SMICRO

# manual
# smicroSuite backend

# Table of contents

# 1.0 Backend

## 1.1 General buttons

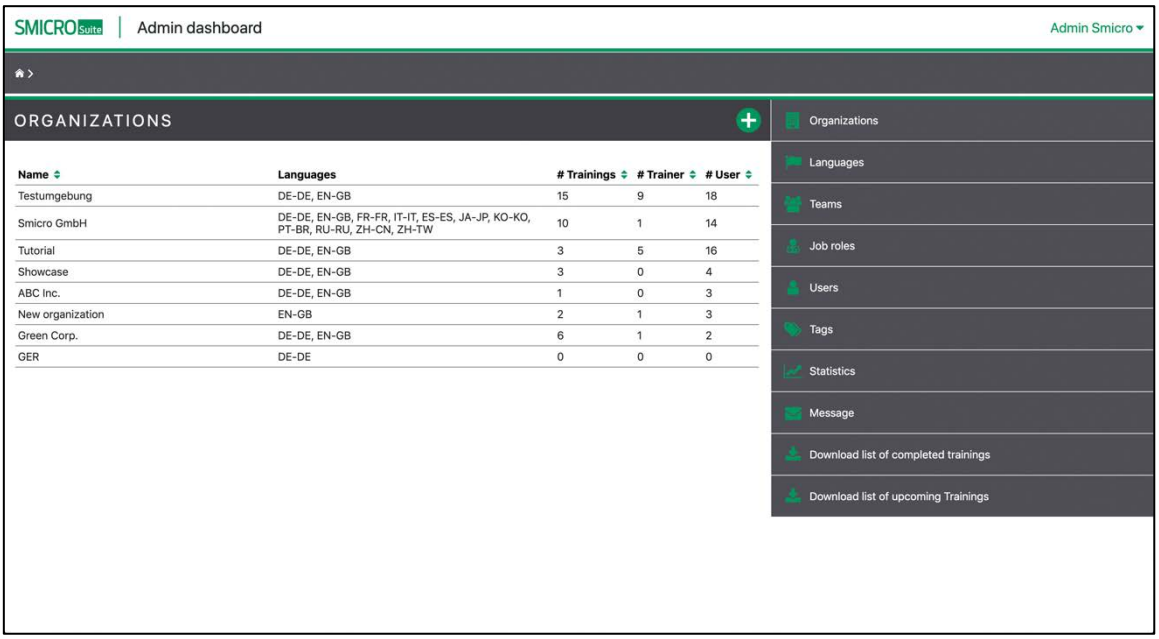
| | |
|---|---|
| | delete |
| | add |
| | edit |
| | safe, cancel |
| | dashboard |
| | moving position |

## 1.2 Type of users

| | |
|---|---|
| Admin | The administrator has access to the whole system in the backend and frontend |
| Trainer | The trainer has access to the backend and the frontend of the entire organization for which he is trainer |
| Eventer | Users can be granted eventer rights for certain events in order to give them access to an event in the backend. Users with only eventer rights will not be able to edit and mange trainings nor see their contents. |
| Team Lead | A user marked as a team lead only has access to the frontend but unlike the general user can manage event invitations and data for her/his team members. |
| User | A user has access to the frontend only. |

## 2.0 Admin dashboard

## 2.1 Overview




On the admin dashboard, an admin has access to all the organizations.
On the right side are different options regarding all organizations.

**Organizations:**
This is the screen the admin dashboard loads in the beginning showing all organizations which have been created in the system

**Languages:**
Creates and shows languages for content.

**Teams:**
List of all teams. Teams can be added, deleted and edited here.

**Job roles:**
List of all job roles. Job roles can be added, deleted and edited here.

**Users:**
List of all users independent of their organization. New Users can be added and deleted here.

**Tags:**
Creates and shows categories and tags. Tags can be used to mark content to make it easier to sort, filter and search.

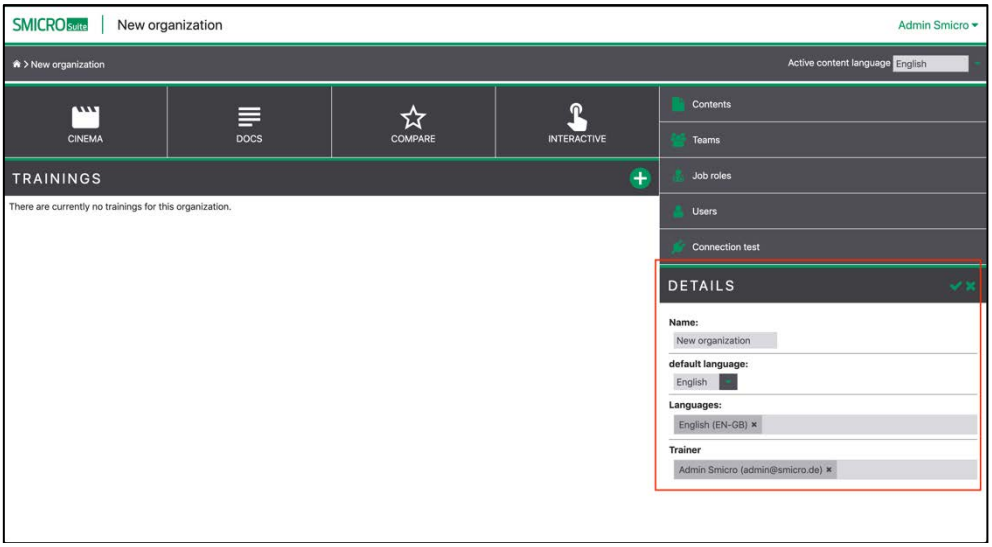
**Statistics:**
This statistic informs about the user count by date and about the used internet browsers and operating systems.

**Message:**
Channel to message all trainers in the system

**Download list of completed trainings /**
**Download list of upcoming trainings:**
Generates an excel file with a list of past and future training waves.

## 2.2 Create a new organization

By clicking on the + in the upper right corner of the admin dashboard a new organization is created.
Clicking the new created organization will lead to the organization dashboard where all the details for this organization can be edited in “details”. Several languages can be added to the organization and one default language has to be set. *(see more **4.1**)*

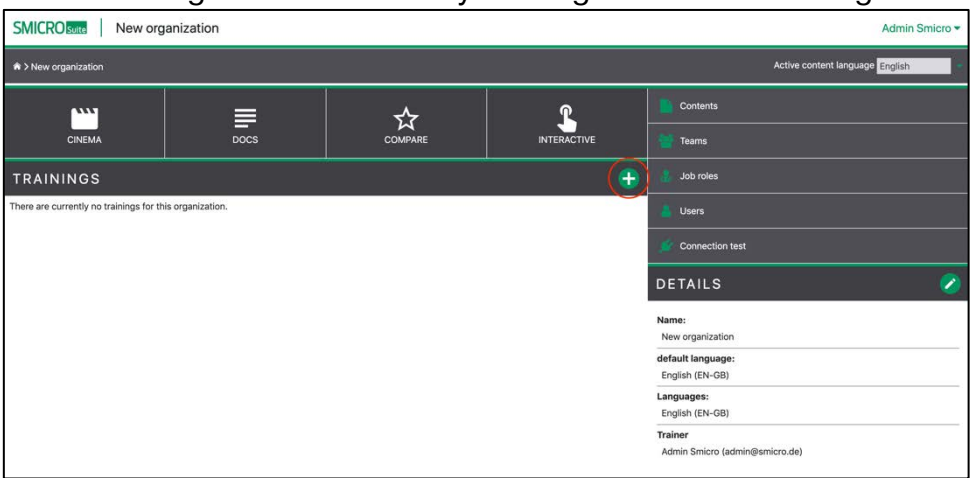


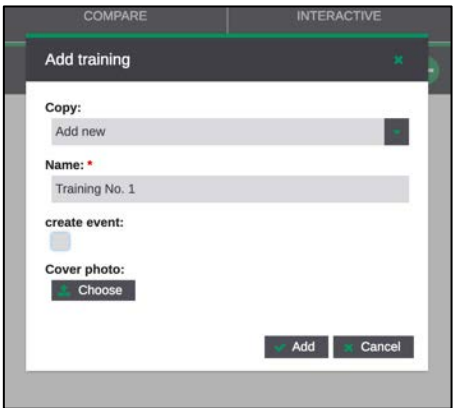
## 3.0 Trainer dashboard

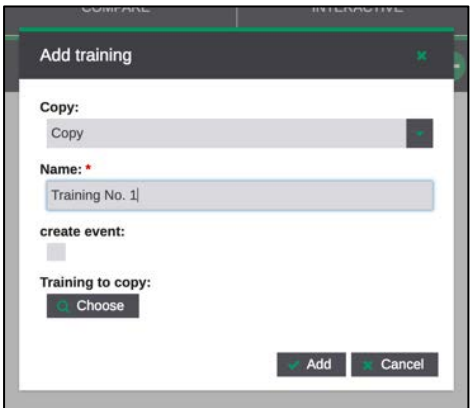
If the trainer is only part of one organization, the organization dashboard of his/her organization will be their starting point. If the trainer has this role in several organizations, the admin dashboard will be their starting point showing only the organizations the users has trainer rights in.
To change the details of the organization on the right side, an admin account is necessary. A trainer can only add other trainers to the organization.

### 3.1 Create a training

A new training can be created by clicking on the + on the organization dashboard.

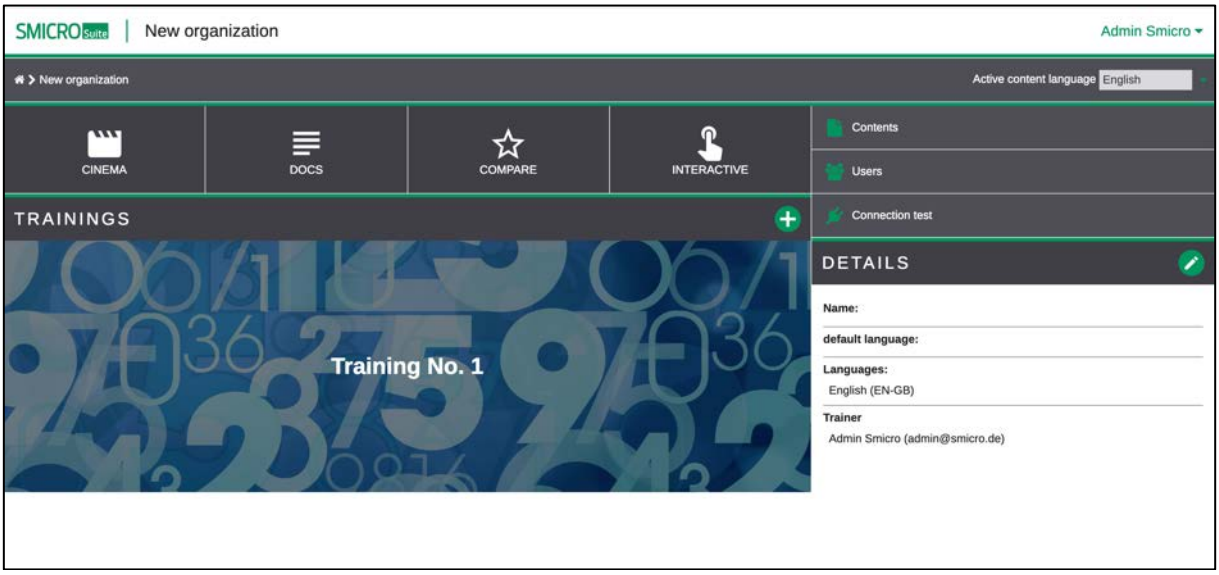


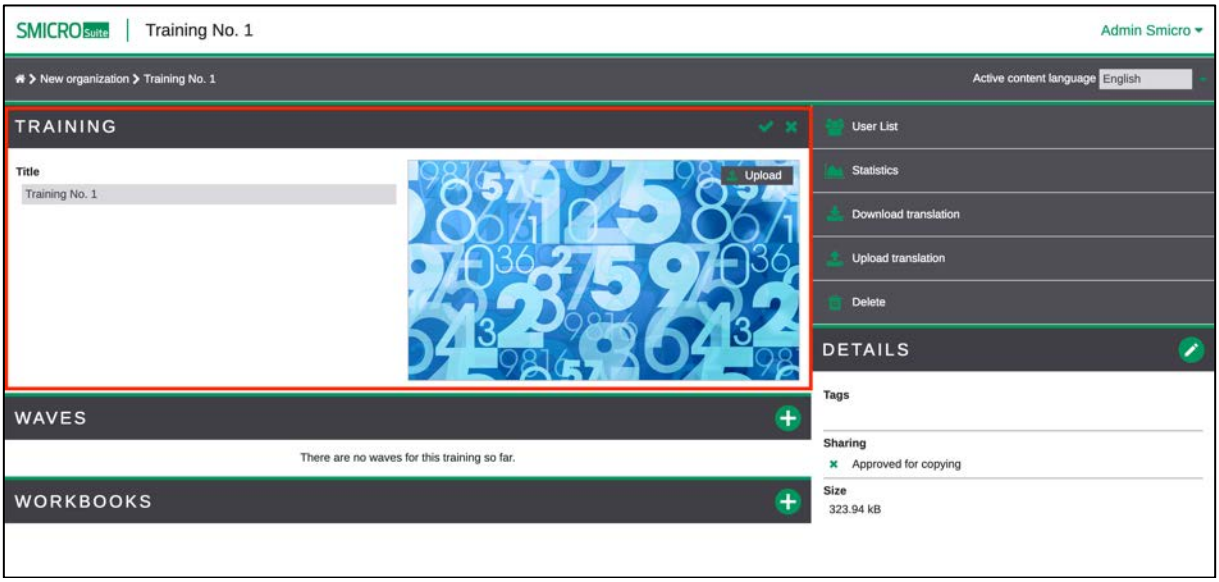

Under “copy” there is the option to add a new training or to copy a training.
If a training with an event is to be created, the box needs to be ticked. *(see more go to chapter **5.1**)*
Enter a name for training, chose a cover picture (optinal) and hit the add button to complete the creation of the new training.

### 3.1.1 Inside the Training



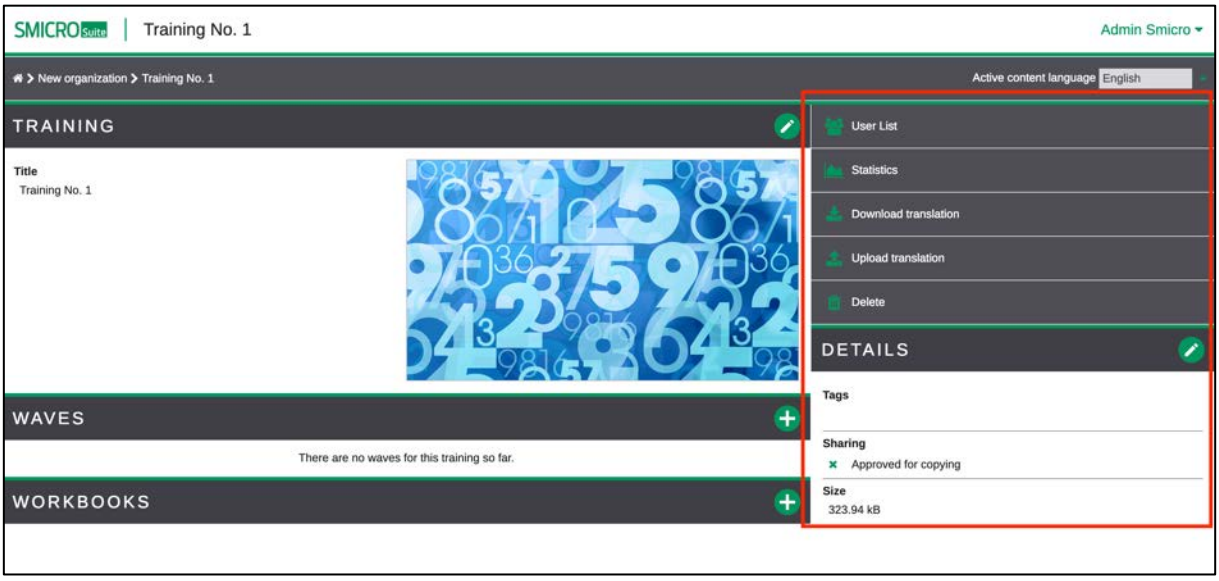

By clicking on this training, the training can be edited.

**General** **Training** **Information**




By using the pencil, the name or the cover picture of the training can be edited. To safe the changes, hit the checkmark symbol. Hit X to discard the changes.
Note that changes to the training will only be made in the set active content language. You can see your active content language in the upper right corner.

### 3.1.2 Functions




**User List:**
Managing the users who are part of this training *(see more **3.3**)*

**Statistics:**
Shows all the statistics generated by training content. For example test, feedback etc. *(see more **3.7**)*

**Download translation:**
Download the translation files for the training *(see more **4.2**)*

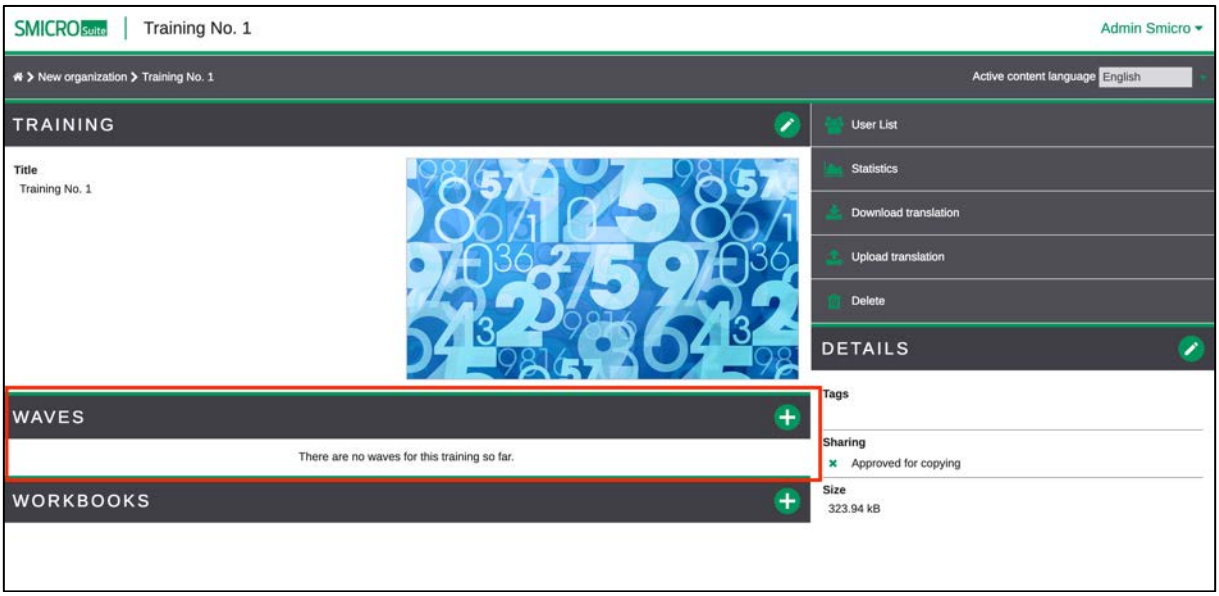
**Upload translation:**
Upload the translation files for the training *(see more **4.2**)*

**Delete:**
Deletes the complete training

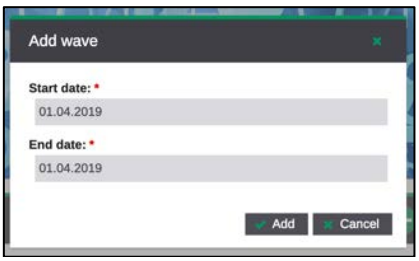
**Details:**
Edit details like tags or approval for copying this training

## 3.2 Create training waves

Create a new wave by clicking the +

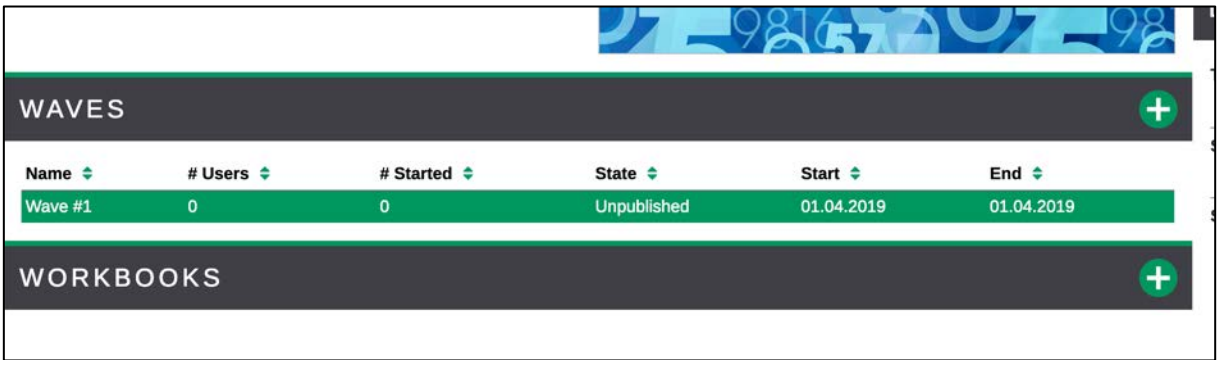



Set the date of start and end of the training wave. This training wave will differ from the event wave. (See 5.2)

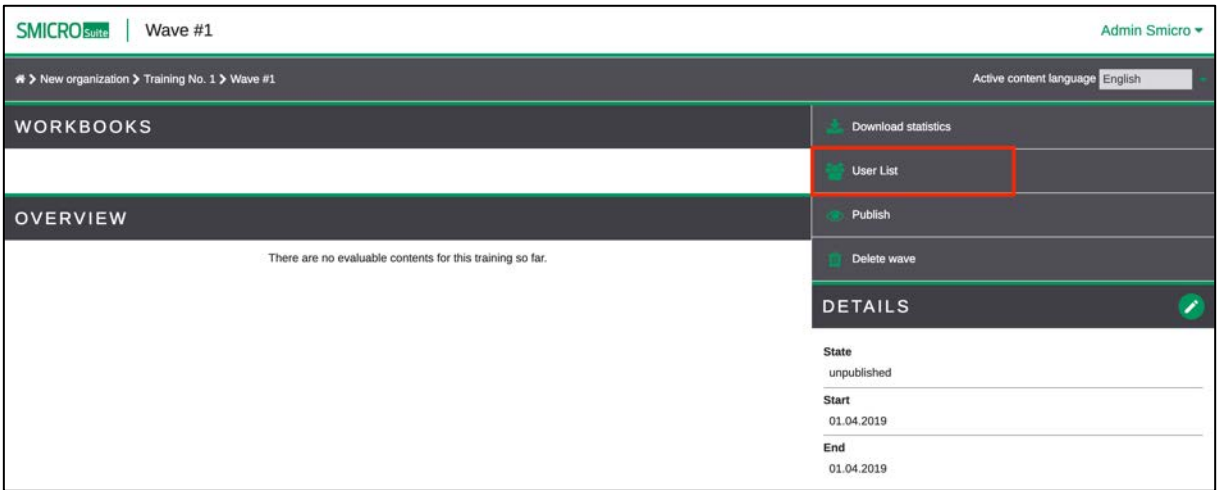



## 3.3 Upload and add users to wave

Click on the wave



Go to User List




A single user can be added with the + if the user already exists in the organization. Adding several users can be done by importing an excel file. The template for this MS Excel file can be generated by clicking the button on
the right.

