Manual for BAS
Booking Appointments Software

Group #3
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Date: December 13, 2023

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1. **Introduction**

   This document will describe how users, service providers and administrators will use the Booking Appointment Software. This software is for single user use. Using this product a user can register for appointments available after logging in. The user will also be able to see and modify their scheduled appointments. The service providers will be able to create appointments for clients to sign up for. The product relies on amazon's AWS cloud server and thus stores all information in this database.

1.1 System Requirements

   This product will run on any modern browser.
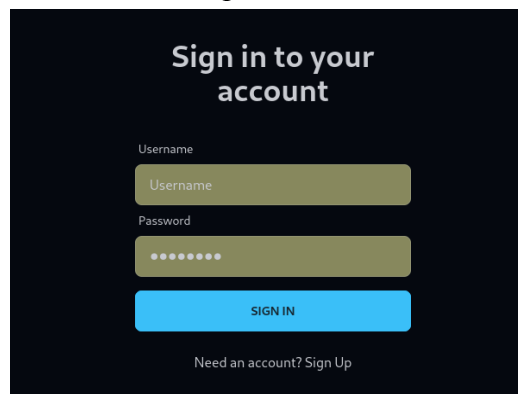
1.2 Installation

   There is no installation required. Nativage to the webpage located at
   https://app.zxai.io

2. **Getting Started**

   This product will have two different perspectives of functionality. One is the client view and the other is the service provider view. Each component works in separate windows after completing a valid login. As many windows can be open as the server can handle.

   Once launched the application will display a login window to allow users to sign in or sign up. If sign up is chosen the user will be prompted to create a client or service provider account. The image below shows the login in or sign up options.
   - The first option is to sign in using a username and password that has been previously stored into the system.
   - The other option is to create an account. As shown in the image below, the user will type in all the listed information and also have the option of a checkbox that will allow the user to be a service provider.

