

VIA Organization Management System



User Guide

December 2017

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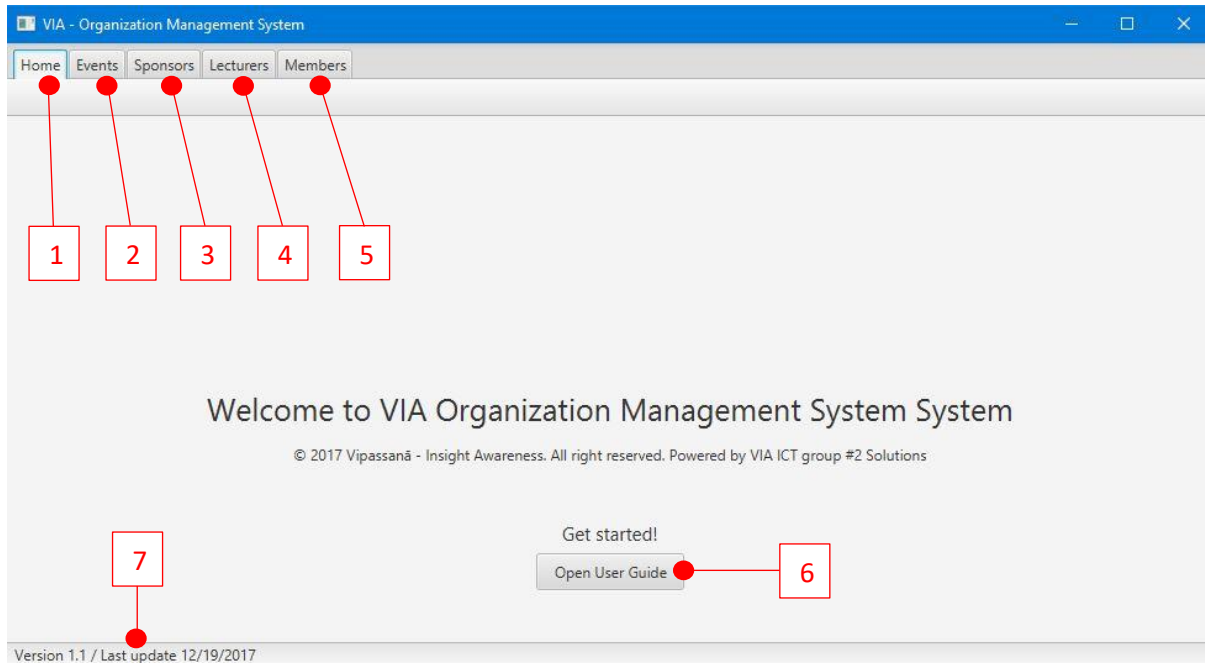
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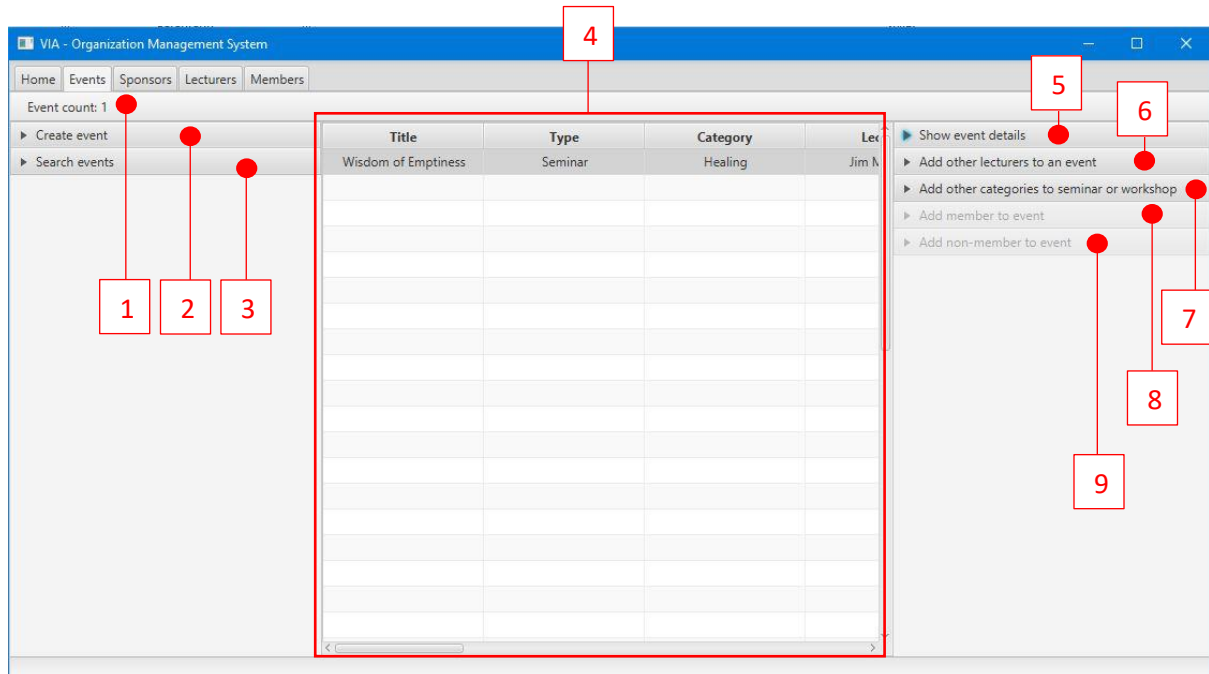
Chapter 1 – The User Interface