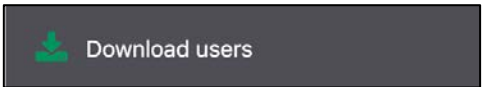

If the uploaded user list contained a new user (= new email address) the system will create a new account and **send an automatic registration e-mail to this user**.

| | A | B | C | D | E | F | G | H | I | J | K | L |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | email | firstname | lastname | wave_id | language | jobroles_1 | jobroles_2 | jobroles_3 | teams_1 | teams_2 | teams_3 | teamlead |
| 2 | | | | | | | | | | | | |
| 3 | | | | | | | | | | | | |
| 4 | | | | | | | | | | | | |
| 5 | | | | | | | | | | | | |

The system needs to know the name, the email and the language of the user. The wave-id is not necessary if the Excel file is uploaded directly into a certain wave. If the trainer needs to upload users by one list to different waves, the trainer needs to know the wave id and the users will be uploaded directly to the respective wave.

https://suite.smicro.de/admin/organization/59/training/363/wave/546

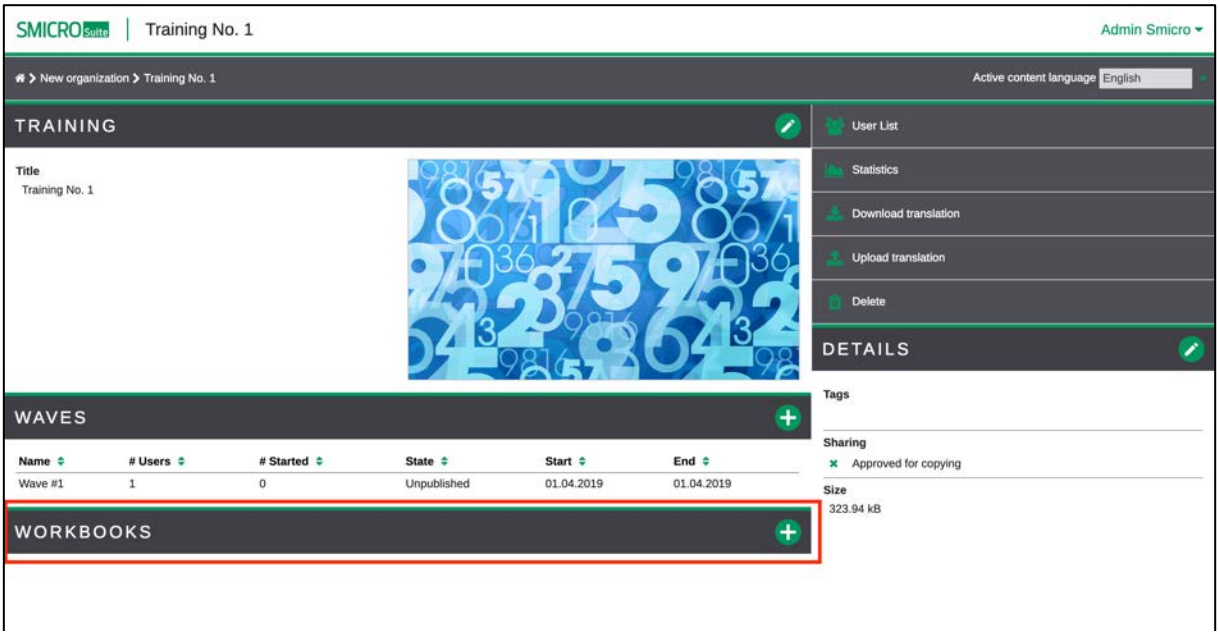
The wave-id is the last number in the URL and can be found in the address bar when navigating inside a wave. The wave-id will also show when downloading a user list of the wave if a user is already part of it.



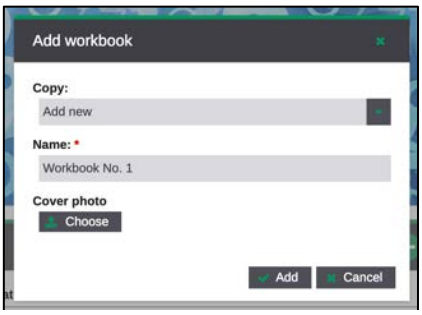
## 3.4 Create a workbook

In order to add content to a training it needs at least one workbook. Workbooks build the structure of every training. Inside the workbooks the different content types can be added and mixed.

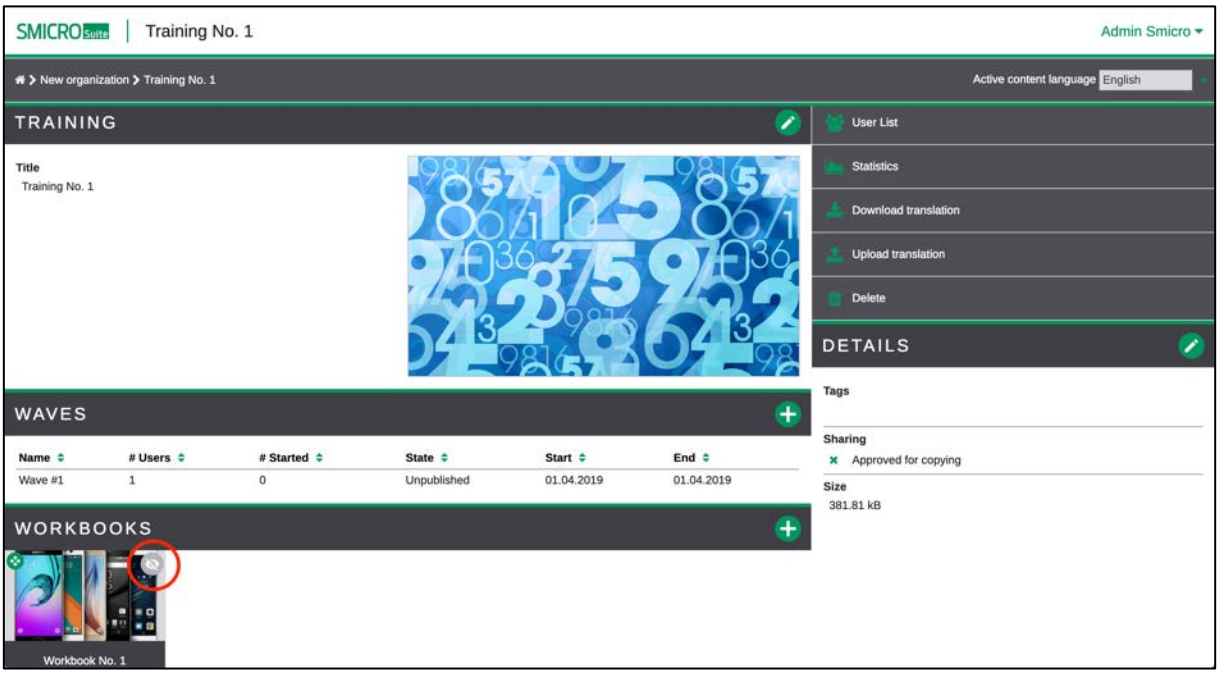
Add a workbook by clicking on the +.




In the same manner as with trainings we can create new and empty workbooks or copy an already existing workbook. The workbook needs a name. The cover photo is optional but recommended. It can be added later as well.



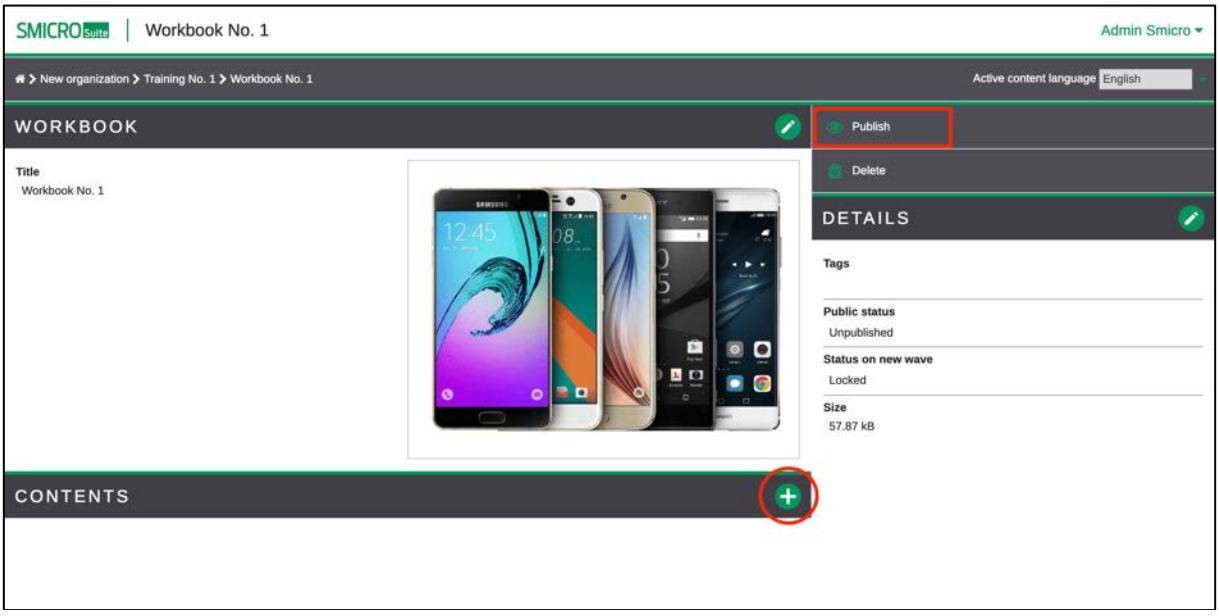

Initially, the workbook is unpublished. This is reflected by the crossed eye in the top right corner of the workbook.




This means it is not visible to the users. The trainer can draft his work.

**Inside the workbook**

When we open the workbook, we can edit the title and the cover photo at any time. In the upper right corner, you find the button to publish the workbook.




A published workbook is visible to all users in published waves, but not accessible unless it has been unlocked for the waves. *(To see more about publishing go to **3.6**)*

## 3.5 Add content to a workbook

Add content inside a workbook by clicking the +
There are different types of content that can be uploaded.

### 3.5.1 Chapter


Chapters create markers within the workbook the user can jump to. The name of the chapter will be displayed inside a burger menu inside the workbook in the frontend. Helpful if there is a lot of content within one workbook or to create a better structure. Chapters can be named and their position inside the workbook can be set individually.

### 3.5.2 Picture


Uploading a picture. There are two options for pictures: plain image or 360° image.

### 3.5.3 PDF


There are two options when uploading a pdf document. Splitting a pdf or not splitting it. This only has an effect for PDF files with multiple pages. A simple (unsplit) upload will have the document displayed on one page of the workbook. The user can scroll the PDF vertically while staying on the same page of the workbook.
Splitting the PDF will create one workbook page for each page inside the document.
The advantage of this method is that other content (videos, chapters, tests, etc.) can be added in between the pages of the PDF document.

It is not possible to upload a powerpoint document. Powerpoint files need to be converted to PDF.

Attention: If there are videos or other animations inside the Powerpoint file, they are no longer available after converting.
If a split PDF document needs to be replaced and the number of pages is the same like in the first uploaded version, the quickest way is to click on the first content page of the “old” PDF content, clicking the pencil to edit and then upload the “new” PDF document there. Afterwards, all the pages will be replaced and if any chapters have been created, they will be retained.
Pages can also be deleted individually.

**Please note: It is best practice to optimize any PDF before adding it to a workbook. Large files will slow down your user’s experience.**

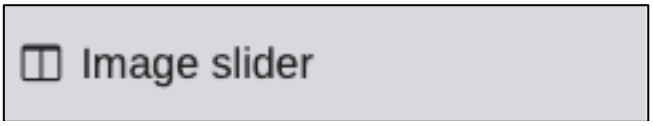
### 3.5.4 Video


Adding this type of video means a video file gets uploaded to the server and made available to watch by users.

### 3.5.5 Videolink


Unlike the video content, a videolink is an external link to vimeo. This means the video can only be seen if the device is connected with the internet. This type of video is helpful for long videos with a large amount of data.

### 3.5.6 Image slider




Two uploaded image files will create one picture with a slider in the middle, giving the user the possibility to cover and uncover the two images. Helpful to compare two photos.

### 3.5.7 Embed


An external html content can be embedded into the system.

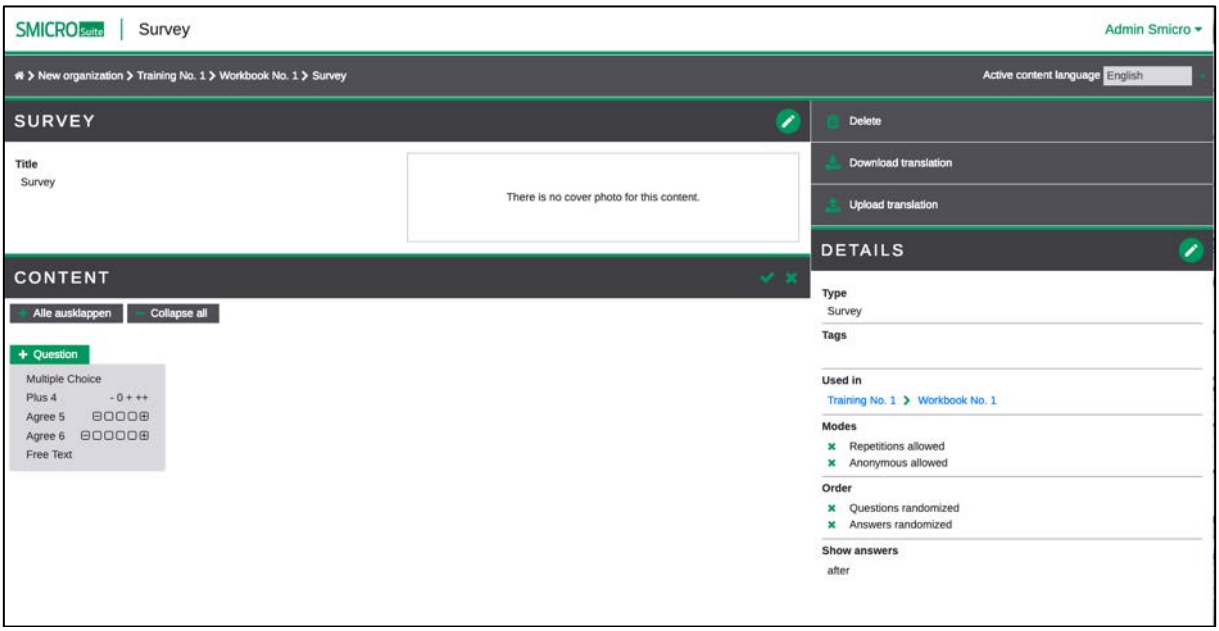
**There are three different variants:**

**Systembrowser:** The user will see the set cover photo for the content fully on the workbook page. A button will be displayed on top of the picture. Clicking the button will open the set URL in the systems default browser.

**In App Browser:** The user will see the set cover photo for the content fully on the workbook page. A button will be displayed on top of the picture. Clicking the button will open the set URL in an In-App browser. This means on a desktop computer the browser will not be switched and on a mobile device the user will not leave the app.

**iFrame:** The content from the external URL is shown directly inside the workbook.

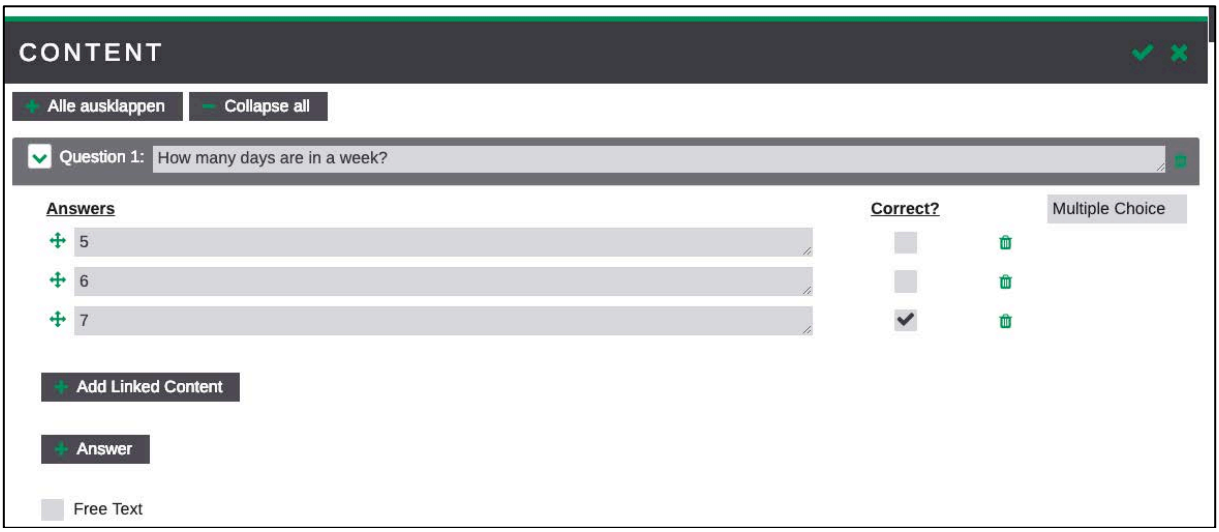
### 3.5.8 Survey


A survey can be a test or a feedback form. Types of questions can be mixed but shouldn't. The calculation of results will not make sense when multiple choice and scale questions will be mixed.

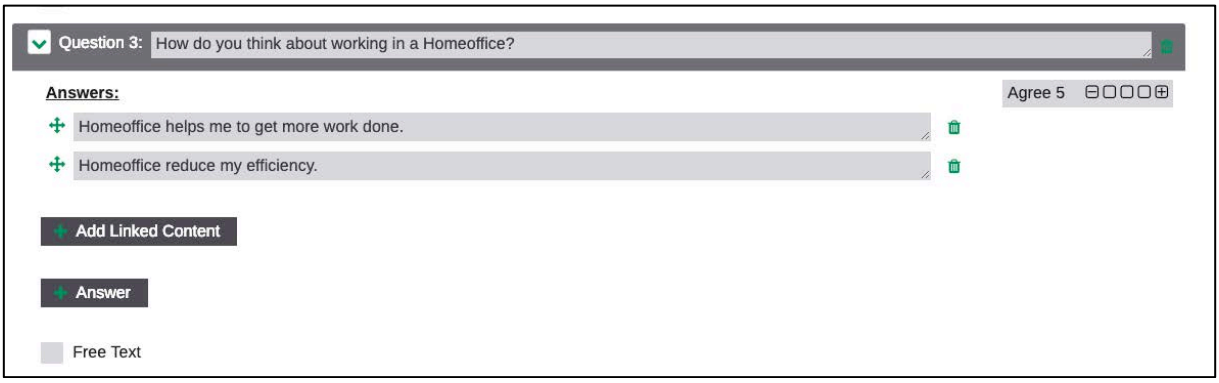
There are 5 types of questions available:

Multiple Choice



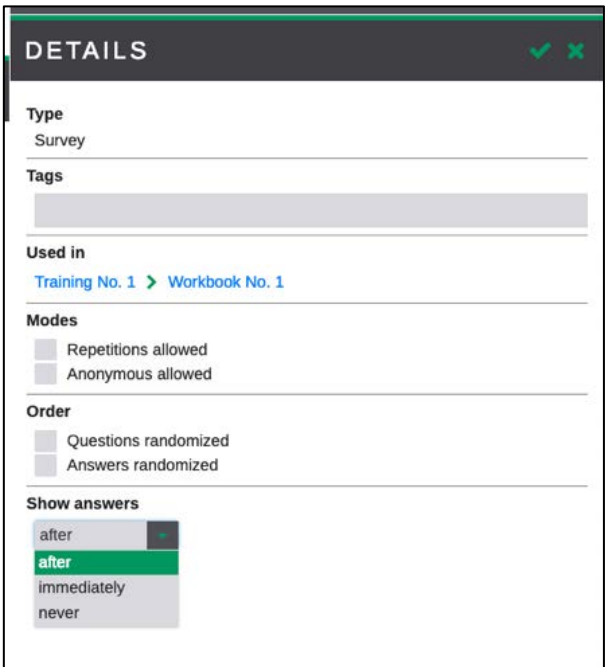
Plus 4  - 0 + ++


Agree 5 or Agree 6




A free text can be set as a single question or can be add to every other type of question.


