**PROJECT MANAGEMENT DOCUMENTATION FOR VIRTUAL ESTATE PLANNING WORKSHOP PLATFORM**

**Overview**

This document provides a detailed explanation of how projects work on the Virtual Estate Planning Workshop Platform, specifically focusing on the roles of three types of users: Attendees, Instructors, and Admins. Each user role has distinct functionalities and access levels to ensure a smooth and efficient workflow.

**User Roles and Permissions**

**In database username**: vestine222016483

**Password:**222016483

My project has three types of user that are the following if you want to login without create you may user this email and password

**Attendee**

**Email:** veve3@gmail.com

**Password:** 12345

**Instructor**

**Email:** minani@gmail.com

**Password:** 12345

**Admin**

**Email:** beatrice1@gmail.com

**Password:** 12345

***1. Attendees***

Attendees are participants who join workshops to learn about estate planning. Their primary interactions involve attending sessions, accessing resources, and engaging in discussions.

***Permissions:***

* Register for workshops
* Access workshop schedules and details
* Join live workshop sessions
* Participate in chats, Q&A, and polls
* Access workshop resources (documents, recordings)
* Provide feedback via surveys

***2. Instructors***

Instructors are responsible for creating and delivering workshop content. They manage the educational aspects and ensure that participants have a meaningful learning experience.

***Permissions:***

* Create and schedule workshops
* Edit workshop details (title, description, agenda)
* Upload and manage resources (documents, templates)
* Conduct live workshop sessions
* Manage participant interactions (Q&A, chat moderation)
* Set up and manage breakout rooms
* Collect and review participant feedback

***3. Admins***

Admins oversee the entire platform, managing both the operational and user-related aspects. They ensure that the platform runs smoothly and that users have the support they need.

***Permissions:***

* Manage user registrations and roles
* Approve or deny workshop creation requests
* Monitor ongoing workshops
* Access all resources and workshop details
* Generate and analyze reports
* Manage platform settings (security, compliance)
* Provide support to Instructors and Attendees

**PROJECT WORKFLOW**

**Registration Process**

**Attendee Registration**

Attendees visit the platform’s homepage and click on "Sign Up."

Fill in the required personal details and create a password.

Verify the email address via the confirmation link sent to their inbox.

Log in to the platform and complete their profile.

**Instructor Registration**

Instructors follow the same initial registration steps as Attendees.

Upon completing profile setup, request Instructor access through the "Request Role" option in the profile settings.

Admin reviews and approves the request.

**Admin Registration**

Admins are usually set up by the platform’s super-admin or during the initial setup phase.

Receive admin access credentials directly from the super-admin.

**Project Creation and Management**

**Creating a Workshop (Instructor)**

Navigate to the "Workshops" tab and click on " New Workshop."

Fill in the workshop details: title, description, date, time, and agenda.

Upload any necessary resources (documents, templates).

Send invitations to potential Attendees by entering their email addresses.

Submit the workshop for approval (if required).

**Approving Workshops (Admin)**

* Admin receives a notification of a new workshop creation request.
* Review the workshop details to ensure they meet platform standards.
* Approve or deny the workshop. If denied, provide feedback for necessary changes.

**Joining a Workshop (Attendee)**

* Browse available workshops in the "Workshops" tab.
* Register for desired workshops by clicking the "Register" button.
* Access the workshop details and add them to their personal calendar.

**Conducting a Workshop**

* Starting the Workshop (Instructor)
* On the scheduled date and time, navigate to the "Workshops" tab.
* Click on the "Start Workshop" button.
* Use integrated video conferencing tools to deliver content.
* Engage participants through live chat, Q&A, and polls.
* Utilize breakout rooms for small group activities.

**During the Workshop (Attendee)**

* Join the live session via the link provided in the workshop details.
* Participate in discussions and activities.
* Access shared resources and take notes.
* Post-Workshop Activities

**Resource Access (Attendee)**

After the workshop, access recorded sessions and additional resources from the "Resources" tab.

Provide feedback through post-workshop surveys.

**Feedback and Reports (Instructor)**

* Review participant feedback collected through surveys.
* Generate reports on attendance and engagement metrics.
* Analyze feedback to improve future workshops.

**Platform Management (Admin)**

Monitor overall platform activity and workshop performance.

Generate comprehensive reports on user engagement and workshop success.

Address any issues reported by Instructors or Attendees.

Continuously improve platform features and security measures.

**Support and Resources**

***Help Center***: Detailed guides and FAQs are available in the Help Center for all user roles.

***Customer Support***: Users can contact customer support via email or live chat for personalized assistance.

***Community Forum***: A community forum is available for users to connect, share tips, and discuss best practices.

**Conclusion**

This documentation provides a comprehensive guide for Attendees, Instructors, and Admins on the Virtual Estate Planning Workshop Platform. By following the outlined processes and utilizing the platform’s features, users can effectively participate in and manage virtual estate planning workshops. For further assistance, refer to the Help Center or contact customer support.