1.1 Home page



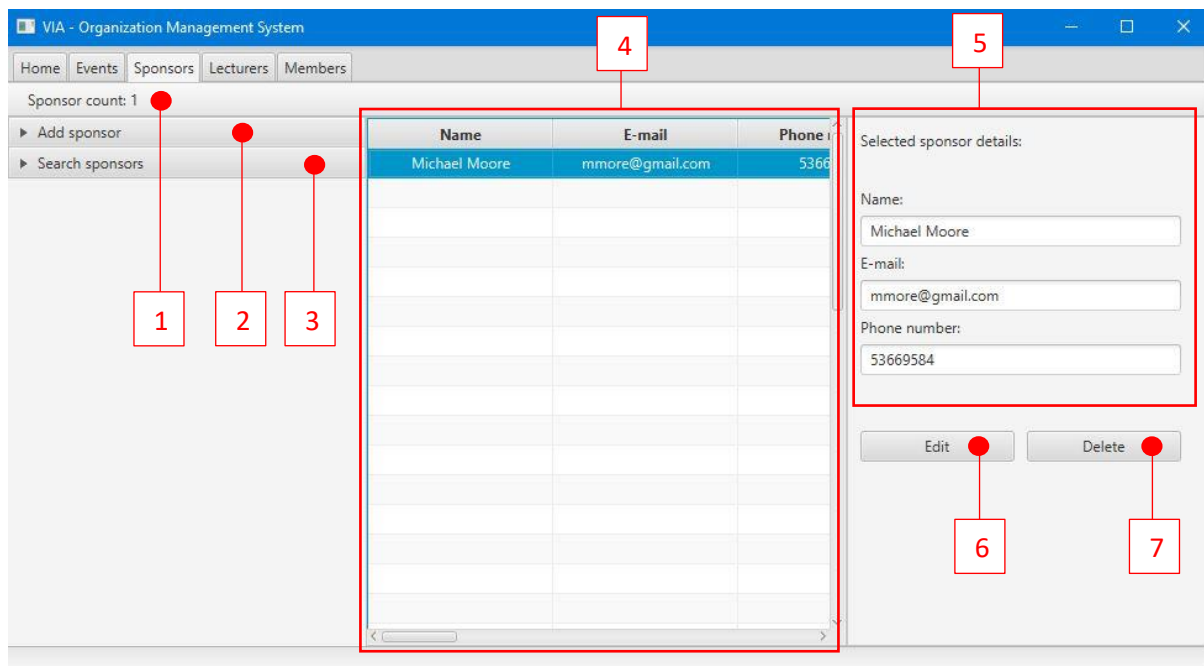
- 1 – Home page tab.
- 2 – Events page tab (*see more on 1.2 – Events page and Chapter 2 – Managing Events Page*).
- 3 – Sponsors page tab (*see more on 1.3 – Sponsors page and Chapter 3 – Managing Sponsors Page*).
- 4 – Lecturers page tab (*see more on 1.4 – Lecturers page and Chapter 4 – Managing Lecturers Page*).
- 5 – Members page tab (*see more on 1.5 – Members page and Chapter 5 – Managing Members Page*).
- 6 – Open User Guide (*this document*)
- 7 – Version number (*last update*)

1.2 Events page



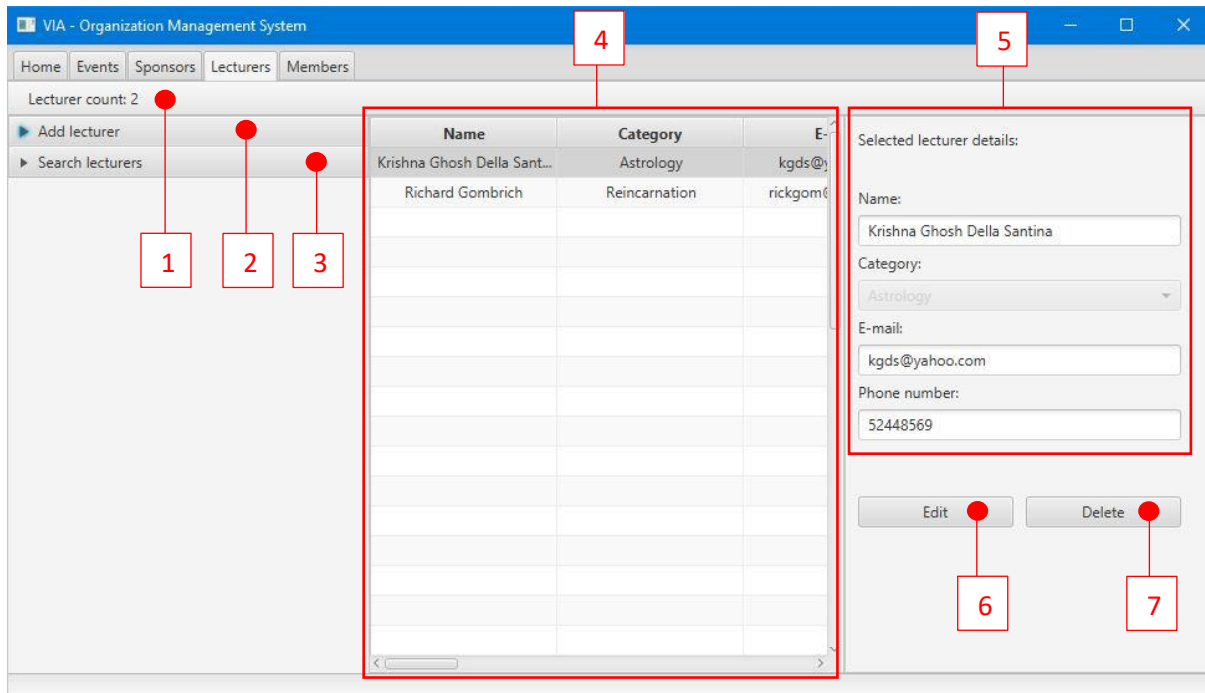
- 1 – Event count (*number of events in the system*).
- 2 – Create event in the system (*see more in Chapter 2 – 2.1 Create event*).
- 3 – Search events in the system (*see more in Chapter 2 – 2.2 Search events*).
- 4 – Events table (*consists of event title, event type, event category, event lecturer, event start-date, event end-date, event start-time, event end-time, event durations (days), number of tickets for the event, event price, event discount, events status (finalized or not finalized)*).
- 5 – Show selected event details (*see more in Chapter 2 – 2.3 Edit event and 2.4 Delete event*).
- 6 – Add other lecturers to an event (*see more in Chapter 2 – 2.4 Add other lecturers to an event*). This option is available for all types of events.
- 7 – Add other categories to a selected seminar or a workshop (*see more in Chapter 2 – 2.4 Add or remove other categories to a seminar or a workshop*). This option is only available if a seminar or a workshop is selected.
- 8 – Add member to selected event (*see more in Chapter 2 – 2.5 Add or remove member from a selected finalized event*). This option is available only if a finalized event is selected.
- 9 – Add non-member to selected event (*see more in Chapter 2 – 2.6 Add or remove non-member from a selected finalized event*). This option is available only if a finalized event is selected.

