Event Planning System

User Guide

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Introduction

The Event Planning System (EPS) was developed for the Morro Bay Bird Festival to support the annual event planning process for developing their annual annual Frestival calendar of events. In addition, the database would provide all information about all the leaders that are associated with all events including pictures and biographical write-ups.

Access to this system is done by referencing the URL of: http://mbbfbirdfestival.org/mbbfevents

This URL will provide the initial login page where an authorized user id and password may be entered. All access requires a unique user id so that individual actions may be logged for security and accountability.

In some pages additional password security is requested in order to limit use of special administrative functions to those with the knowledge of the implications of the action being requested. The passwords for these functions are administered in the same way as other user id's which is discussed in a later section. The user identification portion of these are fixed and should not be changed. However, the password can be adjusted if/when necessary.

Login and Navigation

Supply a valid user id and password to log into the system. After successful login, all pages of the system is available from the menu bar fixed at the top of each page.

Clicking the menu bar selection will (usually) result in a drop down selection list of other menu choices associated with it. s

All menu items are grouped to be logically associated with the menu selection item. For example, all activities associated with creation, update, deletion or reporting of events is under the 'Events' item.

After successful login the 'Home' page of the system is displayed. Return to this page at any time by merely clicking the 'Home' menu item.

Any page that can be updated will show the associated update action button as 'Inactive' until any change has been made. Any change applied will cause the update button to become 'active' and turn RED. Any attempt to navigate away from the page before applying the update will require confirmation.

Events

The heart of the system is the ability to create, update, duplicate and/or delete activities and leaders that comprise the annual calendar of events.

After successful login, the menu bar is displayed at the top of the page. Clicking these selections will cause various actions to happen related to the menu item selected. For example, the menu item Events → Search/List' provides the following page.

Printing the currently listed events can be done by selecting the 'Print Last List' menu item will print all details for all events listed in the current search results list. The Add New Event item will add a NEW event to the current program of events as explained in the following paragraphs. Clicking the 'Home' button will return you to the Home Page.

Event navigation starts with the listing of one or more events in the search results list. This is done by choosing the criteria used for the search. The selection criteria is cumulative. In other words, each additional search criteria selected will typically reduce the number of items in the selection list.

Selection of **any** event in the search results listing will produce a event detail page showing all details for that specific event in editable fields. Changes may be made to any field and applied. The page is checked to make sure all changes are saved before a different page is displayed.

The 'Reset' button will set all search criteria to their initial values.

The 'List All' menu item will produce a complete listing of all events in the current calendar of events EXCEPT those that have an 'Event Status' of 'Delete' discussed in a later section.

Event List Navigation
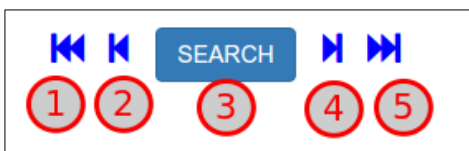
Navigation within the search result listing is accomplished by use of the 'arrow' buttons at the top, center of the event update page. From the event currently being displayed, these buttons will function as follows:

1. Display the page for the first event in the current search result list.

2. Display the previous event to the current in the search result list.

3. Return to the Event Search page to create a new search list (or click the Event → Search Events menu item).

4. Display the next event from the the current in the search result list.

5. Display the page of the last event in the current search result list.

Action Icons

There are additional 'action' icons displayed on each event detail page that are defined for the CURRENTLY displayed event. They are:
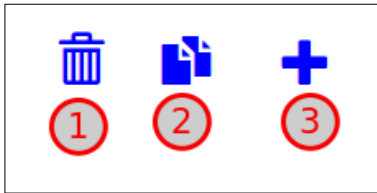
1. Delete the event currently displayed. This action permanently deletes the event from the database regardless of its 'trip status'. This action can not be reversed. A confirmation dialog is displayed to make sure this action is intentional.