Figure 1. Login

Figure 2. Sign Up Page

3. Booking Appointment Software Operations for A Client

Using the booking appointment software after account creation or login allows users to sign up for, modify, cancel and view all available and scheduled appointments related to their account. The dashboard will have a notification, schedule and log out button. Both schedule buttons redirect to the same page.
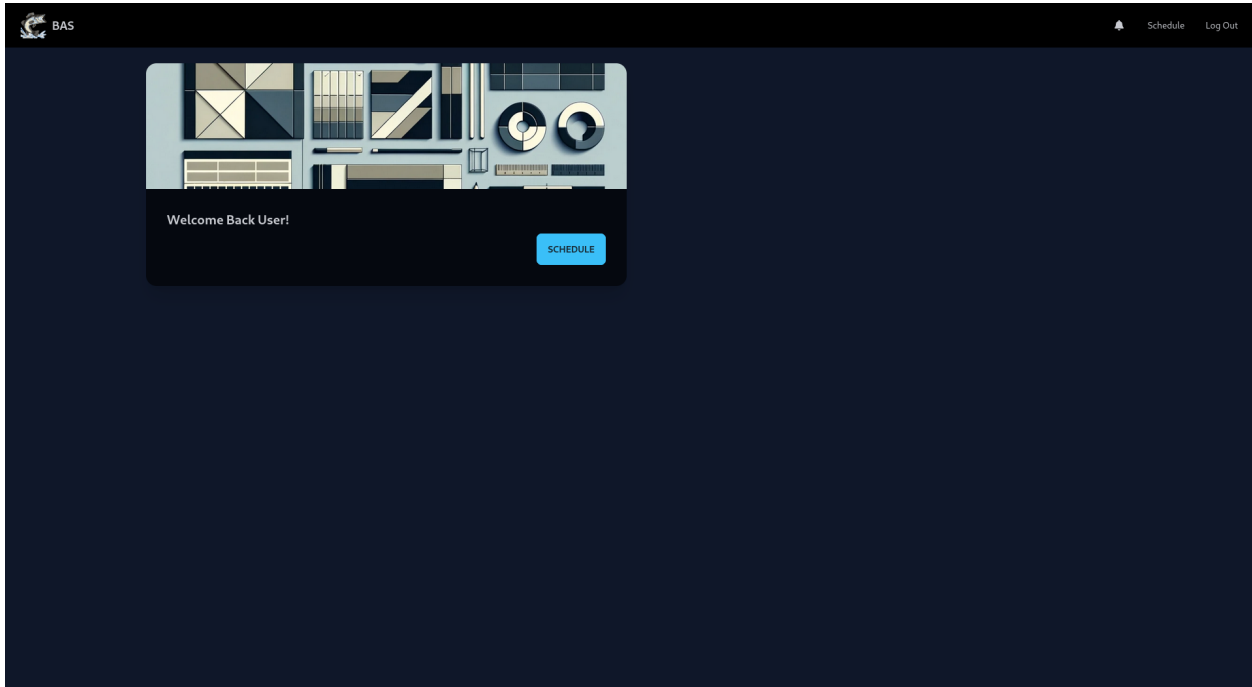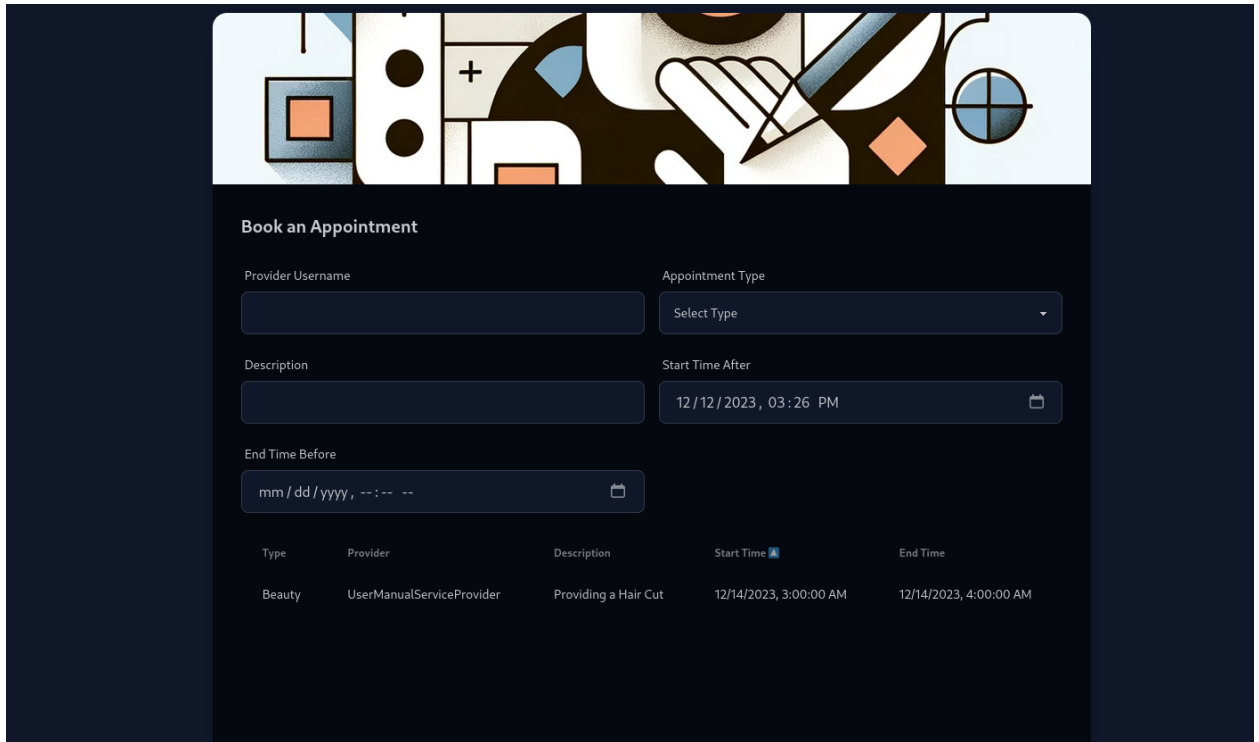