More details for the survey can be defined.




### 3.5.9 Pre-Test / Post-Test

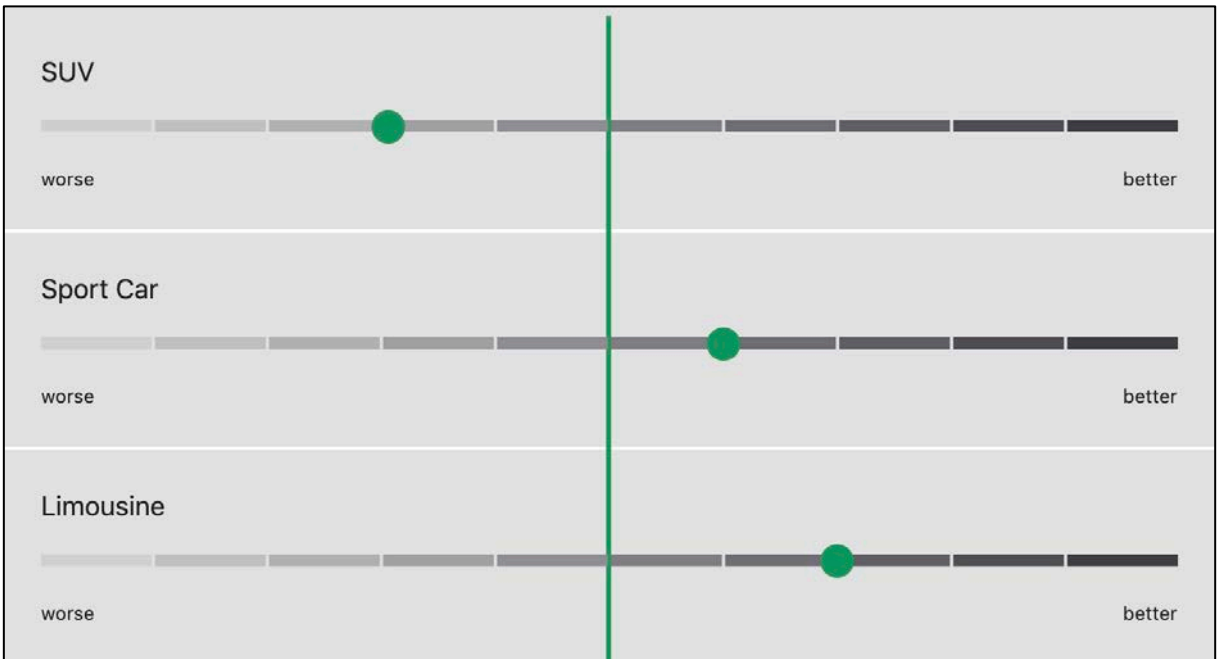

Pre and Post-Test are connected. The questions are the same in order to check the improvement of the users' knowledge. The questions can be added and edited in the content type Pre-Test. To create a Post-Test just add one to a workbook and select the respective Pre-Test to connect them. You can only create a Post-Test when a Pre-Test is created first.

### 3.5.10 Feedback

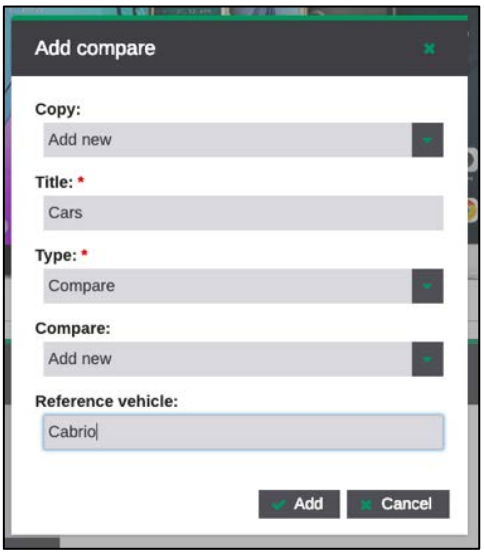

Creating a feedback is similar to creating a survey. At the end of the feedback, the user can decide whether to send the results anonymously or not.

### 3.5.11 Compare


A vehicle can be compared with a reference.

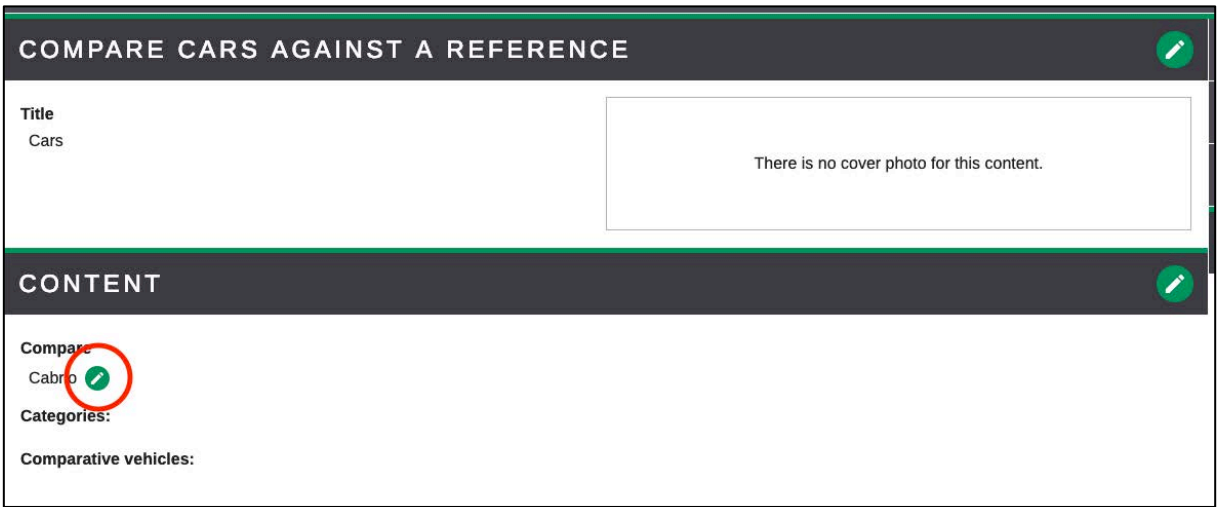



When adding a compare you can choose in between the types compare and rating. The following steps will be the same for either of them.
In order to create the content type a name, type and reference vehicle is needed.



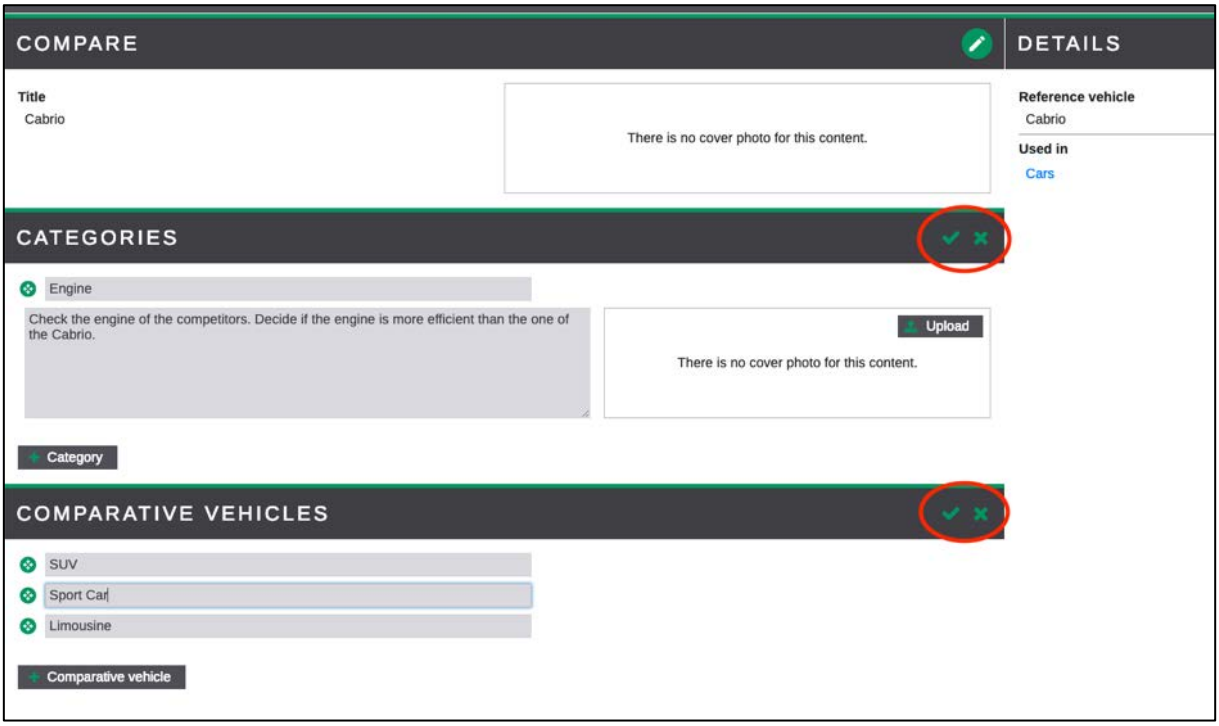

The initial screen will be edited in the last step of the process. Eventually the compare will be put together here after preparing all information.

In the first step edit the reference by clicking the edit icon next to the reference vehicle under compare.

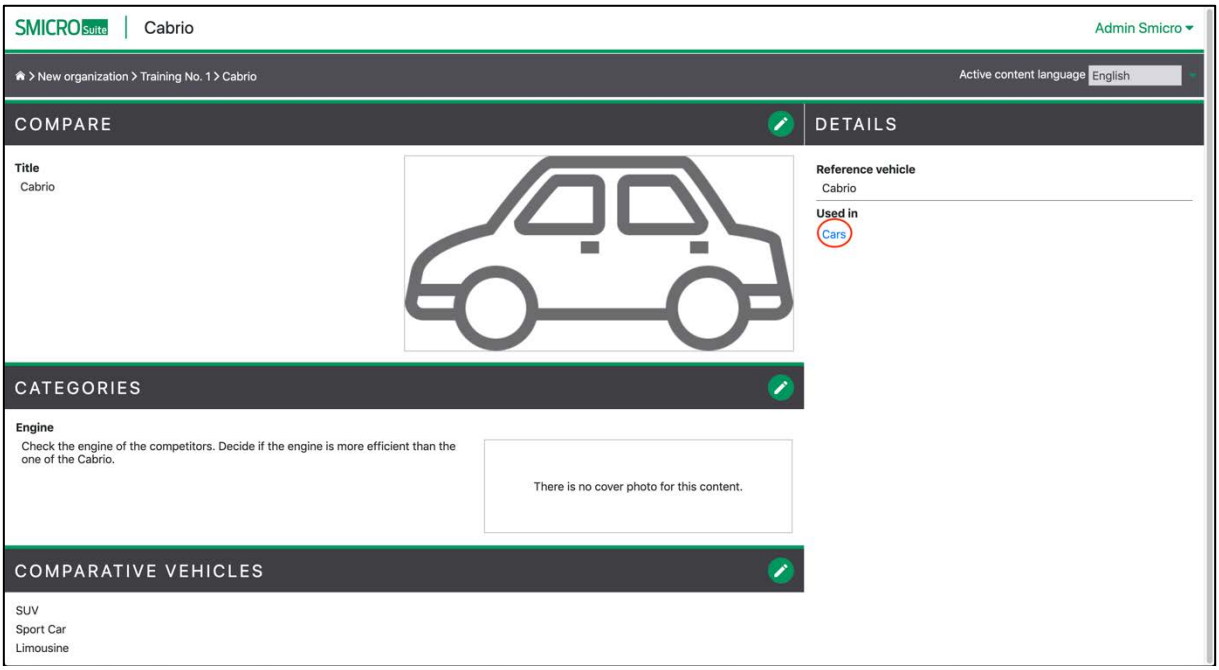



The system now needs information as to what categories the vehicles will be compared in and which vehicles will be compared to the reference.

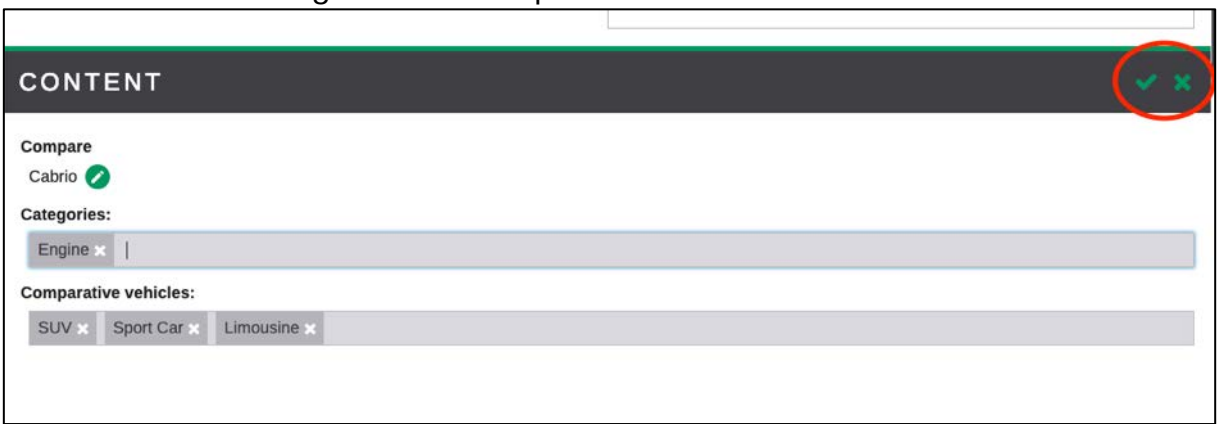
Add the categories with a task description or other useful information including an image (optional).
Then add the vehicles which need to be compared to the reference.
Make sure to save the changes.



To get back to the initial screen click on the name of your compare in the details section.

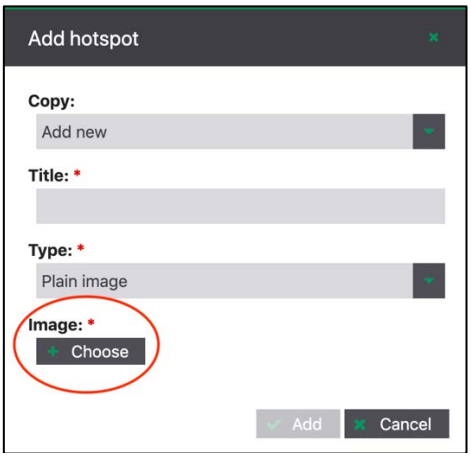



Here the created categories and comparative vehicles can be added.

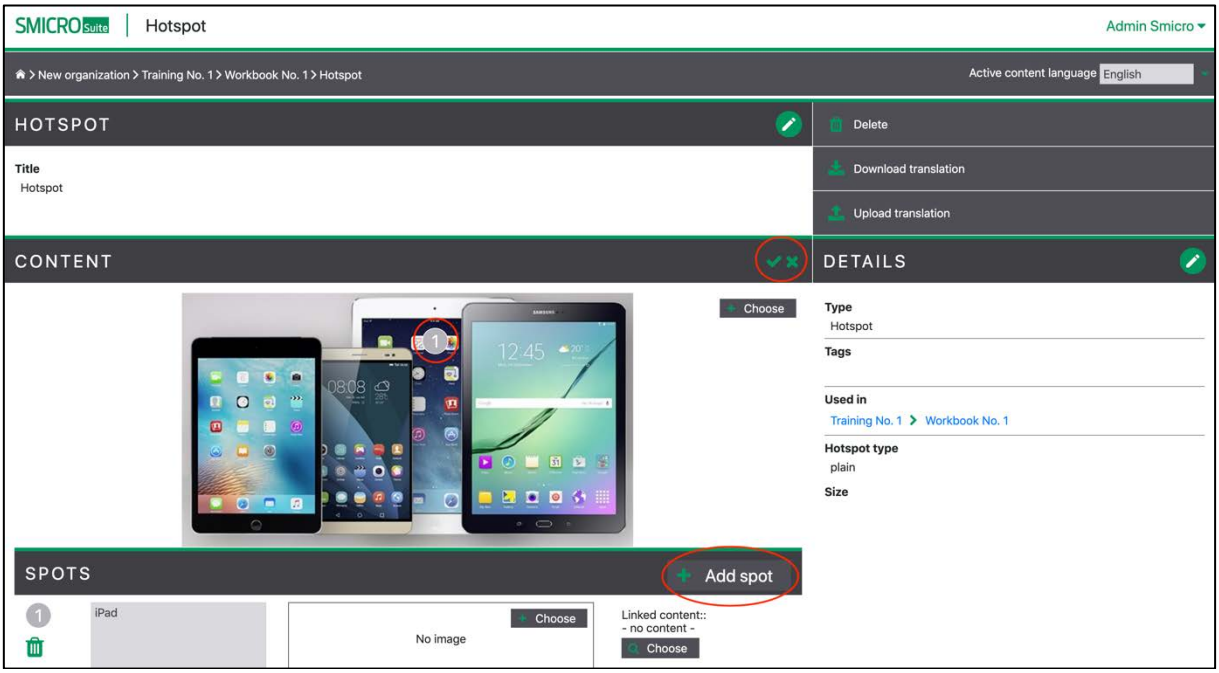



### 3.5.12 Hotspot


The hotspot content will create an image with positioned spots on top, which can reveal information.
When creating a hotspot an image needs to be uploaded to later place the spots on top.

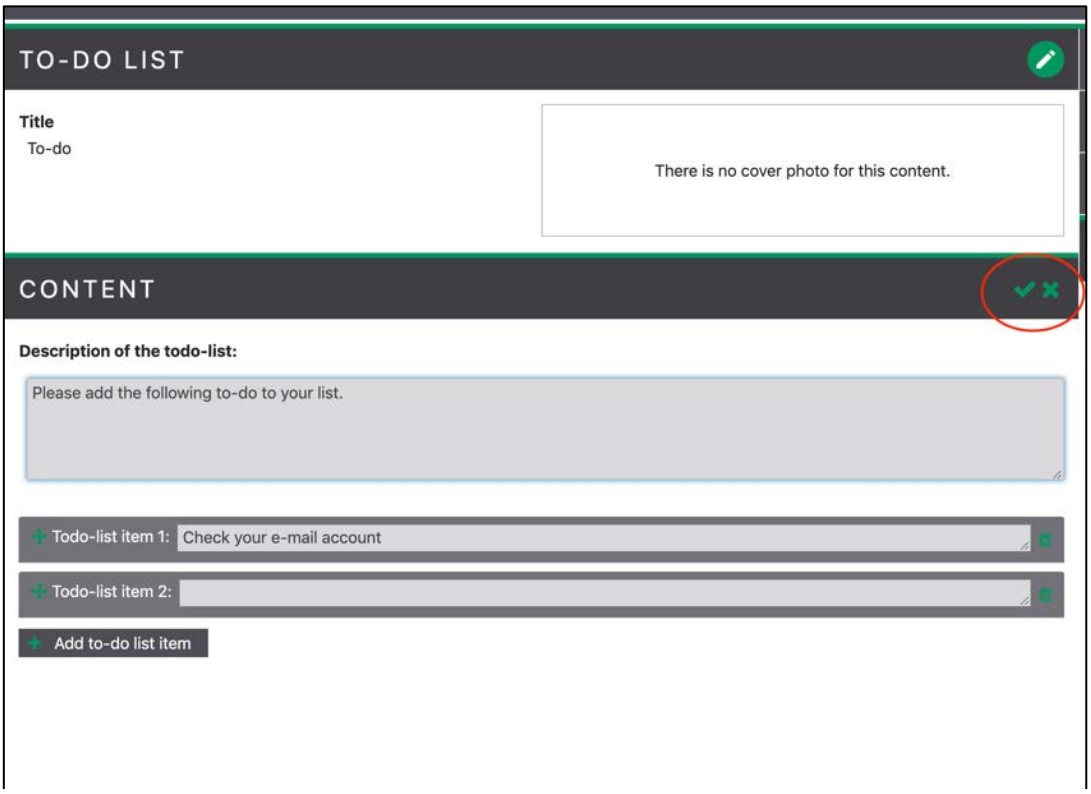



In order to add a spot on top of the image edit the content and either click on the position on the image itself where the spot needs to go or hit the add spot button and move the spot around on the image later on.
For every spot text, a picture and a link to another content within the same training can be added.