2. Duplicate the event currently displayed. This action will make an exact copy of the event in its entirety using the NEW trip number that is solicited. After the new duplicated event is displayed, it is recommended that it's day, start time, end time and other associated distinguishing information be applied. A re-sequencing of all events for a specific day may be necessary if duplicate trip numbers have been created for that day as a result of using this action.

3. Add a new event to the calendar. This action creates a new, blank event record with the trip number set to 999 the Event Title set to '**New Event**'and the 'Trip Status' set to 'Delete'. These are the same actions as done by selecting the 'Events → Add New Event' menu item.

   These values are easily updated on the page displayed after the add. If the new event is not updated at that time it may be found at any time by merely searching for all events with the search 'Status' field set to 'Delete'.

Editing Events

All fields of an event may be updated. Some fields are restricted to the contents of a selection list. Selection lists are managed using the administrative tools provided. Review this user guide in the Utilities section for information about maintaining selection lists.

Time fields are entered using a time 'picker' and the leader fields are prompted with a 'type ahead' function consisting of the names of all 'active' leaders currently registered in the Leader database.

One field of special note is the 'Trip Status' field and specifically the status of 'Delete' contained in it. Special handling of this status has been designed to allow events to be 'parked'. This simply means that the event is not going to appear in any listing or report if their status has been marked as 'Delete'.

When an event's trip status is changed to 'Delete' three things are changed in the event record:

1. The trip number is changed to '999',
2. The day field is set to blank, and
3. The trip status field is updated to 'Delete'.

All other information about the event remains unchanged.

A listing of all 'parked' events may be obtained by creating a search results list with the 'Status' field set to 'Delete'.

An event may be re-used ('un-parked') by merely changing the 'Trip' number and the 'Trip Status' fields. Other distinguishing fields such as the event day, start time, end time, event leaders, etc. would also, probably, be modified as well.

It should be noted that moving an event from 'parked' into the calendar of events may cause duplication of existing trip numbers on specific days. This can easily be detected by creating a search results listing and/or

doing a 're-sequence' of the events for that specific day.

If an event is to be permanently deleted from the database in its entirety, then the event should be displayed and the 'Delete' action icon on the event's page clicked. Merely changing an event's Event Status field to 'Delete' does NOT delete it from the database.
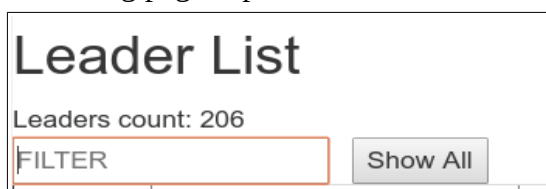
Multi-event Handling

There is often the case where the same event is offered more than once a day or on more than one day. In this case this is the recommended sequence of steps to 'clone' events.

1. Create the first in the sequence of events. Set the 'Multi-Event' flag to 'Y' and create and enter a UNIQUE code into the 'Multi Event Code(s)' field for the events. This code should be alphanumeric and not contain spaces and separated from other codes (if there is more than one) with a comma. This unique code can then be used as the 'Search Events' search string to list this event and all its eventual clones. It is NOT recommended to number these since the unique event code on all will quickly group them in a search results list.

2. After saving the changes, duplicate the event providing a new Trip number.

3. In the duplicated event specifically change the day, start time and end time of the new event as well as any other appropriate fields leaving the Multi Event Code(s) unchanged.

4. Repeat steps 2 and 3 for each cloned event needed.

5. For future access to this group of events enter the 'Multi Event Code(s)' assigned to all of them in the Search string field of the event search page. Preplanned codes developed and used for this multi-event use will greatly enhance future maintenance of these events as a group.

Leaders

The listing page is produced when the main menu item 'Leaders → List All Leaders' is clicked. A 'filter' box is provided to allow entry of a character string which will dynamically show only those rows with the character string enered. The 'Show All' button clears the filter entry and lists all. Leaders are listed alphabetically by last name.

Use the menu item 'Leaders → Add New Leader' to create a new leader record.

