Event Registration

User Guide

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Overview

The Event Registration system is fully integrated with the existing Event Planning System currently used by the Morro Bay Bird Festival to plan and conduct their annual festival.

Effort has been done to create an web application that is compatible with all types of devices including smart phones, tablets as well as desktop systems.

User Interface

Successful access to the registration system will provide the following page.

The one-time security password presented must be successfully entered to enable the two actions presented: 'Create a registration profile' and 'Sign into an existing registration profile'.

Profile

A profile is created when the registrant creates one at the beginning of the scheduling process. The profile name an email address of the registrant since it is an easily remembered entity and is universally unique to the individual.

Registration

A registrant's profile consists of identifying information such as address and contact phone numbers. The first name, last name, contact phone number and the registration type are all required fields and must be entered

Of particular interest are the two fields indicated by (1).

The registrant is allowed to apply for an exemption to the festival registration fees for themselves if they are a volunteer, leader or speaker. However, the field only appears on the profile page during the its initial registration of the profile. The exemption is ONLY made available to the Registrar for review and approval. If approved, the registrant is exempted from registration fees but not fees associated with any of the individual events. Additionally, the profile is limited to a single attendee (named 'SELF') for the scheduling of festival events. Registration of multiple attendees is not allowed for exempted registrants.

The 'Registration Type' field is a choice between a full registration which can have 1 or more attendees added OR have a single day registration which is limited to a single attendee and ability to schedule for events only for the day selected.

Clicking the 'Update Profile' button will record the profile's registration information and proceed to the initial page to add additional attendees and/or commence event scheduling.

Event Scheduling

After completion of the registration page, the actions required to schedule events and/or add additional attendees to the festival registration are presented and the profile action page is presented. Clicking the 'Schedule Events' button (1) will allow the events for each day to be listed for selection

The 'Add/Delete Attendee' button (2) provides the ability to add and/or delete additional attendees that will be included in this profile. Each will have their own unique schedule of events.

Clicking the 'Info' icon ℹ️ (3) in the upper right will expand the page and display addition help information regarding the scheduling process.

The 'Pro Forma Invoice' and Payment' button (8) at the bottom will navigate to a page that will summarize all information about the profile and associated agendas. All charges will be summarized and a balance due amount provided.

Items listed in area (7) summarizes the profile. The total number of defined agendas, the total number of events for all agendas, the total number of events that are wait listed and the total event fees for the events currently selected for all attendees.

Scheduling Action Buttons

The 'Add/Delete Attendee' 👥 button (2) is available for the registration type of 'Full Festival Registration' only.

The 'Finished' button (4) will save the current profile and associated attendees events(s) and exit the registration system.

The 'Event Summary' button (5) will provide an summary of all events (if any) for all the defined attendees.

The 'Upd Profile' (6) will allow the profile information, initially created when defining the profile, to be updated.

Clicking the 'Info' icon (3) a second time will collapse all this information and revert to the initial display.

Profile Reset

A special reset function is available in the help section of this page. It is titled 'Profile Reset' and is intended to allow the registrant to perform a 'do over' for the entire profile. Clicking this link will invoke a page that will ask for confirmation of the actions being requested. If confirmed, this action will delete all attendees that have been added as well as all their scheduled events. Steps to begin the entire registration process can then be taken including the selection of festival registration type and the application for event registration fee exemption.

Scheduling Events

The following image illustrates is what is presented on when entering the scheduling of events. First note that the profile name (1) is presented followed by the 'Done' button at the top (2) and bottom (12) which will return control to the previous page.

The drop down selection list (3) provides the ability to select the festival day for the event list. Changing the day will automatically re-display the registered events for that day (if any). For partial festival registrants only the day that has been registered for will be listed.

The drop down selection list (4) shows all attendees currently defined. An initial agenda named 'SELF' is automatically created for the registrant who created the profile. Additional attendees may be added to this list by using the add/delete attendee' icon assuming that Full Festival registration has been selected in the profile record.

Selection of an day or attendee from either drop down list will automatically display any/all selected events the attendee and day chosen.

Modify Agenda

The use of the 'Add/Del Evt' button (5) will list of ALL events for the selected day and attendee including those already registered. Events may be dropped or added using the associated event's check box. The status column will be updated appropriately assuming that time and capacity checks are passed.

The column headings of the listing are defined as:

- ST (6) – current status of the selected event for this specific profile, agenda and day.

- Evt (7) – The number of the listed event. Note that 100 series number are for Friday events, 200 for Saturday events, 300 for Sunday events and 400 for Monday events.