Figure 3. User Dashboard

3.1 To add an appointment

Adding an appointment is simple. First notice on the dashboard there is a large window with a schedule button in the bottom right corner. Click this button shown in the image above to navigate to the listings for all available appointments. Now scrolling down to the "Book an Appointment " section the user will be able to search through all available listings, once a satisfactory listing has been found the user should click on that listing. Next click the button located on the appointment box labeled "book appointment" shown in figure 5, and if no conflicts exist the appointment will be assigned to your account and the service provider will know this account has booked the appointment. The user will receive a confirmation notification that the appointment has been booked.
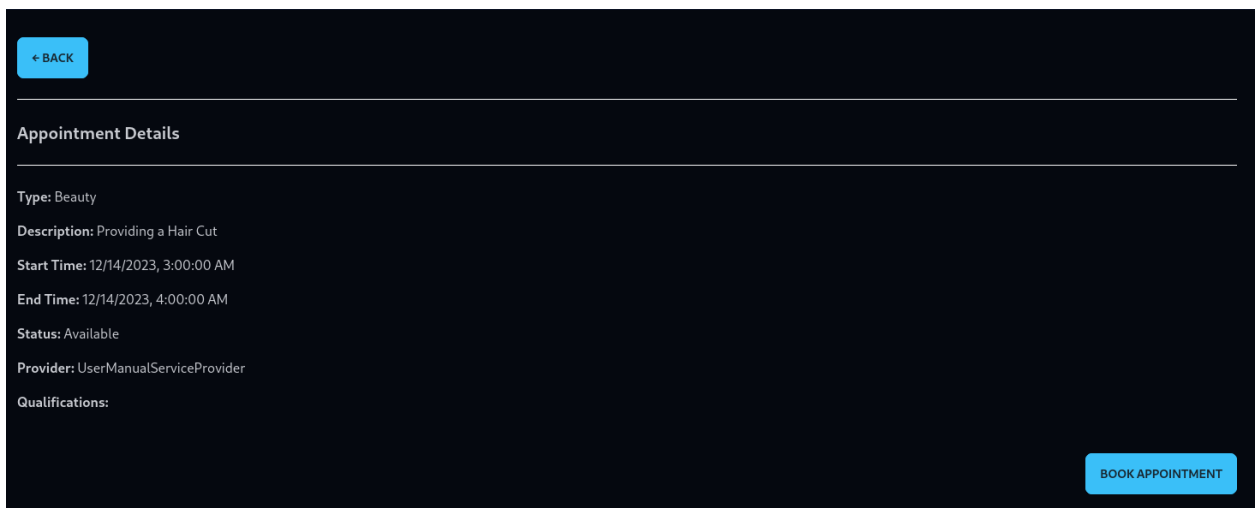
Figure 4. Appointments and Search

Figure 5. Book Appointment

3.2 To cancel an appointment

Once an appointment has been scheduled, notice the appointment will appear under the scheduled appointments section of the users schedule once navigated to schedule. If you have a scheduled appointment you may click on the appointment box you want to cancel and there will be a cancel button in the bottom right corner just as above with booking appointment. The user must click this button if they wish to cancel. This must be done at least twenty-four hours before the appointment to avoid doing harm to a service provider

business. Upon canceling your service provider will receive a notification of your cancelation and a pop up will show the user confirmation of the cancelation.

3.3 To Search An Appointment

To search an appointment navigate to the section desired of the schedule page by clicking the "schedule" button, to search either booking or your own schedule. As shown above in figure 4, users can use all the searching methods provided by the application, which includes all boxes located above current listings.

3.4 To View Your Schedule

To view your own schedule from the homepage, click the "Schedule". It will appear as the first block listed on the page.

