

**BookIt!**  
**Software for Booking Appointments**

**User Manual**

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## 1. Introduction

This user manual describes how to use the software for booking appointments, called BookIt!. The product is a multi-user software where users can book appointments with service providers and vice versa. Using this product, a service provider first makes an appointment with a specific date and time, and then a user can book any available appointments. Other functionalities include modifying/canceling appointments, viewing upcoming appointments, and viewing alerts. The storage limit depends on the secondary storage space available in the computer. BookIt! makes use of a database to store user, service provider, and appointment information. Because of this, the product can't be used as a stand-alone product.

### 1.1 System Requirements

This product runs on a PC with Windows or macOS operating systems.

### 1.2 Installation

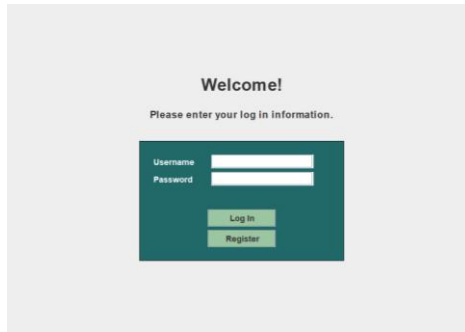
The installation of this product requires Java and SQL to be previously downloaded onto the computer. After copying the ZIP file that comes with the product, the database needs to first be set up using SQL. A file is provided to be used when setting up the database on the computer. Once everything is downloaded, the LoginPage.java file will open the application when run.

## 2. Getting Started

BookIt! consists of functionalities for admin, service provider, and users. Once logged in, the components for each type of user work independently of the other types and use separate frames. In order to use the functionalities for the different types of users, the user must log out and then a new type of user can log in to use its functionalities.

Upon start up, the product displays the main log in screen shown below. From here, a user can do the following:

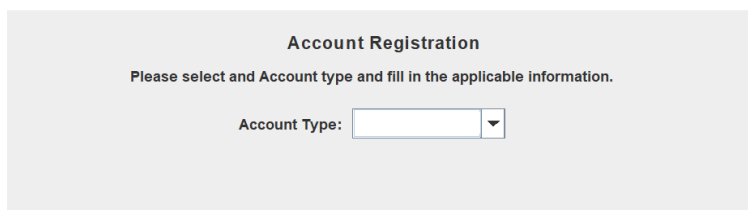
- The user can log in with previously created credentials from registration. To log in, a username and password are required. After filling in the two required fields, the user can click the "Log In" button which will direct them to the home page. For each type of user, the log in requirements is the same, so all types of users use the same log in screen.
- The user can click the button "Register" which allows the user to register a new account, which can be either a service provider account or a user account.
- The user can exit from the system by pressing the "X" in the top right corner of the screen. This will close all of the screens and terminate the program.



A login form titled "Welcome!" with the instruction "Please enter your log in information." It features a dark teal box containing two input fields labeled "Username" and "Password", and two buttons labeled "Log In" and "Register".

### 3. Registration

Within this section, it will describe the process of registration for both a user and service provider account. After pressing the “Register” button, a screen like the one shown below

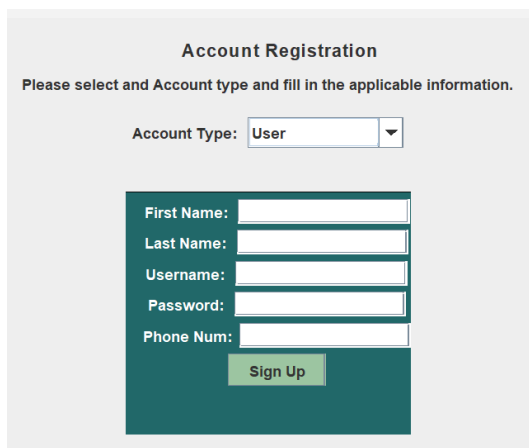


An "Account Registration" form with the instruction "Please select and Account type and fill in the applicable information." It features a dark teal box containing a dropdown menu labeled "Account Type:" and a "Sign Up" button.

The dropdown will have the user select which type of account they would like to register, with the options being either “User” or “Service Provider”.

#### 3.a. User Registration

If the user presses “User” from the dropdown menu, the following information will be shown.