### 3.5.13 To-do list

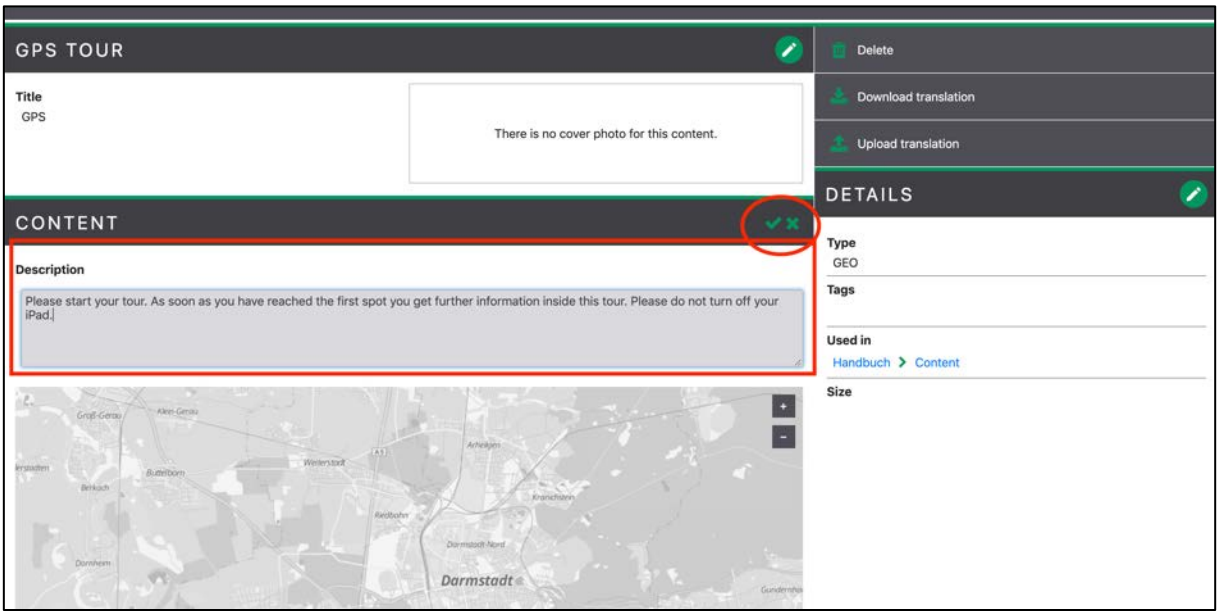

A To-do list can be created to request the users to add To-dos to their personal To-do list and to tick a check box when the To-do is finished.




Note: The users have to copy the list to their own To-do list before being able to tick the checkbox.

### 3.5.14 GPS tour


With this content type it is possible to set GPS locations. As soon as the user has reached a surrounding of 100 meters around the location the information that has been added to this location is shown on screen.




First, a description is to be given to inform the user what to do. The GPS tour content page on the users' device has to stay active in order to be informed when they reach the area of the GPS location. It is no problem to leave the tour, for e.g. to make a note. The user can continue by navigating to the content and start the GPS tour once more.

**Set a GPS spot**

A location can be selected by either entering (1.) and searching (2.) a certain address or by simply clicking in the map while in edit mode.
Click the "Add location" button in order to define the location as one of the tour's GPS spots.

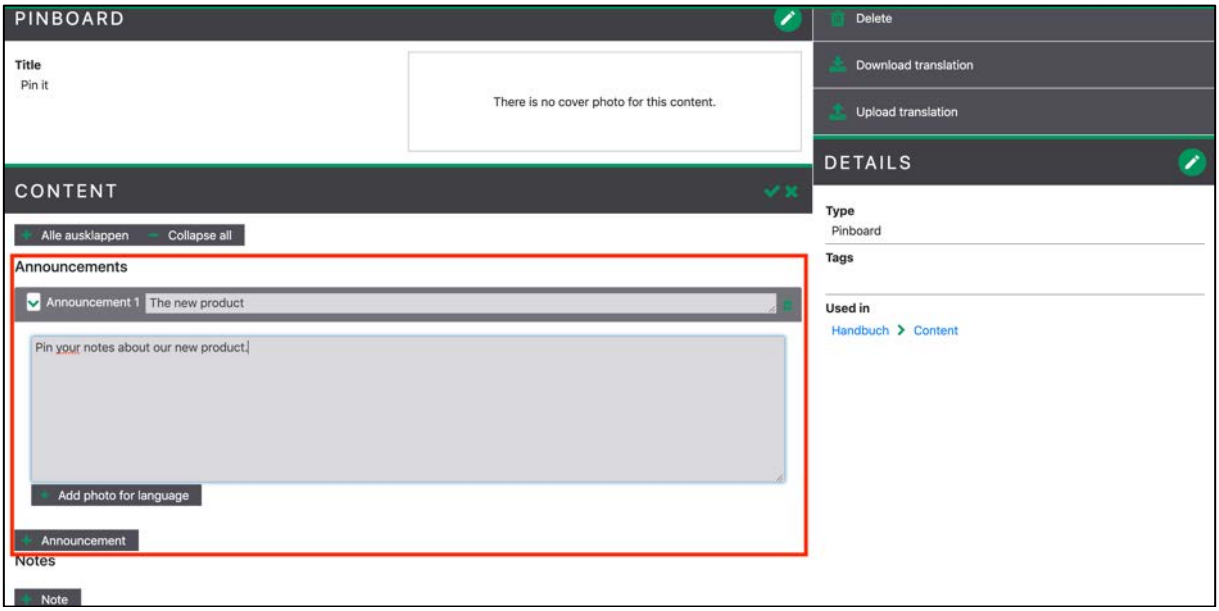
Now, some more information about this location can be added and an image can be uploaded.

A location can be moved on the map or be removed by clicking the trashcan on the right side of the location.

### 3.5.15 Pinboard

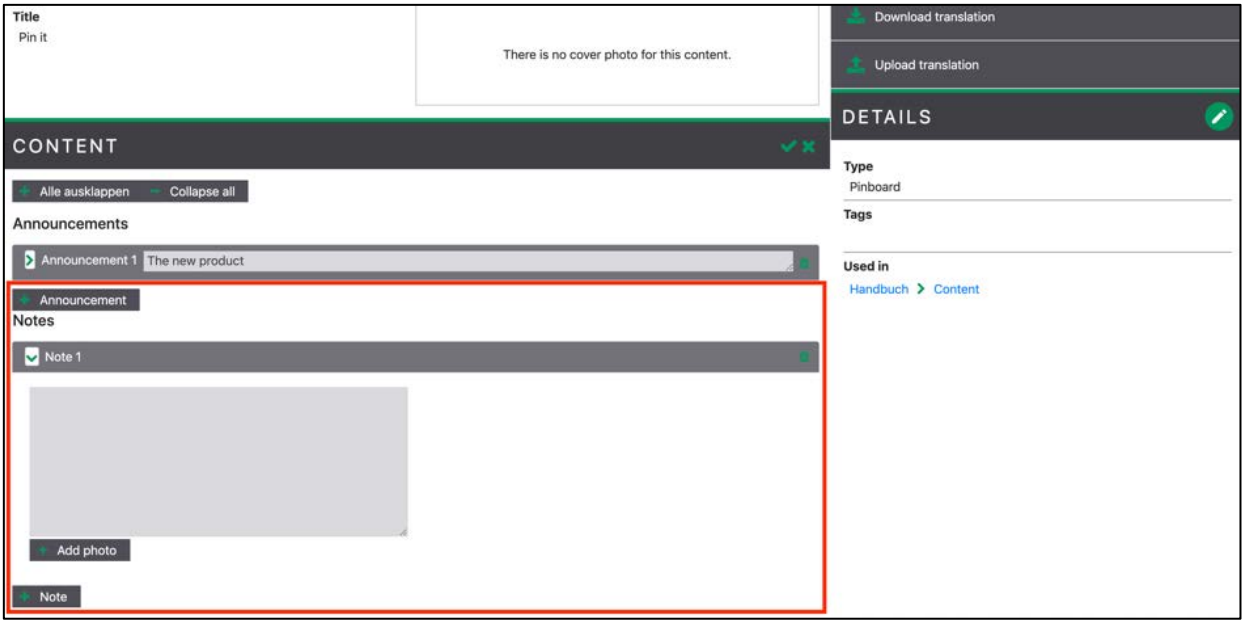

This content creates a pinboard to which the users can attach their notes to. Users of the same wave can see the pins on the pinboard and will be able to comment on them.

**Announcements**
Announcements can only be created by a trainer. It is like a fixed note that remains at the top of the pinboard and can be translated.
The announcement can have a title, text and image.



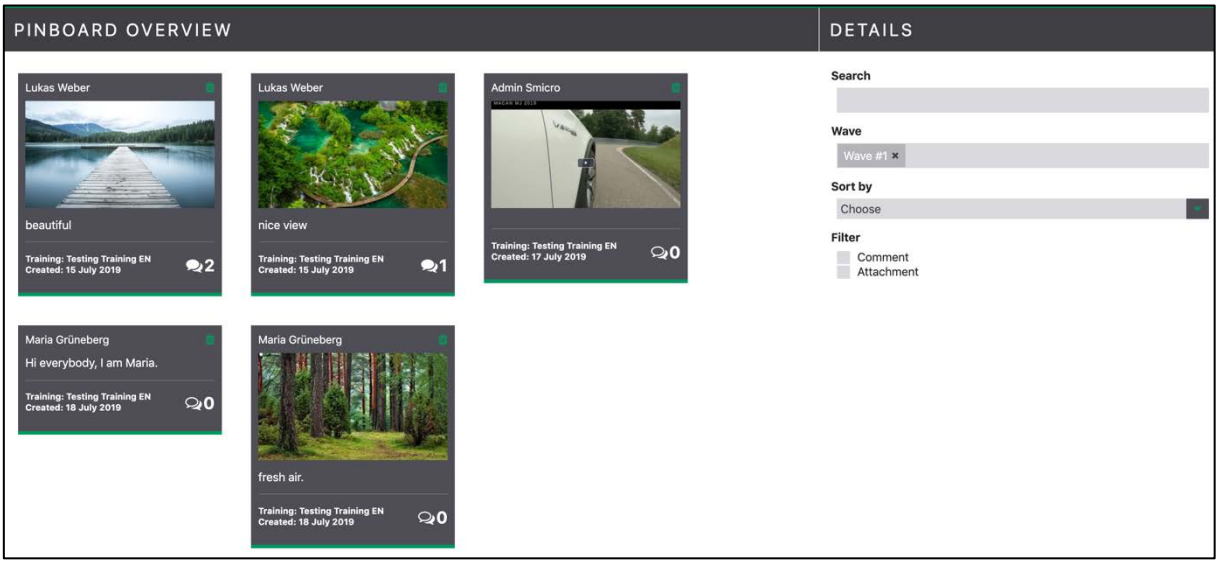
## Note

Trainers can add notes directly to the board through the backend.

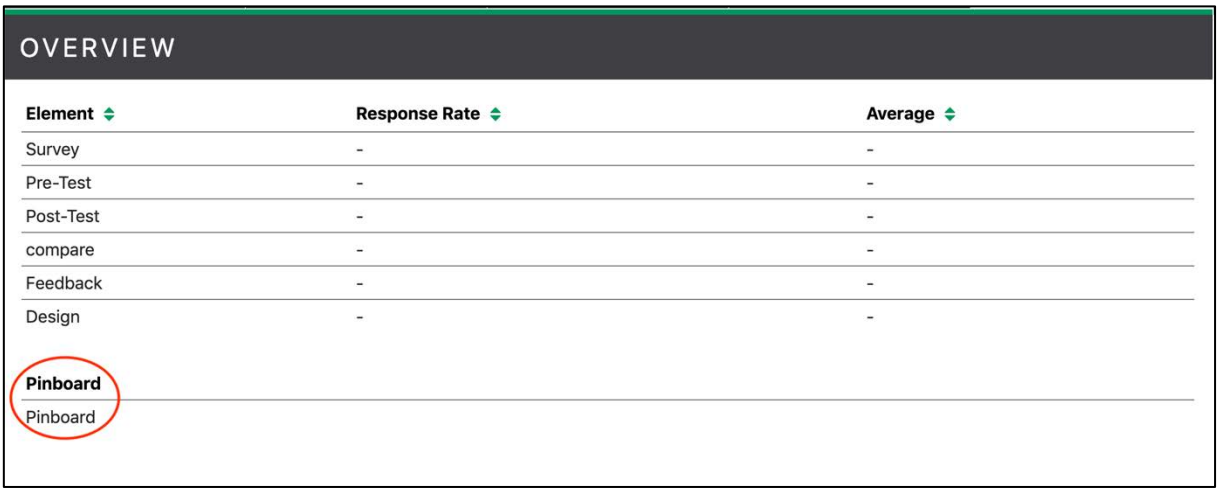



## Pinboard Overview

To check the users' pins and comments, the trainer is able to open and, if necessary, to delete them. It's a backend version of the pinboard.




To get there the trainer has to navigate to the statistics inside a wave. by clicking on the statistics of the wave. First step is to click on Pinboard at the Statistics overview. Then the pins are shown. The trainer has the possibility to delete each pin by clicking on the delete symbol, if the content is considered not appropriate.




### 3.5.16 File Download


With this content any file can be added for the user to download. The user will then have one download button for that page.

## 3.6 QR Codes

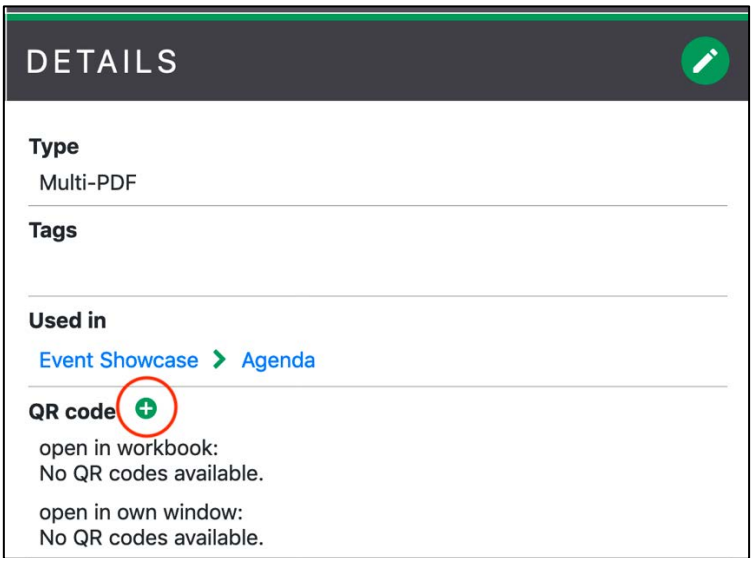
Every content can be linked to a QR Code. The QR codes can then be exported from the system and distributed (e.g. printed).
Users have a QR code scanner integrated in the smicroSuite frontend application. Scanning a respective QR Code will lead to the linked content.

There are two possible actions for each QR code:

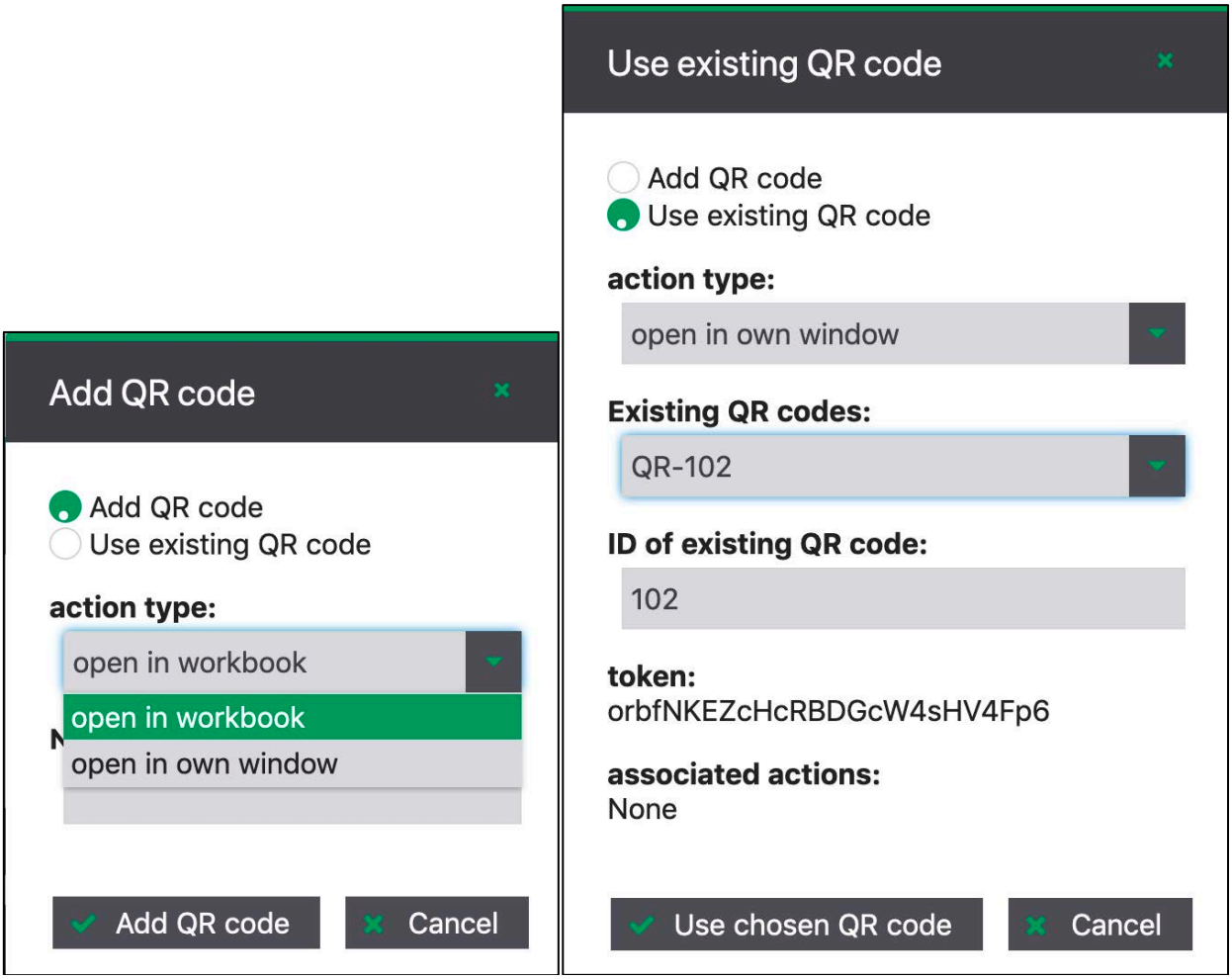
1. Open in workbook
   This action leads the user to the workbook the content is part of and navigates to the respective page in the workbook.

2. Open in own window
   This action opens a window layer on top of the screen the user is currently at. The content will be displayed inside this window. After closing the window, the user will still be on the same screen he has been before scanning the QR code.

In order to add QR Codes and one of the mentioned actions, click on the green “+” next to “QR code” in the DETAILS section of every content.

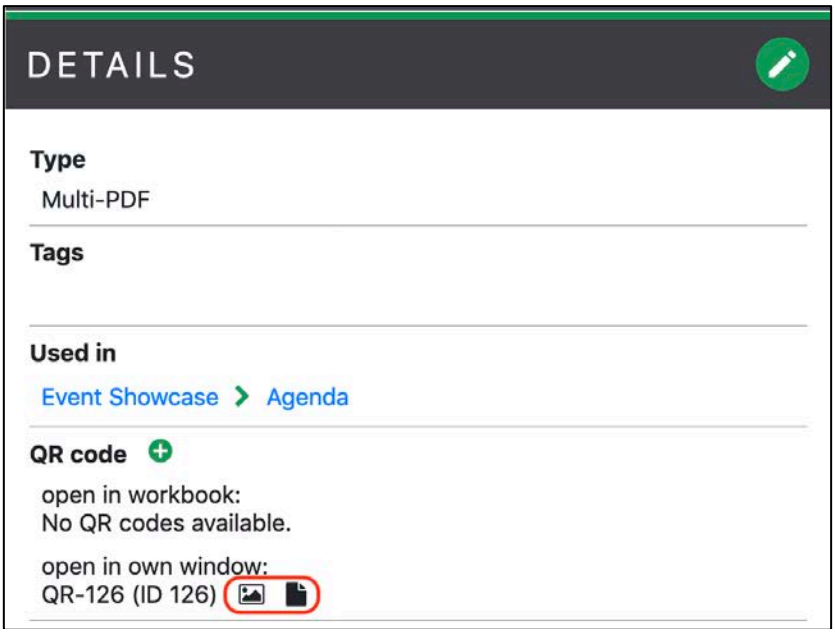



The following window shows options to generate a new QR code or to use an existing one. After that, the action must be selected. If a new one is created, the QR code can be named (optional). If no name is entered, the code will get a number (e.g. QR-126).
In case that an existing QR code is selected the already linked contents will be shown.




Adding more than one content to one QR code is not an issue. Should a user have access to both contents, she will be asked which one to open.

