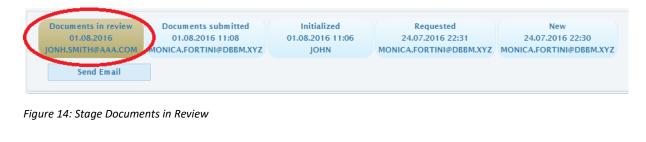
Documents submitted 26.07.2016 09:13 ADMIN Save changes and proceed on next status	Initialized 26.07.2016 09:08 ADMIN	Requested 26.07.2016 08:57 JURGEN.WEISS@XYZ.XYZ	New 26.07.2016 08:56 JURGEN.WEISS@XYZ.XYZ				
Save Changes	Approve by Sci.C.	Reject by Sci.C.	Pend by Sci.C.	Final Confirm	Cancel process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

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@DB8M.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 Scientific Committee Users

After logging in as a Scientific Committee user the following screen appears (Figure 21). On the right side is a table with all Events that need Scientific Committee response.

			Events waiting for Scientific Com	nittee approval. Sel	ect one for review by clicking on it				
			Event Organizer	Category	Name ≎	Description \$	Date From	Date Till	Mail Date
			Dayki Kobayashi, JapaMed	Clients with MoU wi	Nutrition in professional sports	Nutrition in professional sports	03.09.2016	05.09.2016	
	<								
		-							
C	5	i							
	Logout								

Figure 21: 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 22). Actions are described in the chapter Event Lifecycle.

		Events waiting for Scientific Committee approval. Select one for review by clicking on it.									
	Event Organizer Category		Name ≎	Description \$	Date From	Date Till	Mail Date				
		Dayki Kobayashi, JapaMed Clients with MoU wi Nutrition in professional sports			Nutrition in professional sports	03.09.2016	05.09.2016				
				1 of 1 🛛 🗔 🤜	I ⇒ ⇒1 30 ¥						
		Approve	Pend	Reje	set Send	Email					
		Document must be selected in tab	le below for inspec	ction.							
Ó	i		Name		Do						
	_	Short Bio of Speakers (1-2 pages)			! No document is uploaded.						
		Objectives of the Event Copy of Trade License			! No document is uploaded. ! No document is uploaded.						
Logout		Official Proof Of Identity (Emirates IE)/Passport)		! No document is uploaded.						
		Scientific Program/ Agenda			! No document is uploaded.						
s s											

Figure 22: Scientific Committee extended screen

If the selected action is to approve Event by clicking Approve button, the following pop up appears (Figure 23). The user is asked to enter decision date.



Please, confirm that event will be approved.							×	
Sci. Committee Decision Date								
	0	Jul ▼ 2016 ▼ 0						
Yes	Su	Мо	Tu	We	Th	Fr	Sa	No
						1	2	
	3	4	5	6	7	8	9	
	10	11	12	13	14	15	16	
	17	18	19	20	21	22	23	
	24	25	26	27	28	29	30	
	31							
	Tod	ау					Done	

Figure 23: Approve pop up

If the selected action is to pend or reject Event by clicking appropriate button, the following pop up appears (Figure 24). The user is asked to enter decision date and to state reasons.

Please enter reaso	n for not approving this event and confirm pending status.	×
Sci. Committee Decision Date		
Reason for Pending Approval		1
Yes		No

Figure 24: Pend pop up