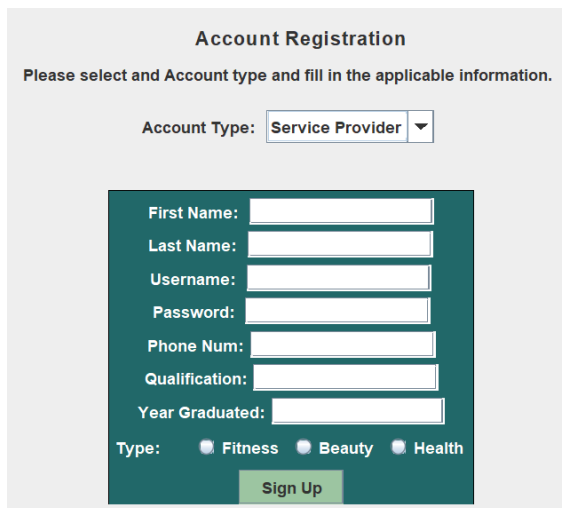


A "User Registration" form with the instruction "Please select and Account type and fill in the applicable information." It features a dark teal box containing a dropdown menu labeled "Account Type:" with "User" selected, and five input fields labeled "First Name:", "Last Name:", "Username:", "Password:", and "Phone Num:". A "Sign Up" button is at the bottom.

It will ask for the user to provide the following information shown above. When all of the required fields are filled in, the user can press the “Sign Up” button at the bottom of the fields. There are no requirements on what the password must be, and the phone number must be formatted as xxxxxxxxxx, where x is an integer between 0-9. After pressing “Sign Up”, a confirmation message will display saying that the account was successfully created, and the user will be directed to the Log In page.

### 3.b. Service Provider Registration

If the user presses “Service Provider” from the dropdown menu, the following information will be shown.



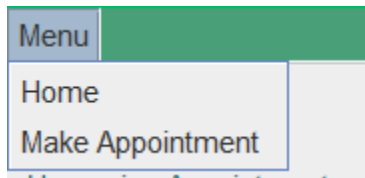
The form is titled "Account Registration" and includes a sub-instruction: "Please select an Account type and fill in the applicable information." The "Account Type" dropdown menu is set to "Service Provider". Below this, there is a dark green box containing several input fields: "First Name:", "Last Name:", "Username:", "Password:", "Phone Num:", "Qualification:", and "Year Graduated:". At the bottom of this box, there are three radio buttons for "Type": "Fitness", "Beauty", and "Health". A green "Sign Up" button is located at the bottom right of the form.

It will ask for the user to provide the following information shown above. When all of the required fields are filled in, the user can press the “Sign Up” button at the bottom of the fields. There are no requirements regarding what the password must be. The phone number must be formatted as xxxxxxxxxx, where x is an integer between 0-9. Qualification and Year Graduated are related to the service providers’ schooling and qualifications, with qualifications being a String and year graduated being an integer. The type of service provider account must also be specified, with the options being Fitness, Beauty, and Health. Only one option can be chosen. After pressing “Sign Up”, a confirmation message will display saying that the account was successfully created, and the user will be directed to the Log In page.

## 4. Navigation

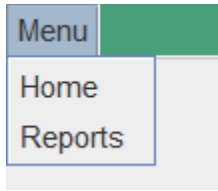
Within this section it will describe and show how to navigate between the pages offered to that particular account type.

### 4.a. User and Service Provider Navigation

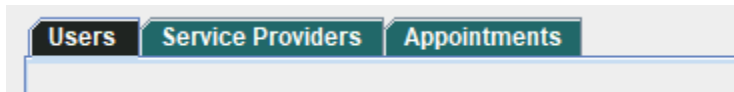


Upon clicking “Menu” in the menu bar, the user will see an option to select “Home” or “Make Appointment.” If they select “Home,” it will change nothing, as they are on the home page. If they select “Make Appointment” they will be redirected to the booking appointments page and the home page will close. The menu bar is available on all pages and does the same functionality.

## 4.b Admin Navigation

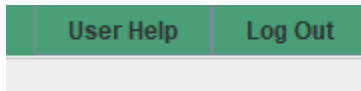


Upon clicking “Menu” in the menu bar, the admin will see an option to select “Home” or “Reports.” If they “Home,” it will change nothing, as they are on the home page. If they select “Reports” they will be redirected to the reports page and the home page will close. The menu bar is available on all pages and does the same functionality.



Admin also has tab navigation on their home page. These tabs contain data in a table format. Clicking on any of the tabs will change the window and thus the information being displayed. The “Users” tab contains all the information in the database within the User entity type. The other tabs follow the same construct but for the labeled type.

#### 4.c. Log Out



Each user type has the option to log out of the application in the top right corner. Upon clicking “Log Out” they will be redirected to the log in page and the current page will close.

## 5. Booking Appointments

Only User and Service Provider have the ability to book appointments.