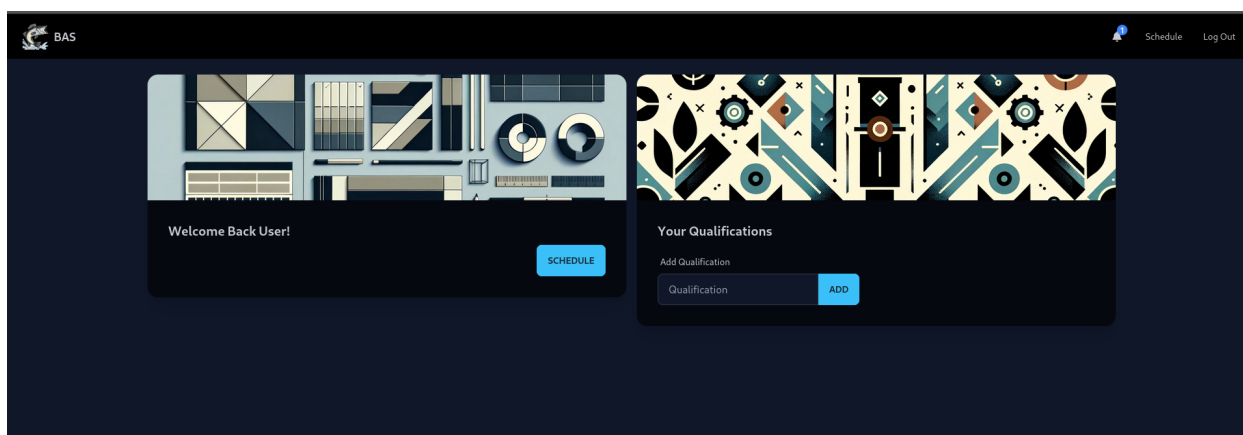## 4. Booking Appointment Software Operations for a Service Provider

Figure 6. Service Provider Dashboard

Using the service provider dashboard users are able to view their currently scheduled appointments and create new appointments by clicking the "schedule" in the box on the left or in the top right corner of the screen shown above in figure 6. Service providers are also able to add qualifications to their accounts using the "add" button after typing in text, this information will be shown to users who register with the service provider. Also provided in the dashboard above is a bell for notifications relating to scheduling and canceling of a service provider's appointments, as well as a logout option.

4.1 Initializing an Appointment

From the dashboard navigate to the appointments sections by clicking the "schedule" button in either location. From here the user will be able to create an appointment within the given parameters for an appointment. Once the appointment is created it will be able to be seen by a client who may now register for the appointment. Appointments must be within valid time constraints. The appointment creation window is shown below.
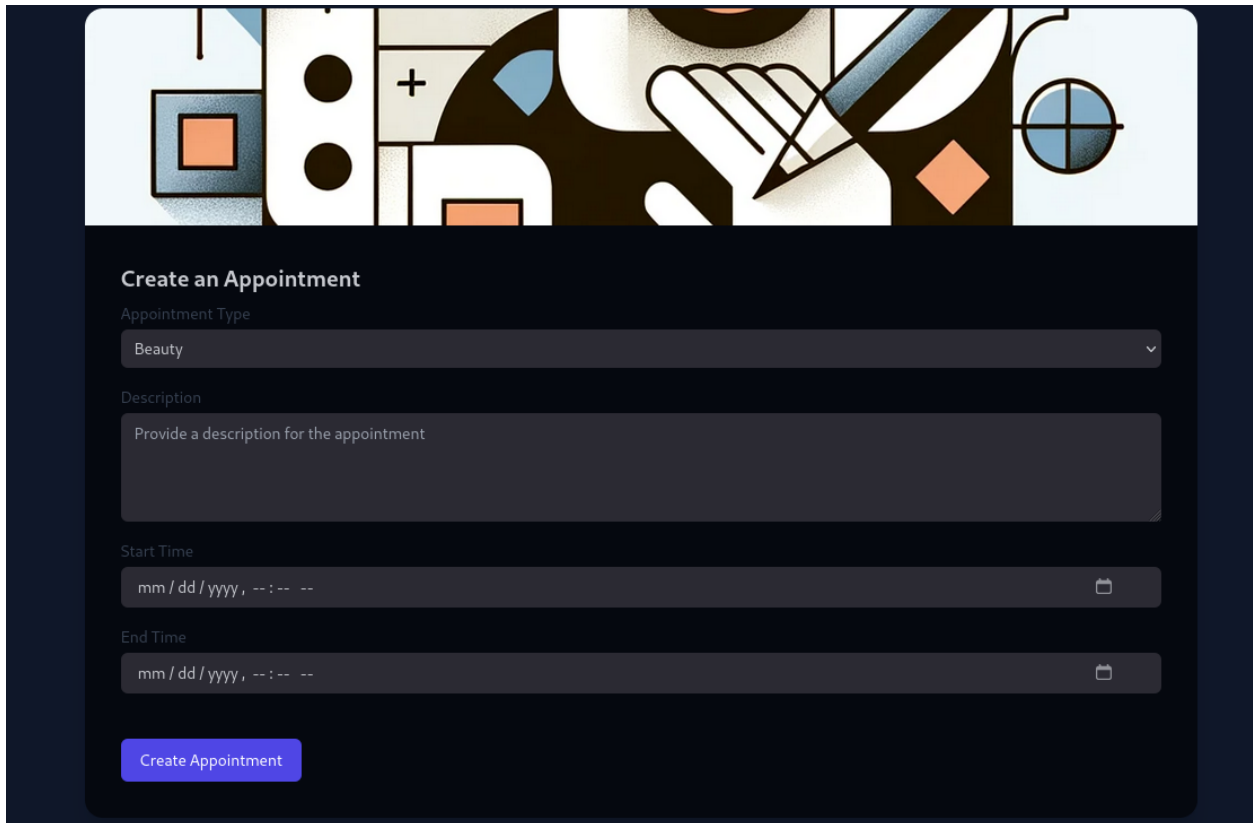