1.3 Sponsors page



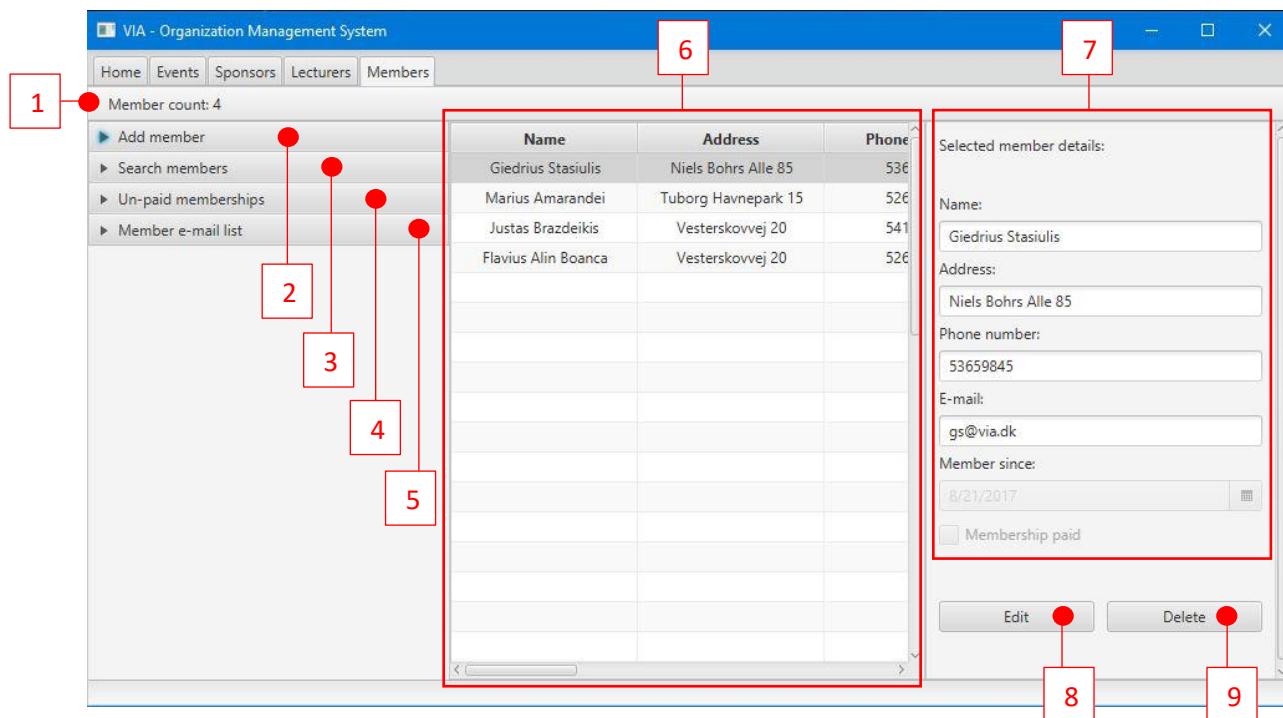
- 1 – Sponsor count (***number of sponsors in the system***).
- 2 – Add sponsor to the system (***see more in Chapter 3 – 3.1 Add sponsor***).
- 3 – Search sponsors in the system (***see more in Chapter 3 – 3.2 Search sponsors***).
- 4 – Sponsors table (***consists of sponsor name, sponsor e-mail address, sponsor phone number***).
- 5 – Show selected sponsor details.
- 6 – Edit selected sponsor (***see more in Chapter 3 – 3.3 Edit sponsor***).
- 7 – Delete selected sponsor (***see more in Chapter 3 – 3.4 Delete sponsor***).