## 5.a User Booking

**Make Appointment**

Type of Appointment:

Medical  
 Beauty  
 Fitness

2024-06-04	02:00:00	exception
2024-04-14	22:00:00	OoB
Book Selection Now		

After the User navigates to the book appointments page, they will be prompted with a drop-down menu of the types of appointments they can choose from. Upon selecting a type, they will need to press “Go” and from there a table will appear displaying all the available appointment slots of that type. Note: only appointments for future times and that have not been booked by another user will appear.

A User can also search for available appointments using the textbox provided below the dropdown menu. A User can type whatever they are looking for in the textbox relating to any of the fields relating to the appointment, either partial or full. Once the textbox is filled in, the User can press the “Search” button below the textbox and a table will appear displaying all the available appointment slots filtered by the search. If the User wishes to search by something else, the User can clear the current text in the textbox and type in the new thing they are searching for.

Once the table data appears, the user can select a row by single clicking. Once a row is selected (it appears blue), they can click the “Book Selection Now” button. They will then see a confirmation message and upon clicking “OK” the table will clear. The user can book another appointment or use the menu bar to go home.

5.b Service Provider Booking

### Make Appointment

Description:

Date:

Time:

Submit

Date:

Time:

01 - Jan

02 - Feb

03 - Mar

04 - Apr

05 - May

06 - Jun

07 - Jul

Submit

After the Service Provider navigates to the book appointments page, they will see the following fields. The description field will allow any text to describe what appointment they are offering. The date fields are drop-downs with the first one being all 12 months. The second date drop down field is the day of month and the third is the year. Note: only the next year from the current date will be available to create. The time field will have a drop-down containing half hour increments all day. Upon filling out all the fields, the Service Provider will click “Submit” where the data entered will be validated (eg. Month day exists, date is only a year in advance, they don’t have an appointment already made at this time, ...). They will then be redirected to their home page and see the new appointment in their list.

6. Canceling Appointments

All user types can cancel an appointment. The example below is for a user.

Upcoming Appointments

Cancel Selection Now

Date	Time	Description	Service Provider	Canceled
2023-12-11	17:00:00	next4	joe smith	No
2023-12-05	18:00:00	next7	joe smith	Yes
2024-06-06	06:00:00	test123	joe smith	No

Select an Option

?

Are you sure you want to cancel your appointment on 2024-06-06 at 06:00:00?

YesNoCancel

The example below is for an admin account.

Users

Service Providers

Appointments

Search:

Go

Cancel Selection Now

Description	Date	Time	Type	User	Service Provider	Booked	Cancelled
haircut	2023-11-10	16:00:00	Beauty	Megan Smith	joe smith	Yes	No
highlight	2023-10-15	12:00:00	Beauty	Megan Smith	joe smith	Yes	No
hi	2023-10-11	23:00:00	Beauty	Megan Smith	joe smith	Yes	No
hello	2023-10-11	23:00:00	Beauty	No Client	joe smith	No	No
next	2023-11-11	14:00:00	Beauty	No Client	joe smith	No	No
next2	2023-10-12	06:00:00	Beauty	No Client	joe smith	No	No
next3	2023-12-11	15:00:00	Beauty	No Client	joe smith	No	No
next4	2023-12-11	17:00:00	Beauty	Megan Smith	joe smith	Yes	No
next5	2023-10-12	16:00:00	Beauty	No Client	joe smith	No	No
next6	2023-10-13	14:00:00	Beauty	No Client	joe smith	No	No
next7	2023-12-05	18:00:00	Beauty	No Client	joe smith	No	No
test123	2024-06-06	06:00:00	Beauty	No Client	joe smith	No	No
logout/in	2024-05-18	22:00:00	Beauty	No Client	joe smith	No	No
successesstest	2023-11-24	16:00:00	Beauty	No Client	joe smith	No	Yes
halfhour	2023-12-04	07:00:00	Beauty	No Client	joe smith	No	No
repopulate	2024-03-03	01:00:00	Beauty	No Client	joe smith	No	Yes
exception	2024-06-04	02:00:00	Beauty	No Client	joe smith	No	No
OOB	2024-04-14	22:00:00	Beauty	No Client	joe smith	No	Yes

Select an Option

?