Figure 7. Appointment Creation

4.2 Searching Appointments

Refer to section 3.3 from User Operations as searching your appointments is the same. The only exception is the last parameter on the appointment slot will let the service provider know whether or not that appointment has been booked. Also the addition of searching appointments by whether or not they have been canceled has been added to searching.

4.3 Canceling Appointments

Similar to section 3.2 a service provider can also cancel an appointment through their schedule. After navigating to the schedule block, a service provider can select an appointment that had not been canceled and cancel it. After clicking the appointment to cancel the service provider will be shown a screen like figure 5 that has "Cancel Appointment" in the bottom right corner. After clicking this button the appointment is

canceled and the client is notified and confirmation is given of the cancellation being successful.

4.4 Adding a Qualification

Adding a qualification as a server provider is simple. Navigate to the dashboard by clicking the BAS logo if not currently there. Next simply type into the textbox located in the "Qualifications" box your qualifications and once "add" is clicked the qualifications will be associated with the service provider account and can be seen by clients.

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5. General User Operations

5.1 To Logout

To log out simply click the button labeled "Logout" and the top right of the screen.

5.2 To exit system

To exit the application, close the browser at any point in the application. If you want the service to go offline, stop the webpage server from running. The database will continue to run in the AWS cloud.

5.3 To Return to Dashboard

To return to a user's homepage a user can simply click the back arrow of their browser and they will be redirected back to their dashboard. Also the user can click the BAS logo in the top left corner to return to their dashboard.