Use the delete icon to delete the leader record being displayed. The blackboard icon is used to display the information that is available on the web site and includes the leader's biography, photo (if available) and all events that the leader is currently associated with.

Of particular note is the first and last name fields of the leader record. These two fields are used to provision the 'type ahead' list used in the Event update page. NOTE: A leader record MUST exist before the name will appear in the leader list for any of the leader fields of the event records.

NOTE: it is not mandatory that a leader record exist for a leader name identified in an event record. As a matter of good housekeeping, it is recommended that a leader record be created BEFORE a leader's name be utilized in an event record.

Leader Information

A unique email address is expected to be entered for every leader. It should NOT be an address shared with any other registered leader.

Buttons are provide to allow he designation of the leader's classification: Event vs Family Day. At least one of these fields is required to be entered. A leader may be either or both. The designation will allow the leader to be listed on the leader listing page(s) in the 'Utilities' menu. To be included on the 'Event Leaders Listing' the leader must be designated as an 'Event' leader AND be identified on one or more scheduled events.

A text field is provided for biographical information for each leader. This information is used, in conjunction with the photo, to provide profile and background on the leader, their experiences and qualifications. This information is used through out the Festival for event information, brochures, web listings and other festival information.

As a part of this biographical information it is often that the speaker/leader asks to have included their web sites, Internet photos albums, or other information of note. This information can be linked within the biographical data by providing a valid URL to it.

The following guidelines should be followed when entering the URL:

- The URL used should point to a site that conforms to the current guidelines of the Festival Board of Directors policy on appropriate promotions or sales by speakers or leaders.

- The URL provided should be verified that it is accurate and valid.

- The URL must be 'stand-alone'. It MUST NOT not have any trailing characters including punctuation marks such as a period or comma.

  - For example, the URLs of (http://mbbirdfestiveal.net) or http://mbbirdfestiveal.net, would not result in a proper URL link. The first due to the trailing right parentheses and the second due to the trailing comma.

  - All valid URLs must begin begin with http: or https: or www.

  - All URLs should be tested after they have been entered to ensure that they are working properly. NOTE: Testing of URLs can be easily done by displaying the event using the 'planner' utility, selecting an event with the leader and clicking on the leaders name. Another would be to display the event information and click the leader name.   The URL should appear in the bio information and when clicked it should open in a new page using the the designated URL Any failure to display the correct web page will require the URL in the leader's profile to be corrected.

Leader Photos

Leader photos can be uploaded to the photo repository using the 'Manage Leader Photos' menu item. All photos should be edited before being uploaded to the repository. Image attributes should be set up to be JPG format, in landscape orientation, have a 4 to 3 ratio (200 pixels wide by 150 pixels high, for example) and be no more than 50-70 Kbyes in size. The naming convention can be anything but it is assumed that the leaders last name is incorporated in the photos file name. Photo file names should be consistent for all photo files.

Leader photos may be assigned to the leader record by using the 'Change' button in the biographical section of

the leader record. The limited list of leader photos will be listed based on the first 3 characters of the leaders last name.

Leader photos can be managed by clicking the 'Leaders → Manage Leader Photos' menu item. New photos may be added, renamed or deleted using this utility. Photo editing is not supported.

Venues

All event sites/venues are listed by selection of the 'View All Venues'. This provides a list of all defined venues. Click on the listing line of any venue to obtain the update form to add or update information regarding the selected site/venue.

Venues are added from the 'Venues' menu 'Add/Delete Venues' item. Enter a unique venue code and descriptive name to add a new venue to the system drop down lists and a new record into the venues database. After successful venue creation, proceed to the 'List All Venues' to access the newly added venue record and enter all information pertaining to the venue site.

Deletion of one or more venue is done on the 'Add/Delete Venues' page as well. Click on one or more venues that are to be deleted and confirm the deletion. This action will delete the site from system drop down selection lists and delete the corresponding information record. NOTE: this action can not be reversed.