Now back in the DETAILS section you can see the added QR code under the respective action. The two icons will download either a PNG pder PDF version of the QR code for distribution.

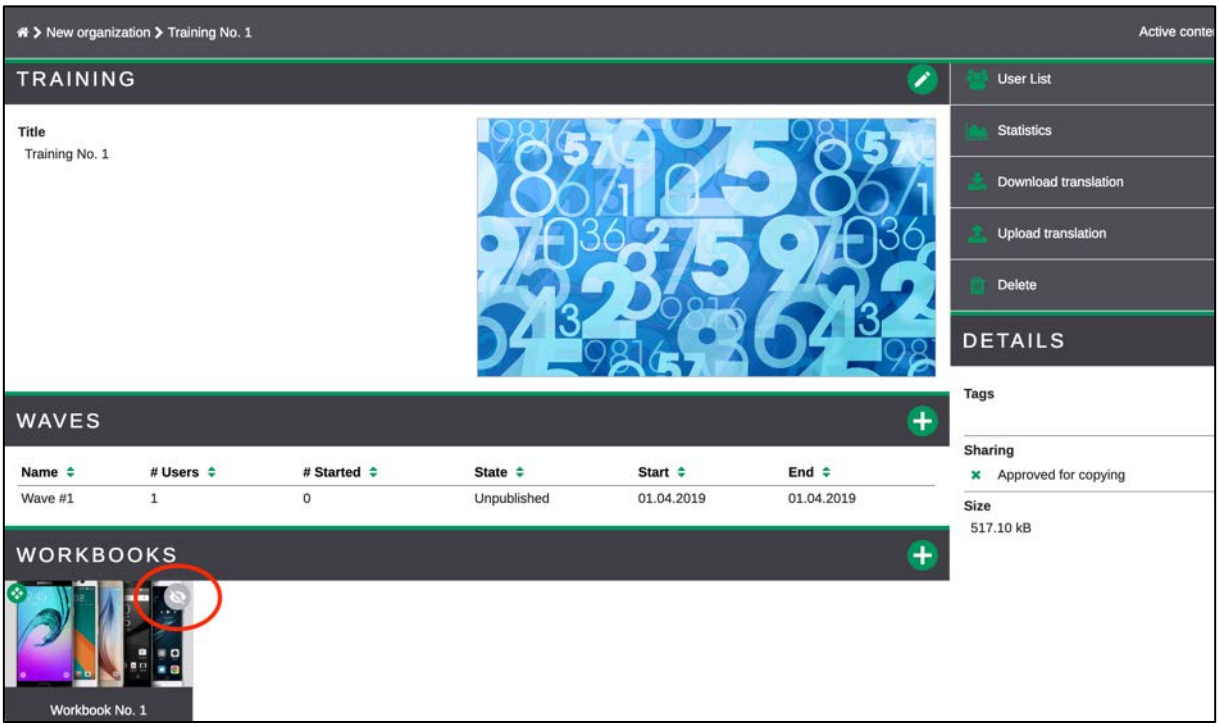



## 3.7 Publish wave/workbook unlock workbook

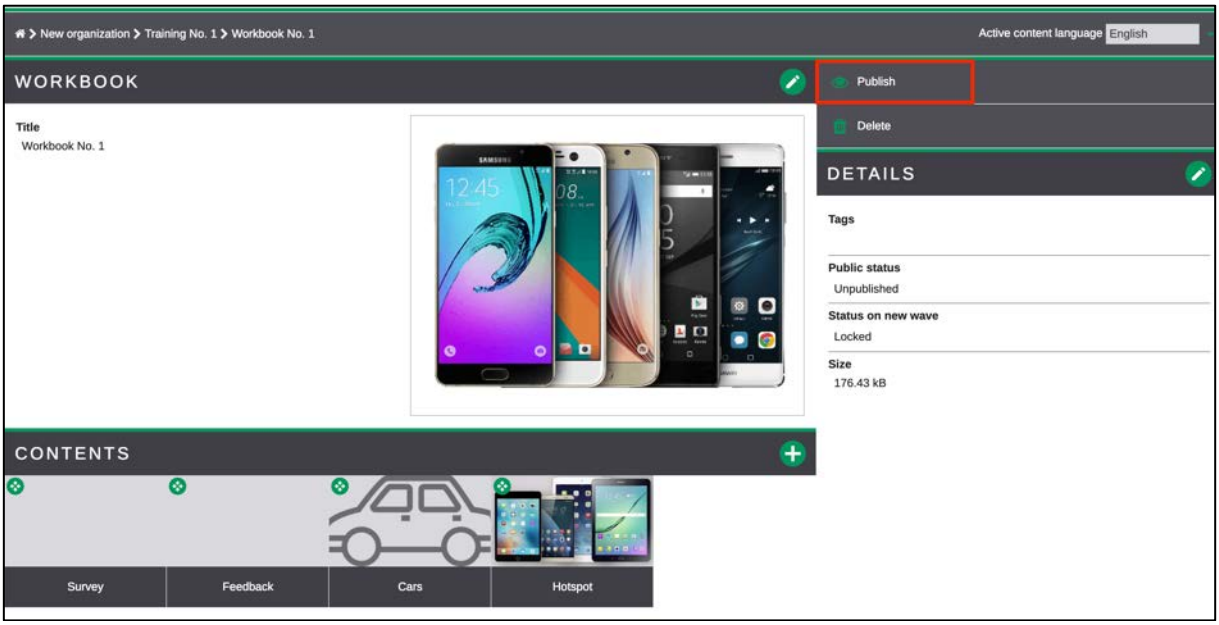
There are three steps to publish content. This is important to consider in order to show the right contents at the right time to the right users.

### 3.7.1 Publish a workbook

If a workbook within your training is not published, the **eye symbol** in the upper right corner is crossed and grey. If the eye symbol is green the workbook is published.

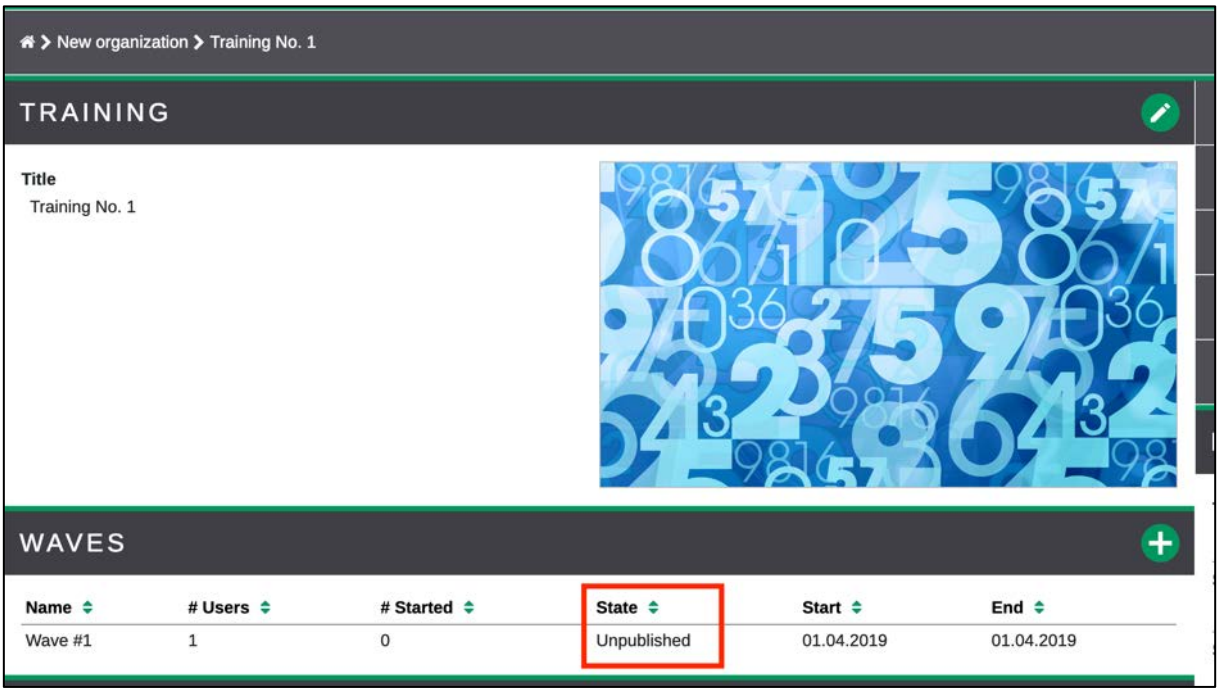



To publish this workbook open it and click “publish”. This can be undone at any time. As long as a workbook is not published, the user cannot see this workbook at all.
To trainers and admins workbooks are visible even when they are not published. (even in the frontend)

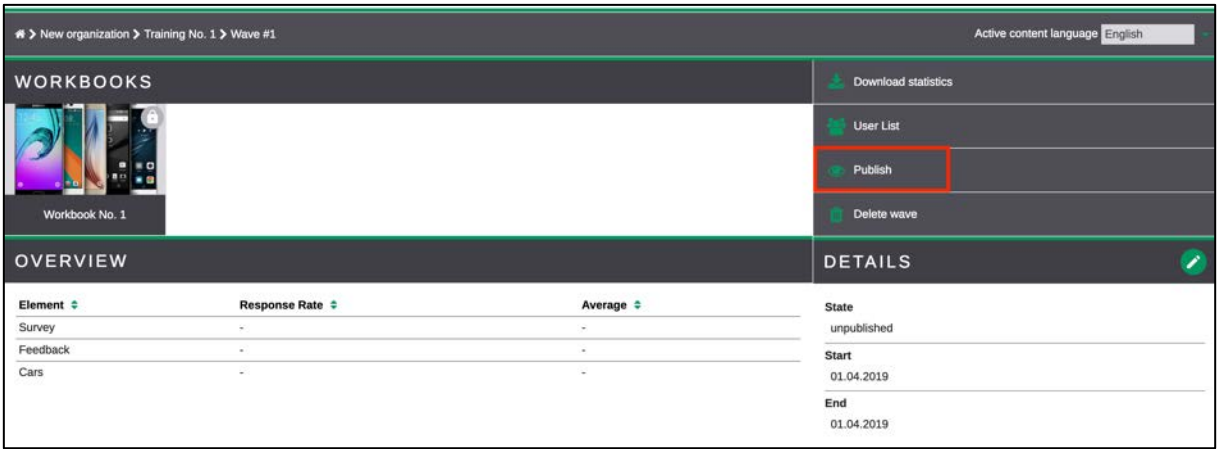



### 3.7.2 Publish a wave

As long as a user‘s wave is not published, the user cannot see the training at all.

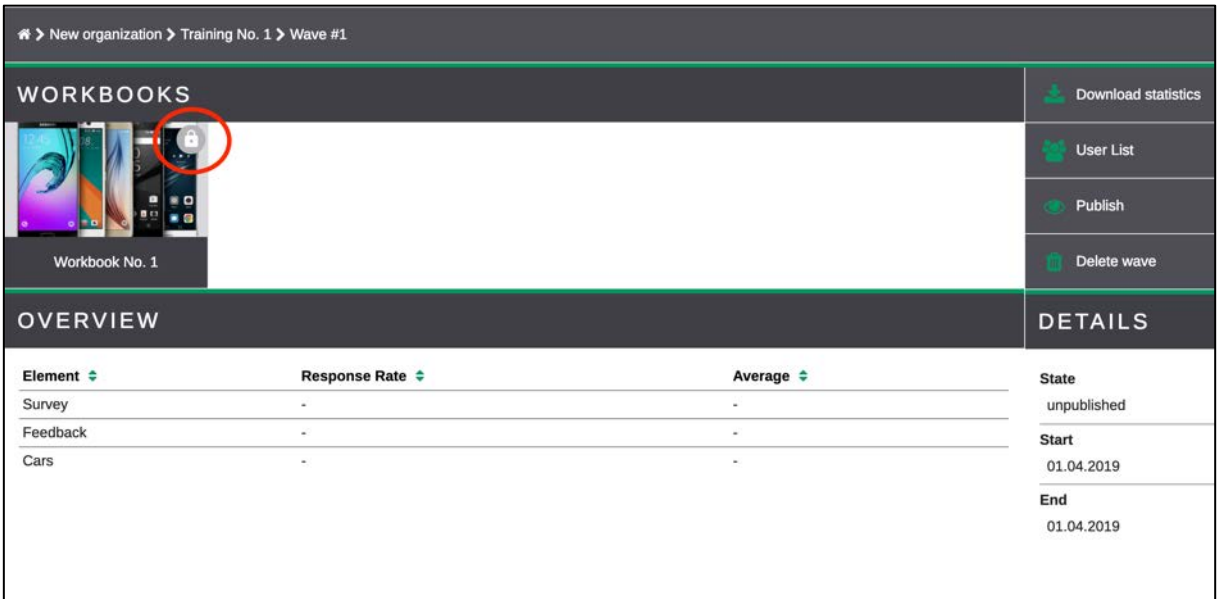



The wave can be published by entering the wave and clicking on “publish”.
Once a wave is published, it cannot be undone.
Now the users of the corresponding waves are able to enter the training in the frontend.




The published workbooks will be visible to them, the unpublished workbooks won’t.

## Unlock workbook in a wave




In order to make a workbook accessible for users in a wave, it has to be unlocked.
This must be done manually for every single wave.
By entering the wave and clicking on the grey lock symbol, the workbook can be unlocked for this wave.
Even unpublished workbooks can be already unlocked to define the workbooks accessibility after it will be published.

Keep in mind: The user's device has to be connected to the internet in order to receive the new state of a training or workbook.

With these states (wave unpublished/published, workbook unpublished/published and workbook locked/unlocked) the trainer can create different scenarios like previewing a workbook, but keeping it locked or hiding trainings and workbooks until a certain point.

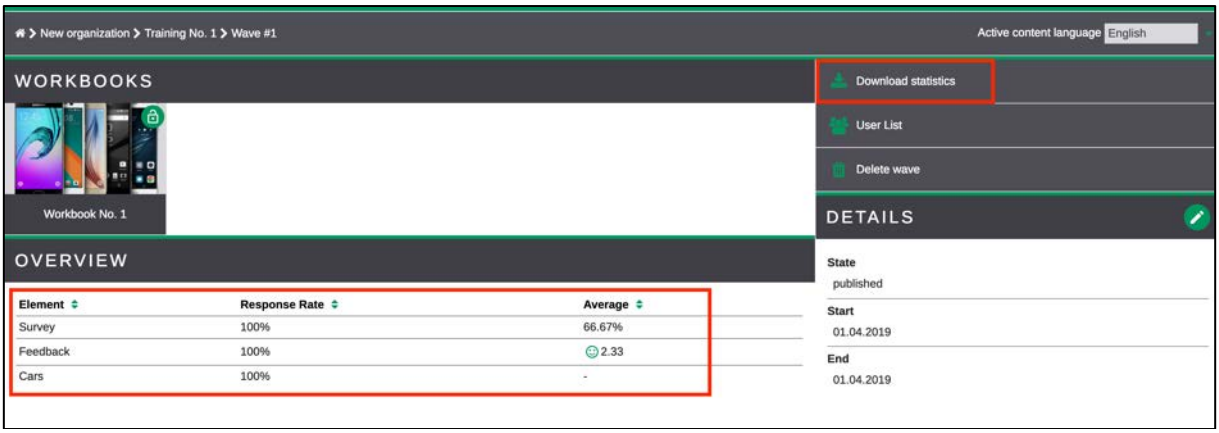
**To summarize, if a user shall be able to access a workbook, three steps are necessary:**

1. **The wave the user is part of has to be published**
2. **The workbook has to be published.**
3. **The workbook has to be unlocked within the wave.**

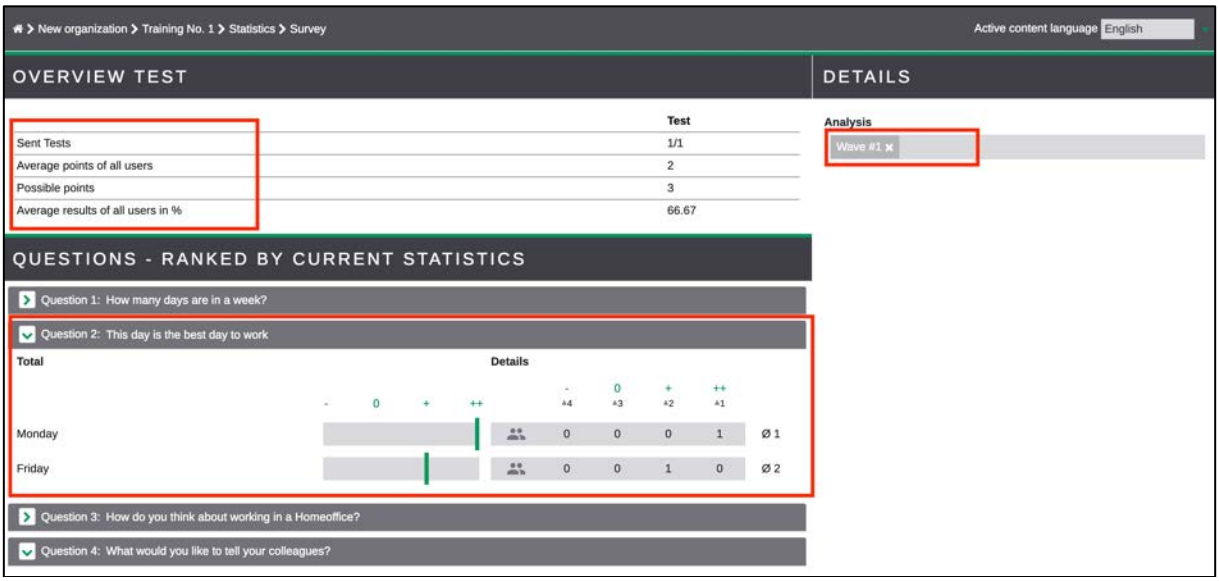
## 3.8 Statistics

Some content types create statistics for the trainer.

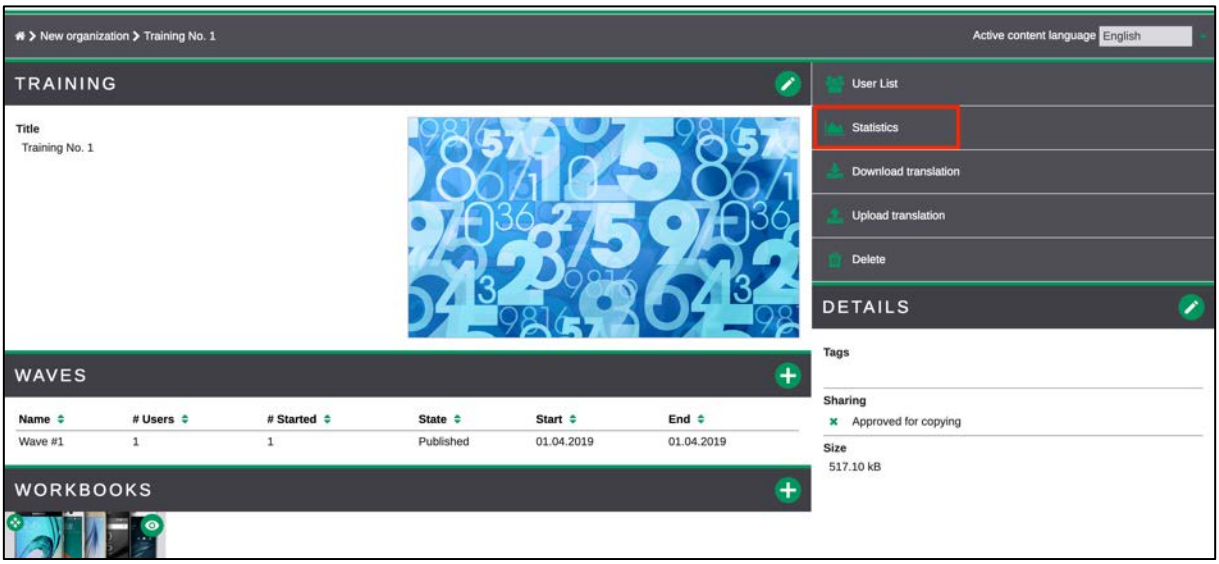
Inside each wave there is an overview of the wave's training results.
The overview gives some general information about the results, details can be accessed by clicking the respective line.
Another way to get the results especially from tests and feedback in detail is to download the statistic in the upper right corner.




Example: Survey
The statistics show some general information in an overview section below the results of every question are visible.
It is not possible to take a look on the answers of every single person. These are the results of one wave. If the results of another wave of the same training shall be accumulated in this view, the respective wave can be added in the upper right box.




To get the statistics of all waves of one training, the button "Statistics" on the training dashboard is the shortest way.


New organization > Training No. 1
Active content language
English
TRAINING
Title
Training No. 1
User List
Statistics
Download translation
Upload translation
Delete
DETAILS
Tags
Sharing
Approved for copying
Size
517.10 kB
WAVES
Name
# Users
# Started
State
Start
End
Wave #1
1
1
Published
01.04.2019
01.04.2019
WORKBOOKS

# 4.0 Language and Translation

If users with different languages are part of a training, content can be uploaded in different languages.
The system also comes with different UI-languages.

## 4.1 Type of language in the System

**Language:** There is no limit to which and how many languages trainings can be translated. The respective language just has to be “created” by an administrator in the backend.