Are you sure you want to cancel the appointment on next4 at 2023-12-11 for Megan Smith with joe smith

Yes

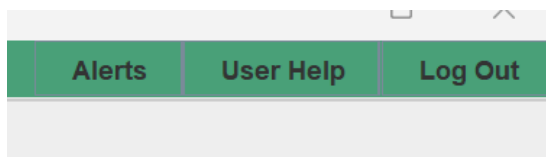
No

Cancel

When the program user selects something in their table on their home page, they can click on “Cancel Selection Now.” This will display a confirmation message that will ask if they would like to cancel the appointment at the specified time and date. If they select “Yes” it will cancel it and send a notification to the other account involved in the appointment. If they select “No” or “Cancel” the window will close and the appointment will not be cancelled.

## 7. Viewing Alerts

Viewing alerts for appointments can be done by either a service provider or a user. From the home screen for either a service provider or a user, the following layout below will be shown in the top right corner of the screen.



At any time, a user or service provider can click on the “Alerts” button, which opens a new window like the one shown below. If the “Alerts” button is red, this indicates that there is a new alert that the user or service provider has not seen regarding one or more of their appointments.



The image shows a window with two sections. The top section is titled 'New Alerts' and contains the text 'No new alerts'. The bottom section is titled 'Previous Alerts' and contains the text 'No previous alerts'. At the bottom of the window is a green button labeled 'OK'.

The first box shows any new alerts that the user or service provider hasn't seen yet. Once the user or service provider has seen a new alert, it will then appear in the previous alerts box, which then keeps a record of all past alerts. To close the alerts window, the user can either press the "Ok" button or the "X" in the top right corner.

## 8. Admin Functionalities

Admin functionalities include User, Service Provider, and Appointment Search; Account Deletion; Appointment Cancellation (see section 6); and Report Generation.

### 8.a Search

The Admin Account has the ability to search all existing records within the database, including Users, Service Providers, and Appointments. This functionality exists within the home page immediately upon logging in. Note the three tabs for Users, Service Providers, and Appointments.

To search within a particular record type:

1. Click the respective tab (e.g. Users, Service Providers, or Appointments)
2. In the search bar, type whatever you are looking for.
  - a. The search bar matches any field, partial or full.
3. Click **Go**

The image shows a search interface with three tabs: 'Users', 'Service Providers', and 'Appointments'. The 'Users' tab is selected. Below the tabs is a search bar with the text 'jDoe' and a green button labeled 'Go'.

4. To pull all existing records of that record type, clear out the search bar, then click 'Go' again.
5. The columns in the search results table may also be sorted in ascending or descending alphabetical/numerical order. Click the column headers to change the order.

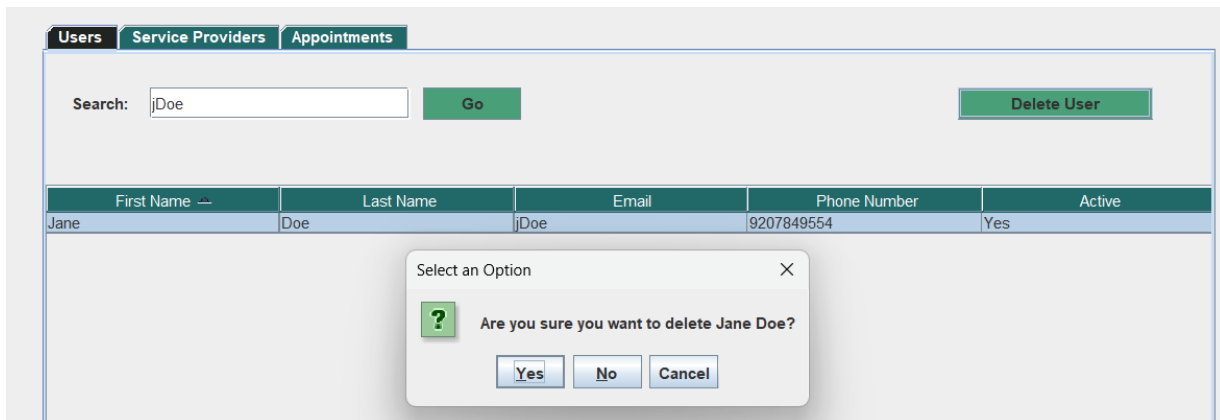
First Name	
Alex	Er
Bob	Do
Cole	Sp
Jane	Do
Lana	Re
Sophia	Co

## 8.b Account Deletion

The Admin Account also has the ability to delete all account types, save its own. Deleting a User or Service Provider account is a **Soft Delete**, meaning it will be marked as “Inactive.” The account will not be deleted forever, but the respective user will not be able to log back in until the account is made active again.