Two reports are available pertaining to the venues defined. On provides a listing of all venues defined as well as the number of events currently scheduled to utilize the site. This report also validates that a corresponding database record exists.

The second report is a printer formatted so that it will print 1 venue site per page. Print all pages if hard copy printing is required. Isolate and print only 1 page for the specific venue site if that is needed.

Reports

A series of reports have been developed to support the development and maintenance of the calendar of events. Most all reports are self documenting. This simply means that the report has an optional explanatory description provided when the '?' icon in the report title is clicked.

All reports have been created to be displayed as a web page, printed as a hard copy page, and/or saved as a PDF file (Chrome is the recommended browser for doing this.) Extraneous buttons, headings, etc. are eliminated in the printer output of a web report page and pagination is done where appropriate.

Most all reports have been created to allow the results to be exported to a spreadsheet. This may be accomplished using one of two possible methods:

- highlight all report lines displayed (including the headers) and copy/paste them into an open, empty spreadsheet program like OpenOffice/LibreOffice Calc, MSExcel, Google Doc spreadsheet, etc..
- When available, click the 'DOWNLOAD AS CSV FILE' link to download a text file formatted as a comma separated values (CSV) file to subsequently open using a spreadsheet program.

Utilities

The utilities menu contains special programs needed to maintain or monitor the entire system. Some of these

utilities require an added, special password to control the security and usage of these functions. These passwords are all maintained in 'User Administration' utility.

List Maintenance

All drop down selection lists utilized in the EPS have been created in such a way as to allow changes to them without the need for changing the programs that use them. All lists are maintained as free form text boxes. The lines that begin with double slash marks ('//') are considered as comments and ignored as are all blank lines.

Drop down lists are created by using the HTML '<option>' tag. A group of these tags comprise the 'list' of options presented when the drop down selection field is selected in the update form. The '<option>' tag consists of two basic parts: the 'value' portion and the 'prompt' portion. The prompt portion is what is displayed in the drop down selection list visible to the user. The value portion is what is provided to the program and recorded in the database for that selection. The format is:

> <option value='**XXXXX**'>**ZZZZZ**</option>
> where '**XXXXX** is the <u>value</u> of the selection stored in the database and '**ZZZZZ**' is the display <u>prompt</u>.

The contents of the various lists are made available for editing when that list is selected from the choices provided in the utility.

Most all lists are formatted exactly the same with exception of the 'Sites' list. In this particular list the site's location code is also specified separated by a colon (':') from the site name. Care must be taken with this list since the site code is automatically isolated and entered into the event record as a part of selecting that site. Not having a site code specified or having one which is duplicated on another site would not be a good thing.

Any change made to the list will not be permanent until the 'SAVE UPDATES' button is clicked after which the updated list is displayed again.

CAUTION: CHANGING THE CONTENTS OF A SPECIFIC LIST DOES NOT CHANGE ANY EVENT DATA VALUE ALREADY RECORDED ON THE DATABASE.

Usage Log Browsers

All database activity is logged in the database for each user. There are two log browsers provided both using a date range to isolate specific actions based on dates and times. One provides a detailed listing of specific actions undertaken by every user. The second provides summary information about page usage.

User Administration

```
//The following are special administrative user id's
//The password may be changed, however, DO NOT change the userid
// SignUp Master extract password
SAMUser:raptor

// Admin password
Admin:raptor

// ReSequence password
ReSeq:raptor

// ReSet Event Status password
ReSet:raptor
```

Administration of the systems users is done with the menu selection 'User Administration' of the utilities menu. This will prompt for an additional password which is initially set to 'raptor'. Once access to this facility is accomplished this password may be changed.

The administrative tasks are accomplished by editing as free form text. The initial lines of the text merely explain that lines that start with double slash marks ('//') are considered comment lines and, along with blank lines, are ignored.

The first line of interest defines the event start date for the event calendar. This must be specified in YYYY-

MM-DD format.

Users are identified using a unique character string for each user followed by a password with a colon (':') separating them (as illustrated.) This definition must begin on a single line with nothing following it.