**Default language:**
The default language of an organization can be set by admin users. It defines which language will be displayed if the selected content language is not available.

Example: The organization has the languages English, German, French and Spanish.
The content of the training is available in English and French only.
The default Language is set to French.
If now a user has German set as his language, the system has to pick another available language instead. In this case the default language French will be chosen over the also available English content.

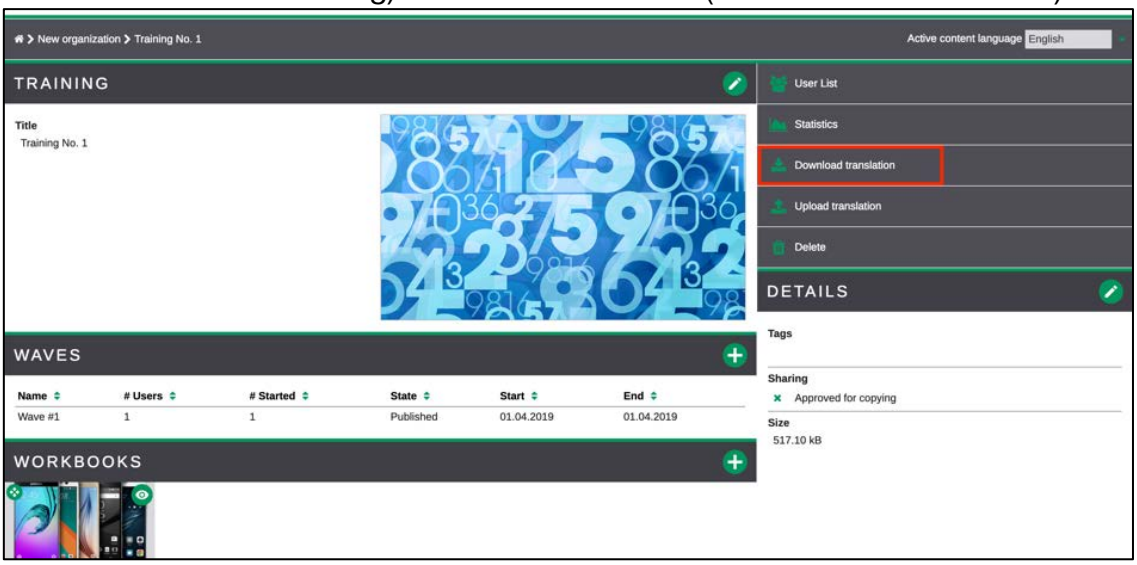
**UI-language:**
This is the language of the user interface.

**Content language:**
The language in which the content has been added by the trainer.

## 4.2 Translation - Training

### 4.2.1 Download translation

The button “download translation” appears on the right side of the training dashboard (to translate the whole training) and inside a content (to translate that content)



By clicking “download translation” the system generates a zip file. Inside this zip file every content can be found in different folders. (pdf, pictures, videos, etc.)
Every written text like questions and answers of a test, names of workbooks or descriptions can be found in the Excel file named “translations.xls”.

**How to translate all your content:**

The most important thing is to know the prefixes of your available languages.
These can be found in the “translations.xls” file.

| | A | B | C | D | E | F | G | H | I | J | K | L |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | translation_id | parent_type | parent_field | content_type | parent_id | de-DE | en-GB | fr-FR | it-IT | es-ES | ja-JP | ko-KO |
| 2 | 65399 | Training | name_tid | -- | 384 | | | | | | | |
| 3 | 65400 | Workbook | name_tid | -- | 2613 | | | | | | | |
| 4 | 65401 | Content | name_tid | multi_pdf | 31447 | | | | | | | |
| 5 | 65402 | Content | name_tid | multi_pdf | 31448 | | | | | | | |
| 6 | 65403 | Content | name_tid | multi_pdf | 31449 | | | | | | | |
| 7 | 65404 | Content | name_tid | multi_pdf | 31450 | | | | | | | |
| 8 | 65405 | Content | name_tid | multi_pdf | 31451 | | | | | | | |

If you do not know what languages the prefixes stand for, please contact your administrator. He has a list of all languages and their set prefixes available from the admin dashboard:

Example: (can be different for your company)

| Content language | File prefix | UI-Language |
|---|---|---|
| Deutsch | DE-DE | DE-DE |
| English | EN-GB | EN-GB |
| Französisch | FR-FR | FR-FR |
| Italienisch | IT-IT | IT-IT |
| Spanisch | ES-ES | ES-ES |
| Japanese | JA-JP | JA-JP |
| Korean | KO-KO | KO-KO |
| Portuguese | PT-BR | PT-BR |
| Russian | RU-RU | RU-RU |
| Chinese/China | ZH-CN | ZH-CN |
| Chinese/Taiwan | ZH-TW | ZH-TW |
| Polnisch | PL-PL | EN-GB |
| Türkisch | TR-TR | EN-GB |
| Niederländisch | NL-NL | NL-NL |

Step one: translate your text.

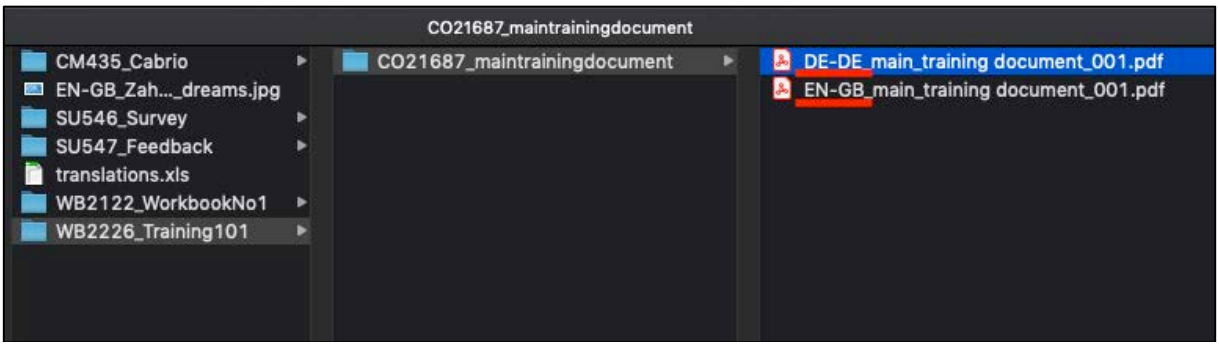
In order to translate all the text within the training you have to open the “translations.xls”. Here every column starting with column F (next to parent_id) represents one of your possible content languages.
After creating your training with all the added content in different workbooks one of these columns will be filled with your entered text.
Just translate the content of every cell in every column with a language prefix.
In the following example you can see the text of cells F2 and F3, originally English, have been translated to German in cells G2 and G3.

| translation_id | parent_type | parent_field | content_type | parent_id | en-GB | de-DE |
|---|---|---|---|---|---|---|
| 48112 | Training | name_tid | -- | 363 | Training No. 1 | Training Nummer 1 |
| 48113 | Workbook | name_tid | -- | 2122 | Workbook No. 1 | Workbook Nummer 1 |
| 48250 | Content | name_tid | survey | 20688 | Survey | |
| 48262 | Content | name_tid | survey_feedback | 20695 | Feedback | |
| 48264 | Content | name_tid | compare | 20696 | Cars | |
| 48271 | Content | name_tid | hotspot | 20697 | Hotspot | |
| 48272 | CHotspotSpot | text_tid | -- | 9 | iPad | |
| 48251 | Survey | name_tid | -- | 546 | Survey | |
| 48259 | SurveyQuestion | name_tid | -- | 3782 | This day is the best day to work | |
| 48294 | SurveyAnswer | name_tid | -- | 12754 | Monday | |
| 48295 | SurveyAnswer | name_tid | -- | 12755 | Friday | |
| 48258 | SurveyQuestion | name_tid | -- | 3781 | How many days are in a week? | |
| 48296 | SurveyAnswer | name_tid | -- | 12756 | 5 | |
| 48297 | SurveyAnswer | name_tid | -- | 12757 | 6 | |
| 48298 | SurveyAnswer | name_tid | -- | 12758 | 7 | |
| 48260 | SurveyQuestion | name_tid | -- | 3783 | How do you think about working in a Homeoffice? | |
| 48299 | SurveyAnswer | name_tid | -- | 12759 | Homeoffice helps me to get my work done | |
| 48300 | SurveyAnswer | name_tid | -- | 12760 | Homeoffice reduce my efficiency | |
| 48261 | SurveyQuestion | name_tid | -- | 3784 | What would you like to tell your colleagues? | |
| 48263 | Survey | name_tid | -- | 547 | Feedback | |
| 48398 | SurveyQuestion | name_tid | -- | 3787 | How was your training? | |
| 48402 | SurveyAnswer | name_tid | -- | 12769 | The hotel location was good. | |
| 48403 | SurveyAnswer | name_tid | -- | 12770 | I was able to learn new content | |
| 48404 | SurveyAnswer | name_tid | -- | 12771 | The trainer was competent | |
| 48265 | Compare | name_tid | -- | 435 | Cabrio | |
| 48266 | CompareCategory | name_tid | -- | 1236 | Engine | |
| 48267 | CompareCategory | description_tid | -- | 1236 | Check the engine of the competitors. Decide if the engine is more efficient than the one of the Cabrio. | |
| 48268 | CompareObject | name_tid | -- | 1484 | SUV | |
| 48269 | CompareObject | name_tid | -- | 1485 | Sport Car | |
| 48270 | CompareObject | name_tid | -- | 1486 | Limousine | |

Step two: translate your content files

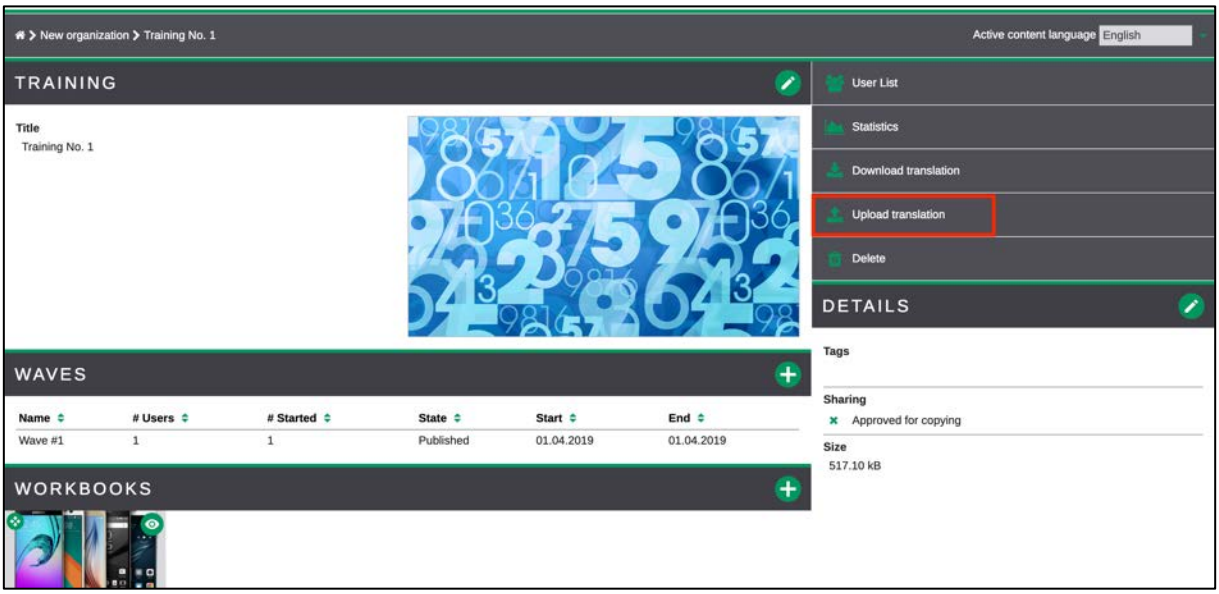
Every single file uploaded to your training like PDFs, pictures and videos will be found in the zip file as well.
Look through all the different folders and make sure to catch all files you want to translate. The files will have the same file name as they had before the upload, but with the added language prefix.
In order to add a different language version of the file simply upload the translated file in the exact same location, with the exact same name, but the changed language prefix.

Example:
The initially uploaded PDF-file was named “main_training document_001”.
After downloading the translation file the document can be found in a folder named after the workbook it has been added to and the prefix for the English language has been added in the beginning of the file name. This is the English version as the trainer has created the training in English.
The file is now named “EN-GB_main_training document_001”.
In order to add the German version of this file the respective PDF has to be named “DE-DE_main_training document_001” and then placed in the exact same location as the English version.

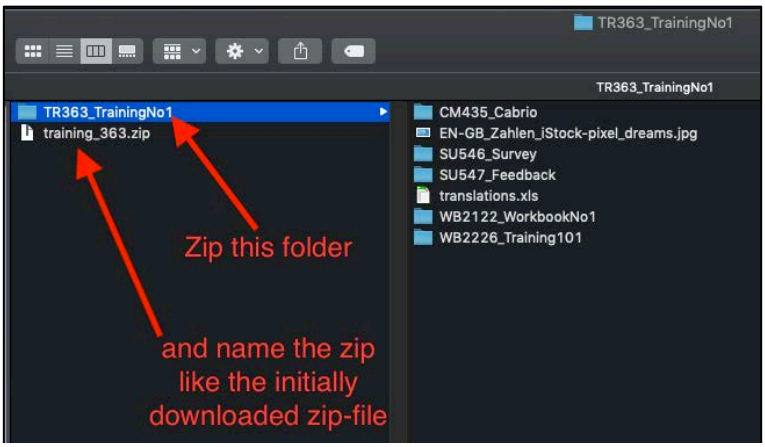



### 4.2.2 Upload translation

To upload the translated content, the documents need to be zipped and uploaded by the button “upload translation”.




**The main folder needs to be zipped. That is the one which was zipped in the downloaded file and contains all the other sub folders and files.**
**The zipped folder needs to have the same name as the downloaded zip-file.**

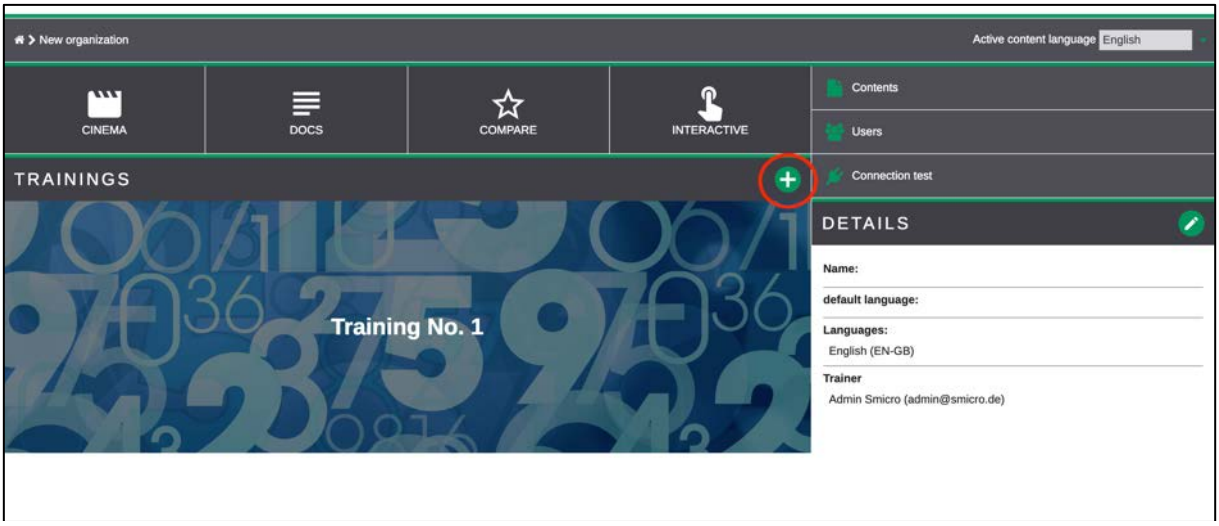


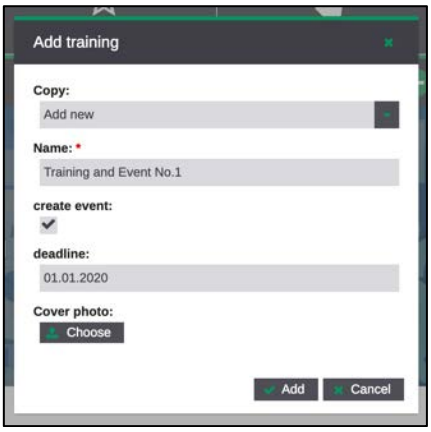
## 5.0 Event-Tool

A training can be combined with an event. The event-tool supports participant management and booking process.

### 5.1 Create an event

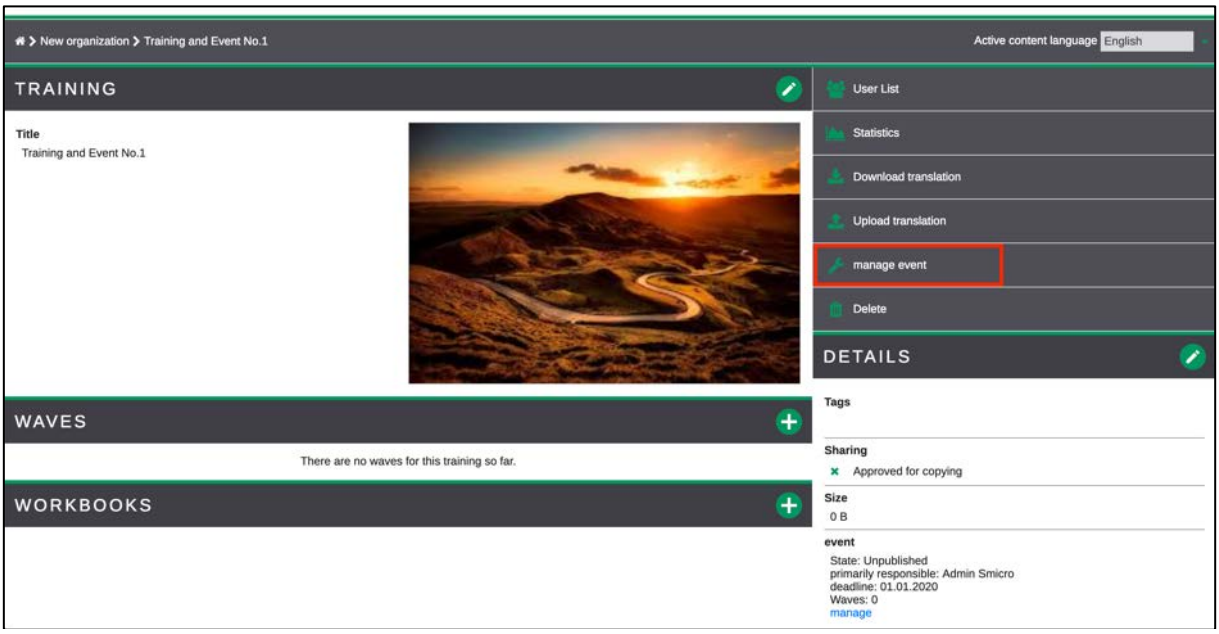
Creating a training with an event, is similar to creating a simple training but the box “create event” has to be ticked.



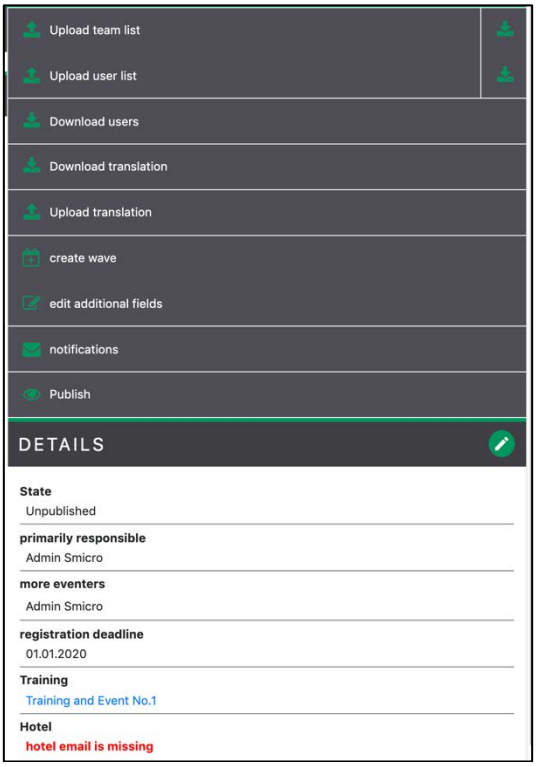




The system asks for a deadline date. At this date, a reminder e-mail will be sent to participants who have not submitted all event relevant data *(see more **5.3** and **5.6**)*. This date can be changed at any time.

In order to work on the event part of the training click on “manage event” on the training dashboard.




On the details section of an event we see the state of the event (unpublished, published or completed), the primarily responsible person (by default the user who created the training including the event), additional eventers, the registration deadline and the email of the hotel.
The primarily responsible user as well as everybody under “more eventers” only have access to this event screen and not the training, unless the user has also trainer rights.
This way a dedicated person or agency can be put in charge of managing the event without giving access to the training content.
A hotel e-mail can be added if a hotel needs to be informed about any participant event changes *(see more **3.5**)*.