1.4 Lecturers page



- 1** – Lecturer count (***number of lecturers in the system***).
- 2** – Add lecturer to the system (***see more in Chapter 4 – 4.1 Add lecturer***).
- 3** – Search lecturers in the system (***see more in Chapter 4 – 4.2 Search lecturers***).
- 4** – Lecturer table (***consists of lecturer name, lecturer category, lecturer e-mail address, lecturer phone number***).
- 5** – Show selected lecturer details.
- 6** – Edit selected lecturer (***see more in Chapter 4 – 4.3 Edit lecturer***).
- 7** – Delete selected lecturer (***see more in Chapter 4 – 4.4 Delete lecturer***).

1.4 Members page



- 1 – Member count (***number of members in the system***).
- 2 – Add member to the system (***see more in Chapter 5 – 5.1 Add member***).
- 3 – Search members in the system (***see more in Chapter 5 – 5.2 Search members***).
- 4 – Un-paid memberships (***see more in Chapter 5 – 5.3 Un-paid memberships***).
- 5 – Member e-mail list (***see more in Chapter 5 – 5.4 Member e-mail list***).
- 6 – Member table (***consists of member name, member address, member phone number, member e-mail address, membership date, membership status***).
- 7 – Show selected member details.
- 8 – Edit selected member (***see more in Chapter 5 – 5.5 Edit member***).
- 9 – Delete selected member (***see more in Chapter 5 – 5.6 Delete member***).

Chapter 2 – Managing Events Page

2.1 Create event

1. Click “Create event”.
2. Enter event title (mandatory).
3. Select event type.
4. Select event category.
5. Click “Continue”.

The screenshot shows the 'Create event' form with the following elements and annotations:

- 1. A red dot on the 'Create event' button at the top left.
- 2. A red dot on the 'Title' input field, which has a placeholder text '*Mandatory field*'.
- 3. A red dot on the 'Type' dropdown menu, which is currently set to 'Lecture'.
- 4. A red dot on the 'Category' dropdown menu, which is currently set to 'Dream Interpretation'.
- 5. A red dot on the 'Continue' button at the bottom right.

The screenshot shows the 'Create event' form with the following elements and annotations:

- 6. A red dot on the 'Lecturer' dropdown menu, which is currently set to 'Krishna Ghosh Della Santina'.
- 7. A red dot on the 'Start-date' input field, which has a calendar icon.
- 8. A red dot on the 'End-date' input field, which has a calendar icon.
- 9. A red dot on the 'Start-time (hh:mm AM/PM)' input field.
- 10. A red dot on the 'End-time (hh:mm AM/PM)' input field.
- 11. A red dot on the 'Number of tickets' input field.
- 12. A red dot on the 'Price' input field.
- 13. A red dot on the 'Discount' input field.
- 14. A red dot on the 'Create' button at the bottom left.

Below the form, there are two buttons: 'Create' and 'Clear fields'. A red line connects the 'Clear fields' button to a red box containing the text 'Clear all input fields'.

6. Select lecturer according to selected category.
7. Select event start-date (can be left blank).
8. Select event end-date (can be left blank).
9. Enter event start-time (can be left blank).
10. Enter event end-time* (can be left blank).
11. Enter a number of available event tickets (digit only, can be left blank).
12. Enter event price (digits only, can be left blank).
13. Enter event discount** (digits only, can be left blank).
14. Click “Create event”.

**As per design, event end-date will be initially set the same as event start-date, but this can be changed by entering a different event end-date.*

***Discount will be set to 0 if selected event type is a journey.*

2.2 Search events

1. Click "Search events".
2. Select search criteria (Title, Type, Category, Lecturer, Status) from a drop-down menu.
3. Enter search key-word
4. Click "Search".

The screenshot shows a 'Search events' dialog box. It has a title bar 'Search events' with a dropdown arrow. Below it is a label 'Select search criteria:' followed by a dropdown menu currently showing 'Title'. Below that is a label 'Enter search key-words:' followed by a text input field. At the bottom is a 'Search' button. A red box labeled 'Search results' points to the area below the input field, which contains a list of search results. The first result is 'Inbetween lives, Lecture, Reincarnation, Richard Gombrich'.

1. Click "Search events".

2. Select search criteria (Title, Type, Category, Lecturer, Status) from a drop-down menu.

3. Enter search key-word

4. Click "Search".

Search results

Inbetween lives, Lecture, Reincarnation, Richard Gombrich

2.3 Edit event

1. Select an event from events table (1A) or event search results (1B).

The top screenshot shows an 'events table' with the following data:

Title	Type	Category	Lecturer
Inbetween lives	Lecture	Reincarnation	Richard Gombrich

1A points to the 'Type' column header.

1B points to the first row of the table.

The bottom screenshot shows a search results list with a 'Search' button above it. The first result is 'Inbetween lives, Lecture, Reincarnation, Richard Gombrich'.

2. **Show event details**

Title:
Inbetween lives

Type:
Lecture

Category:
Reincarnation

Lecturer:
Richard Gombrich

Start-date:
12/21/2017

End-date:
12/21/2017

Start-time:
18:00

End-time:
19:30

Number of tickets:
50

Tickets remaining:
50

Price:
200.0

Discount:
20.0

☐ Finalize event

3. **Edit** **Delete**

2. "Show event details" panel will expand.
3. Click "Edit" – information can be edited now.
4. Once changes have been made, click "Save".

4. **Finalize event**

Save **Clear fields** **Cancel**

Edit **Delete**

Cancel edit event

2.4 Add other lecturers to an event

The screenshot shows a web interface for adding lecturers to an event. It includes input fields for event details and a list of available lecturers. Red boxes and numbers highlight specific UI elements:

- 2**: Points to the title "Add other lecturers to an event".
- 3**: Points to the list of lecturers to add, with "Joan Halifax Roshi" highlighted.
- 4**: Points to the "Add" button.
- 5**: Points to the list of lecturers already added, showing "Norman Fische" and "Joan Halifax Roshi".
- 6**: Points to the "Remove" button.