Any new users added should be tested before providing the user id and password to them to ensure they work.

```
// define the event start date in international format of YYYY-MM-DD
eventstart:2017-01-13

// user id's and passwords
davek:fresno
jeanf:brant
bobr:kingfisher
jeanettes:eagle
suzyb:falcon
glenns:cormorant
```

The second portion of the same file contains special user ids and associated passwords used by other utilities of the system.

The password portion of these entries (the character string following the colon (':') character) may be changed as security requires.

CAUTION: DO NOT CHANGE THE USER ID PORTION OR IT WILL MAKE THAT FUNCTION UNAVAILABLE.

Re-sequencing Events of a Day

For identification purposes, each event has a unique sequential number assigned known as a 'Trip' number for the specific festival day it is to occur on. As the planning process proceeds, new events are added and existing events are rescheduled. This will often result in duplicated trip numbers being assigned to events. This is resolved by using this utility.

First the utility selects all events with the status of 'New' or 'Retain' for the selected day. These are then sorted by start time and then end time within start time. Finally these events are sequentially renumbered depending on the day where the 100 series is for the Festivals first day, 200 for the second, 300 for the third, etc.

Re-sequencing may be needed if the number of Festival days, event day, start time or end time is modified since changes to any of these fields may result in a change of the sequence order. Listing and reviewing the trip numbers for all the events for a single day will quickly identify if this utility needs to be run.

The results report of this function will report the old sequence number as well as the new sequence numbers that has been assigned.

Reset Trip Status

This facility is normally used to commence the development of a new calendar of events for a new annual festival.

This utility allows the status field for all events to be set to 'UNDER CONSIDERATION'. This action would also normally be accompanied by the setting of the event start date for the new calendar in the 'User Administration' utility.

It is recommended that all events for the prior festival be backed up in some form before this function is used.

Validate Events and Leaders

This utility examines each event and leader record and applies a series of business rules to determine if the event has any obvious omissions or errors.

Rules applied to each event:

- Event has a site code.

- Event has at least the first leader identified
- All leaders identified for event are 'registered'.
- Event has a start time.
- Event has an end time.
- Event 'Fee Required' is YES and a FEE amount is specified.
- Event 'Multi-event' is YES and a multi-code is specified.
- Event 'Transport Required' is YES and transportation is specified
- Event has 'Max Attendees' specified.
- Event has a experience level specified.

Similar type rules are applied to each active leader as well. Rules checked on each leader include:

- Any leader not having a primary phone number registered.
- Any leader without an email address.
- Any leader with a duplicated email address.
- Any leader missing a photo image.
- Any leader that is 'active' but not assigned a current event.

A resulting report is created reporting any exceptions to these rules. The report sections as well as the explanation these rules are optionally displayed or hidden by clicking the '?' icons.

SignUp Masters Extract

On-line reservations is supported by an external vendor. This utility creates a special file and makes it available for downloading to this reservations vendor.

This utility creates a new window/tab and is capable of running in a 'stand-alone' mode. This would allow the URL of:

http://www.morrobaybirdfestival/mbbrevents/sumextract.php

There is a special 'usage' password required for security purposes so that access and control of this function can be managed via the user administration utility.

Two methods are available for making the registration information available.

1. Allow the registration vendor to run the utility using the URL provided plus the password provided and downloading the file produced, and

2. Running the utility and then download and send the file produced to the registration vendor as an attachment to an email message.

File Format Information

The format of the file produced is a text file in a modified comma separated variable (CSV) format. All fields required by the vendor is provided in the format needed. These fields are separated from one another using the vertical bar ('|') or 'pipe' character. The registration vendor is able to import this file, separate the fields using this character and initialize all the needed data into their database.

Leader Review Feature

It is often desirable to enable the review of events and demographic information directly by the leader involved. This is provided for by a using a function provided at the URL of:

http://morrobaybirdfestival.net/mbbfevents/lead

The user must supply their unique email address to access the page.