5.4 To Return to Login

To return to the login page the user should open a new browser to the application or logout of their currently used account or click the back arrow until arriving at the page desired. This can be done by simply clicking the logout button in the top right corner.
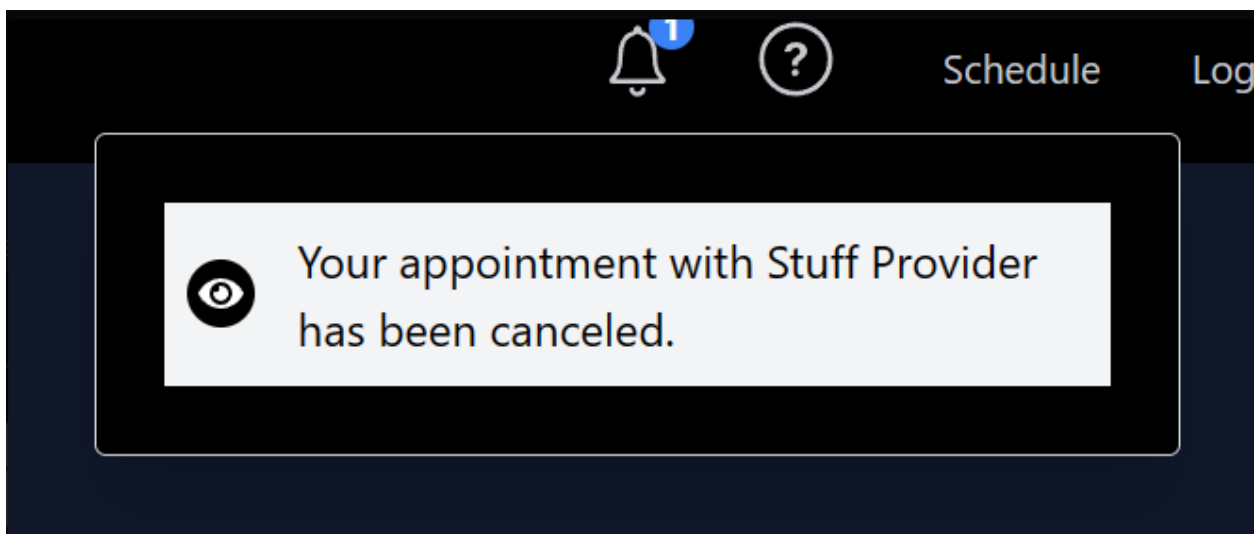
5.5 Notifications

Figure 8. Notifications

To view notifications simply click the bell icon in the top right corner as either type of user. If the user would like the notification to go away they must click anywhere on the

notification that appears when hovering over a given notification they want to clear from the list. An example of a notification is shown in figure 8.