- Event Title (8) – The description of the event. This is also a link when, if clicked, will display a full description of the event.

- Start (9) – This is that start time of the event using a 24 hour clock notation.

- End (10) – This is the end time of the event using a 24 hour clock notation.

- FEE (11) – The fees for the event (if any).

The 'DONE' button (12) performs the same action as button 2. Both will return the user to the profile page.

After clicking the 'Add/Del Evt' button an additional column is added at the start of the list which contains a check box used to select/deselect specific events for the chosen day and agenda.

When an event is checked a series of validations are performed to determine the appropriate status to provide.

First a check of the start and end times of the newly selected event is compared to any other previously selected events for that day to determine if there are any time conflicts. If so, an advisory error message is displayed and the event is not selected.

Schedule Events

Profile Name: jdoe@email.com   D O N E   ①

Friday ▾ SELF ▾

Sel ②	ST	Evt	Event Title	Start	End	FEE
☐		101	Casual Little Big Day	06:45	14:30	60.00
☐		102	Big Day	07:00	16:00	70.00
☐		103	Birding the Carrizo Plain	06:45	17:00	80.00
☐		104	Bird Banding in Morro Bay	07:00	10:00	
☐		105	Hiking Half Day in Morro Bay State Park	07:00	12:00	

If there are no time conflicts a check is then done to make sure that there is attendance capacity available in the event.

If both checks are successfully passed, the status column is updated with 'OK' and the registration for that profile, agenda and day is recorded.

If there are no time conflicts but the maximum capacity for the event has been reached the status is updated to 'WL' and the registration for that profile, agenda and day is recorded as 'wait listed'. The Festival Registrar is responsible for reviewing all events and if/when capacity becomes available for an event with a wait list take appropriate steps of notifications and adjustments to assign attendance from the wait list.

When selecting events pay attention to the end time of an early event compared to a later event's start time to make sure to avoid event time conflicts.

In the case where an event is 'wait listed' a check by the registrant can be done by deselecting the wait listed event and selecting it again. If capacity has become available, the the status will show 'OK' otherwise it will revert to the 'WL' state.

If an event has been reported as 'wait listed' a second event with overlapping times may be selected without a time conflict being reported. It will be assumed that a wait listed event with an overlapping event time-wise will indicate that the wait listed event is preferred. The registrar may change the registration to 'OK' and canceling the second event if space to the original wait listed event becomes available.

There is a special status that can also appear which is created when the Registrar makes a event selection for a specific profile, day and attendee. If the Festival Registrar makes the reservation, there is no time conflict and capacity is available then the status is set to 'OK' (same as if an attendee). However, if the capacity has been exceeded, the Registrar can over-ride the capacity check and register the attendee regardless of capacity limitations. When this is done, the status of the scheduled event is 'AO' signifying that an 'Attendance Override' has been done by the Registrar. NOTE: this action could result in more attendees for a specific event that defined as the event's maximum capacity.

Merely change the day and/or attendee to continue the selection process until the entire festival has been scheduled for all those registered.

These steps can be revisited repeatedly until all changes and agenda have been finalized.

When event selection for this session has been completed clicking the 'DONE' button (1) will return control to the previous page.

Special Attendee 'ALL'

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A special item 'ALL' is located in the Attendee list drop down list. When this item is selected all events that are added or deleted are applied to all attendees that are currently listed for that specific day chosen (four attendees in the example screen shot.)

All events for all attendees for a specific day are initially listed with 'checked' entries showing. The checked events designate ANY event selected by ANY attendee for the day selected. It should be noted that these events may not be applied to all attendees for the specific day since some may have been selected on an individual basis.

Un-checking any checked event will remove that event from any/all attendee agendas for that specific day. Clicking an event will add it to all agendas of all attendees listed for the specific day.

When selecting an event, if there are any time conflicts with any other events already selected on any attendee agendas for the specific day, the selection will fail for all with an advisory message shown.

Add/Delete Attendees -

This action provides that ability to register additional attendees onto the agenda and schedule events for them. Selection of the 'Add/Del Attendee' icon will produce the following page:

This example shows in the area labeled (1) that 3 attendees in addition to the default 'SELF' have already been added. These names will appear in the attendee list when scheduling events.

All registration and event fees (if any) will be accumulated with the profile.

Selection of the check box for one or more attendees will designate them for deletion if follow by clicking the 'Delete check attendees(s)' button (2). A confirmation message will also allow the action to be reconsidered.

CAUTION: deletion of an attendee will also cause the deletion of all scheduled events for that attendee.

To add a new attendee to the current profile merely supply a unique name and click the 'Add new attendee' button (3).

Administration