Software for Personal Calendar Software

User Manual

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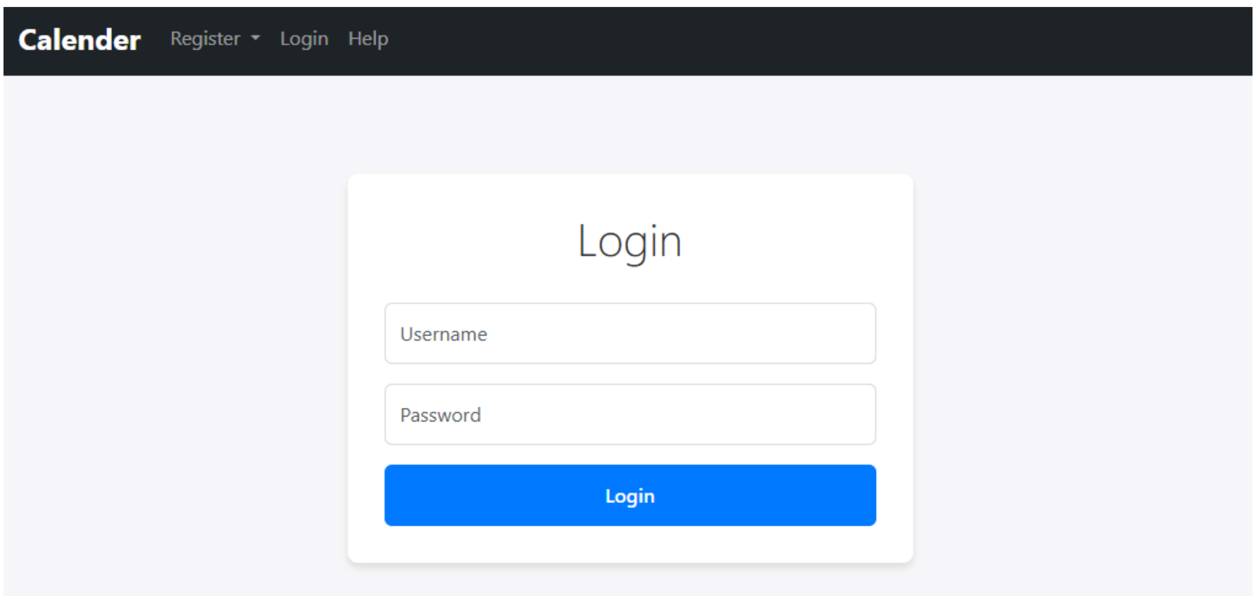
Introduction