Selected event: Wisdom of Emptiness

Selected event category: Healing

Selected event lecturer: Jim Morrison

Select other lecturer to add:

- Jim Morrison
- Norman Fische
- Joan Halifax Roshi
- Pema Chodron

Add

Lecturers already added: 2

- Norman Fische
- Joan Halifax Roshi

Remove

1. Select an event from the events table or event search results (**See 2.2 Edit event**).
2. Click "Add other lecturers to an event".
3. Select a lecturer from a list to add.
4. Click "Add" - Added lecturers will be shown in a list below
5. If you wish to remove the additional lecturer from an event, select a lecturer from a list "Lecturers already added".
6. Click "Remove" – lecturer has been removed

2.5 Add or remove additional categories to a seminar or a workshop

1. Select a seminar or a workshop from the events table or event search results (See 2.2 Edit event). If a lecture or a journey is selected, this option will be disabled.
2. Click “Add other categories to a seminar or a workshop”.
3. Select a category from a list to add.
4. Click “Add” - Added categories will be shown in a list below
5. If you wish to remove a category from an event, select a category from a list “Categories already added”.
6. Click “Remove” – category has been removed

The screenshot shows a web interface for adding categories to an event. At the top, a grey header bar contains the text 'Add other categories to seminar or workshop'. Below this, there are two input fields: 'Selected event:' with the value 'Inbetween lives' and 'Selected event category:' with the value 'Reincarnation'. A red dot with a line pointing to it is labeled '2'. Below these fields is a section titled 'Add more categories:' which contains a list of categories: 'Dream Interpretation' (highlighted in blue), 'Healing', 'Astrology', 'Reincarnation', 'Karma', and 'Alternative Health-Care'. A red box around this list is labeled '3'. Below the list is a grey button labeled 'Add' with a red dot and line pointing to it labeled '4'. Below the 'Add' button is a section titled 'Categories already added:' which contains a list with 'Astrology' and 'Healing'. A red box around this list is labeled '5'. At the bottom is a grey button labeled 'Remove' with a red dot and line pointing to it labeled '6'.

2.6 Add or remove member from an event

The screenshot shows a web interface for adding or removing members from an event. The dialog box is titled 'Add member to event'. It contains a 'Selected event:' field with the value 'Inbetween lives'. Below this is a 'Select member to add:' section with a list of names: Giedrius Stasiulis, Marius Amarandei, Justas Brazdeikis (highlighted), and Flavius Alin Boanca. An 'Add' button is located below the list. Below the 'Add' button is a section titled 'Members already added: 2' with a list of names: Flavius Alin Boanca and Justas Brazdeikis. A 'Remove' button is at the bottom. Numbered callouts point to various elements: 1 points to the 'Add member to event' title, 2 points to the 'Selected event:' field, 3 points to the 'Select member to add:' list, 4 points to the 'Add' button, 5 points to the 'Members already added: 2' list, and 6 points to the 'Remove' button.

2. Add member to event

Selected event:

Inbetween lives

Select member to add:

Giedrius Stasiulis

Marius Amarandei

Justas Brazdeikis

Flavius Alin Boanca

Add

Members already added: 2

Flavius Alin Boanca

Justas Brazdeikis

Remove

1. Select an event from the events table or event search results (**See 2.2 Edit event**). Please note that if the selected event is not finalized, this option will be disabled.
2. Click "Add members to event".
3. Select a member from a list to add.
4. Click "Add" – added member will be shown in a list below.
5. If you wish to remove a member from an event, select the member from a list "Members already added".
6. Click "Remove" – Member has been removed.

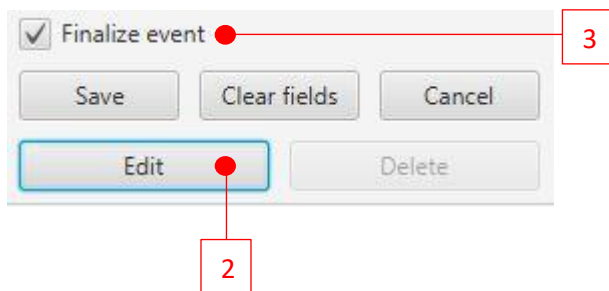
Number of members added to the selected finalized event.

2.7 Add or remove non-member to an event

1. Select an event from the events table or event search results (**See 2.2 Edit event**). Please note that if the selected event is not finalized, this option will be disabled.
2. Click “Add non-member to event”.
3. Enter non-member’s name.
4. Enter non-member’s phone number.
5. Click “Add” – added non-member will be shown in a list below.
6. If you wish to remove a non-member from an event, select the non-member from a list “Non-members already added”.
7. Click “Remove” – Non-member has been removed.