To delete a particular account:

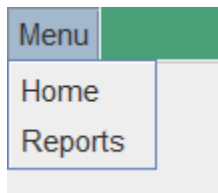
1. Locate the record within its respective tab (see section 8.a for how to search)
2. Highlight the corresponding line within the table.
3. Click **Delete User**
4. A message will pop-up asking to verify the deletion – select Yes to proceed, or No/Cancel to go back.



## 8.c Report Generation

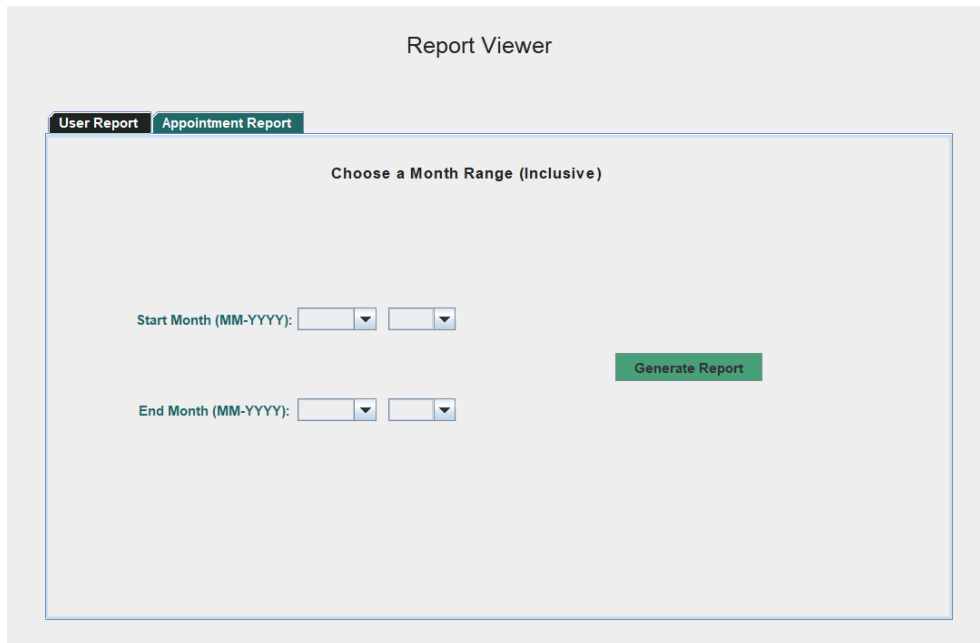
The Admin account has access to two different Reports: the User Report, the data for which is pulled via a date range, and the Appointment Report, the data for which is pulled via a month and an appointment category.

To access the Report Viewer page, upon logging in, select **Menu** and **Reports**.



To run the User Report:

1. Select the **User Report** tab (this is the default upon entering the Report Viewer page.)
2. Choose a date range using the drop-down boxes
  - a. The report will **not** run if any of the fields are left blank
3. Click **Generate Report**
4. The generated report will subsequently open in a new window. You will **not** have the option to save the report, but taking a screenshot of the page may be helpful to keep the report in your records.

A screenshot of the 'Report Viewer' interface. At the top, there are two tabs: 'User Report' (selected) and 'Appointment Report'. Below the tabs, the text 'Choose a Month Range (Inclusive)' is displayed. There are two rows of date selection fields. The first row is labeled 'Start Month (MM-YYYY):' and the second row is labeled 'End Month (MM-YYYY):'. Each row contains two dropdown menus for month and year selection. A green 'Generate Report' button is positioned to the right of the date fields.

To run the Appointment Report:

1. Select the Appointment Report tab.
2. Choose a Month using the drop-down box.
3. Choose an Appointment Category using the drop-down box.
4. Click **Generate Report**
5. The generated report will subsequently open in a new window. You will **not** have the option to save the report, but taking a screenshot of the page may be helpful to keep the report in your records.

Report Viewer

User Report Appointment Report

Choose a Month and a Category

Month: 12 - Dec Appointment Category: Beauty

Generate Report

## 9. Glossary

### Account Types:

- *Service Provider*: The entity providing a service.
- *User*: The entity being provided a service.
  - **Note**: “user(s)”, denoted with a lowercase ‘u’ collectively means both Users and Service Providers. The capitalization and context clues will provide clarification on which is being referred to.
- *Admin*: there is only one admin account accessible with one username/email and password.

**Soft Delete**: Refers to marking a record as “inactive” vs completely deleting it from the system.

**Book/Make Appointment**: Used interchangeably but mean different things depending on the type of user the action corresponds to.

- When a *Service Provider* makes an appointment, they are creating a time slot that may or may not be booked by a User.
- When a *User* makes an appointment, they are filling a time slot that has already been created by a Service provider.