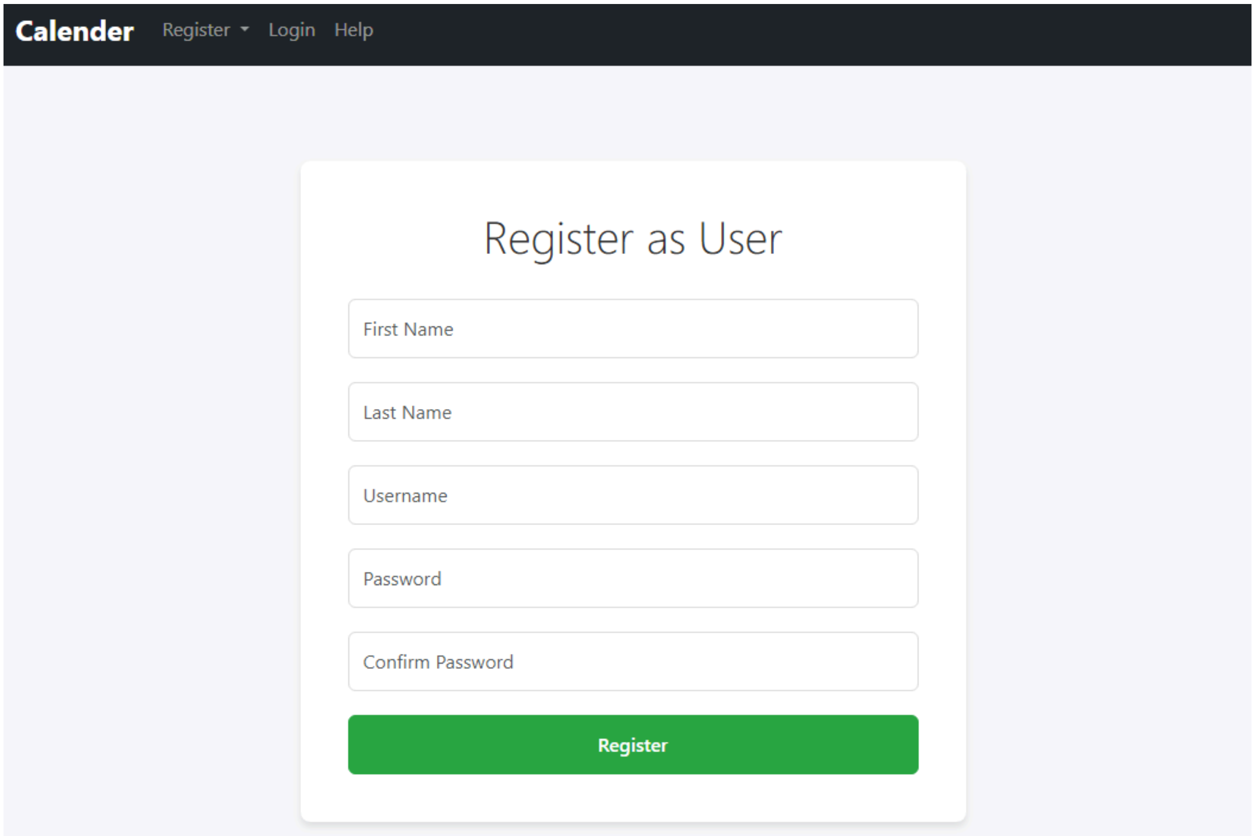
This user manual describes how to use the Personal Calendar Software (hereafter called calendar software). The product is a single user interface with the option of being a user or service provider. The service provider has the ability to list their credentials and offer their services through their personalized interface. Users have the ability to sign up for listed services that are being provided and both will have calendar holds to recall their appointments. The software will ensure that no appointments can exist at overlapping times.

Getting Started



If you are a registered user or service provider, simply log in by entering your username and password in their respective fields. To register for the first time, simply click the Register drop-down menu in the top left corner and select if you are a user or service provider, depending on your personal needs. To navigate back to the Login page, click on the Login button, also found in the top left corner of the navigation bar.

Account Management



To register a User, your first name, last name, a username, and a password are required.