As long as the event is not published, no user will see or get notified about this event. The following described steps can be done in preparation for the event.
**Please be aware that completely new users to the system will get an activation mail for the software once they get added in any way. Meaning also when uploaded to the event like in 5.6.**
**They will only be able to access the system.**

## 5.2 Create event waves

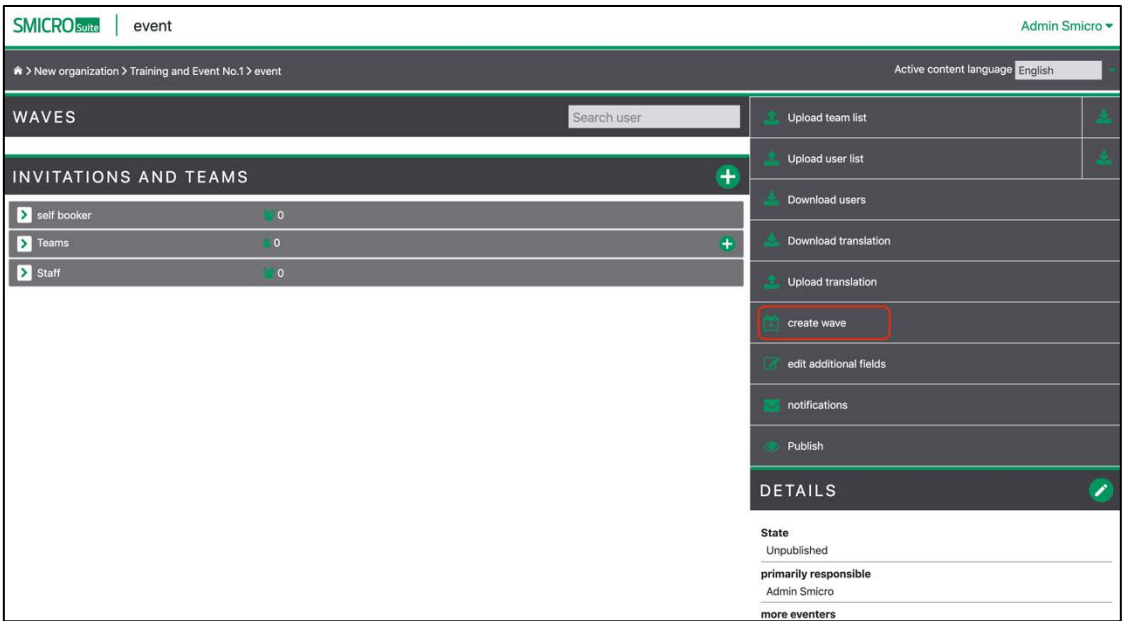
Unlike a training wave, event waves are created in the event tool.

Users inside an event wave will be part of the event and able to book dates, edit their event details as well as receive event relevant system mails.

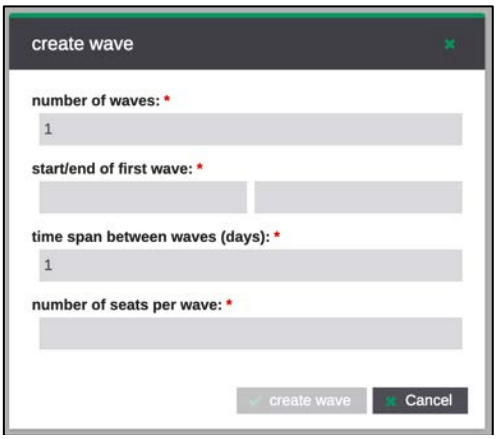
Users added to a training wave will not be part of the event. (See 3.2)

These event waves will have all the training relevant functionality as the waves created inside the training such as publishing, unlocking workbooks, statistics, etc.
However, users can only be added to these event waves by managing the event. Not inside the training as in 3.3.

In order to create event waves, hit the button “create wave”



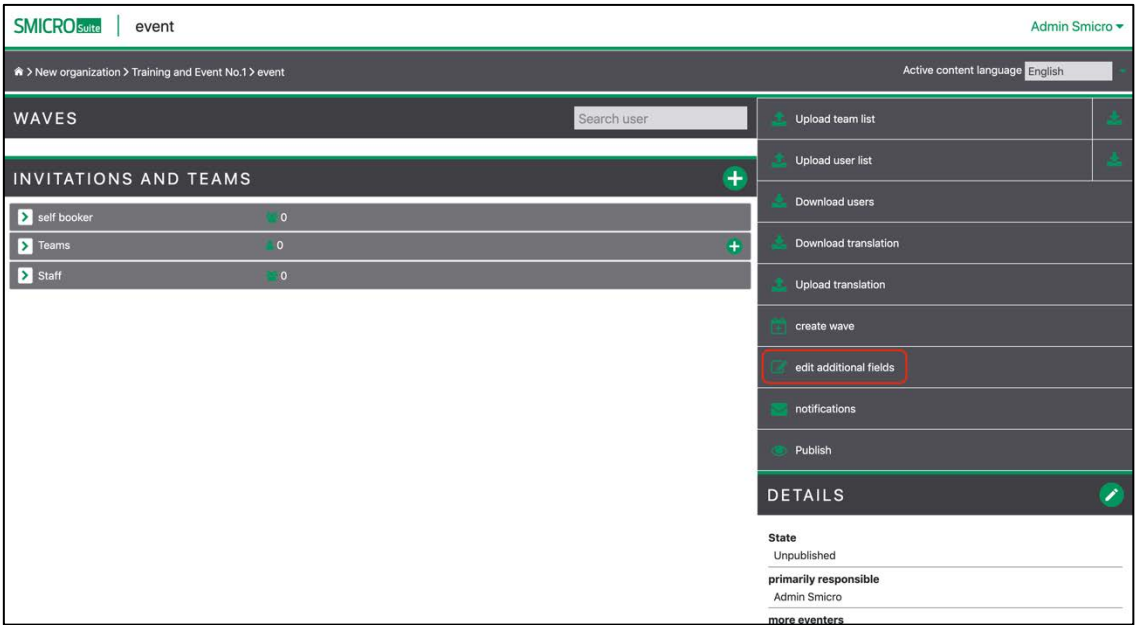

More than one wave can be created at once.
“time span between waves (days)” refers to the amount of days between the first days of each wave. For example, entering 7 days here will have every wave start on the same weekday one week apart from each other. Entering 1 will have a wave start every day.




For irregularly scheduled waves use the create wave button several times and always add one wave at a time.

## 5.3 Additional fields

Additional fields are defined by the trainer or eventer. They are used to collect event relevant data from users like address, phone number or flight details.



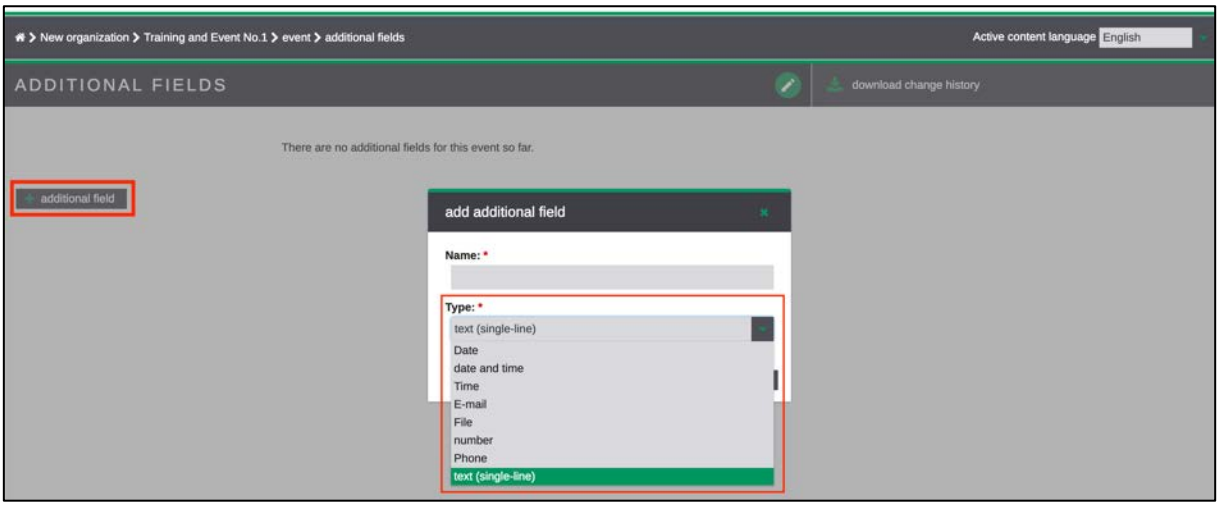

There is no limit to how many fields can be added to an event.

When adding a field, the name of the field needs to be entered and a type selected.

The types are:

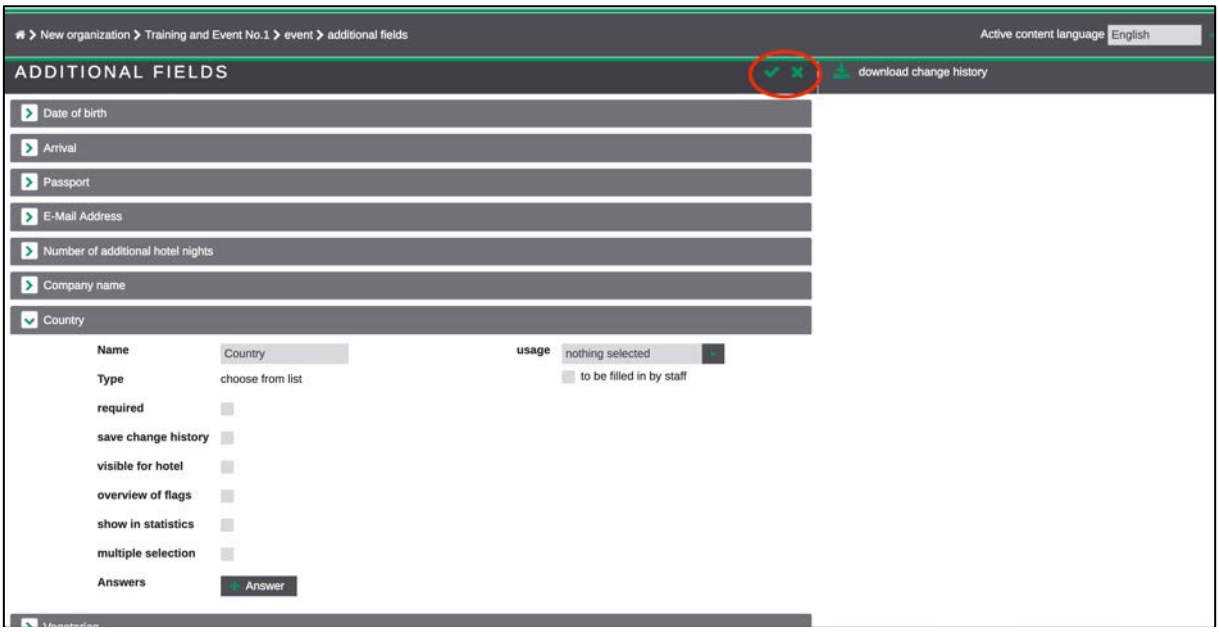
- Address
- Yes/No
- Date
- Time
- E-mail
- File → adds an upload possibility for any kind if file

- Number
- Phone
- Text (single line)
- Text (multiline)
- Choose from list → creates a list the user can select one or more items from




After adding the fields, they need to edited
In edit mode the field can be renamed, but you can also add some properties to your fields.
**Most important and mandatory for the field to appear in the first place is the drop-down list on the right side reading "usage".**

Selecting "Users" will make the field visible for the users to fill in.
Selecting "only eventers" will make the field NOT appear for the users to fill out. The filed will then only be visible in the user's profile in the backend, giving only trainers and eventers the possibility to fill it out.
This can be useful for information that the user might not be able to know, notes or internal information important for the organizers if the event.



On the left side the following properties can be set:

- **required**:

Filling out this field is mandatory. If the field will not be filled out when the registration deadline passes, the user will get an email notification.
(It is not recommended to use a required field for second address lines or similar elements which not all users will need and fill in.)

- **save change history**:

Any Change to this field will be documented in a history that can be downloaded by trainers and eventers.

- **visible for hotel:**

The summary of changes to the user data will trigger an e-mail to the hotel (address defined in event details)

- **overview of flags**:

The information of this field will appear in the list on the event screen after the state changed to *booking complete*. It helps to give certain fields a prominent place for the eventer. Too many details marked as such can result in the list being hard to read.

- **Show in statistics**:

The field will appear in the Excel export which can be triggered on the event screen by trainers and eventers.

- **Multiple selection**:

This property only shows if the field type is “choose from list”. Ticking this will enable the possibility to chose more than one item from the list.

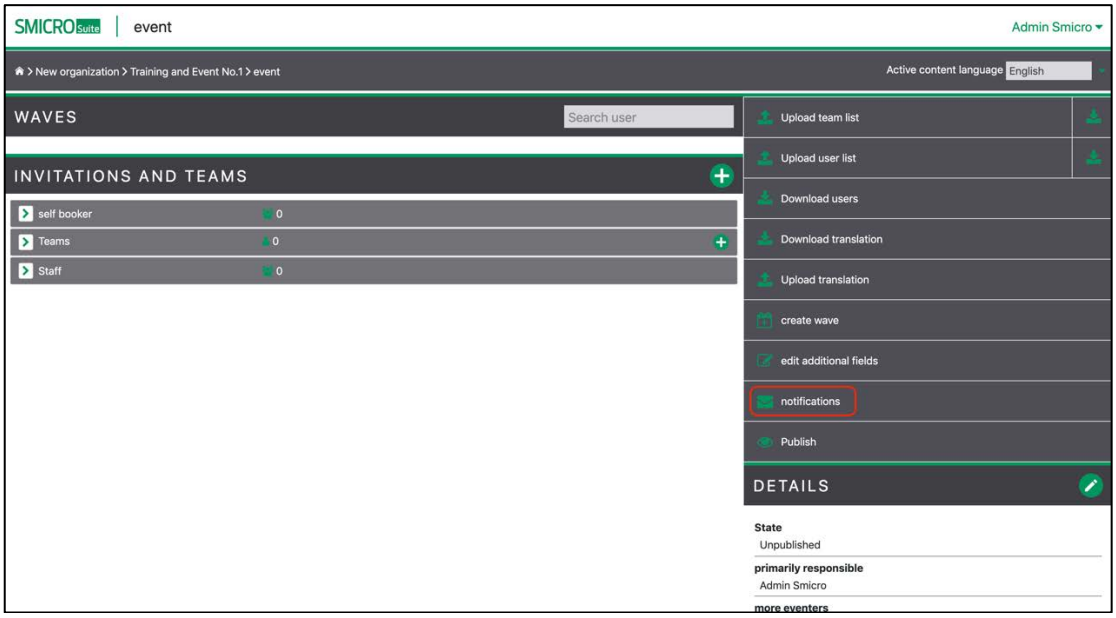
- **Answers**:

This also only shows for the type “Choose from list”
By adding items here the list will be created. There is no limit to the amount of list items that can be added.

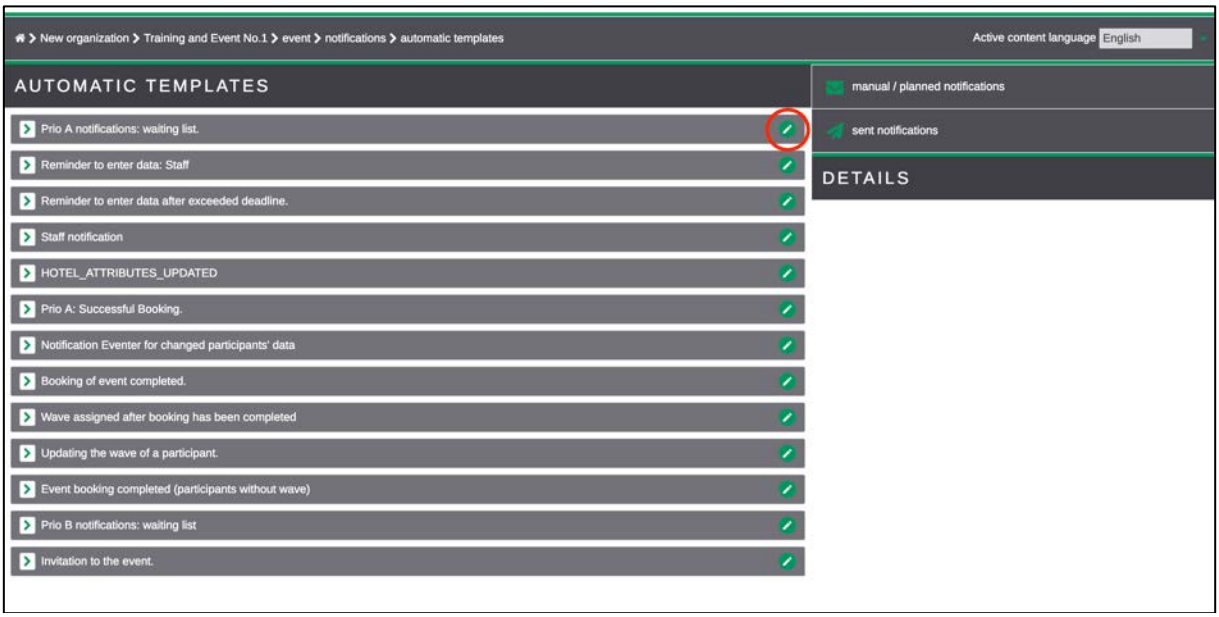
The order of the fields can be changed in edit mode as well. Use the arrow symbol to move a field up or down.


## 5.4 Notifications

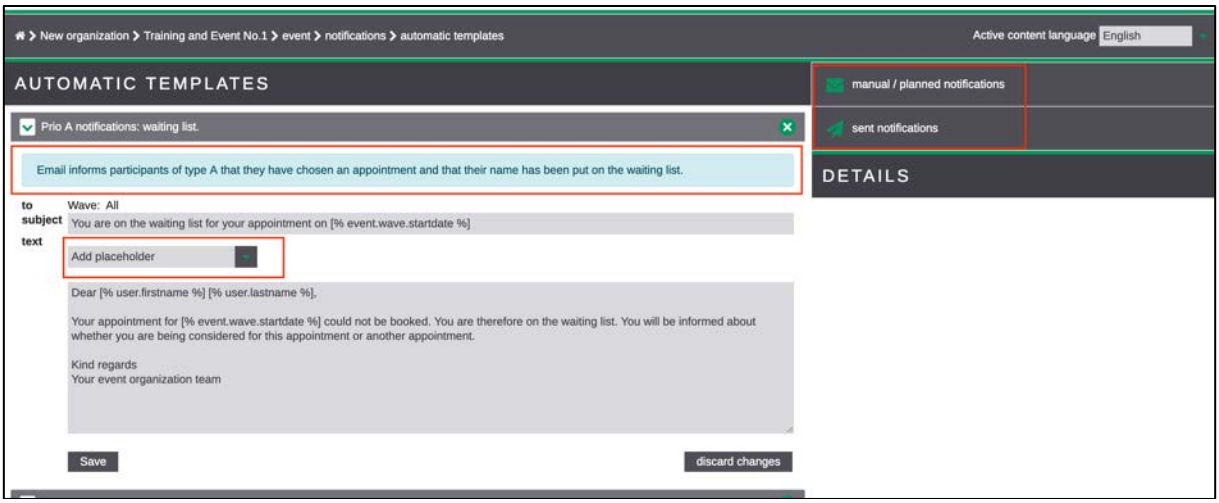
To find all templates for the system's automatic email and to send individual emails to waves or staff members click on "notifications".




The first screen shows all the templates of the mails triggered by different actions like publishing an event, changing a user's wave after the booking has been completed or the reminder notification for the missed deadline.
These templates do not need to be modified, but they can if you want to send a different text.
Click the arrow on the left of a template's name to see the message. To edit a template, click the edit icon.




The blue box describes which action triggers the e-mail.
Placeholders can be used to individualize the e-mail for every user.




On the right side you can reach the screens for already sent mails and the screen where you can create new emails to be sent out immediately or at a planned date and time.

To draft a new message, click the green plus. Choose the recipients, enter your subject and add write your message. You can use the placeholders which then will be filled out by the system. For example When writing “Dear [% user.firstname %]” the system will send a mail to all defined users, filling in their first name instead of the placeholder.

**You will not be able to send a message unless you have translated it to all languages in your organization. Switch the language in the upper right corner (Active content language) and write the message again in the respective language.**

You can choose to plan the message by selecting “time-controlled (UTC)” and picking the date and time it shall be sent.