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6. Administrator Operations

An administrator will have special privileges that can only be used with root privileges. With this the admin can revoke access of users and service providers and mark them as inactive. Also the admin can generate reports about user activity and appointments. In addition the admin can view everything both users can see. As shown in the dashboard below the admin can manage both users and appointments.
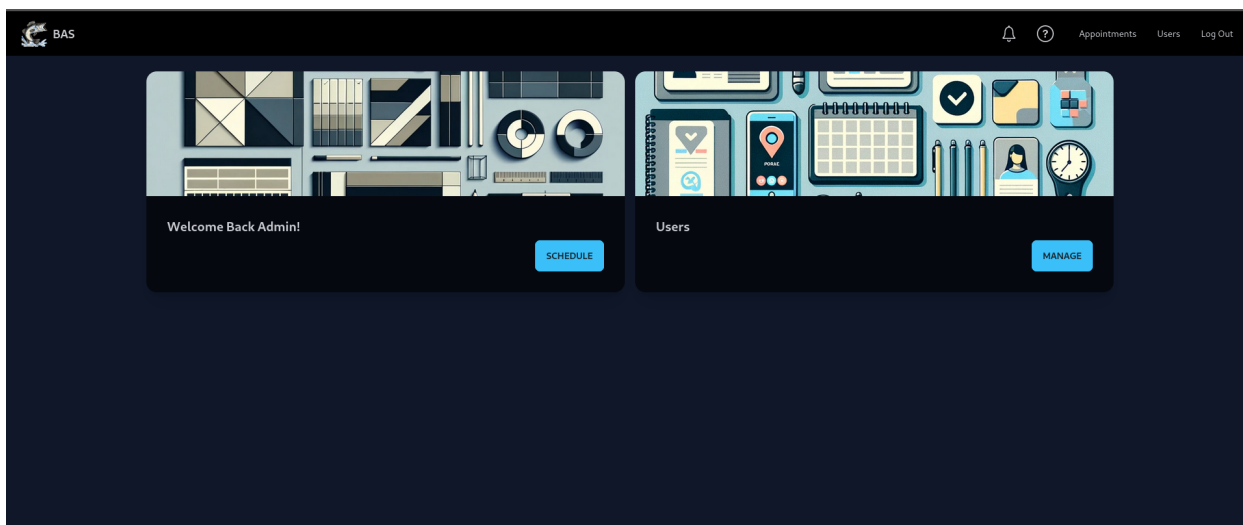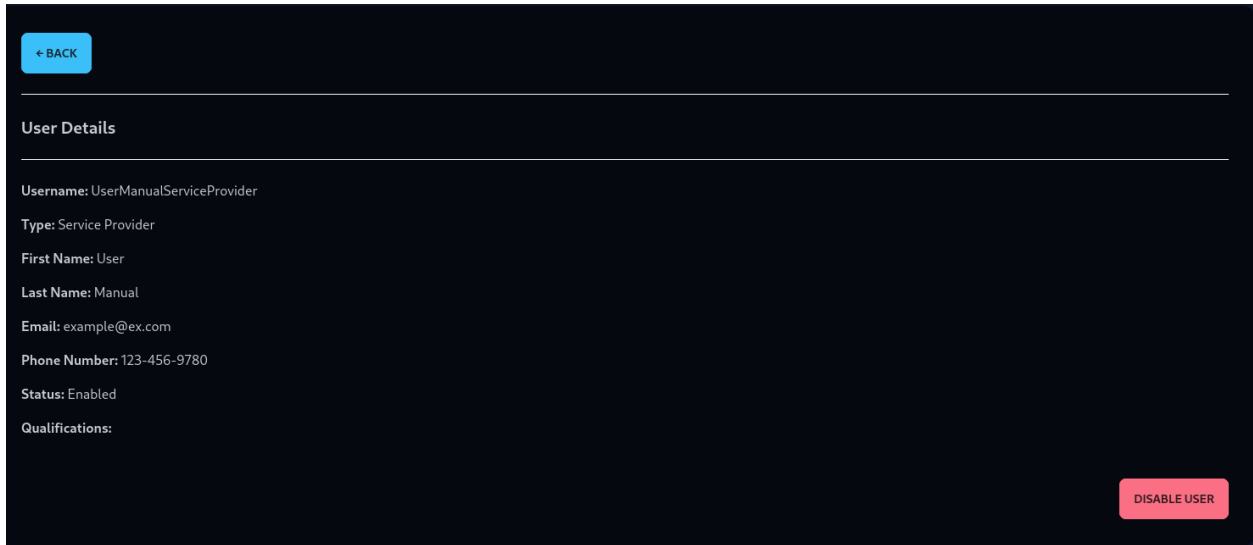