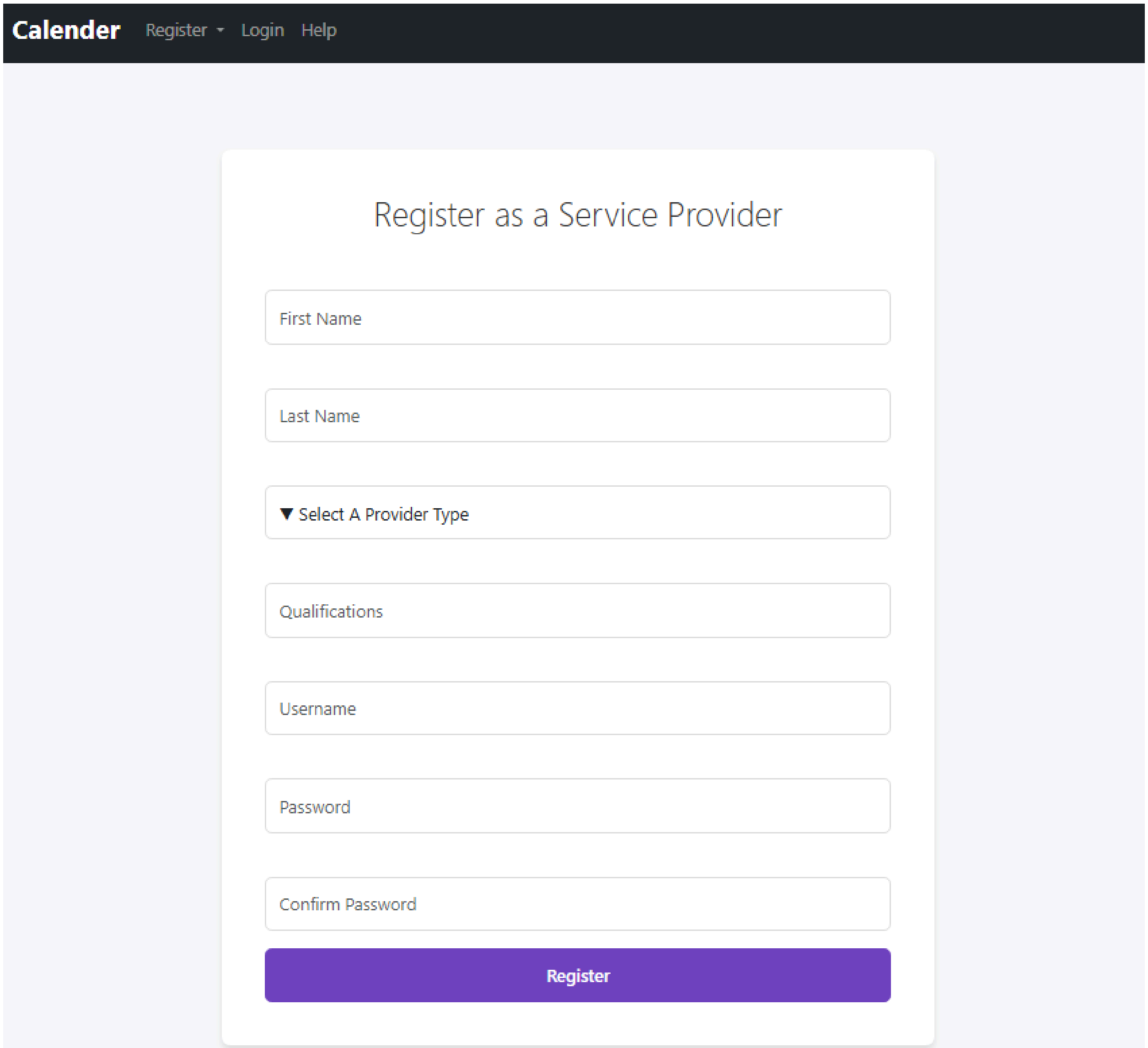
The username must:

- Not be taken
- Start with a letter
- Have a length of 3 or more characters
- Contain only lowercase and uppercase letters, numbers, and underscores.

The password must:

- Be at least 8 characters
- “Password” must match the “Confirm Password” exactly

Failure to adhere to these requirements will result in an error message and will not allow the creation of a user account.