**Note that the time is UTC (coordinated universal time). Make sure to check the time zone of the recipients if necessary.**

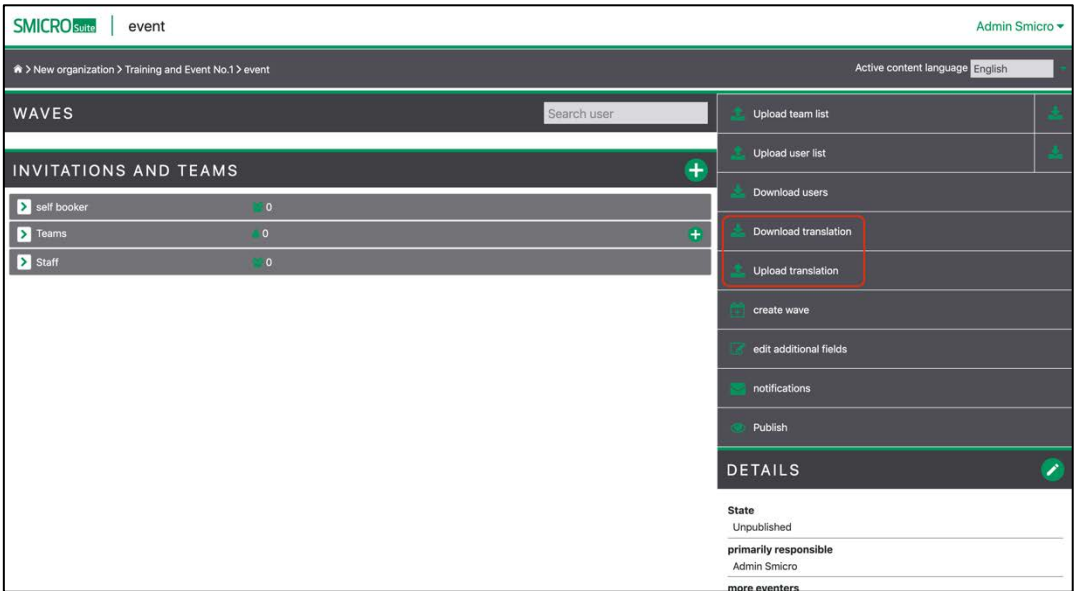
Save your draft. You will be able to send it from the “drafts” list if the message is not time-controlled or find the draft under “planned notifications” in order to edit it again.

## Overview of automatic e-mail notifications

| State | Action initiated by | | | Receptient | | | | |
|---|---|---|---|---|---|---|---|---|
| | Eventer | Team Lead | Participant | Participant | Team Lead | Staff | Eventer | Hotel |
| Published | Event gets published. | | | Self Booker (No wave assigned):<br>Invitation to the event<br><br>Any participant who has been assigned to a wave before publishing:<br>Prio A: Successful booking | Team lead notification: Start booking | Staff notification | | |
| Published | | Team Lead selects team members for self booking a wave. | | Becomes type "A" participant.<br>Invitation to the event | Team lead notification: Self booker | | | |
| Published | | | Self booker Type "A" participant selects a free wave. | Prio A: Successful booking | | | | |
| Published | | | Self booker Type "A" participant selects a full wave and is on waiting list. | Prio A notification: waiting list | | | | |
| Published | | | Self booker Type "B" participant selects any wave and is on waiting list. | Prio B notification: waiting list | | | | |
| Published | | Team Lead books team member onto wave. | | Participant notification: Booked | Team lead notification: Booked | | | |
| Published | | Team Lead books team member onto waiting list for a wave. | | Team member notification: Waiting | Team lead notification: Waiting list | | | |
| Published | | | Invited team member (self booker "A") has chosen a free wave. | Prio A: Successful booking | Team Lead notification: Booking state changed | | | |
| Booking completed | Completes booking. | | | All participants who have been booked for a wave:<br>Booking of event completed<br><br>Self booker who have not chosen a wave:<br>Event booking completed (participants without wave) | Team lead notification: Booking of event completed | | | |
| Booking completed | Assigns self booker to a wave. | | | Wave assigned after booking has been completed | | | | |
| Booking completed | Changes participants wave. | | | Wave assigned after booking has been completed | | | | |
| Published or booking complete | Start or end date of a wave gets changed. | | | Updating the wave of a participant | | | | |
| Published or booking complete | Contingent for a team has been changed. | | | | Team lead notification: Contingent was changed | | | |
| Published or booking complete | Updated event data (additional field information) for any user. | Updated event data (additional field information) for a team member. | Updated own event data (additional field information). | | | | Notification Eventer for changed participants' data | If updated data was marked as relevant for hotel:<br>Hotel data updated |
| Published or booking complete | | Registration deadline experied: | | Reminder to enter data after exceeded deadline | Reminder to enter data: Team lead | Reminder to enter data: Staff | | |

## 5.5 Translation – Event

Click “Download translation” to generate and download an excel file with all additional fields and notifications of the event.
It is built in the same way as the translation.xls explained in 4.2.

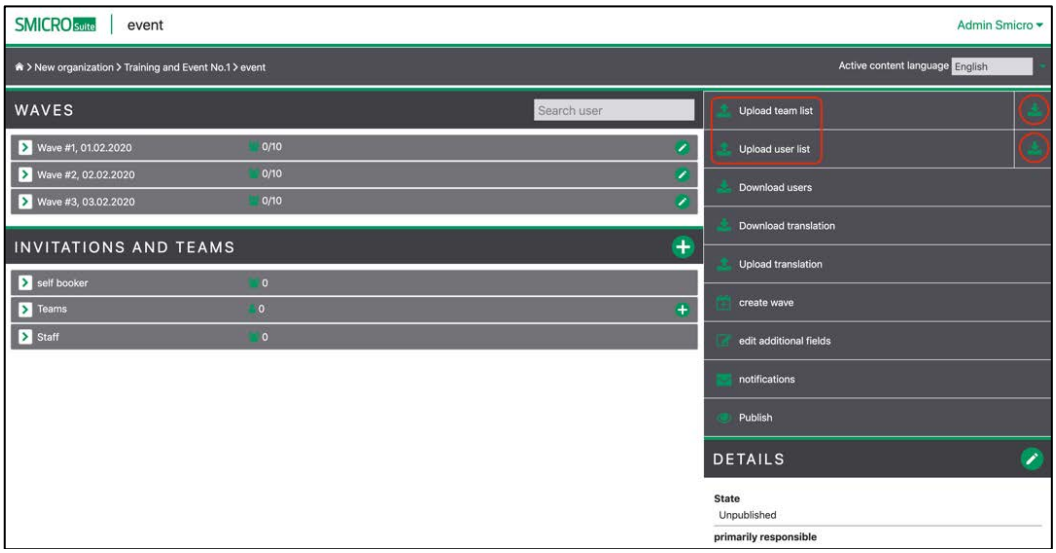



## 5.6 Upload Users

There are generally two ways to add users to an event. One way is to invite teams/team leads, the second way is to invite users directly.

The first method notifies the team leads only and gives them the opportunity to manage their users before they get notified.
The second method notifies the users directly about the event and gives them the possibility to select a wave themselves.

You find the button “Upload team list” for the team invitation and the button “Upload user list” for the direct user invitation on the right side.
**Make sure to download a template using the icon on the right side of the respective button.**




In the team invitation Excel file you can select the teams/departments to be invited by dropdown selection. Another feature is the allocation of a quota of places. This allows you to limit the maximum number of participants each team can register. The contingent can be set by the trainer and can be adapted at any time. **Important: The teams/departments must have been created in the system in advance, otherwise they will not appear in the selection list. It is not possible to add new teams to the list for a trainer himself, because every team is linked to a system ID.**

In the user invitation Excel file first name, last name, email address, type and language are mandatory.

| | A | B | C | D | E |
|---|---|---|---|---|---|
| 1 | firstname | lastname | email | type | language |
| 2 | John | Smith | johnsmith@smicro.de | a | en-GB |
| 3 | Johanna | Grollmann | Johanna@smicro.de | b | en-GB |
| 4 | Pauline | Test | pauline@smicro.de | staff | en-GB |
| 5 | | | | | |
| 6 | | | | | |

The three types explained:

**“a” user**
If an “a” user selects a wave which has free seats, he/she will be booked to the wave immediately.

**“b” user**
If an “b” user selects a wave which has free seats, he/she will get a notification that the wave is full and offers to be places on a waiting list for the wave.

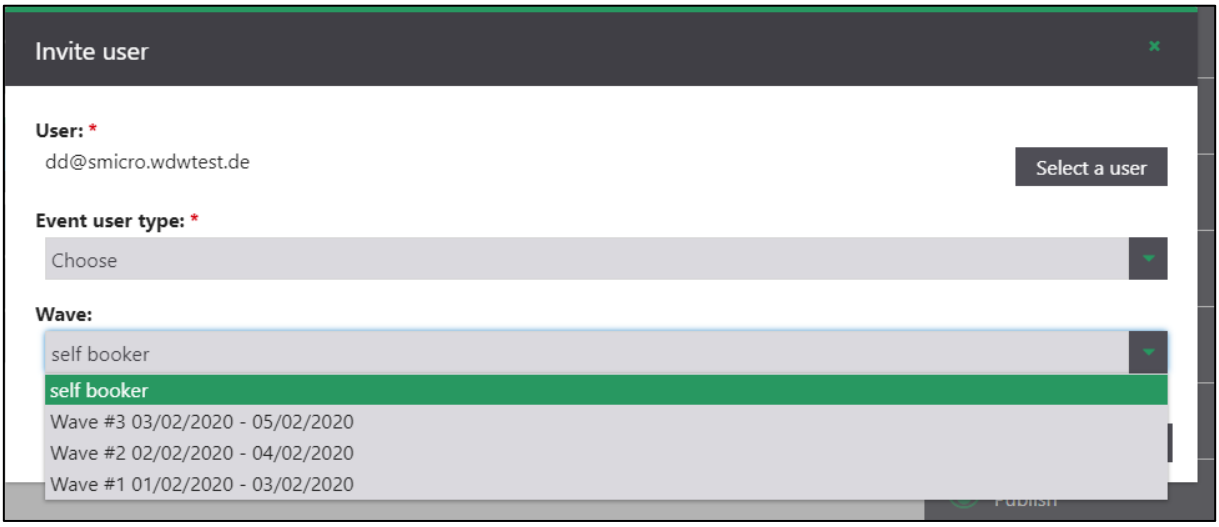
**“staff”**
Staff members cannot book waves. They are not participants of the training and will not see training content. They will receive an notification about the event and asked to enter their data.

It is useful to add staff members of an event to the system in order to collect data from them as well and have all event relevant information of participants and staff in the same place.

If the uploaded user list contained a new user (= new email address) the system will create a new account and **send an automatic registration e-mail to this user**.

If a user already exists in the system, there is also the possibility to him/her directly on an event wave or invite the user to the event.
Click the green plus icon next to “invitation and teams”

The following screen appears:

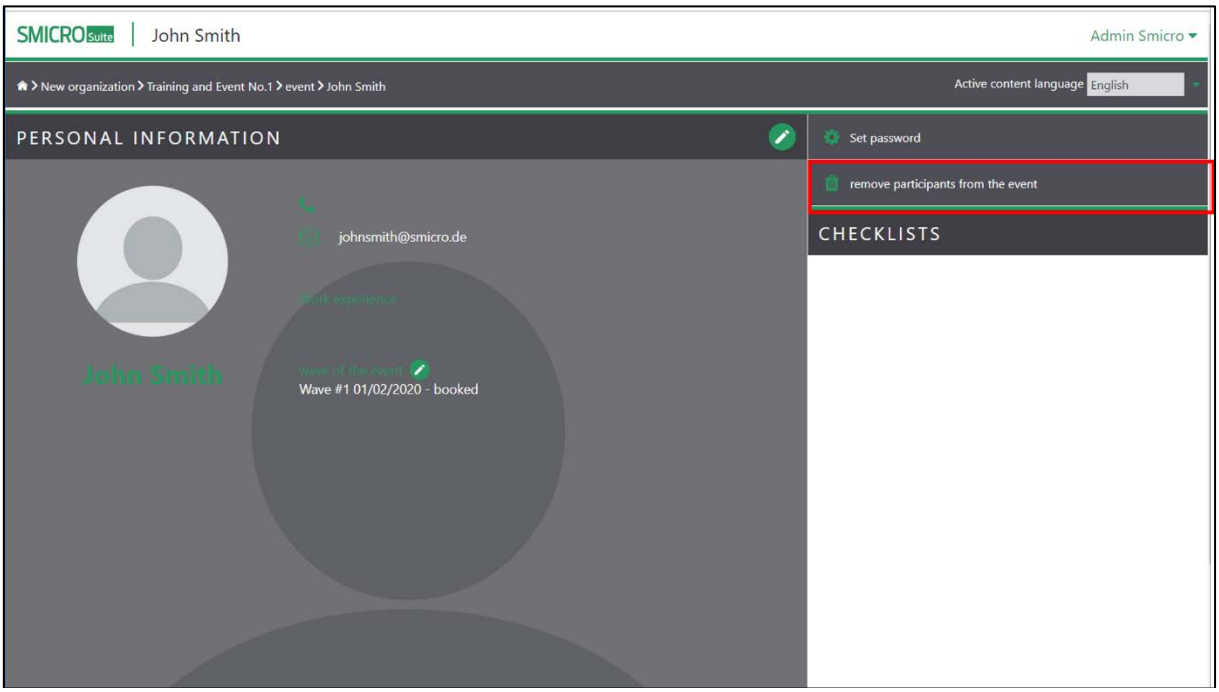



Choose a user, type and wave to add the user directly. Again, staff cannot be added to waves. Choose self booker to invite the participants and have them choose a wave themselves.

Attention: When manually adding a participant to a wave, there will be no system e-mail confirmation. The same applies to transfers between waves.

After uploading the teams list, the teams are listed under "teams" with the most important information. The quota for the available places can be individually adjusted by the trainer and eventer using the edit symbol. By clicking on the team you get further details about the members.
Individual teams can be manually added to the event via the green plus sign.

To remove a user from the event, click on the name to open the profile. Hit "Remove participants from event".

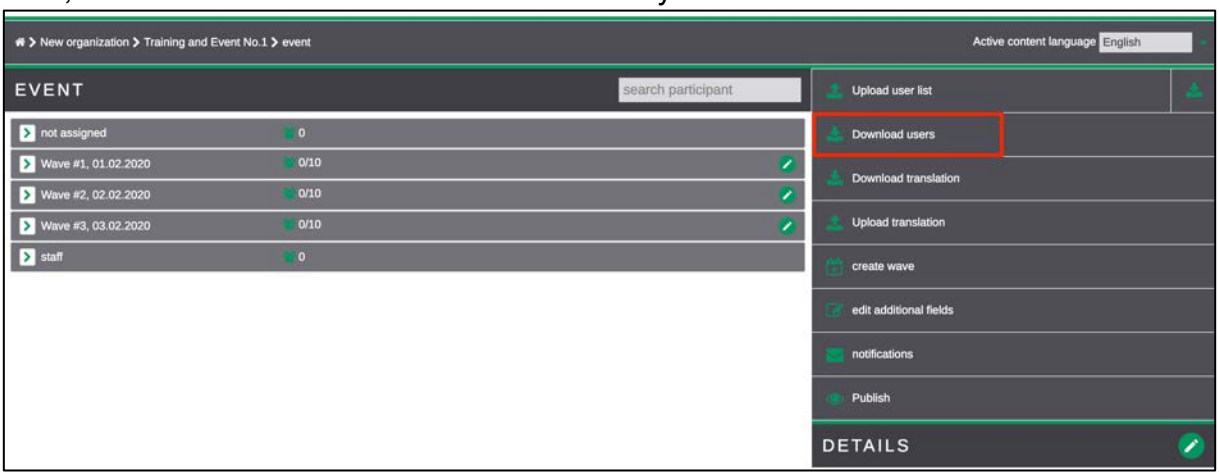



Use the search to find users quickly.

The user is not deleted from the system and can be added to the event at any time again.

## 5.7 Download Event User List

Export an Excel file of the Event to get an overview of all invited users and their data. This list gives Information about all the names and e-mail addresses, the booking status of the user, the wave and even if the user has already activated the account.

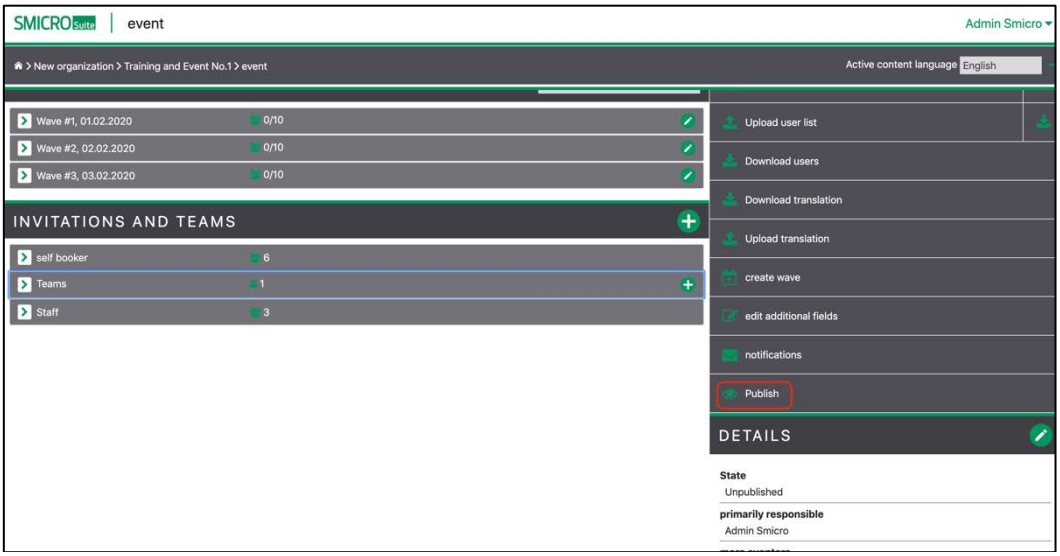



In order to check an individual user's profile and event data search for the user on the event screen and click on the name. Having the profile open, the trainer or eventer can manually change event data or assign the user to another wave.
This is also the only place where the additional fields marked as "only eventers" under "usage" will appear. (*see 5.3*.)

## 5.8 Publish

So far, no user has been informed about the event, nor does it appear on their dashboard. In order to invite the users, the team leads or to make the event visible for those who have been added to a wave manually beforehand, the event must be published.

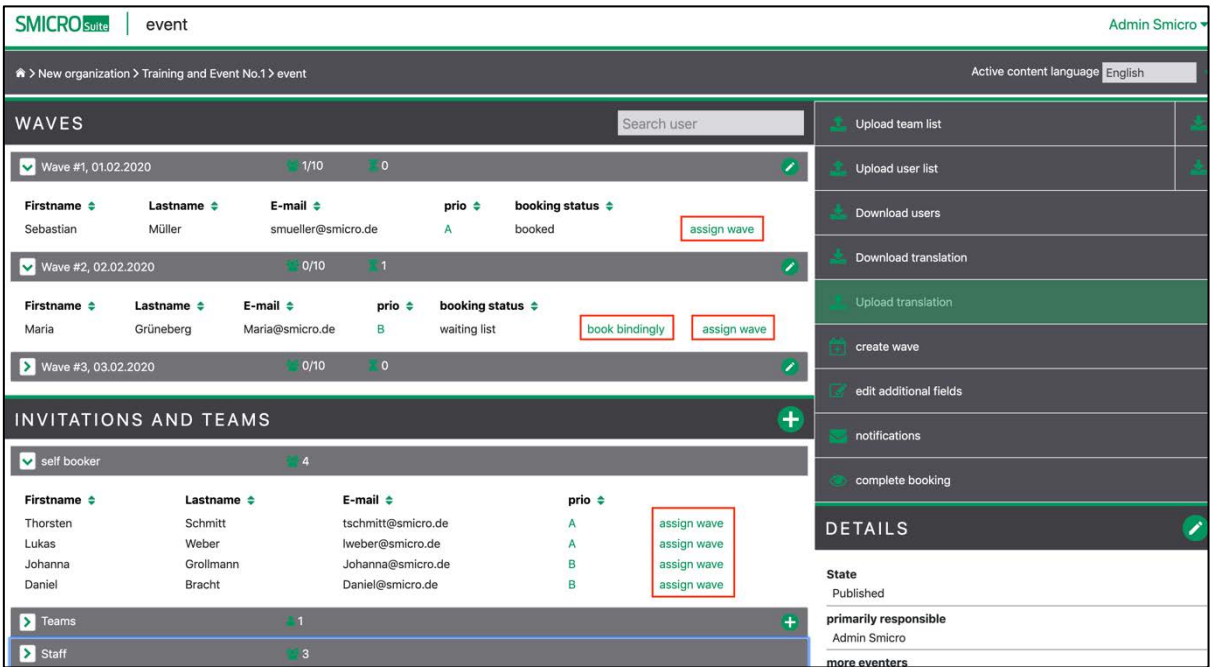
The button to publish the event can be found on the event screen.




As soon as the event is published, user marked as self booker as well as staff members will receive an invitation. Team leads will also receive an email being asked to assign their team members a seat in one of the waves.
**If you want to assign users to specific waves and not give them or their team leads the opportunity to do so, please assign waves as described in the following section BEFORE publishing the event.**

## 5.9 Booking waves

Staff members cannot be booked to waves, self bookers will be able to do so themselves through the frontend application. Team leads will manage their team member's waves. This way booking a user's wave through the backend is not necessary.
However, trainers or eventers might prefer to book users onto waves themselves. There might also be the case where changes need to be done in the backend. Users on waiting lists for certain waves must be manually added to a wave through the backend as well. In order buttons next to their names.




## 5.10 Complete booking

Clicking “Complete booking” on the event screen will confirm all user’s waves. Every change to a user’s wave from here on will trigger an email to the user, updating her/him about the changes.
This state will also add the additional fields marked with “overview of flags” on the event screen next to a user’s name.