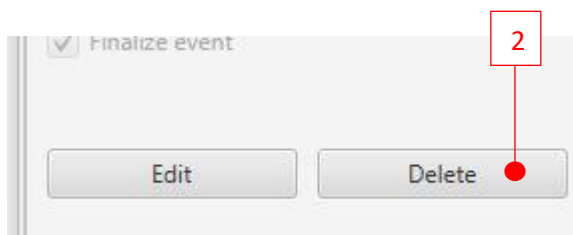
[illegible]

2.8 Finalize event

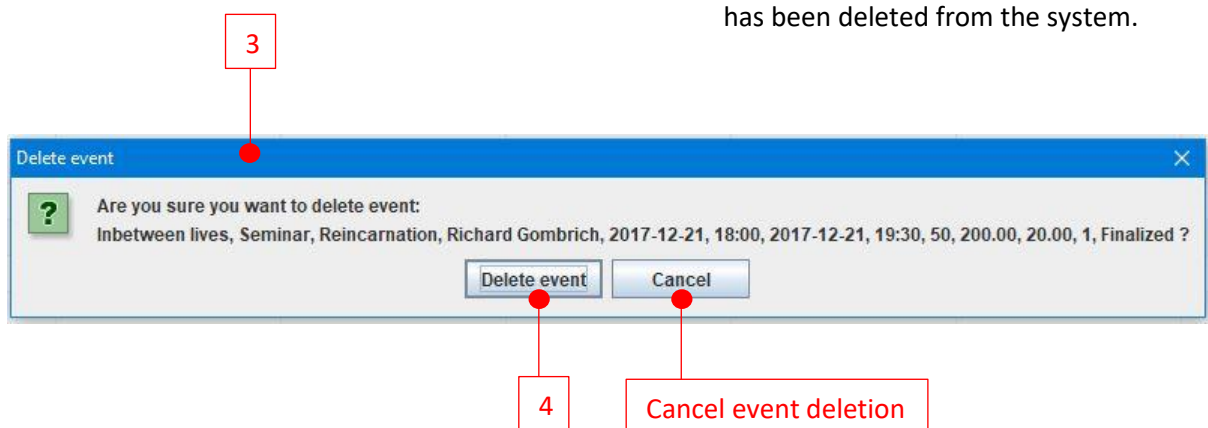


1. Select an event from the events table or event search results (**See 2.2 Edit event**).
2. Click "Edit".
3. Select check-box "Finalize event".
4. Event is now finalized. Members and non-members can be added to this event.

2.9 Delete event



1. Select an event from the events table or event search results (**See 2.2 Edit event**).
2. Click "Delete".
3. A message will pop-up, asking to confirm event deletion.
4. If confirmed, click "Delete" – event has been deleted from the system.



Chapter 3 – Managing Sponsors Page

3.1 Add sponsor

The screenshot shows a web form titled "Add sponsor". It contains three input fields: "Name:", "E-mail:", and "Phone number:". Below these fields are two buttons: "Add" and "Clear fields". Red callout boxes with numbers 1 through 5 point to the following elements:

- 1. The "Add sponsor" title.
- 2. The "Name:" input field.
- 3. The "E-mail:" input field.
- 4. The "Phone number:" input field.
- 5. The "Add" button.

A red box labeled "Clear all input fields" points to the "Clear fields" button.

1. Click "Add sponsor".
2. Enter sponsor name.
3. Enter sponsor e-mail.
4. Enter sponsor phone number.
5. Click "Add" – sponsor is now added to the system.

3.2 Search sponsors

1. Click "Search sponsors"
2. Select search criteria (Name, e-mail, phone number).
3. Enter search key-word.
4. Click "Search".

The screenshot shows a web form titled "Search sponsors". It contains a dropdown menu for "Select search criteria:" with "Name" selected. Below this is an input field for "Enter search key-words:". Below the input field is a "Search" button. A red box labeled "Search results" points to a table displaying the search results.

Michael Moore,mmore@gmail.com,53669584

3.3 Edit sponsor

1. Select a sponsor from sponsor table (1A) or sponsor search results (1B).

Name	E-mail	Phone number
Michael Moore	mmore@gmail.com	53669584

1A

Search

Michael Moore,mmore@gmail.com,53669584

1B

Selected sponsor details:

Name:

E-mail:

Phone number:

3

2

Clear all input fields

2. Click "Edit".

3. Once changes have been made, click "Save".

Cancel edit sponsor

3.4 Delete sponsor

Selected sponsor details:

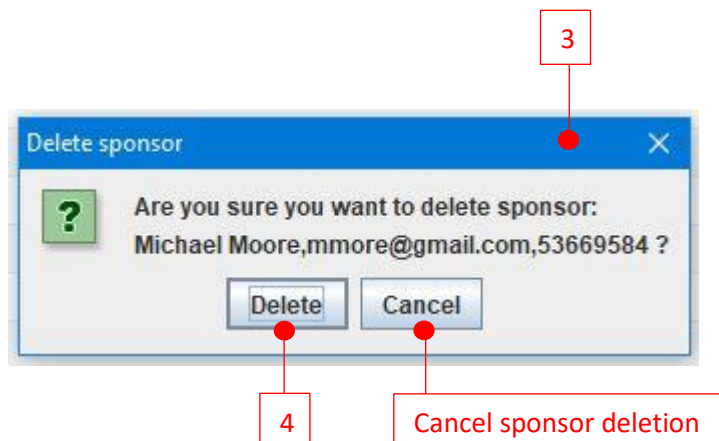
Name:
Michael Moore

E-mail:
mmore@gmail.com

Phone number:
53669584

Edit Delete

1. Select a sponsor from the sponsor table or sponsor search results (**See 3.3 Edit event**).
2. Click "Delete".
3. A message will pop-up, asking to confirm sponsor deletion.
4. If confirmed, click "Delete" – sponsor has been deleted from the system.



Chapter 4 – Managing Lecturer Page

4.1 Add lecturer

1. Click “Add lecturer”.
2. Enter lecturer name.
3. Select lecturer category (Dream interpretation, Healing, Astrology, Reincarnation, Karma, Alternative Health-Care)
4. Enter lecturer e-mail address.
5. Enter lecturer phone number.
6. Click “Add” – lecturer is now added to the system.