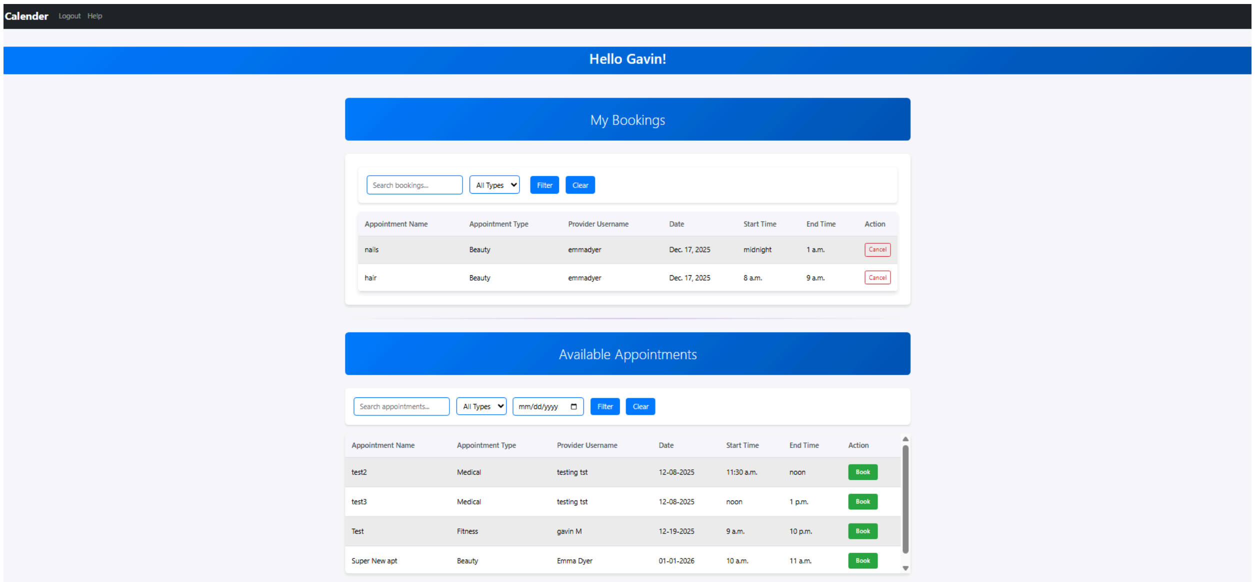


To register a Service Provider, your first name, last name, provider type, qualifications, a username, and a password are required. The “Select A Provider Type” is a selection of medical, fitness, and beauty services, and your services must fit into one of these categories. The “Qualifications” section allows you to put any achievements or qualifications that support your services. For the Username and Password field, please refer back to the User registration section, as the requirements are the same.

The registration of Administrator (Admin) accounts will **NOT** be permitted.

After registration, simply log in to your account with your username and password, and you will be directed to your personal page.

User Functionalities



Once a user has logged in, they will be taken to the user dashboard. The primary function of this dashboard is booking appointments, which can be seen under the **Available Appointments** section. For each appointment, you will see the appointment name, the service provider, the date and time, and then a button to book the appointment. To book the appointment, click the green button that says **'Book'**. On this user dashboard, there is additional functionality:

Filter appointments:

- Use the **search bar** to search for appointments names
- Use the **'All Types'** drop down to filter by appointment type
- Use the **date field** to filter by date
- To apply a filter, click the **'Filter'** button.
- To remove a filter, click the **'Clear'** button.

View all appointments:

- In the **'Booked Appointments'** section, all appointments booked by that user appear here
- In the **'Available Appointments'** sections, all appointments that can be booked will appear here

Cancel Appointments:

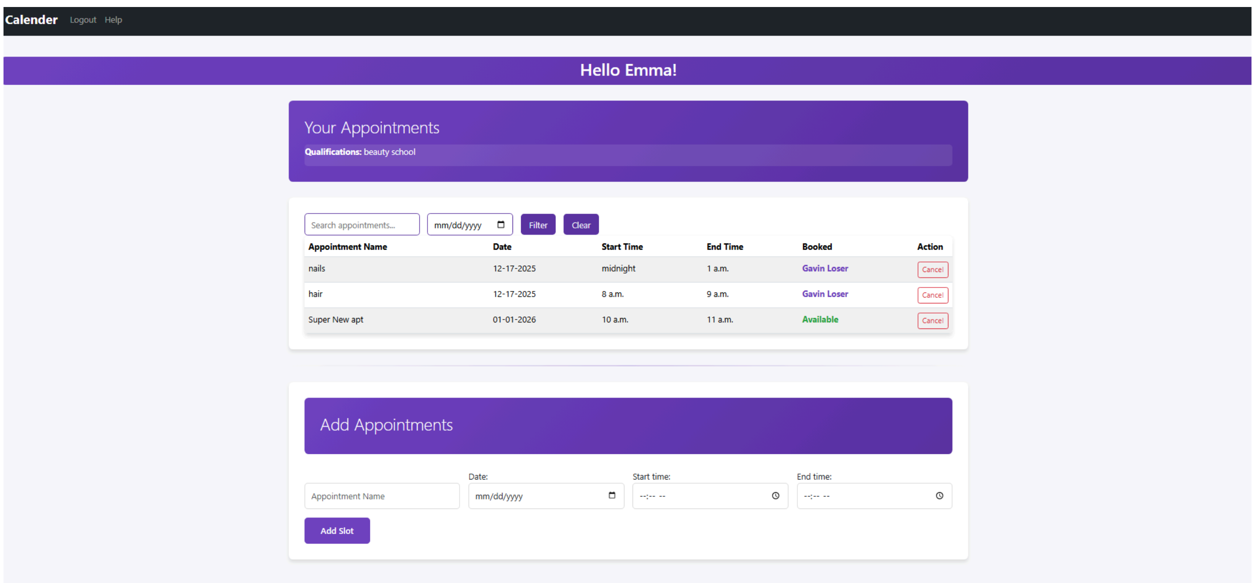
- Users may cancel a booked appointment at any time by clicking the **'Cancel'** button
- Canceling a booked appointment releases it and notifies the affected service provider on their dashboard.

Navigation Bar:

- Click **Logout** to log out and return to the login screen

- Access the User Manual by using the ‘Help’ button.

Service Provider Functionalities



Managing Appointments :
Service providers are responsible for adding and managing the appointment times they offer to users. After logging in, providers are taken to their personalized dashboard, where they can:

Add Appointment Slots:
- Enter a title for the appointment.
- Select a date and start/end time.
- Post to publish the slots for users to see and book.

View Existing Appointments:
- Created appointment slots are listed on the dashboard.

- Each slot shows its date, time, and whether it’s currently booked.

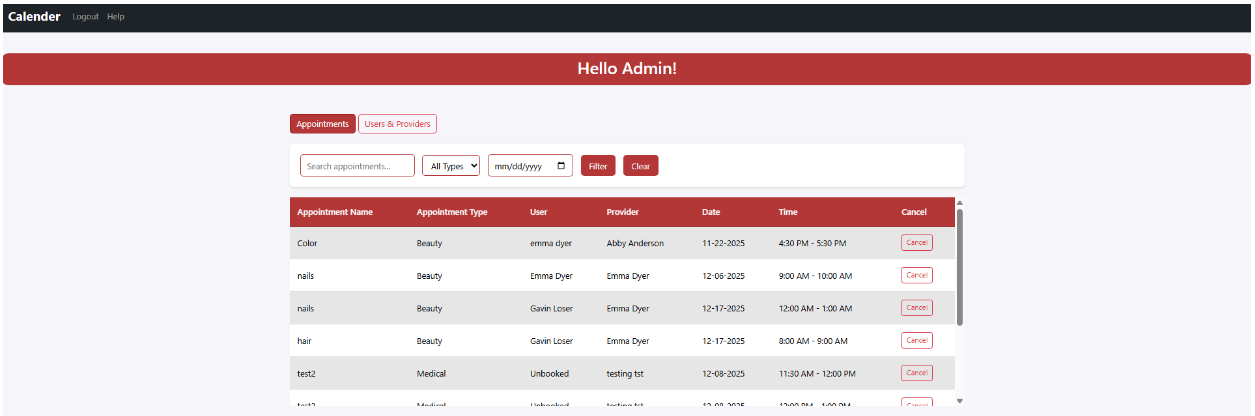
Cancel Appointments:

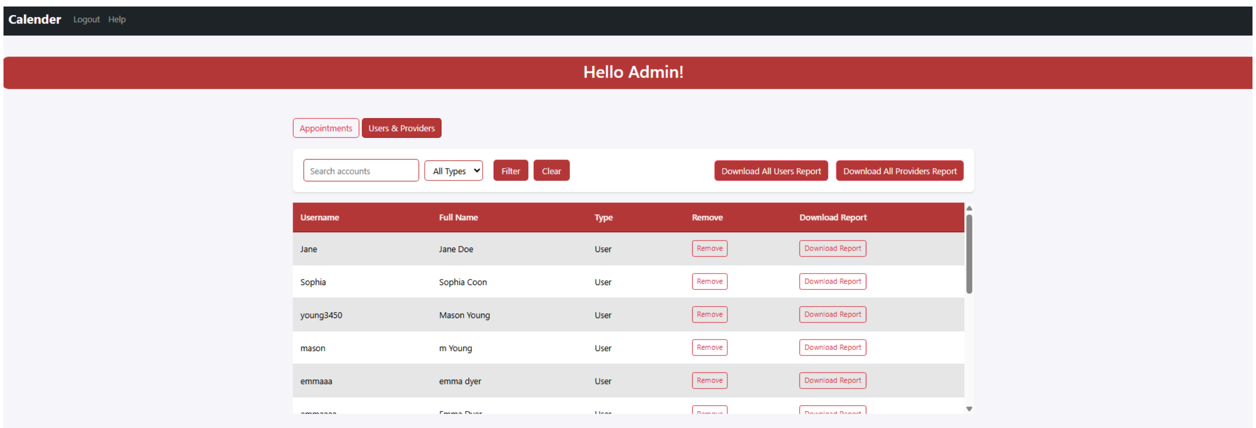
- Providers may cancel an appointment slot at any time.
- Canceling an available slot removes it from the system.
- Canceling a booked appointment releases it and notifies the affected user on their dashboard.

Manage Booking Status:

- Booked slots become unavailable to others.
- Canceled slots become open again for booking.

Administrator Functionalities





Another feature of this scheduling application is the admin page. No new admin accounts will be allowed to be created, so if you need admin access, the credentials must be requested. Once admin credentials are obtained, you will be able to access the admin page through the login screen, similar to other pages.

Once logged in, the admin has the ability to cancel any existing/future appointments, remove user or provider accounts, and generate appointment reports for users and providers. The admin is responsible for removing accounts if a user or provider wants to switch account types or remove an unused account. Below describes how to perform admin responsibilities.

Account Management

- ❖ Remove a user account
  - ➢ On login, select the “Users & Providers” button near the top of the page
  - ➢ Then search for the account to remove and select the “Remove” button associated with the account to remove in the table.
  - ➢ Confirm that none of the appointments in the appointments table have the deleted user’s username.

Appointment Management

- ❖ Remove Appointments
  - ➢ On login, select the “Appointments” button near the top of the page
  - ➢ Search for appointments to cancel
  - ➢ Select the “Cancel” button for the appointment that you want to cancel in the table

Report Generation

- ❖ Generate All User Reports
  - ➢ On login, select the “Users & Providers” button near the top of the page
  - ➢ Select the “Download All Users Report” button near the top right of the table
  - ➢ A .csv file will download that will contain all appointment-related data for all users
- ❖ Generate User Report
  - ➢ On login, select the “Users & Providers” button near the top of the page
  - ➢ Search for the user whom you want a report on
  - ➢ Select the “Download Report” button for the user within the table to generate the report for.
  - ➢ A .csv file will download that will contain all appointment-related data for the selected user
- ❖ Generate All Providers Report
  - ➢ On login, select the “Users & Providers” button near the top of the page
  - ➢ Select the “Download All Providers Report” button near the top right of the table
  - ➢ A .csv file will download that will contain all appointment-related data for all registered providers
- ❖ Generate Provider Report
  - ➢ On login, select the “Users & Providers” button near the top of the page
  - ➢ Search for the provider whom you want a report on
  - ➢ Select the “Download Report” button for the provider within the table to generate the report for.
  - ➢ A .csv file will download that will contain all appointment-related data for the selected provider