Figure 9. Administrator View

6.1 Remove User

To remove users navigate to the "manage" user by clicking the button on the dashboard. From here you will see a similar searchable list to figure 4 but with the ability to search by any user attributes. Once searching and finding the user the admin wants to delete click on the specific users box. Now click the "Disable User" button as shown below in figure 10. This will close the users account and not allow them to log back in. There will also be a re-enabled button in the same location that allows admin to reactivate.
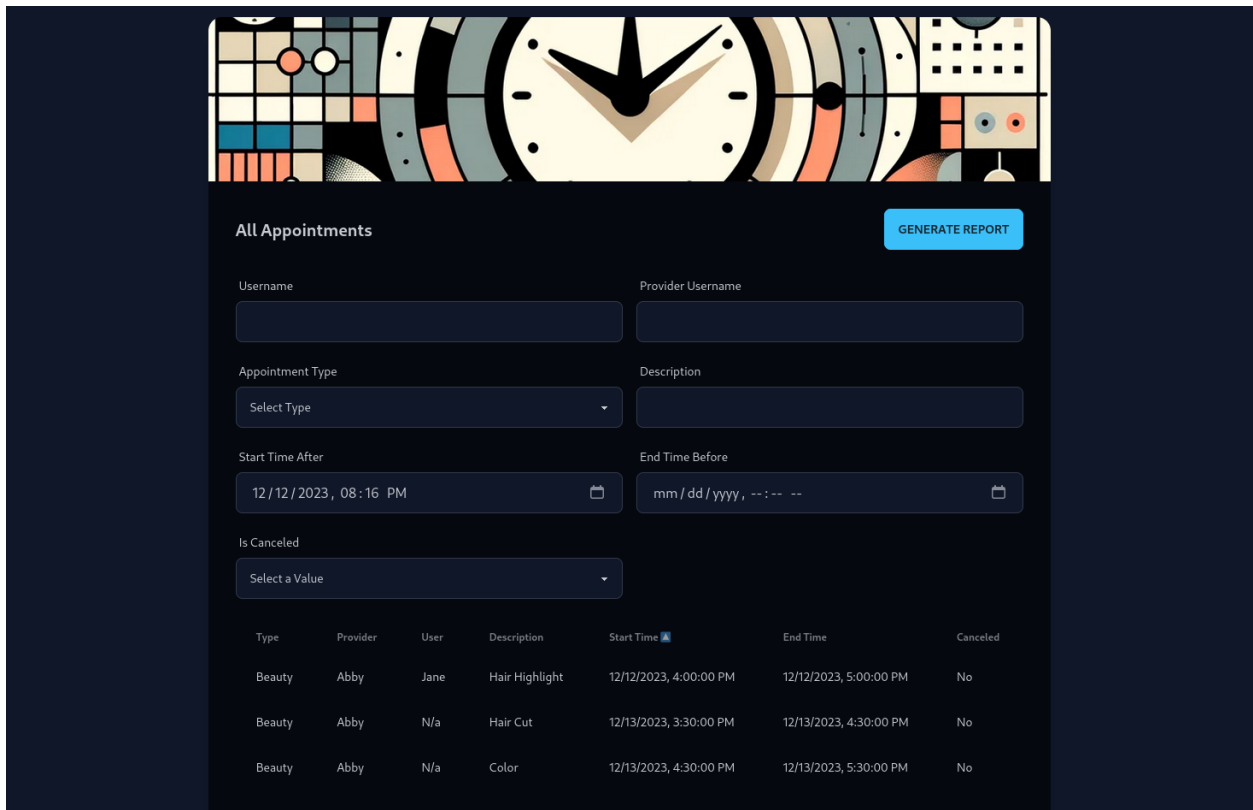
Figure 10. Remove User

6.2 Generate Report

If the admin wants to generate a report about users or appointments in the system they must navigate to the "schedule" or "appointments" page by clicking the button on the dashboard. Once here the admin can click the "generate report" button to create a report based on search parameters showing graphs and trends. This is shown below in figure 11.

Figure 11. Generate Report

6.3 Administrator Cancel

      The administrator also has the ability to cancel and user appointments. This can be done in the same way as 4.3 and 3.2 by navigating to "schedule" and from there searching for the appointment to cancel, clicking on that appointment and pressing the "Cancel Appointment" button in the bottom left corner. This looks similar to figure 5.

6.4 Administrator Search

      To search through the appointments block the administrator uses the same searching methods as section 3.3 but with some additional parameters for example being able to search by username or provider. Figure 11 illustrates the search boxes that correlate to the listings of appointments.

      Another type of search new with an administrator is searching for users. Located in the Users section of the webpage, the admin can search using any parameters associated with a given user by using text boxes similar to that in figure 11. These are intuitive to use.

Glossary

BAS - Booking Appointment Software, the name of our application.

Client - A user who wants to sign up for appointments.

AWS - Amazon's cloud based storage service where the database is located.

Appointment - an entry into the database which stores information related to a scheduled appointment.

Service Provider - a user who wants to provide their services to customers registered as clients within the system by creating appointments for the clients to book.

Administrator - an account that cannot be created, this account will have access to all data in the application and can manipulate it.

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Submission Date: December 13, 2023
We the team members agree to share the mark for this document equally among ourselves.