The screenshot shows a form titled "Add lecturer". It contains the following fields and controls:

- 1. A red dot on the "Add lecturer" title bar.
- 2. A text input field for "Name".
- 3. A dropdown menu for "Category" with "Dream Interpretation" selected.
- 4. A text input field for "E-mail".
- 5. A text input field for "Phone number".
- 6. An "Add" button.
- A "Clear fields" button.

A red box labeled "Clear all input fields" points to the "Clear fields" button.

4.2 Search lecturers

The screenshot shows a form titled "Search lecturers". It contains the following fields and controls:

- 1. A red dot on the "Search lecturers" title bar.
- 2. A dropdown menu for "Select search criteria:" with "Name" selected.
- 3. A text input field for "Enter search key-words:".
- 4. A "Search" button.

A red box labeled "Search results" points to the area below the search button, which displays the text "Krishna Ghosh Della Santana,Astrology,kgds@y".

1. Click “Search sponsors”
2. Select search criteria (Name, e-mail, phone number).
3. Enter search key-word.
4. Click “Search”.

4.3 Edit lecturer

1. Select a lecturer from lecturer table (1A) or lecturer search results (1B).

Name	Category	E-mail	Phone number
Krishna Ghosh Della Sant...	Astrology	kgds@yahoo.com	52448569
Richard Gombrich	Reincarnation	rickgom@gmail.com	56968545

1A

Search

Krishna Ghosh Della Santana,Astrology,kgds@y

1B

Selected lecturer details:

Name:

Category:

E-mail:

Phone number:

3

Save

Clear fields

Cancel

2

Edit

Delete

2. Click "Edit".
3. Once changes have been made, click "Save".

Cancel edit lecturer

Clear all input fields

4.4 Delete lecturer

Selected lecturer details:

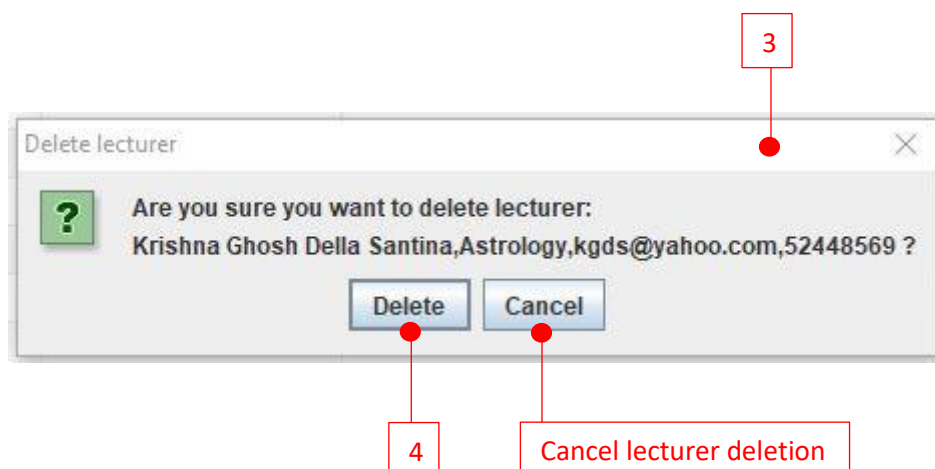
Name:

Category:

E-mail:

Phone number:

1. Select a lecturer from the lecturer table or lecturer search results (See 4.3 Edit lecturer).
2. Click "Delete".
3. A message will pop-up, asking to confirm lecturer deletion.
4. If confirmed, click "Delete" – lecturer has been deleted from the system.



Chapter 5 – Managing Members Page

5.1 Add member

The 'Add member' form contains the following fields and controls:

- 1. Form title: Add member
- 2. Name input field
- 3. Address input field
- 4. Phone number input field
- 5. E-mail input field
- 6. Member since input field with a calendar icon
- 7. Membership paid checkbox
- 8. Add button
- Clear fields button

1. Click “Add member”.
2. Enter member name.
3. Enter member address
4. Enter member phone number.
5. Enter lecturer e-mail address.
6. Enter membership date.
7. Select whether the member has paid for this year membership.
8. Click “Add” – member is now added to the system.

5.2 Search members

1. Click “Search members”
2. Select search criteria (Name, e-mail, phone number).
3. Enter search key-word.
4. Click “Search”.