The reply page displays all events that the leader has been assigned as well as their photo and all information that has been provided to event staff that will be published concerning them and their associated events.

Event leaders as supplied the email addresses of all leaders by using the report "Leaders → Leader Reports → Leader Info Report" and clicking the 'Show/Hide Email Addresses' button. Alternatively, the email address can be obtained by running the report "Leaders → Leader Reports → Leader Email Merge Report' or by displaying the leader information for that specific leader.

It should be noted that it is necessary for all leaders to have different, unique email addresses for this feature to work properly. A leader that has a duplicate email address shared with another will prevent either leader from displaying their information .

Web site Interfaces

Three special pages have been provided to allow access to certain information from any external system such as a web site. One is an overview of all events in the EPS with specific search functions that would facilitate a user to find specific events. A second page provides the ability to display all acitve leaders designated as 'Event' leaders AND currently listed on any active event providing. Active links allow display of the associated photo and biographical information regarding that leader. The third page is similar to the event leader page listing all marked as 'active' and designated as 'Family Day'.

Use the following URLs:

Planner page: http://morrobaybirdfestival.org/mbbfevents/planner.php

Leader page: http://morrobaybirdfestival.org/mbbfevents/eventleaders.php

Family Day page: http://morrobaybidfestival.org/mbbfevents/familydayleaders.php

These URLs would normally be called with an <iframe> tag in an existing web page.

NOTE: A special button is provided the 'Utilities' menu item to allow review of all events and event leaders using the same programs used on the web site. This provides a way to review all pertinent event information viewed by attendees when planning their weekend activity roster.

Adding or deleting days to the Festival schedule

Events are scheduled for individual days of the Festival. The actual date of an event is based on two factors: the 'eventstart' date set in the 'User Administration' utility (see Figure 1) PLUS the day of the week defined for the specific event (see Figure 2). The consecutively named days of the week to be include in the Festival schedule are defined in the 'List Maintenance' utility menu for 'Day's.

The duration of the Festival is, therefore, a function of the start date with a duration of the number of consecutive days listed. The example illustrates a Festival to start on August 10, 2020 and last a total of 10 consecutive days inclusive of the start date.

1. Define the festival start date in the 'User Administration' file:

// define the event start date in international format of YYYY-MM-DD
eventstart:2020-08-10

Figure 1: Define Start Date

2. The Festival start date **must be** the date of the first day in the 'Day' list.

3. All days of the festival must be in the 'Day' list must be a unique name. NOTE: it is recommended that a standard convention be adopted to append a 2 digit calendar date number to each day's name to ensure uniqueness. (See Figure 2)


```
<option value="">Day</option>
<option value="Monday10">Monday10</option>
<option value="Tuesday11">Tuesday11</option>
<option value="Wednesday12">Wednesday12</option>
<option value="Thursday13">Thursday13</option>
<option value="Friday14">Friday14</option>
<option value="Saturday15">Saturday15</option>
<option value="Sunday16">Sunday16</option>
<option value="Monday17">Monday17</option>
<option value="Tuesday18">Tuesday18</option>
<option value="Wednesday19">Wednesday19</option>
```

4. The figure illustrates a 10 day festival starting on a Monday, August 10.

Figure 2: Event 'Day' List

To add or remove a day from the Festival schedule requires that the day be added (or removed) from the beginning or end of the 'Day' list AND the 'eventstart' date be adjusted to the starting day of the Festival.

Once both parameters that been appropriately adjusted all events days and times adjusted and events for each day need to be re-sequenced so that their event numbers will correspond to the day of the festival they are scheduled for. This is accomplished by using the 'Resequence Day Events' utility. ALL days of the Festival events should be re-sequenced if any change is made to the number of days for the Festival.

Events can be moved between different days of the week by merely updating the event's 'Day' setting and adjusting the other parameters about the event such as the start and end time, description, venue, etc. After changing the day of an event use the re-sequencing utility to renumber all event's for that day until a final version is established.