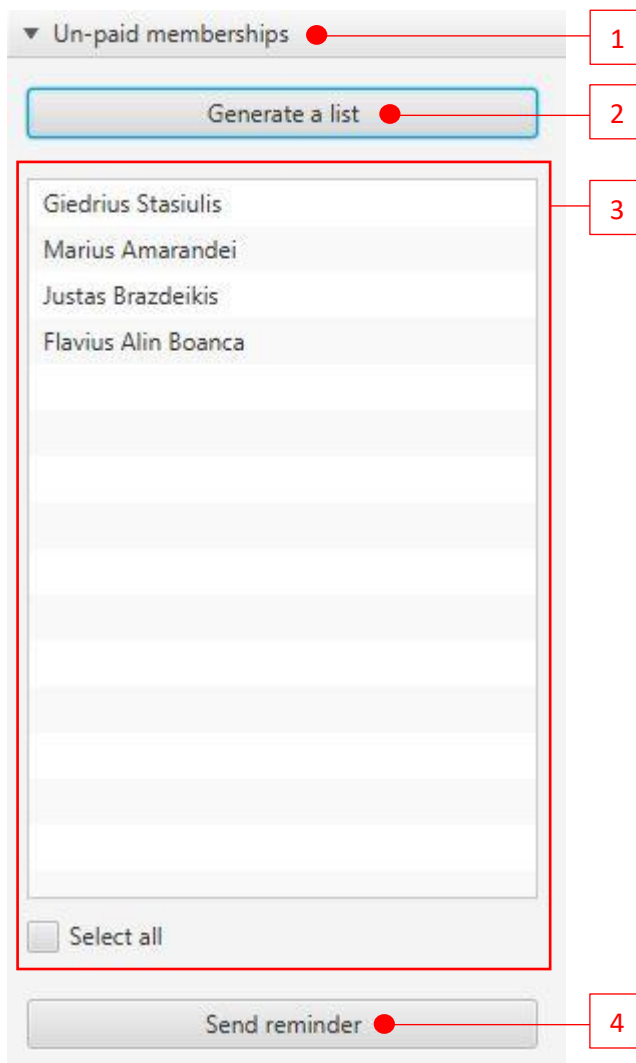
The 'Search members' form contains the following fields and controls:

- 1. Form title: Search members
- 2. Select search criteria dropdown menu (currently showing 'Name')
- 3. Enter search key-words input field
- 4. Search button
- Search results box (highlighted in red)

Search results:

Marius Amarandei, Tuborg Havnepark 15, 52669
--

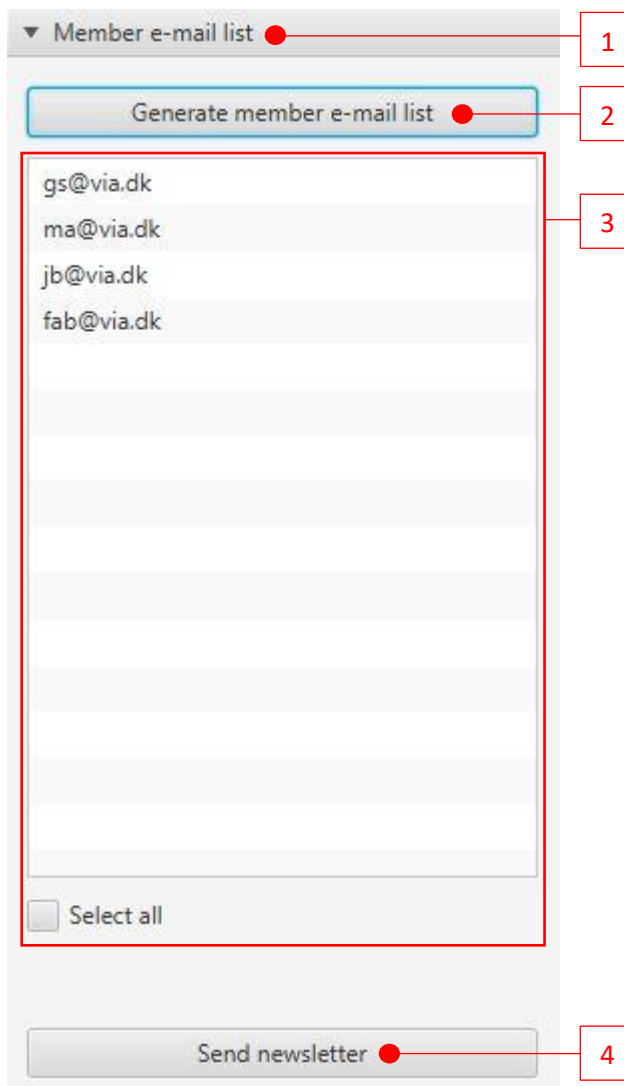
5.3 Un-paid memberships



1. Click "Un-paid memberships".
2. Click "Generate a list".
3. Select a member who you want to send the reminder, or click "Select all".
4. Click "Send reminder"
5. A message will pop-up confirming that the reminder has been sent.



5.4 Member e-mail list



1. Click "Member e-mail list".
2. Click "Generate member e-mail list".
3. Select a member who you want to send the newsletter, or click "Select all".
4. Click "Send newsletter"
5. A message will pop-up confirming that the newsletter has been sent.



5.5 Edit member

1. Select a member from member table (1A) or member search results (1B).

Name	Address	Phone number	E-mail
Giedrius Stasiulis	Niels Bohrs Alle 85	53659845	gs@via.dk
Marius Amarandei	Tuborg Havnepark 15	52669957	ma@via.dk
Justas Brazdeikis	Vesterskovvej 20	54112365	jb@via.dk
Flavius Alin Boanca	Vesterskovvej 20	52663589	fab@via.dk

1A

Search

Justas Brazdeikis, Vesterskovvej 20, 54112365, jb@via.dk

1B

Selected member details:

Name:

Address:

Phone number:

E-mail:

Member since:

☐ Membership paid

3

2

Clear all input fields

Cancel member deletion

2. Click "Edit".
3. Once changes have been made, click "Save".

5.6 Delete member

Selected member details:

Name:

Address:

Phone number:


E-mail:

Member since:

☐ Membership paid

1. Select a member from the member table or member search results (**See 4.3 Edit member**).
2. Click "Delete".
3. A message will pop-up, asking to confirm member deletion.
4. If confirmed, click "Delete" – member has been deleted from the system.

Delete member

 Are you sure you want to delete member:
Justas Brazdeikis,Vesterskovvej 20,54112365,jb@via.dk,2017-08-21,Not paid ?

3

Cancel member deletion

4